



**MAINTENANCE  
COMPANION**

We Trim Your Admin

# The life of a work order

Work Orders Made Simple: Create, Schedule, Complete

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## Work Order Statuses

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## Work Order and Scheduling Reports

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<b>Open Work Orders</b>	List of all current work orders. Used for planning, scheduling, adding notes, costs. Work orders are displayed until completed or cancelled.
<b>Work Order Calendar</b>	A calendar view of Open Work Orders where the work orders scheduled with time can be updated by resizing and dragging / dropping the entries.
<b>All Work Orders</b>	List of all work orders of all statuses. Used for searching and any updates after the work is completed. Used to enter Notes, costs and scheduling on work orders after completion for invoicing purposes. Can also mark work orders to be excluded from invoices.
<b>Reminders</b>	View of all current reminders Can be used to set reminders for future events, for example to track annual or semi-annual maintenance tasks.
<b>My Schedule</b>	List of all current work orders that you are scheduled against. Used to enter your time; update checklists; add notes and costs against the work order.
<b>My Calendar</b>	A calendar view of my schedule.

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<b>Team Schedule</b>	List of all team and subcontractors that are scheduled on current work orders. Used to enter time, update checklists, add notes and costs
<b>Team Calendar</b>	A calendar view of the team's schedule.
<b>Team Hours</b>	List of team's hours grouped by team by date. Can be used to track time entry and incomplete time

## Creating a Work Order

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### As a Property Owner

- Property owners may submit work order requests, based on the work order type that their maintenance companion has made available to owners.
- They can choose the type of work order, provide a description, optionally attach an image, and specify a requested by date.
- Submitted work orders become visible to the maintenance company for planning and scheduling.

### As a Maintenance Company User

Maintenance company users can create a work order and may choose to:

- Plan the work by specifying a date or date range,  
or
- Additionally schedule the work by assigning team members to the work order in addition to setting the time frame.

**Work Order Type:** The type of work order determines its functionality:

- Property lists: Creates multiple work orders based on the properties in the list, ideal for teams performing routine tasks on set routes.
- Repeating work orders: Automatically generates recurring work orders according to specified frequency and date range.
- Reminders: Prompts users to create a future reminder upon completion, useful for scheduling seasonal or annual tasks.

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- **Invoicing Only:** Used solely for invoicing without scheduling any work.

**Property:** Choose the property for the planned work. Where available, Property Lists are prefixed with an asterisk (\*) appear at the top of the drop down list.

If a property list is selected, it is possible to edit the list, adding / removing / re-ordering properties in the list.

**Description and Additional Details:** Enter a description of the work order for the team, which will also be visible to property owners. You may add private additional details for the maintenance company and team; these are not visible to owners and allow you to share team-specific information as needed.

**Image:** An image can optionally be added to help describe the work to be completed.

**Checklists:** When selected, checklists offer a detailed task lists for completion. You can create a new checklist when generating a work order or select an existing saved list, and items in the list can be reordered.

### **Plan or Schedule:**

**Plan:** Select Plan if you are going to select a date or date range without adding team members to the work order. There are quick select options to specify This Week / Next Week. Either a date or Date range can be entered.

**Schedule:** Select schedule if you know which date and which team members are going to be assigned to the work order.

It is possible to set the scheduled date only or to schedule a date and a time for the work order.

The Scheduling Category and Team Member fields are also available. Users can choose one or more categories to search and select team members to be assigned to the work order.

**Repeating:** If applicable for the work order type, the repeating field will show. Selecting it displays additional fields to set up repeating work orders.

**Frequency and Every:** The frequency sets whether the work order will repeat daily, weekly or monthly. The “every” field sets whether the work order will repeat every 2 or 3 weeks for example.

**Occurrences or Last Date:** To determine how many repeating work orders will be created, users can specify either the number of occurrences or the last date in the range of repeating work orders.

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## Editing a work order

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### Editing by a Property Owner

- Property owners can make changes to work orders that they have created if work is not in progress on the work order.
- Once work is underway, notes can be added to the work order to communicate changes or updates with the Maintenance Company.

### Editing by a Maintenance Company User

- Maintenance Company users can edit work orders if work is not in progress on the work order.
- If the work order was created by a property owner, changes are not permitted to the description, the image or the checklist created by the owner. Additional details can be added that are not visible to owners.
- The property on a work order cannot be edited once created. If needed, the work order should be cancelled and a new work order created.
- The work order can be edited to update a planned work order to scheduled by adding team members. Team members can also be updated on scheduled work orders.

## Scheduling

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### As a Maintenance Company User

The team members and subcontractors scheduled against a work order can be managed at any time using the 'Scheduling' option up to the point of an Invoice being sent on the work order.

This option can be accessed from the Open Work Order list or the All Work Order list.

Users can make the following changes to the scheduling on work orders:

- Add and remove team members and subcontractors from the work order.
- Add time and break time for team members.
- Mark subcontractors as complete and enter the subcontractor fee.
- Mark individual scheduling rows to be excluded from invoices.

If Subcontractors are required for the work order, the scheduling option is the only option to add and update subcontractors.

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## Adding Notes and Changing Note Visibility

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### All Users

- Notes, images and attachments can be added to work order at any status.
- Notes can be added from the current Work Order list or the Work Order History list.
- Each note is timestamped and can be viewed from the work order details.
- Multiple notes, images and attachments can be added.
- Cancel comments, cost attachments, checklist notes and attachments are visible as notes.
- From a mobile device, it is possible to take a picture and add directly to the notes as well as attaching a picture saved on a mobile.

### As a Property Owner

- All added notes are public and visible to the maintenance company.
- Property owners can only view notes that are marked as public.

### As a Maintenance Company User

- Notes are added by default as private.
- Admin users can set the visibility of notes when they create them.
- Admin users can also change the visibility of existing notes to make private notes public using the 'Change Note Visibility' option.

### As a Team Member or Subcontractor

- Notes can only be added as private notes.

## Costs

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### As a Maintenance Company User

Costs can be added to work orders so that all invoice details are stored against the work order.

Costs can be:

- Added, updated and removed from work orders using the 'Costs' option, which is available on the current Work Order list and the Work Order History list.
- Added with a description, an amount, a flag to indicate whether the amount includes tax or not and an image or an attachment.
- Managed at any status up to the point of an Invoice being sent on the work order.

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- Viewed by maintenance company users from the work order details.
- Made visible to property owners, to be able view the images and attachments.
- Marked to be excluded from invoices.

## Cancelling a Work Order

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### As a Property Owner

- You can request a work order to be cancelled if its status is Requested, Planned or Scheduled.
- A maintenance company user will review and update the work order as cancelled.
- Cancel comments must be added when cancelling a work order.

### As a Maintenance Company User

- You can cancel a work order as long as no time has been added to the work order.
- Cancel comments must be added when cancelling a work order.
- Cancelled work orders are excluded from invoices.
- Cancelled work orders will no longer be visible on the Work Order list, the day after they have been cancelled.

## Completing a Work Order

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### As a Maintenance Company User

Marking a work order as complete, indicates that all work has been completed on the work order, and that the work is no eligible to be invoiced.

- A work order can be marked as completed if its status is Scheduled or In Progress or Work Finished.
- Completed work orders will no longer be visible on the Work Order list, the day after they have been cancelled.
- If changes or additions are required, for example for invoicing purposes, the scheduling and costs can be updated from the Work Order History list.

Note : A work order's status will automatically be updated to Work Finished once all the scheduled entries have a check in and check out time added.

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## Exclude and Remove from Invoice

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### As a Maintenance Company User

- A work order may be excluded from both current and future invoices if it will not be invoiced.
- Alternatively, a work order can be removed from an invoice that has been created but not yet sent; in this case, the work is not included in the current invoice but remains eligible for inclusion in future invoices.
- Removal instead of exclusion may be appropriate when some costs or times are not yet available, and the maintenance company prefers to wait until all details are complete before invoicing.