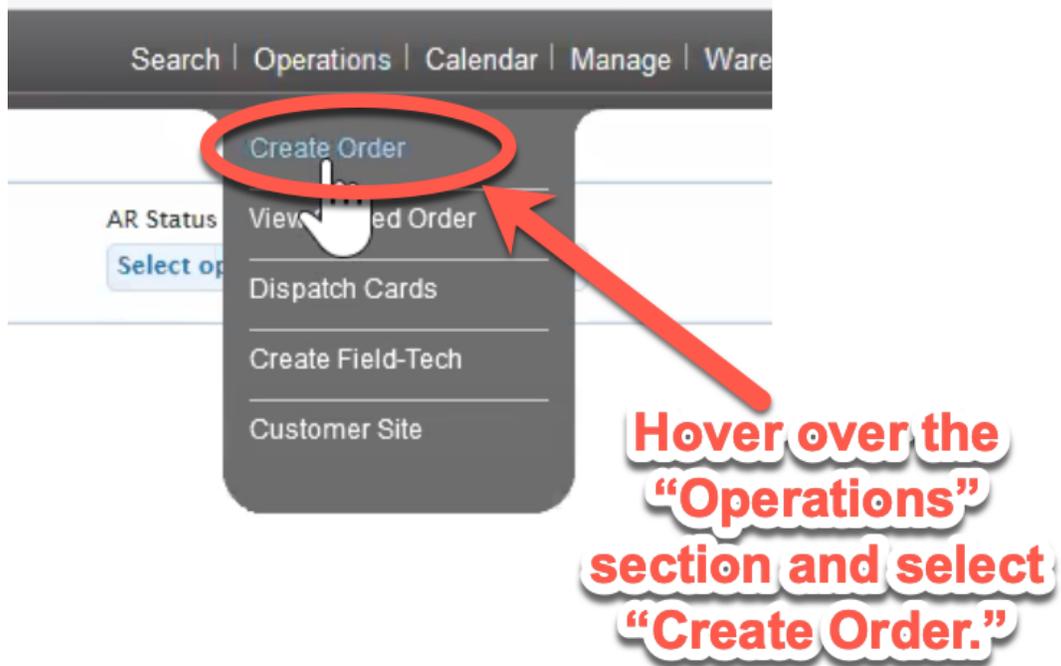


To create a **new** work order, hover over the **"Operations"** section on the toolbar. When the drop-down menu appears, select **"Create Order."**



After you select "Create Order" the following screen will populate. 🖱️

The screenshot shows the "Create a New Work Order" form in the CPTCare system. The form is organized into several sections:

- Customer:** A dropdown menu.
- Customer Site:** A text input field with a search icon.
- Requested By:** A text input field.
- Reference:** A text input field.
- PO Number:** A text input field.
- Current Site Time:** A text input field.
- Order Type:** A dropdown menu.
- Priority:** A dropdown menu.
- B/F SLA Date and Time:** A text input field with a "Central Time" label and "auto-calculated" text.
- Site Time:** A text input field.
- Problem Code:** A dropdown menu.
- Classification:** A dropdown menu.
- Department:** A dropdown menu with "Tech Support" selected.

At the bottom of the form, there is a "File Description" field with a "Browse..." button, and checkboxes for "Field-Tech Visible" and "Customer Visible". Below the form is a "Work request" section with a rich text editor toolbar and a large text area. At the very bottom, there are three buttons: "Protocol", "Reset Form", and "Create Order".

On this screen, you will need to select the **customer name** by using the "Customer" drop-down box.

Customer:

- Acadia Healthcare
- Albion Ventures
- Apple American Group
- Arlington Computer Products**
- ASSURED AUTOMOTIVE (2017) INC
- AutoZone
- Azria Health
- Bed Bath & Beyond
- Bell American Group

Order: - Sele

Priority: - Sele

B/F SL: []

File Description: [] Browse... No file s

Work request:

Select the Customer Name

Then you will need to type in the **four-digit site number** in the customer site box.

CPTCare John

Create a New Work Order

Customer: []

Customer Site: []

Requested By: [] Reference: []

PO Number: []

Current Site Time: []

Order Type: - Select -

Priority: - Select -

B/F SLA Date and Time: [] Central Time auto-calculated

Site Time: []

Problem Code: - Select -

Classification: - Select -

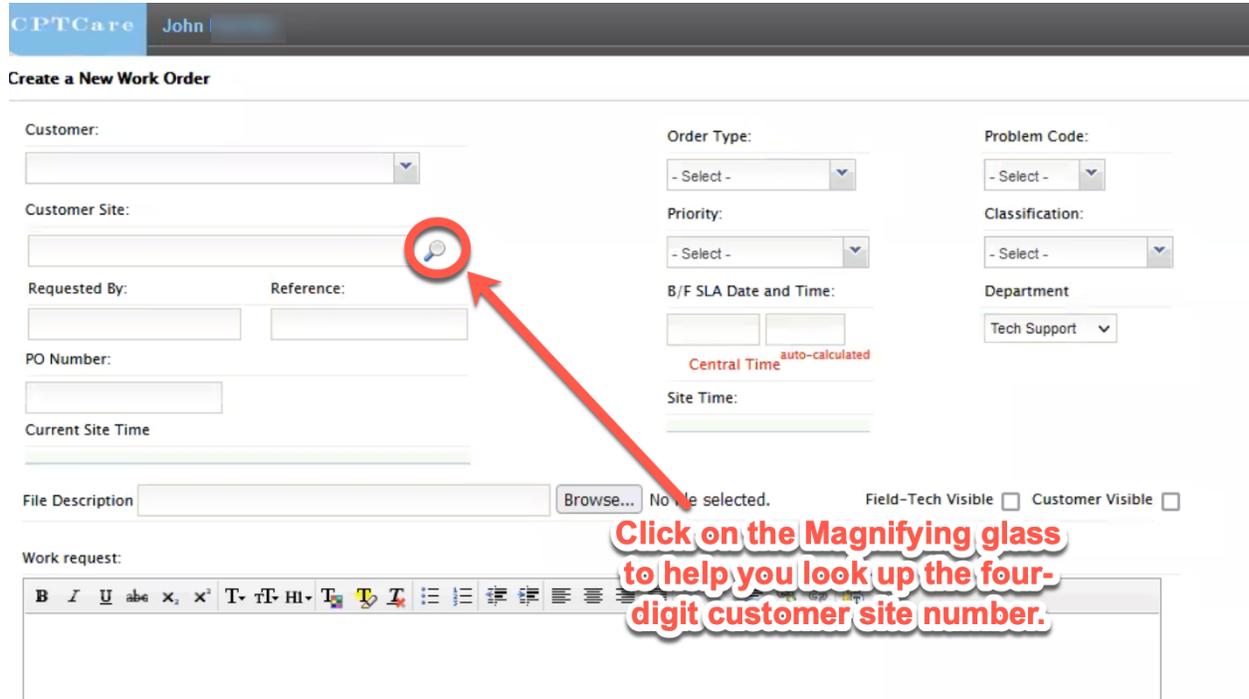
Department: Tech Support

File Description: [] Browse... No file selected. Field-Tech Visible [] Customer Visible []

Work request:

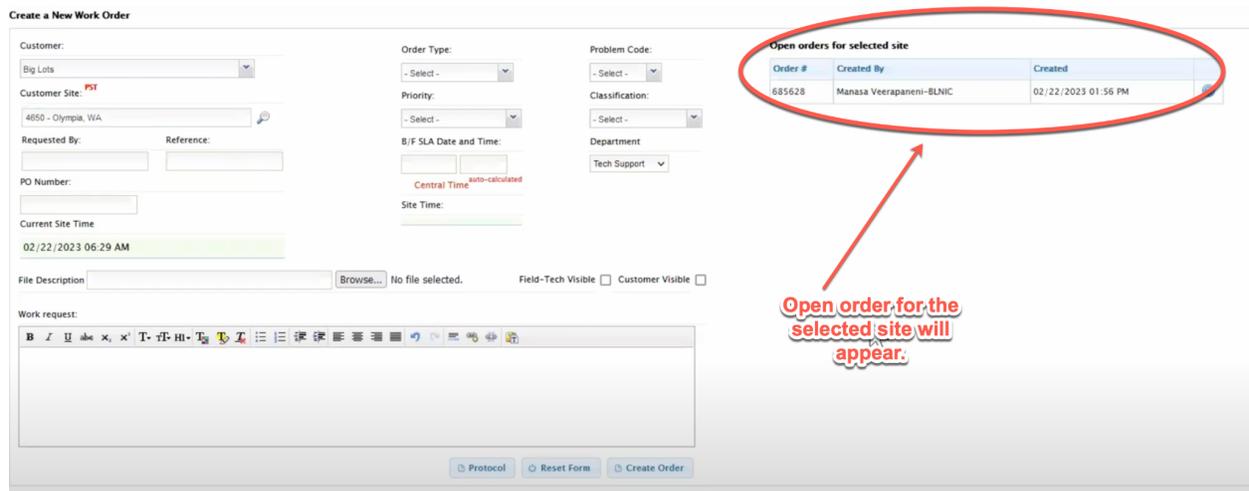
[Rich Text Editor]

Pro Tip: If you do not know the customer's **four-digit site** number, you can search for it by clicking the **magnifying glass** next to the "Customer Site" field.



The screenshot shows the 'Create a New Work Order' form. The 'Customer Site' field has a magnifying glass icon circled in red. A red arrow points from a callout box to the magnifying glass. The callout box contains the text: 'Click on the Magnifying glass to help you look up the four-digit customer site number.'

When you enter the site number, if there is **another ticket** associated with that location, it will pop up on the **top left-hand side**.



The screenshot shows the 'Create a New Work Order' form with the 'Customer Site' field populated with '4850 - Olympia, WA'. A table titled 'Open orders for selected site' is displayed in the top right corner, circled in red. The table has three columns: 'Order #', 'Created By', and 'Created'. One row is visible with the following data:

Order #	Created By	Created
685628	Manasa Veerapaneni-BLNIC	02/22/2023 01:56 PM

A red arrow points from a callout box to the table. The callout box contains the text: 'Open order for the selected site will appear.'

[Click this Video to View this Process!](#)

IMPORTANT NOTE: If this happens, the ticket needs to be reviewed to ensure duplicate tickets are NOT created.

Next, filling the "Requested By" section for the individual requesting the work order. 📌

The screenshot shows a form with several input fields. The 'Requested By' field is circled in red. A red arrow points from a callout box to this field. The callout box contains the text: 'Type the person requesting the ticket here.' Other fields visible include 'Reference:', 'PO Number:', 'Current Site Time', and 'File Description' with a 'Browse' button.

Then fill in the "Reference" section, if the customer has provided one. This code will allow the customer to get updates, in real time on their work order, through their "Service Now" program.

The screenshot shows a 'Create a New Work Order' form. The 'Reference:' field is circled in red. A red arrow points from a callout box to this field. The callout box contains the text: 'Fill in the reference code provided by the customer.' Other fields visible include 'Customer:', 'Customer Site:', 'Requested By:', 'PO Number:', 'Current Site Time', and 'File Description'. On the right side, there are dropdown menus for 'Order', 'Priority', and 'B/F Site'.

Now, fill in the “PO Number” section. Some customers will send a unique **PO number provided** in their emails and later require this information for their invoices.

CPTCare John

Create a New Work Order

Customer:

Customer Site:

Requested By: Reference:

PO Number:

Current Site:

File Description:

Input the unique customer PO Number from the customer email.

Next select the “**Order Type**” from the drop down menu.

Order Type:

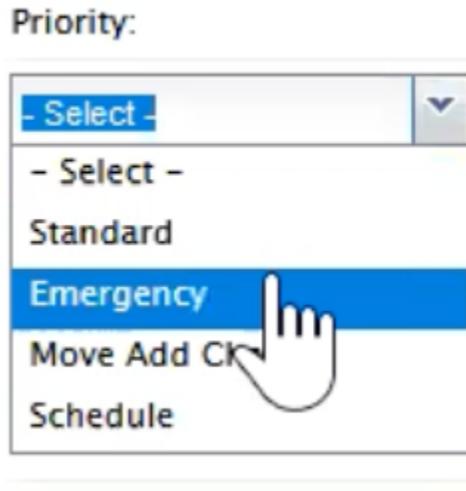
- Select -

- Select -

Break / Fix

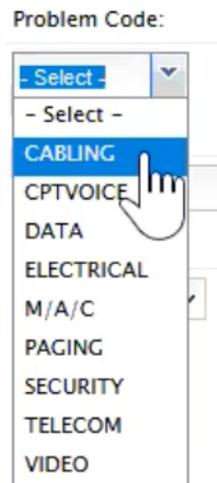
Equipment Only

Then, select the **Priority** of the work order from the drop down menu.

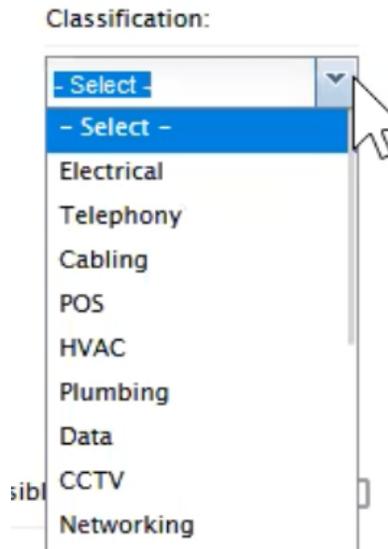


Important Note: When you have completed the last two steps, the “**B/F SLA Date and Time**” and the “**Site Time**” with auto populate.

Next, select the “**Problem Code**” from the drop down box. This is the work order **issue type**.



Now, select the “**Classification**” Code from the drop down menu. This is to select the **type of technician** needed for this specific job.



Select the “**Department**” from the drop down menu. This will push the work order to whatever department it **needs to go to**.



Upload and attach a file to **“File Description”** if the **customer has provided** us with one.

Please note that only one file can be added here and other files will have to be added after the work order has been created.

File Description Browse... No file selected. Field-Tech Visible Customer

Work request:

Add customer provided files here.

Decide whether the work order needs to be **visible** to the **field-tech**, the **customer** or **both**. **Check** the corresponding **boxes** for the specific needs of the work order.

CPTCare John

Create a New Work Order

Customer: Order Type: Problem Code:

Customer Site: Priority: Classification:

Requested By: Reference: B/F SLA Date and Time: Department:

PO Number: Site Time:

Current Site Time:

File Description Browse... No file selected. Field-Tech Visible Customer Visible

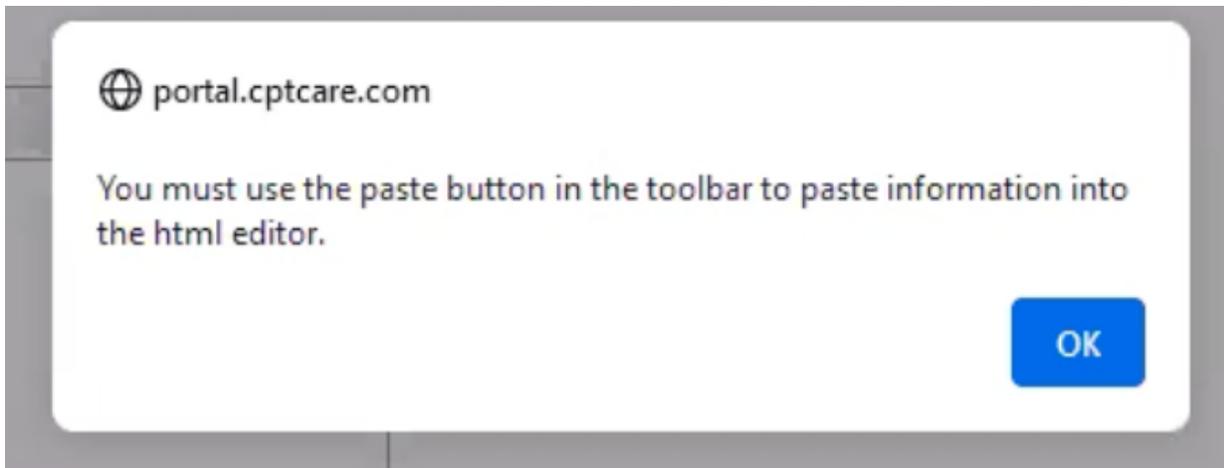
Work request:

Check the appropriate boxes to make the work order visible to different parties.

Next, in the “Work Request” box add a short description of the issue from the customer. This should be **copy and pasted** (See Important Note Below) from the customer email or as close to work for word as possible.

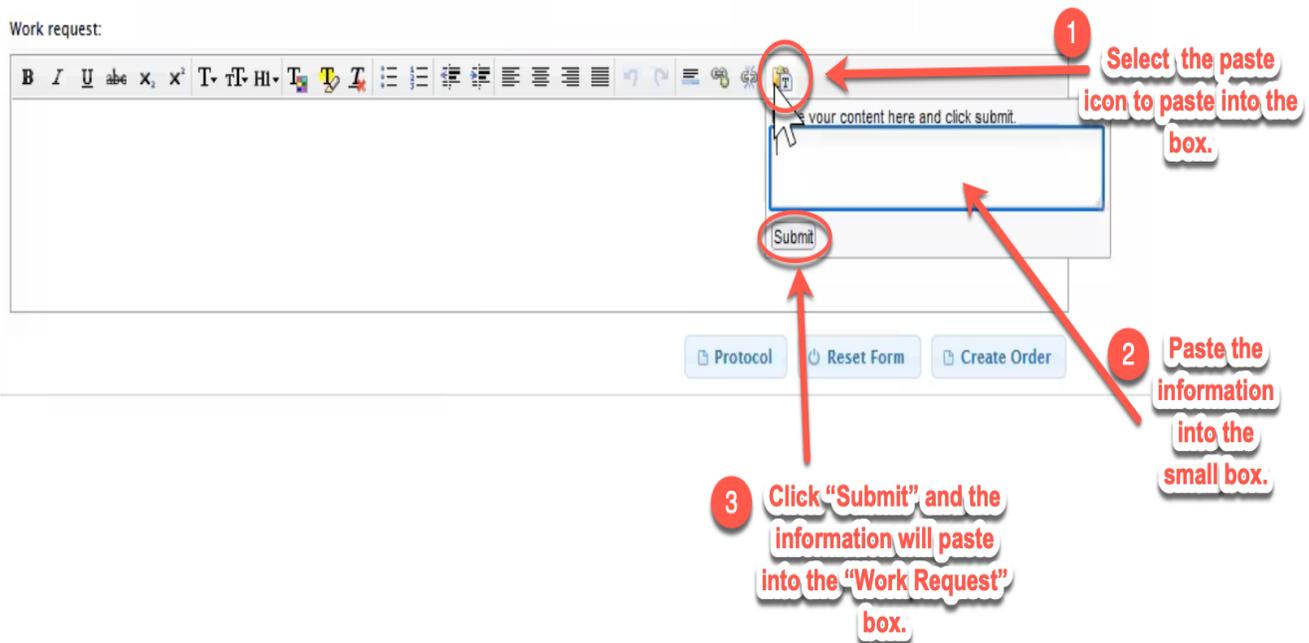
The screenshot shows the 'Create a New Work Order' form in the CPTCare system. The form includes fields for Customer, Customer Site, Requested By, PO Number, Current Site Time, Order Type, Priority, B/F SLA Date and Time, Site Time, Problem Code, Classification, and Department. A red box highlights the 'Work request' text area, which contains a rich text editor toolbar. A red arrow points to this area with the text 'Add a Short description of the issue from the customer.'

Important Note: The system will not allow you to paste directly into the “Work Request” Box. When you try you will receive this **error prompt**.



To paste into the “Work Request” box, first select the paste icon (shown below), paste in the small box that appears, then click “Submit”

Work request:



The image shows a screenshot of a 'Work request' form. At the top, there is a rich text editor toolbar with various icons for text formatting and alignment. A red circle highlights the 'Paste' icon (two sheets of paper) in the toolbar, with a red arrow pointing to it from a callout box labeled '1'. Below the toolbar is a large text area with a placeholder text 'your content here and click submit.' A smaller, blue-bordered box is overlaid on this area. A red arrow points from a callout box labeled '2' to this small box, with the text 'Paste the information into the small box.' Below the text area is a 'Submit' button, which is circled in red. A red arrow points from a callout box labeled '3' to the 'Submit' button, with the text 'Click "Submit" and the information will paste into the "Work Request" box.' At the bottom of the form, there are three buttons: 'Protocol', 'Reset Form', and 'Create Order'.

- 1 Select the paste icon to paste into the box.
- 2 Paste the information into the small box.
- 3 Click "Submit" and the information will paste into the "Work Request" box.

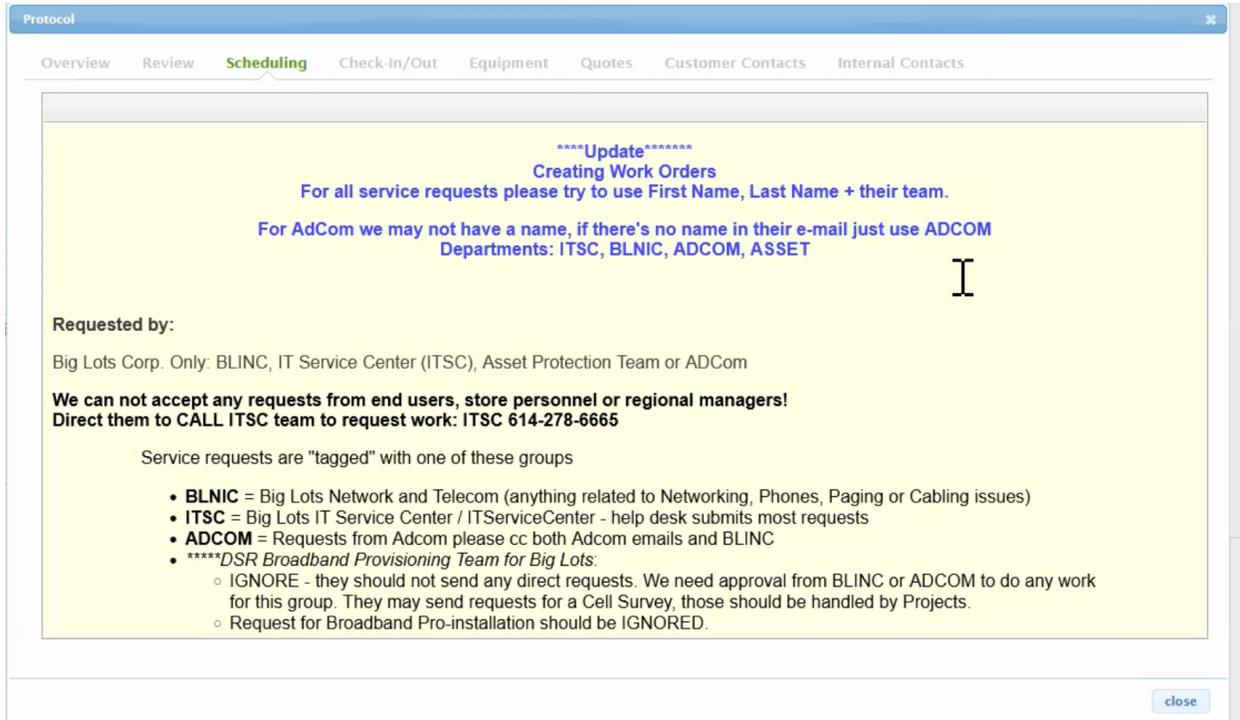
After the appropriate information is entered, the work order is ready to be created and you can click “Create Order”

The screenshot shows the 'Create a New Work Order' form in the CPTCare system. The form includes fields for Customer, Customer Site, Requested By, Reference, PO Number, Current Site Time, Order Type, Priority, B/F SLA Date and Time, Site Time, Problem Code, Classification, and Department. There are also checkboxes for 'Field-Tech Visible' and 'Customer Visible'. A 'Work request' text area is present at the bottom. The 'Create Order' button is circled in red, and a red arrow points to it with the text: 'Click “Create Order” to create the work order.'

Special Note: Some customers have specific protocol to be followed when completing jobs. This is important information to place in the work order and can be found by clicking “Protocol”.

This screenshot is identical to the one above, showing the 'Create a New Work Order' form. In this instance, the 'Protocol' button is circled in red, and a red arrow points to it with the text: 'Click “Protocol” to view customer specific protocols.'

A protocol box will appear with more customer specific information.



The screenshot shows a window titled "Protocol" with a navigation bar containing "Overview", "Review", "Scheduling" (highlighted), "Check-In/Out", "Equipment", "Quotes", "Customer Contacts", and "Internal Contacts". The main content area has a yellow background and contains the following text:

******Update******
Creating Work Orders
For all service requests please try to use First Name, Last Name + their team.
For AdCom we may not have a name, if there's no name in their e-mail just use ADCOM
Departments: ITSC, BLNIC, ADCOM, ASSET

Requested by:
Big Lots Corp. Only: BLINC, IT Service Center (ITSC), Asset Protection Team or ADCom

We can not accept any requests from end users, store personnel or regional managers!
Direct them to CALL ITSC team to request work: ITSC 614-278-6665

Service requests are "tagged" with one of these groups

- **BLNIC** = Big Lots Network and Telecom (anything related to Networking, Phones, Paging or Cabling issues)
- **ITSC** = Big Lots IT Service Center / ITServiceCenter - help desk submits most requests
- **ADCOM** = Requests from Adcom please cc both Adcom emails and BLINC
- ******DSR Broadband Provisioning Team for Big Lots:**
 - IGNORE - they should not send any direct requests. We need approval from BLINC or ADCOM to do any work for this group. They may send requests for a Cell Survey, those should be handled by Projects.
 - Request for Broadband Pro-installation should be IGNORED.

close