

# INITIAL SET UP

A quick guide to getting started



## Work Order Types

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- These are a list of the services that you offer your customers, and this links to how they are invoiced
- The Work Order Types would be similar to the list you would display on your website
- Work order types are entered when a work order is created.



- Against work order types, you can select a set of flags, that determines behaviour such as availability to owners or whether the type can be used with property lists.
- Select the billing service against a work order type. This should be the same value as is defined in your accounting package.

## Team Members / Contractors

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- These are the people you schedule to against work orders and are grouped into scheduling categories
- Internal team members can enter their time in / out
- Contractors can update their status to indicate progress



- Team members and contractors can be set up with one or more categories.
- Against each team member a default billing rate should be applied.
- You can specify which team members are admin users and which can see all work orders vs just those there are scheduled against
- It is possible to define Equipment as a Team Member so that items such as a Barge or a Truck can also be scheduled and billed against a work order

## Services / Rates

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- These are used to link to your accounting package and to calculate invoice amounts
- Fixed price work is defined against the service
- Rates are



- Services are attached to work order types, so you can have multiple work order types that get grouped into common services on an invoice.
- Rates set against a team member are defaulted against work that the team member is scheduled, it is possible to change the rate on individual work orders