

What Is a Work Order?



If creating and assigning detailed tasks isn't part of your regular workflow, you may very well have asked, "What is a work order?" at some point in the past.

Used for everything from customer service to preventive maintenance, work orders are a crucial part of documenting, tracking, and improving customer service for many companies today.

Understanding how work orders function, and investing tools that can help your business improve the way your team fulfills and follows up on work requests, can help set you apart from the competition and enhance your company's productivity and profitability along with customer satisfaction.

Work Orders: The Basics

The most important thing to know about work orders may be what they *aren't*. While they may sometimes be confused with purchase orders, work orders fulfill a very different function.

Work orders are formal authorizations for work to be completed, assigned to individuals or teams and scheduled for completion within specific time and budgetary parameters.

The work in question is generally related to operations, maintenance programs, and repairs, although they are also used heavily in areas outside of traditional manufacturing, production, or construction, such as service and support.

For example, a company's information technology (IT) department may create work orders to resolve service calls from staff or customers, or a specialist may be sent a work order detailing the parameters of installation for a custom software package for a new customer.

Work orders are created to meet a variety of business needs, including:

- Creating a formal record of the issue that led to the creation of the work order (e.g., repairs, service call, preventative maintenance, etc.)
- Record and schedule the resources necessary to perform the work.
- Ensure the person(s) fulfilling the work order have all the information and instructions they need to complete it successfully within the required parameters.
- Create a record of materials, labor, and other resources required to successfully complete the work order.
- Provide an ongoing record of maintenance performed, services rendered, and repairs made for clients, company assets, etc.

Anatomy of a Work Order

While specific procedures may vary from business to business and purpose to purpose, an effective and accurate work order will generally contain:

- Requestor's contact information.
- Detailed description of the work to be performed (e.g., maintenance work order, customer installation, repairs to production equipment, etc.).
- When and where the work is to be completed, including a due date (sometimes called the delivery date).
- All tools, materials, and other resources required to complete the job.
- Instructions for completing the task.
- Name of person required to authorize the work, if any.
- Name of person(s) completing the job order.

In addition, some companies may include specific budget, industry, and compliance information.

For maintenance management systems, work orders may also include relevant information about ongoing service to a given piece of equipment, along with any associated costs.

Like purchase orders, work orders generally travel a simple path:

1. Creation
2. Approval
3. Implementation
4. Follow-up Review for Completeness and Accuracy

The path may be simple, but it generates a substantial amount of data.

And capturing that data, and putting it to good use via process improvements, can help ensure your work orders are providing value for your business as well as necessary repairs or customer support.

The same problems that plague traditional purchase order management—human error; process inefficiencies; wasted time, resources, and talent—can also cause problems with work orders. In order to operate at peak efficiency, companies who want to get the most value from their work order management should choose a procurement solution that includes work order software.

Get the Most out of Your Work Orders with Automation

When there's work to be done, the last thing anyone wants to deal with is needless delays, errors, or wasted resources.

That's why, despite having been born alongside maintenance teams at the dawn of industry, work orders need to be as responsive, accurate, and efficient as your procurement, accounting, and marketing teams are in today's competitive, high-speed marketplace.

Developing a *work order management system* supported by the right tech tools can help ensure your work orders, and the production, maintenance, repairs and service they support, are firing on all cylinders, and the data they generate is

being recorded and leveraged to produce additional refinements to the process.

Choose the Right Software Solution

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Digital solutions form a firm foundation for your work order management ambitions.

PLANERGY, for example, gives you access to powerful process automation supported by artificial intelligence, along with advanced customization options that allow you to optimize your work order processes.

Comprehensive training and support round out the package, making it much easier for your entire organization to make the “digital leap” and transition from outdated, paper-based workflows to cloud-based, data-driven ones.

Of course, it’s not just remarkable gains in speed, accuracy, and efficiency waiting on the other side of that leap. Using a digital solution brings a host of benefits when you’re working to achieve optimal work order management, including:

- Better communication and collaboration thanks to total data visibility and shared, leveled access for all stakeholders using the work order system.
- Consolidation of all work orders in a single system that accommodates phone calls, emails, instant messages from mobile devices, Web-based work order forms, etc.
- Improved forecasting, reporting, audits, and strategic decision-making supported by historical data, current data, and predictive and prescriptive analytics.
- Improved scalability to accommodate growing hardware needs, customer service requirements, and expanded maintenance schedules.
- Paperless workflows that improve your company’s environmental

footprint and reduce wasted resources.

- Reduced or eliminated backlogs thanks to real-time monitoring of every work order at every stage of the process, as well as reporting tools for big-picture visibility on demand.
- Support for mobile app access to further improve efficiency and responsiveness.

Take the Strain out of Work Order Management

Whether it's maintenance, production, or customer service and support, the work your company does to support its larger ambitions—the work that keeps you working, so to speak—can benefit from the same next-gen tech that drives process improvement and cost savings in the rest of your business.

Modernizing your work order management with automation and analytics gives your team the tools they need to get the job done right the first time—and the data you need to minimize expenses, optimize productivity and customer satisfaction, and build value for your business.

What's your goal today?

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