

[WorkOrder and Parts Transaction Training Video](#)

INTRO: reviewing your work order, parts tracking, part transaction, close out/schedule view, FS Portal review

Work order from Default view (0:23)

Site name, date to go to site, needs parts.

Click on Work Order (0:42)

Details Tab (0:50)

Attachments (0:52)

Parts: Tracking information (1:26)

Return service tag (1:38)

Work Order Tech report (2:45)

Walmart instructions – Service Channel, Check in/out and PHOTOS (3:11)

Issues reported, Address (3:33)

Walmart specific instructions (3: 47)

Site Access—lift needed (3:56)

No NCT Approved (4:06)

Lift information from dispatch of what was ordered (4:33)

Lift Call off Form (4:46)

Parts info -Shipping address (5:07)

Attachments Section (5:15)

Do the work – enter timestamps, lunch, transact parts.

4 Types of part transactions – transaction should match what was physically done with parts (5:32)

1. **Install parts used/left at site**—Install Exchange part (6:17)
 - a. Need to do a remove transaction because it's an exchange (6: 57)
 - b. Return label sent with parts.
2. **Remove Transaction** – all parts that are being sent back to Daktronics need a FA part number created. (7:11)
3. **Parts Return** – part will not be needed (8:27)
4. **Receive to truck** – service not complete need to come back, taking part with you (9:11)

Following service call installed parts from truck – click drop down and select Inventory then search (10:33)

Once parts are transacted, enter timestamps and Close the work order (11:50)

Once work order is closed go to Schedule to pull up the Work order Details report and send to your Accounting Department. Pay off timestamps in GSP. (12:14)

[Field Service Portal](#) –Lift Call off Form, Return Service Form, GSP Training documents, GSP login and UPS Labels (12:57)

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