Work**Order****Pdf**

Registration of hours, parts and kilometers

1. Introduction

After finishing a job, field service is responsible for creating a workorder showing the work performed, used parts, travel times and mileage. This workorder must be signed by the client, and delivered at the office. Incomplete, unsigned or lost workorders cause problems or delays during invoicing or payment. Mobile WorkOrderPdf supports the field engineer in creating a workorder and offers the opportunity to sign this order directly on smartphone or tablet by the client. Data can be synchronized with the backoffice. The signed workorder is mailed as a PDF directly to the office and the client. This document describes using the app WorkOrderPdf.

2. WorkOrder

Once the app is started the WorkOrder Screen appears. This screen provides access to the various components of the active workorder. The header displays the text *WorkOrder*. If no number is specified, no workorder is active. In this case a workorder must be loaded from the summary, or a new workorder must be created via the button (+). The workorder number will appear in the header. The workorder number is made up of the unitnr and the next workorder number, which is adjustable via Config. At each new workorder the workorder number is incremented by WorkOrderPdf.
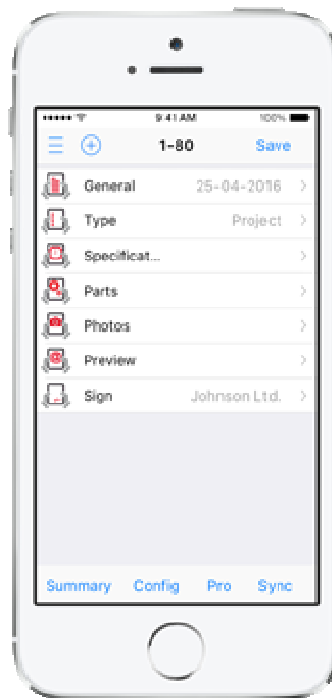
The active workorder can now be edited, viewed or sent via the various menu-items of the WorkOrder Screen. After an active workorder has been edited, it must be stored in the underlying database by clicking the button Save in the upper right corner of the screen.

3. General

Tap the item General in the WorkOrder Screen to enter general data of the workorder.

Enter the projectnr, jobsite, assignmentnr and activities by clicking the corresponding field and enter the text with the keyboard. Confirmation by the button Done of the keyboard.

Select a client by clicking the field Client. A list with available clients appears. Double click the desired client to load. First time this list is empty. By tapping the + at the right side in the bottom of the screen, the Client Screen appears. Here you can enter the name of the new client, it's contact and the e-mail address to which the workorder must be mailed. By tapping OK, the client with contact and e-mail address is added to the workorder and stored in the list. Contact and e-mail address can be changed manually afterwards.

Select a date by clicking the field Date. A Datewheel appears. Set the desired date and confirm by clicking the button Done.
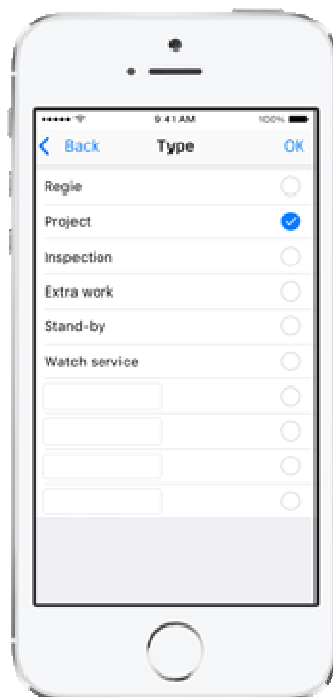
By clicking the OK button, the entered data will be linked to the active workorder and you will be redirected to the WorkOrder Screen. By clicking the < Back button, the entered data will be canceled and you will be redirected to the WorkOrder Screen. The item General of the WorkOrder Screen shows the entered date.
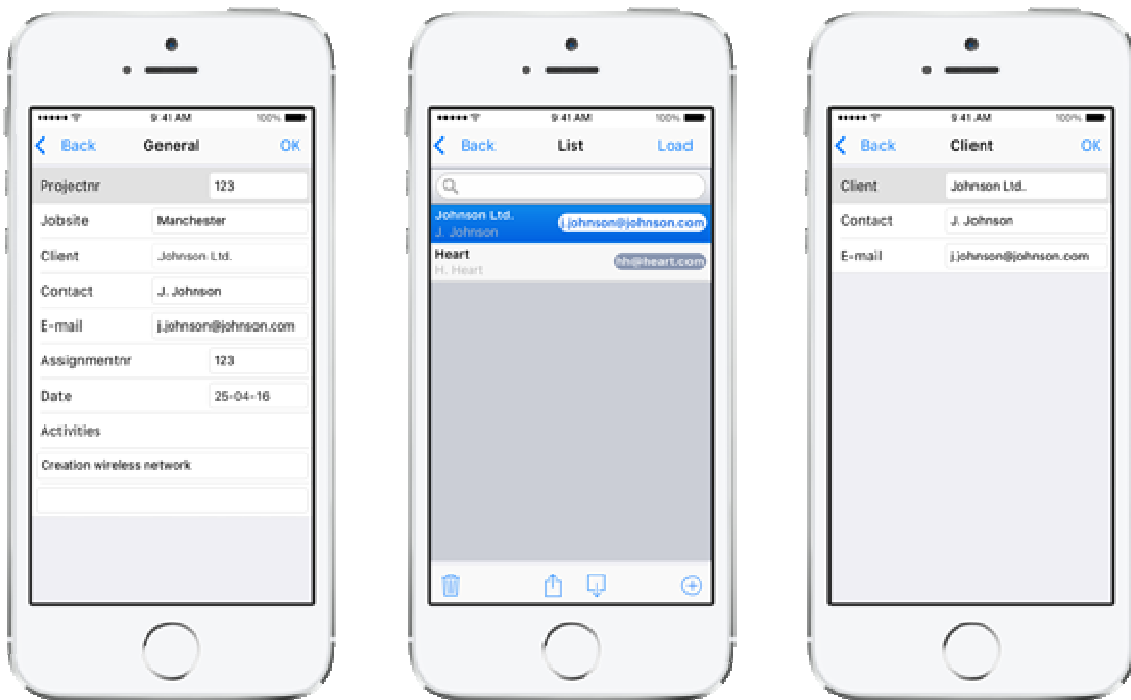
4. Type

Tap the item Type in the WorkOrder Screen to enter the type of work.

Select one or more of the predefined types by clicking the corresponding checkbox at the right side of the screen. The lower four positions can be used to define and select custom types of work.

By clicking the OK button, the selected types will be linked to the active workorder and you will be redirected to the WorkOrder Screen.

By clicking the < Back button, changes will be canceled and you will be redirected to the WorkOrder Screen. The Type Item of the WorkOrder Screen shows the selected types.

5. Specification

Tap the item Specification in the WorkOrder Screen to register hours or kilometers.

The Specification Screen shows the 7 days of the week. If a day has already been specified the date of that day will be shown in the item. Hit a day in the Specification Screen to enter hours or kilometers for that day.

Select a date by clicking the field Date. A Datewheel appears. Set the desired date and confirm by clicking the button Done.

Enter the actual hours for Working time, Overtime and Traveltime. By clicking the adjacent buttons + and – the corresponding time is increased/decreased by half an hour. If desired, the hours can also be specified to the nearest minute. In that case, hit the corresponding field, set the time in the Timewheel and confirm by clicking the button Done.

Enter the actual kilometers. By clicking the adjacent buttons + and – the kilometers are increased/decreased by 1. Direct entry is possible as well by clicking the field and entering the actual kilometers directly via the numeric keyboard. Confirmation by clicking the button Done.

6. Parts

Tap the item Parts in the WorkOrder Screen to add parts to the workorder.

The Parts Screen appears with the parts of the active workorder. Of course, first time this screen is empty. By tapping the + at the right side in the bottom of the screen, a list with available parts appears. Double click the desired part to add it to the active workorder. But at first use, this list with available parts is empty as well. By tapping again the + at the right side in the bottom of the screen, the Part Screen appears. Here you can enter the ordernr, description, quantity and price of the new part. By clicking OK this part is added to the active workorder together with its quantity and (without its quantity) added to the list of available parts.

7. Photos

WorkOrderPdf offers the opportunity to add photos to the workorder. For instance photos of the final result. To do this, tap the item Photos in the WorkOrder Screen.
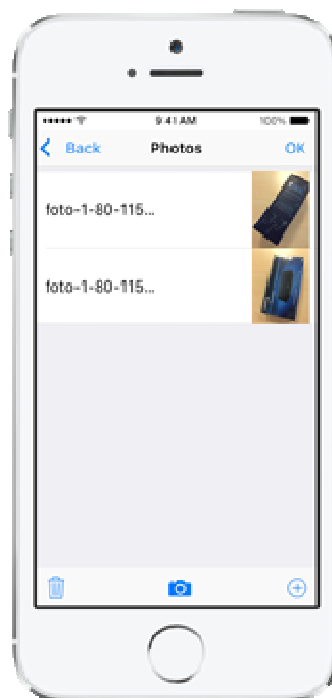

Click at the button + to add a photo out of an album. By clicking the Camera icon a new shot can be added directly. An added photo can be removed by selecting the photo and hitting the Trash icon.
Up to 4 photos can be added to a workorder..

8. Preview

Tap the item Preview in the WorkOrder Screen to preview the resulting workorder.

Double-click on the workorder to zoom in. To zoom out double-click again on the zoomed workorder. If the workorder is not centrally positioned after zooming out, click once to correct this.
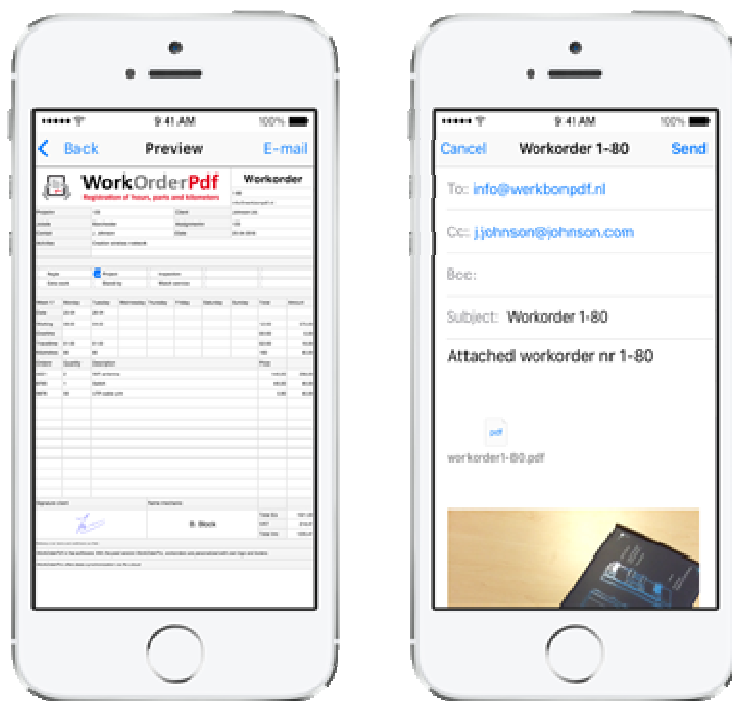
By clicking Mail at the upper right corner, an e-mail is composed with the workorder in PDF-format and any added photos as appendices. The recipients are the client and the backoffice. All components of the e-mail can still be changed. Recipients can be added or removed, subject and body can be changed. By hitting Send the e-mail is actually sent. By hitting Cancel, the e-mail is canceled and can be stored as a concept.


9. Sign

If the client has viewed the workorder and agrees with it, it can be signed. To do this click the item Sign of the WorkOrder Screen. Keep the device across for a wider surface. By hitting the Trash icon, the screen is cleared and a new signature can be drawn. By hitting OK the signature is stored and connected to the active workorder.
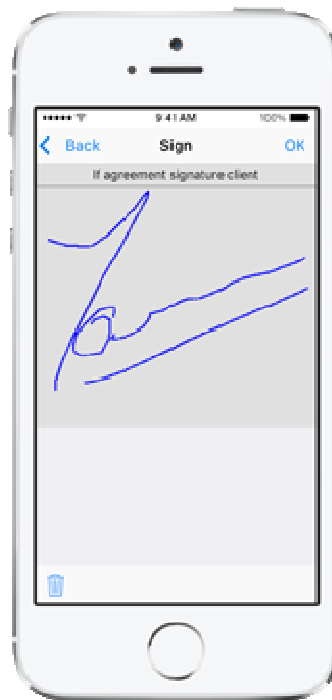
10. Summary

Click Summary in the lower left corner to open the Summary Screen. This screen shows all workorders stored in the database. The client, date and ordernr of each workorder are shown. Use this screen to load, remove or synchronize workorders.
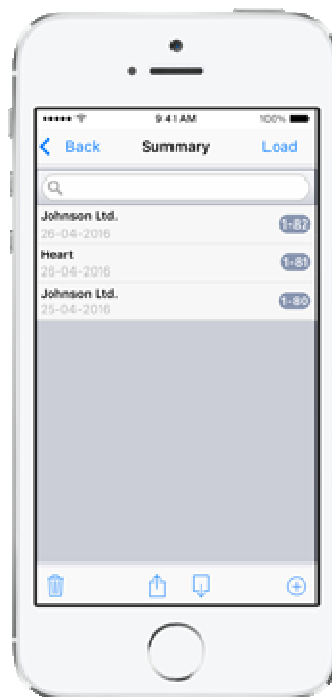
Select a workorder by clicking on it. After that, click at the button Load in the upper right corner to load this workorder and make it active. By double-clicking at the corresponding workorder in the summary, the workorder is loaded as well.

Select a workorder by clicking on it. After that, click at the Trash button to remove this workorder. By swiping to the left at the corresponding workorder in the summary and clicking the red Delete button, the workorder is removed as well. Before a workorder is definitely removed from the database, WorkOrderPdf will always ask for confirmation.

Select a workorder by clicking on it. After that, click at the Upload icon to synchronize this workorder with the selected units in the Sync Screen. By clicking at the Download icon, WorkOrderPdf checks if workorders are offered to this unit by the office or other units.

11. Menu

WorkOrderPdf uses a side-menu. Click at the menu icon = in the upper left corner of the WorkOrder Screen to open this menu. This menu gives direct access to the lists of clients and parts. In this way clients and parts can be maintained (modify, delete, add) without having an active workorder.

The menu also provides access to the Language Screen. In this screen the language of the app can be set. Click the field and select the desired language (de, en, es, fr, nl). Confirm by clicking at the button Done. The currency unit can be changed by clicking on the field and enter the desired abbreviation on the keyboard. Always confirm with the button Done on the keyboard.

The Language Screen also contains a section Jargon where alternatives can be set for the terms 'workorder', 'client' and 'mechanic'. By entering here 'declaration', 'patient' and 'therapist' for instance, the app can be used in a completely different market. These alternatives are handled throughout the entire app, and of course handled in the resulting workorder as well.

By clicking the OK Button, the entered data will be stored and you will return to the WorkOrder Screen. By clicking the button < Back, the entered data will be canceled, the old settings stay active and you will return to the WorkOrder Screen.

12. Config

General settings are made in the Config Screen. Click at Config in the WorkOrder Screen to open it.

The Unitnr distinguishes between the different devices in the field. You are advised to use unit number 0 for the main app or desktop application at the office. Then, number the devices of field workers from 1 up to the number of active apps. When creating a new workorder, an ordernr is generated which is preceded by the unitnr. The unitnr is also important during synchronization.
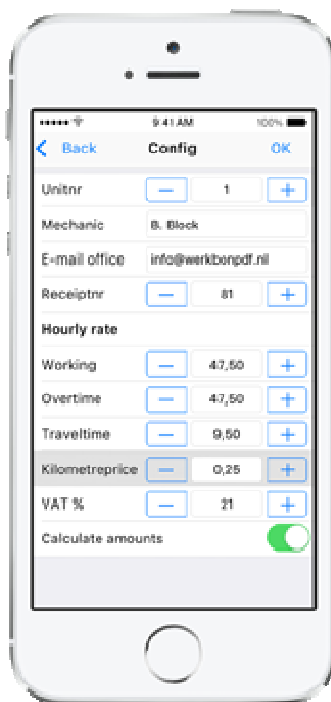
The unitnr can be adjusted by increasing or decreasing it with the adjacent buttons + and -. The number can also be adjusted by clicking at the field and typing the desired number on the numeric keyboard. Always confirm with the button Done of the keyboard.

The mechanic's name can be changed by clicking at the field and typing the name on the keyboard. Always confirm with the button Done of the keyboard. You are advised to enter the full name. It appears at the bottom on the final workorder.

The e-mail address of the back-office can be changed by clicking at the field and typing the address on the keyboard. Always confirm with the button Done of the keyboard. Enter the address of your own back-office! When the workorder in PDF-format is mailed, this e-mail address is added as recipient as well.

The field Ordernr shows the upcoming ordernr that will be used. When creating a new workorder, an ordernr is generated, which is composed of the unitnr and this ordernr. The ordernr is increased automatically. This number can be changed manually via the adjacent buttons + and -. The number can also be changed by clicking at the field and entering the desired number on the numeric keyboard. Always confirm with the button Done of the keyboard.
The hourly rates for working time, overtime and traveltime, as well as the price per kilometer can be changed by the buttons + and – (stepsize 1) or by clicking at the concerned field and entering the price on the numeric keyboard, and finishing by clicking the button Done of the keyboard.

Through an On/Off switch can be indicated if the workorders should include the calculated amounts based on the prices in this screen.

By clicking the OK Button, the entered data will be stored and you will return to the WorkOrder Screen. By clicking the button < Back, the entered data will be canceled, the old settings stay active and you will return to the WorkOrder Screen.

13. Pro

The differences between the free version WorkOrderPdf and the paid version WorkOrderPdfPro consist of the possibility to load an own company logo, the possibility to specify footers for the workorder and the possibility to synchronize data. These settings are made in the Pro Screen. In the WorkOrder Screen, click on Pro to open this screen.


By double clicking on the actual logo (or a single click on the header Logo) an image out of one of the albums can be selected as logo. A company logo can be added to an album via iTunes or E-mail.

Below the header Footers, you can enter up to 3 footers for the workorder. Consider, for example, in terms of delivery conditions, full company name or address, website url, special offers or a thank you message.

WorkOrderPdfPro provides the ability to synchronize workorders, clients and parts to other devices or the back-office. An account is required for this. Synchronization takes place over a secure server. The account-data of this server is entered in the Pro Screen: server, database, user and password. Note upper and lower case during data entry. By clicking on the header Synchronization, the connection can be tested and the number of units for this account is shown.

14. Sync

Use the Sync Screen to select units for synchronization. In the WorkOrder Screen, click on Sync to
open this screen.
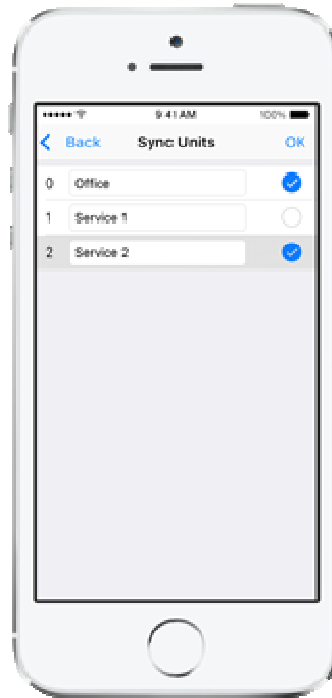
This screen shows the number of units for which a synchronization account has been closed. Unit 0 is
included as an additional unit, for a central office app or desktop application. For each unit it's user can
be specified. By selecting the checkbox of a unit, this unit is included in the synchronization. By default
only the unit office has been selected. It makes no sense selecting your own unit: no synchronization
takes place to your own unit.