

Work Instruction: Scheduling a Field Service Job

1. Audience

Sales Department

2. Objective:

To create and schedule a job for field service

3. Revision and Approval

Rev.	Date	Nature of Changes	Approved By
N	6/16/18	Original issue.	Eicher

4. Scope

To have a job available for service to be done in the field.

5. Prerequisites

Knowledge on Operating M1

6. Records

Job Record (Electronic)

7. Associated Documents

Job Traveler

8. Evaluative Factors

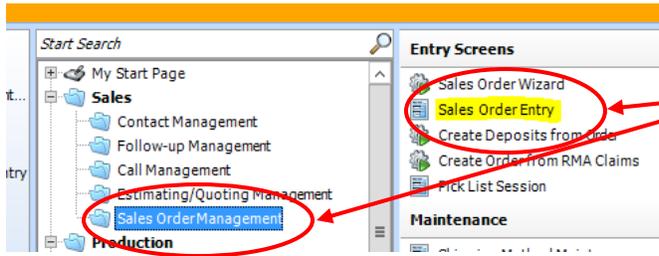
Job Status Report

9. Responsibility

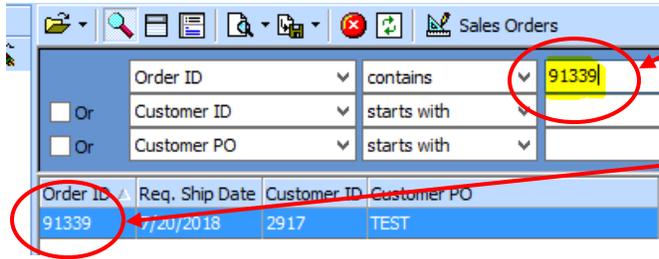
Sales or manufacturing person performing work

10. Instructions

Step 1



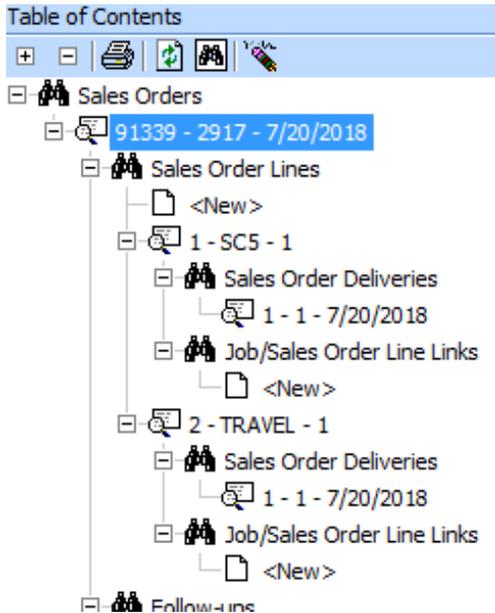
To open a Sales order, click on "Sales Order Management" then click on "Sales Order Entry."



Type in Sales order number you want to open..

Double click on the appropriate line to open the sales order.

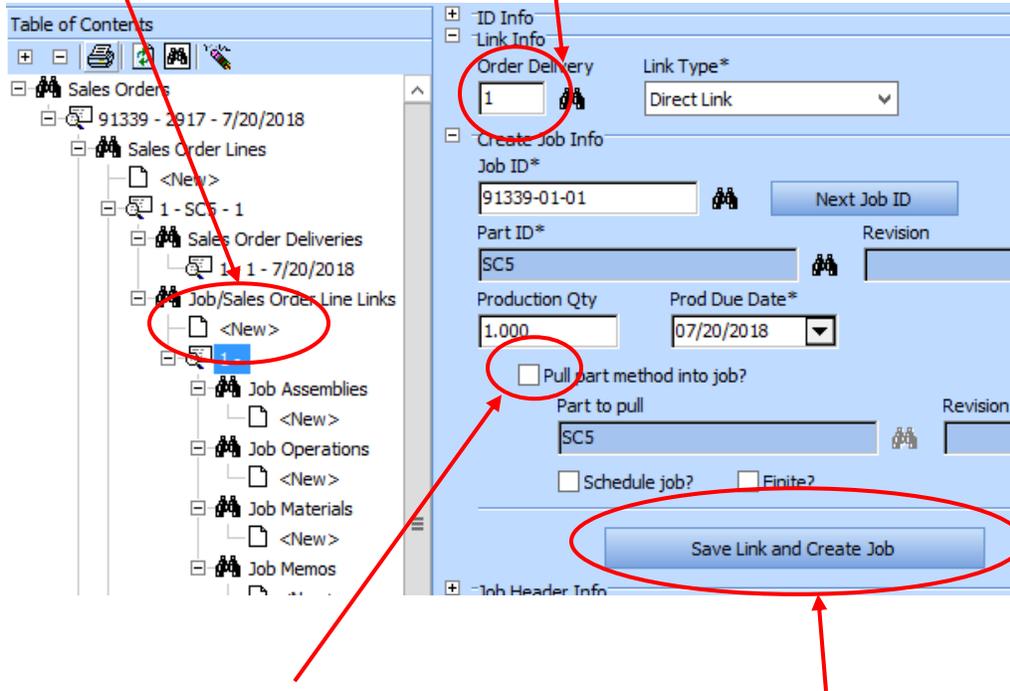
Step 2



A field service order has two line, "SC5" and "Travel". Both lines require a job to be created and to be scheduled.

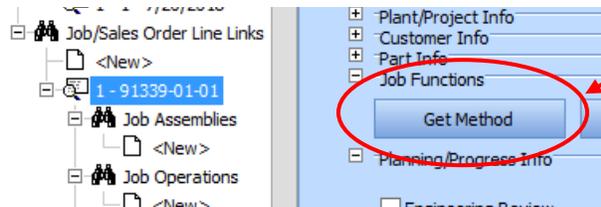
Step 3

Click on <New> under “Job/Sales Order Line Links” under the Sales order line to be scheduled. Enter “1” in the “Order Delivery” field.

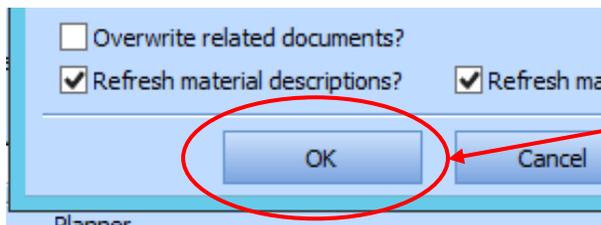


Uncheck the “Pull part method into job?” box. Click on “Save Link and Create Job”.

Step 4



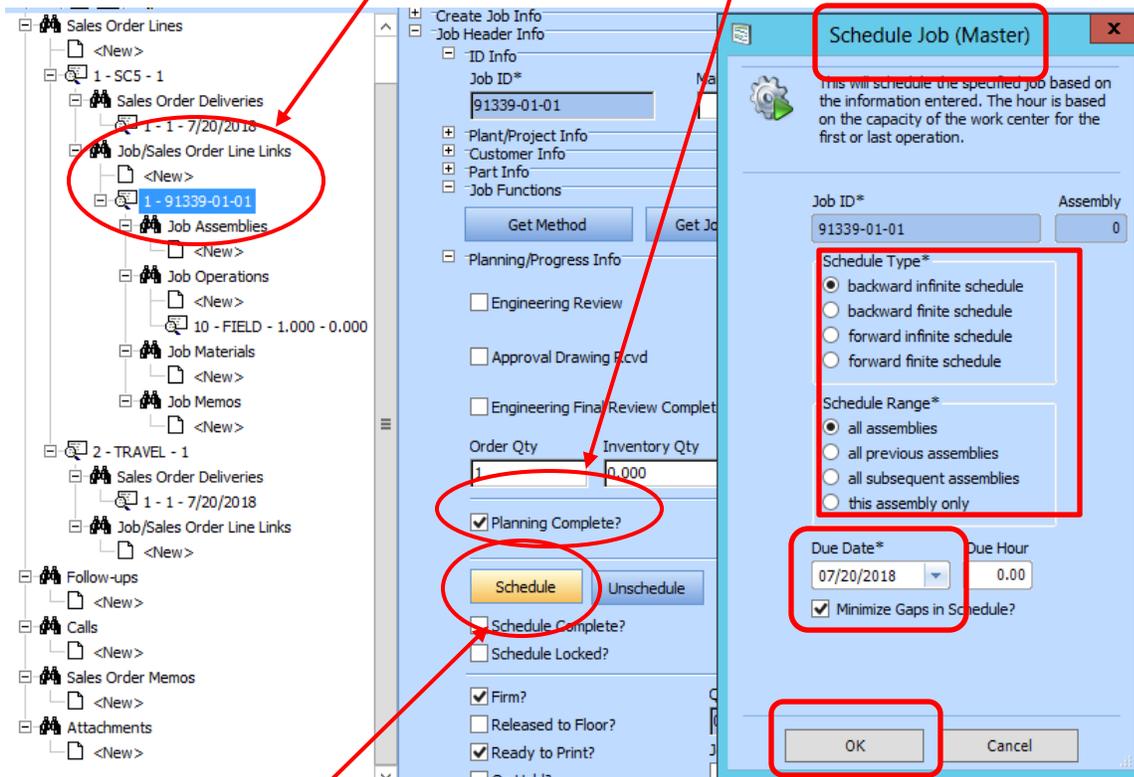
Click on “Get Method” on the right side of the screen.



Click “OK” on the pop up.

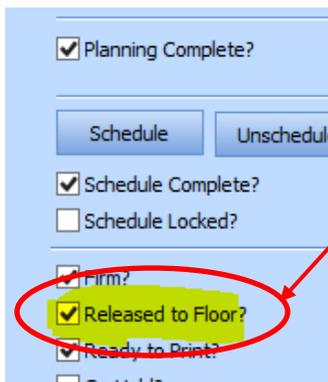
Step 5

Click on the job line to be scheduled. Check the “Planning Complete?” button on the right side of the screen.



Click on the “Schedule” button. The “Schedule Job (Master) Screen will pop up. Make sure “Backward infinite schedule” and “all assemblies” are checked. The due date should be the same as the “sales Order Delivery” date on the left side of the screen. The “Minimize Gaps in Scheduling” should be checked. Then click the “OK” button.

Step 6



Check the “released to Floor?” box on the left side of the screen.

Now create a job for the “Travel” line on the order. Follow steps 3 through 6 to complete the process.