INITIAL SET UP

A quick guide to getting started

COTTAGE COMPANION

1 Work Order Types

- These are a list of the services that you offer your property owners.
- This would be similar to the list you would display on your website
- When a work order is created a work order type must be selected.

For each work order type you can set a flag to determine whether
- A customer has an option of requesting a quote
- A prompt appears for a Reminder when completing a work order

2 Team Members / Contractor Categories

- These describe the tasks that team members / contractors can be scheduled against
- Setting up categories helps to find the correct resource to add to the schedule
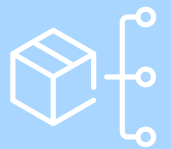
Examples of Categories include Categories can be set up :-
- Cleaning, Construction, Plumbing etc..

It is possible to define Equipment as a Category so that items such as a Barge or a Truck can also be scheduled against a work order

3 Team Members / Contractor

- These are the people you schedule to against work orders
- Internal team members can enter their time in / out
- Contractors can update their status to scheduled, return required and complete

Each Team members and contractor can be set up with one or more categories

Team members and contractors can be set up with or without inviting them to use the app
- They can still have an email set up so that they get notified when they are scheduled against work orders