

# WORK ORDERS

A quick guide to getting started

## Work orders can be created by Maintenance Co Users or by Property Owners:

- Work orders are visible to maintenance company users and to property owners
- Private notes, scheduling details, costs are only visible to maintenance company users

## Work orders can be created as a repeating set of work orders:

- The frequency and occurrences of the work order can be specified
- Once created, a single entry or the repeating set can be edited

## Quotes can be added to work orders:

- Based on the work order type, the property owner has an option to request a quote
- The property owner has an option to approve or reject a quote
- If a quote is rejected, there is an option to refine the quote or the work order can be cancelled

Add Quote

Add Note

Edit Work Order

Cancel Work Order

Change Note Visibility

View Record

Print

## Notes & Pictures can be added to work orders:

- Property owner notes are always public; team member/contractor notes are always private
- Maintenance company user notes default to private but can be set to public

## Team members or contractors can be added to the schedule for a work order:

- To streamline the process of finding the correct team member or contractor, a category is specified first
- Time can be added to schedules by both team members and maintenance company users, including specifying break times
- Both contractors and maintenance company users have the ability to set the schedule status for contractor rows
- Schedule rows are flexible and can be updated or have additional rows added
- The schedule details remain confidential and are not visible to the property owner
- Categories for equipment can be created, allowing for the booking and charging of trucks, barges, and other items onto work orders
- Costs can be added to work orders to track expenses such as supplies that would be charged to the property owner

## Work orders can be Cancel Requested or Cancelled :

- Property owners can request that a work order is cancelled; this work order will then be cancelled by a maintenance company user
- Maintenance company users can cancel work orders unless they are In Progress or Completed