

# 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 created by owners are marked as requested:

- Requested work orders can be picked up by maintenance company users and updated to planned or scheduled.

Add Note

Scheduling

Edit

Cancel Work Order

Change Note Visibility

View Record

Print

## Work Orders created by Maintenance company are marked as planned or scheduled:

- Planned work orders have no team members scheduled on them.
- Planned work orders help to notify owners of upcoming work.
- Scheduled work orders are set for a date and have

## Notes, Pictures & Checklists:

- Notes added by the team are private, admin users can make notes public, which are visible to property owners.
- Pictures can be added to the work order at creation or added to notes
- Checklists can be saved in advance or created with a work order, they allow individual tasks to be ticked off as they go by them team.

## Team members or contractors can be scheduled against work orders:

- The scheduling can be created at the same time as the work order, or at a later date and it can be edited if needed.
- Time can be added to schedules by both team members and maintenance company users, including specifying break times.
- Team members can swipe to check in / out from My Scheduled Work Orders
- The schedule details are 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 users can cancel work orders unless they are In Progress or Completed