UtilizeCore

WORKFLOW GUIDE · WORK ORDERS · PHASES P1 TO P4

From Intake to *the Field.*

One Work Order, from the moment it arrives until the Service Provider checks out. Four phases: the screen, the fields that matter, the branch points, and the result to see before moving on.

APPLIES TO

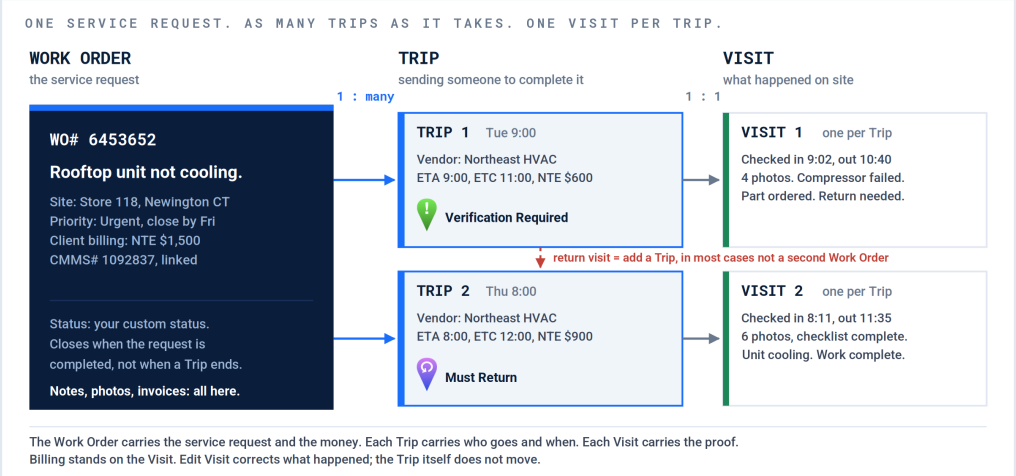
Dispatchers, operations leads, account managers

BEFORE ANYTHING ELSE

A Work Order is a service request to be completed.

A Trip is sending someone to complete it, once or as many times as it takes.

Everything on the platform follows from those two sentences. If a Work Order is open, the request is not complete yet. If a Trip is open, someone still has to go.



One service request, two Trips, one Visit per Trip. The Work Order carries the service request and the money. Each Trip carries who goes and when. Each Visit carries the proof of what happened on site.

THE DISPATCH BOARD, IF YOU HAVE EVER RUN ONE

Picture the whiteboard in a snow or HVAC shop. The call that comes in, “no heat at Store 118”, goes on the board and stays there until it is completed. That is the Work Order. Every truck you roll against it is a Trip. The work slip the technician fills in before leaving the site is the Visit. The board does not lose the call because the first truck came back needing a part; it gets a second truck. On the platform the board is the Action Filters, the trucks are Trips, and nothing comes off the board until the request is completed and the money has moved.

The first half, in one table.

Four phases. Each one has an owner, a question it answers, and a result you can see on the screen before you move on. The rest of this article is those four rows, in full.

PHASE	THE QUESTION	OWNER	DONE WHEN YOU SEE
P1 Work Initiation	Where did this request come from, and is it already on the board?	Intake, or the integration	One Work Order per request, at the right Site, with the CMMS number if it came through one.
P2 Qualification and Planning	What exactly is wrong, what does it cost, and what needs to happen before anyone rolls?	Account manager	Asset, Tasks from the Service, priority and dates, NTE set. Nothing typed by hand that a setting could have filled.
P3 Assignment and Dispatch	Who goes, and when?	Dispatcher	A Trip with the priority Vendor, dates set from the outside in, and the blue pin: Scheduled On Tech’s Mobile.
P4 Service Execution	Did they get there, do the work, and prove it?	Dispatcher and the Service Provider	Check-in and check-out on the Visit, photos in, and either Verification Required or a Must Return with its second Trip already dispatched.

THE FIRST HALF OF THE LIFECYCLE

Run it, phase by phase.

Each phase names the screen, the fields that matter, the branch points, and the result you should see before moving on. When the last Trip checks out, the Work Order belongs to the operations lead and the second half begins.

P1 · WORK INITIATION

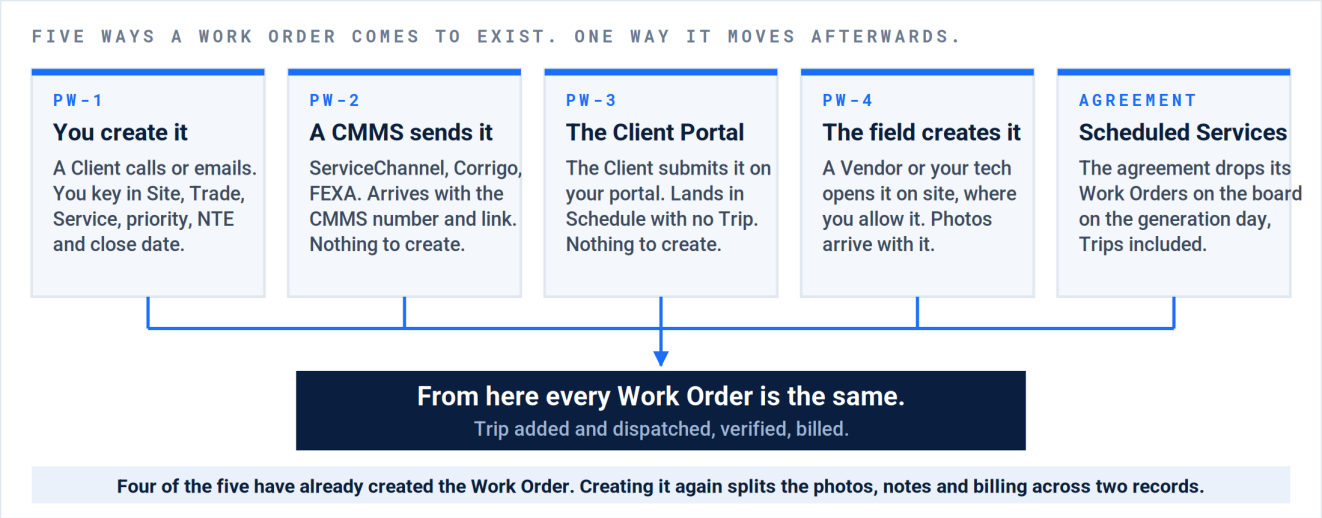
Where Work Orders come from.

P1	P2	P3	P4	P5	P6	P7
Work Initiation	Qualification and Planning	Assignment and Dispatch	Service Execution	Validation and Resolution	Financial Processing	Reconciliation and Closure

WHEN DO I CREATE A WORK ORDER?

Only when it did not arrive on its own.

Four pathways bring work in and a fifth creates it on a schedule. From Phase 2 on, they are all the same.



Five ways in, one Work Order. After it is on the board, the pathway no longer matters.

PATHWAY	HOW IT ARRIVES	YOUR FIRST MOVE
Client's CMMS (ServiceChannel, Corrigo, FEXA and others)	Created by the integration, with the CMMS number and link under the UtilizeCore number. Statuses sync both ways.	The CMMS creates the UtilizeCore Work Order automatically. If auto dispatch is set up for the integration, there is nothing left to do. If not, assign and dispatch.

PATHWAY	HOW IT ARRIVES	YOUR FIRST MOVE
Client Portal	The Client creates it on your portal with their own Site list.	Read the scope, confirm the Trade and Service, then dispatch.
Manual	A call, an email, a walk-in. You create it with the WORK ORDER button.	Phase 2, in full.
CIWO	Created in the field by a Vendor with permission, for work they found.	Qualify it against the contract before anyone dispatches it.
Scheduled Services	Recurring agreements drop their Work Orders on the board on the generation day, Trips included.	Confirm the count against the agreement list. Nothing to create.

INTEGRATED CLIENTS

On a CMMS Work Order the Client's status is the one that counts. Complete Pending Confirmation, set by you, goes to the CMMS and comes back as Complete Confirmed. Once it is set, it overrides anything else on the Work Order. Treat a Client note that says "proceed with invoice" as a signal to verify the Trip, not as verification.

RESULT A Work Order with a number, a Site, and a Trade is on the board. On the Work Orders page it sits in the Schedule Action Filter until it has a dispatched Trip.

P2 · QUALIFICATION AND PLANNING

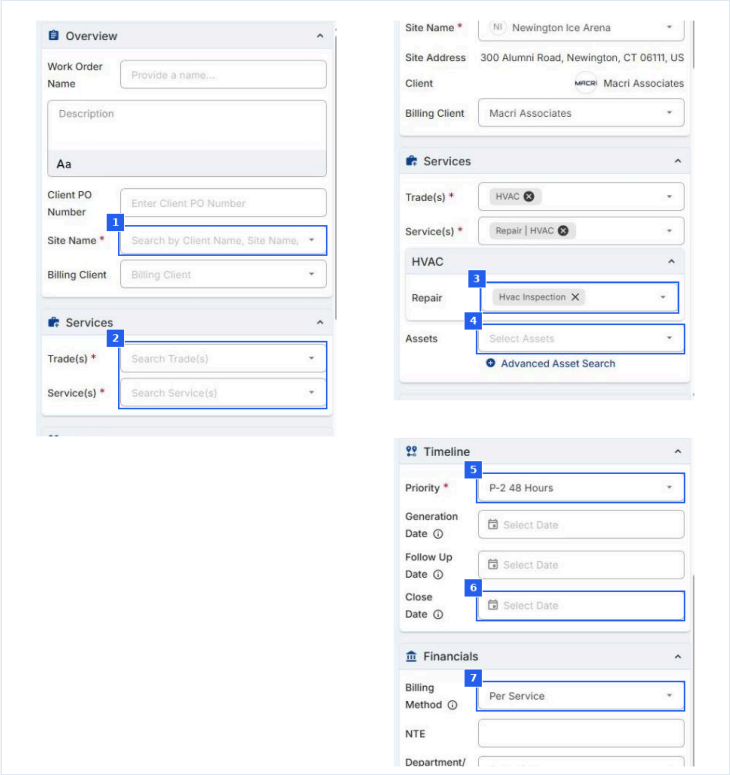
Qualify it, and set it up to succeed.

QUALIFICATION

Get three fields right: Site, Service, priority. Everything after runs off them.

The Site pulls the Client and its instructions. The Service pulls the Tasks and billing defaults. The priority sets every date.

Manual creation starts with the WORK ORDER button on the Work Orders page.



1. Site Name. Choosing it fills the Client, the address, and the Billing Client.
2. Trade(s) and Service(s). These decide which Tasks, photos, and forms the technician sees.
3. Task(s). Populated from the Service. Remove the ones that do not apply; add none by hand unless the contract calls for it.
4. Asset. Required whenever the Service enforces photos or forms; without it the app cannot enforce them.
5. Priority. Sets the ETA, ETC, Trip Expiration, and Work Order Close in one move.
6. Close Date. This is the Work Order Close: the Client's SLA, the finite date everything on the Work Order has to be done by.
7. Billing Method, under Financials. The Client-side billing method every Trip inherits.

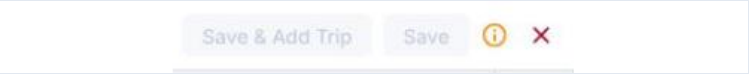
> **The new Work Order form, empty and filled.** Left, the fields as they open. Right, the same form after the Site and Service are chosen: the Client, the address, and the Tasks filled themselves in.

FIELD	WHAT TO ENTER	WHY IT MATTERS LATER
WO Name	What the Client would call it. Short.	It is the subject line on every email and the label on every list.
Description	The scope, written for the technician. Where, what, what done looks like.	It is what the technician reads in the app before knocking on the door.
Site Name	Search by name or address.	Pulls Client, billing address, Permanent Site Instructions, and the priority Vendor.
Billing Client	Defaults from the Site. Change only for a third-party payer.	Decides whose name is on the Receivable.
Trade(s), Service(s), Task(s)	One Trade, the Services under it, the Tasks that apply.	Tasks are what the technician ticks and photographs. Billing per task reads this list.
Asset	The unit being serviced. Advanced Asset Search finds it by tag.	Photo and form enforcement in the app keys off the Asset.
Priority	The Client's SLA level.	Fills the dates once. Change the priority, not the dates.

FIELD	WHAT TO ENTER	WHY IT MATTERS LATER
Follow Up Date	When you want to look at this again.	Your own tickler. Use it on anything waiting on someone else.
Close Date	The Work Order Close. The Client's deadline.	Every Trip Expiration must fall before it. Set it first when the date fields look frozen.
Financials	Default billing method, Client NTE, and the invoice generation rule.	Decides how the Receivable is built in Phase 6. Per Hour (T&M) or NTE for on-demand work; Proposal when it was quoted.

SAVE, OR SAVE & ADD TRIP

Save creates the Work Order and leaves it in the Schedule Action Filter with no Trip. Save & Add Trip opens the Trip form with the Site, Trade, and Service already filled in, which is Phase 3. Use it unless you are deliberately parking the Work Order for a quote.



The New Work Order header. SAVE and SAVE & ADD TRIP sit at the top right of the form. Save parks the Work Order in Schedule with no Trip; Save & Add Trip opens the Trip form.

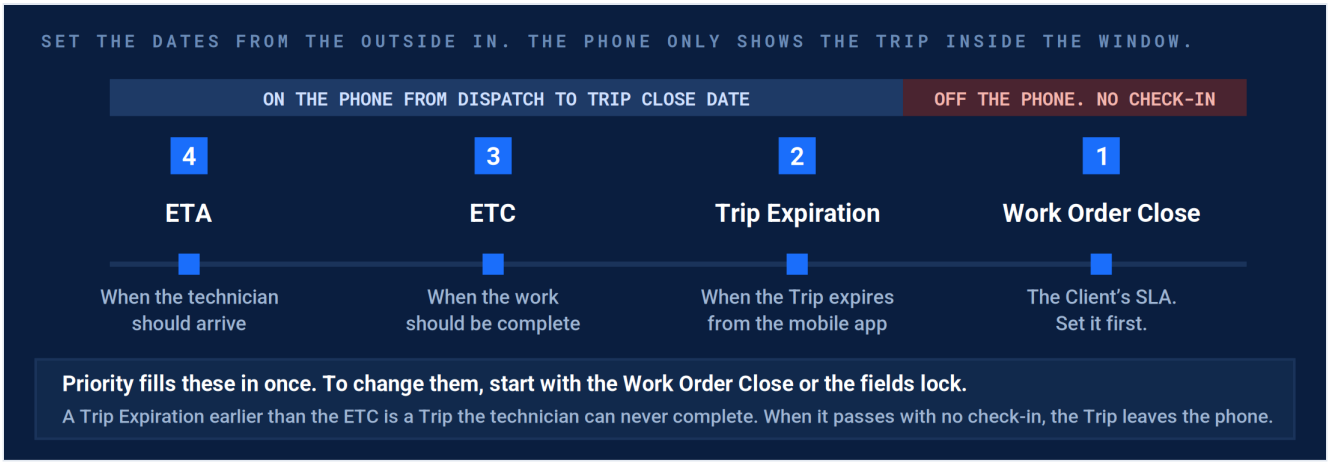
RESULT The Work Order shows its number and the Site in the Overview panel, the Tasks under Services, and the dates under Timeline. Save & Add Trip has opened the Trip form.

P3 · ASSIGNMENT AND DISPATCH

Assign, set the dates, dispatch.

P1 Work Initiation | P2 Qualification and Planning | **P3 Assignment and Dispatch** | P4 Service Execution | P5 Validation and Resolution | P6 Financial Processing | P7 Reconciliation and Closure

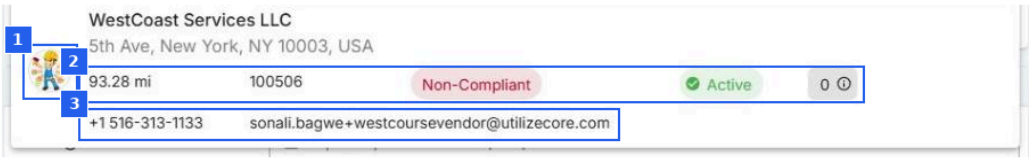
A Trip is the thing that appears on a phone. Phase 3 decides whose phone, when, for how much, and for how long the Trip stays there. The order you fill the date fields in is the single most repeated teaching point on training calls, so it comes first.



> **Set dates from the outside in:** Work Order Close, Trip Expiration, ETC, then ETA. A field that looks frozen is waiting for the outer date.

Assignment.

Choose a Vendor or one of your own team members. Your priority Vendors for the Site show first, with the number on the avatar. Advanced Vendor Search sorts by distance and does not filter by Trade, so read the row before you pick.

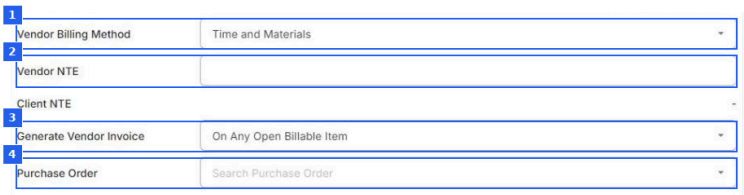


1. The priority number on the avatar: this Vendor was assigned to the Site with priority 1 in How a Work Order Moves, Part A.
2. Distance from the Site, platform id, compliance chip, active status. A Non-Compliant chip means documents are missing.
3. Phone and email, so the call in Phase 4 starts from here.

> **The Vendor search on the Trip form.** The priority Vendor for this Site shows first, with its priority number on the avatar and its distance, platform id, compliance, and active status before you commit.

The Vendor's money.

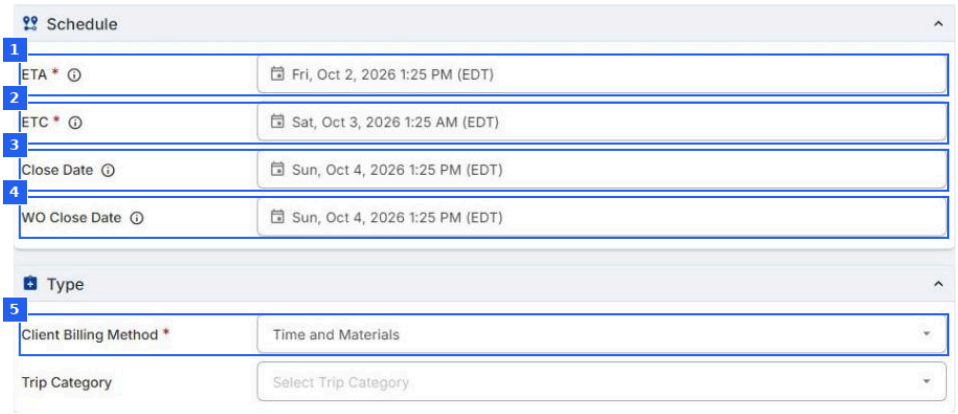
Two things get decided here and are hard to change after dispatch: how the Vendor bills, and how much they may bill without asking.



1. Vendor Billing Method. NTE, Per Hour (T&M), Per Task, Per Service, Equipment Task T&M, Per Event, Proposal, Non Billable. Billing Methods Explained covers each.
2. Vendor NTE. The ceiling. The platform blocks a Vendor invoice above it unless a named user overrides.
3. Generate Vendor Invoice. When the Payable is created: on any open billable item, or on completion.
4. Purchase Order. Attach one here when your process issues the PO before the work.

> **Vendor billing on the Trip form.** These fields feed the Vendor Payable in Phase 6.

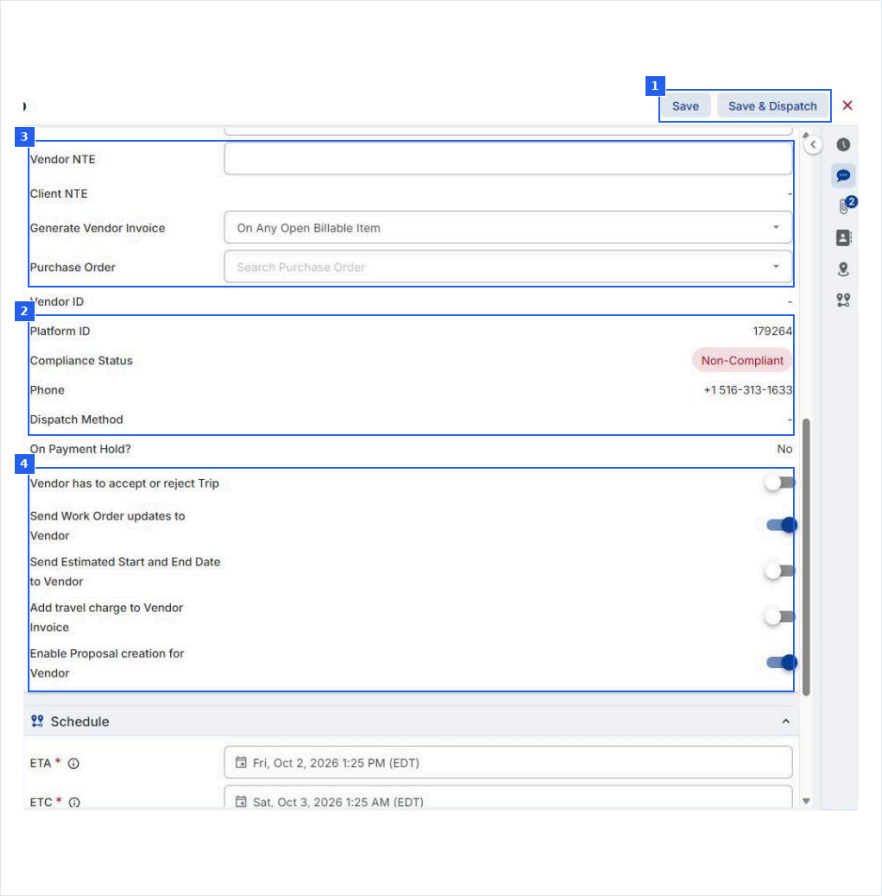
Schedule.



1. ETA. When the technician is expected. The late clocks in How a Work Order Moves, Part A count from here.
2. ETC. When the work should be done. The check-out clock counts from here.
3. Close Date. The Trip Expiration in the mobile app.
4. WO Close Date. The Client's deadline, carried from the Work Order. Set it first.
5. Client Billing Method. Inherited from the Work Order; change it here only for this Trip.

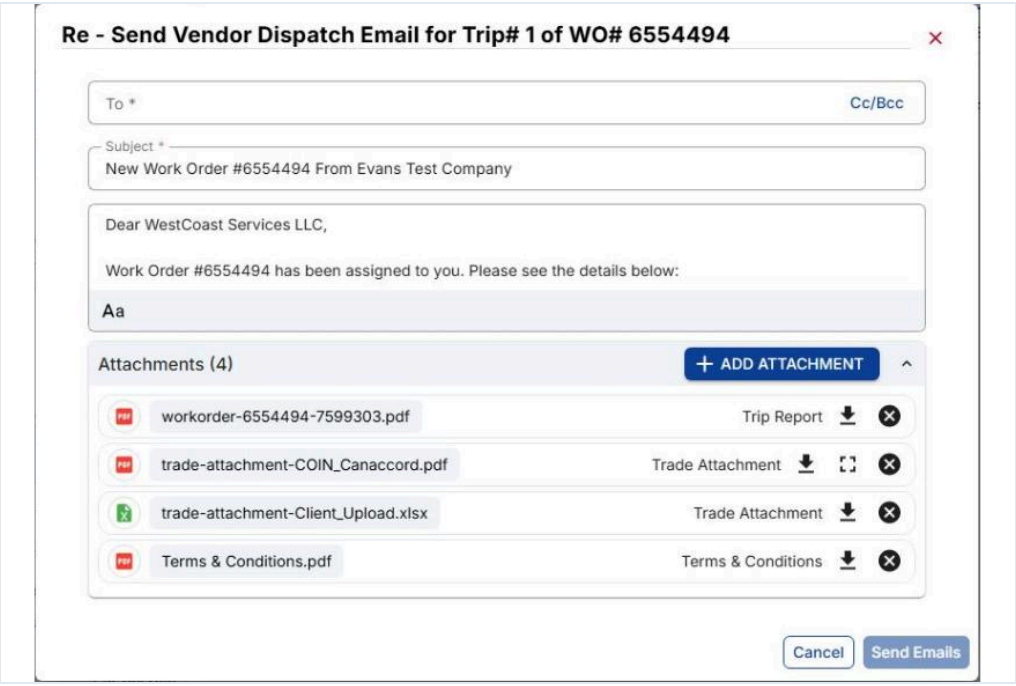
> **The Schedule and Type blocks.** Four dates and the Client billing method for this Trip.

> **SAVE IS NOT DISPATCH**
>
> Save leaves the Trip at Not Dispatched, on nobody's phone. Save & Dispatch sends it. If nobody was notified, use Re-send Dispatch Email rather than creating a second Trip.



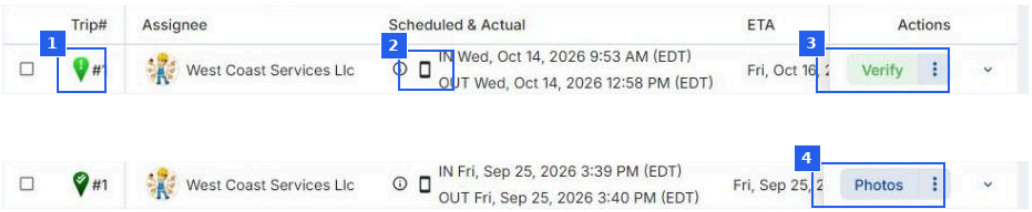
1. SAVE keeps the Trip at Not Dispatched. SAVE & DISPATCH sends the email and puts it on the phone.
2. The Vendor card once chosen: platform id, phone, email, dispatch method, compliance chip.
3. Vendor Billing Method, Vendor Not to exceed (NTE), Generate Vendor Invoice, Purchase Order.
4. Vendor Settings: “Vendor has to accept or reject trip” is the toggle behind Waiting For Approval. “Send work order updates to vendor” is what makes notes reach them.

> **The Trip form with a Vendor chosen.** SAVE and SAVE & DISPATCH sit in the header. The Vendor card, the money fields, and the Vendor Settings toggles all live between them and the schedule.



The dispatch email. Save & Dispatch opens this before anything is sent: the Vendor's address, the subject, the Trip Report and Terms attached. Send Emails is the moment the Trip lands on the phone.

What you see after dispatch.



1. The pin. Tan means Not Dispatched; blue means it is on the phone. The full set is in the Pin Legend.
2. The origin icon beside the times: a phone means the technician entered them from the app; a computer means the office did.
3. VERIFY. The suggested action once the technician has checked out and the Trip is waiting for review.
4. PHOTOS. The suggested action on a verified Trip; the invoice buttons appear in the header at the same time.

The Trips tab on the Work Order, two Trips. The top Trip is waiting to be verified; the bottom one is already verified. The pin, the origin icon, and the action button change together.

WAITING FOR THE VENDOR TO ACCEPT

If your company requires Vendor acceptance, a dispatched Trip shows the pink Waiting For Approval pin until the Vendor accepts from the email, the portal, or the app. It sits in no queue. Put a Follow Up Date on it, and reassign if the ETA is close.

GETTING A TIME WINDOW AFTER DISPATCH

There is no field on the Trip for a Vendor to type an arrival window. Teams that need one call the Vendor for a two-hour window and note it, or add “confirm your window by reply” to the Permanent Client Instructions so it rides on every dispatch email.

RESULT The Trip shows the blue Scheduled On Tech’s Mobile pin, the dispatch email is in the Work Order activity, and the Work Order has left the Schedule Action Filter.

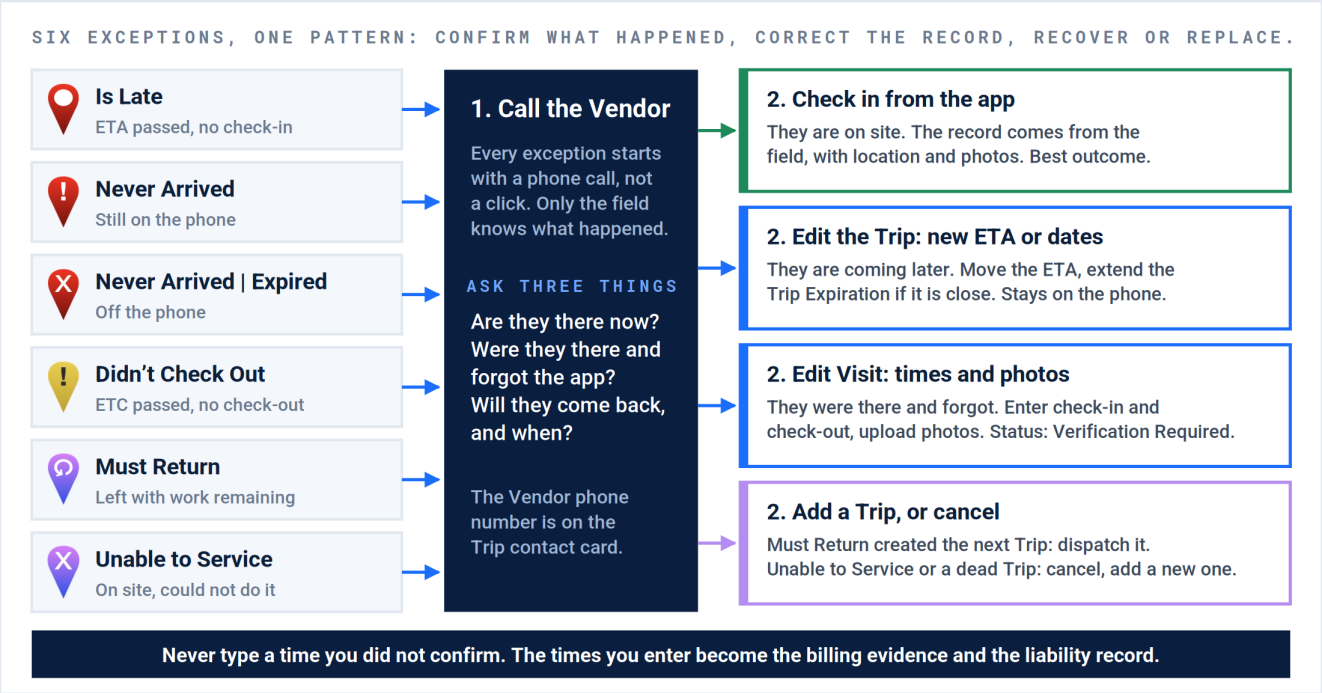
P4 · SERVICE EXECUTION

In the field, and the exceptions.

On a good day Phase 4 needs nothing from you. The technician opens the Trip in the app, checks in inside the geofence, completes the Tasks, takes the photos the Service asks for, and checks out. The check-out has three choices, and each one moves the Trip somewhere different.

CHECK-OUT CHOICE	WHAT THE PLATFORM DOES	WHAT YOU DO
Complete	Trip moves to Verification Required (green pin). Times, photos, and Tasks are on the Visit.	Phase 5.
Must Return, with a reason	This Trip closes as Must Return (purple pin) and a new Trip is created on the same Work Order for the return, inside the window set for that reason.	Dispatch the new Trip. It sits in Schedule as Not Dispatched until you do.
Unable to Service	This Trip is done and shows in Operations Failure. The technician’s note says why.	Read the note. Add a new Trip if the Service is still needed.

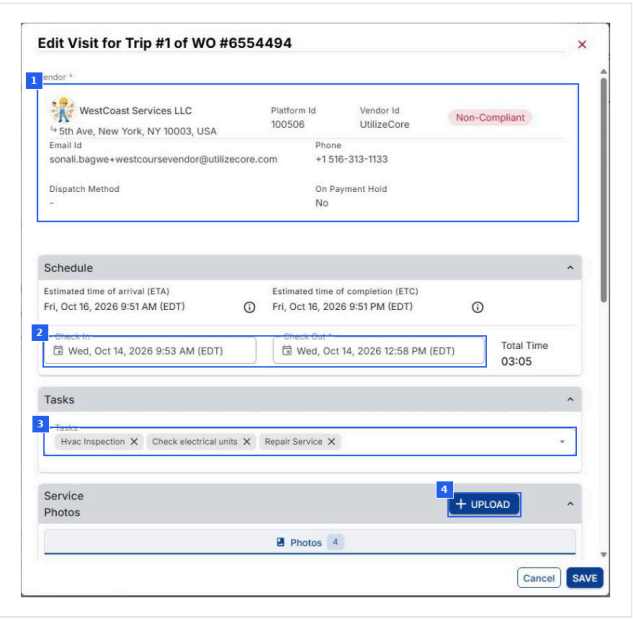
Dispatcher work in this phase is exception-only. You do not watch Trips that are on the phone; you watch the Operations Failure Action Filter, and when something lands in it you follow one pattern.



> **Six exceptions, one pattern.** Every fix starts with a call, because only the field knows what happened. Then the record is corrected to match. Cancel-and-recreate is the last resort, not the first.

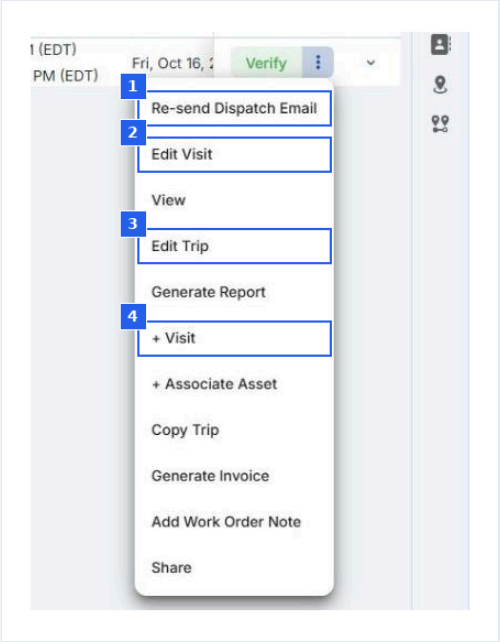
Edit Visit.

Edit Visit is the tool for correcting the record: a technician who was on site and forgot the app, a check-in from twenty miles away, a check-out that never happened. It changes the Visit, never the Trip: the assignee and the dates stay as they were. Times you enter here are what the invoice and the CMMS will show.



1. The Vendor card, with the phone number. This is the number you call before you change anything.
2. Check In and Check Out. Enter the times the Vendor confirms. Total Time updates.
3. Tasks. Tick what was done.
4. Service Photos, UPLOAD. Photos belong here, on the Visit. Photos dropped on the Attachments tab never categorize and never sync to the Client's CMMS.

> **Edit Visit for one Trip.** Open it from the three-dot menu on the Trip row.

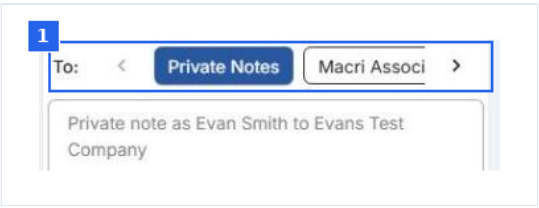


1. RE-SEND DISPATCH EMAIL. For when the Trip is on the phone and the Vendor says they never got it.
2. Edit Visit. Times, Tasks, photos.
3. Edit Trip. Assignee, ETA, ETC, Trip Expiration. Use it to push the ETA when the Vendor is coming later.
4. + Visit. A second check-in and check-out on the same Trip, for a technician who left and came back the same day.

> **The Trip row menu on an unverified Trip.** Everything you can do to a Trip from the Work Order page is here.

NOTES, AND WHO HEARS THEM

The To chips decide who sees a note. Nothing emails unless a Work Order Manager is set and the sender clicks the email icon. Check that first when a Vendor says they never saw it.



1. Private Notes, the Client, or the Vendor. Only the chosen party sees the note.

> **The notes composer, To row.** Pick the chip before you type.

TWO OPEN WORK ORDERS AT ONE SITE

When a Site has two open Work Orders, a technician can check into the wrong one. The wrong Trip moves to Verification Required and the right one goes to Never Arrived. Fix it with Edit Visit on the right Trip using the real times, then clear the wrong Trip's Visit, or cancel that Trip if it was never needed.

RESULT Every Trip on the Work Order shows the green Verification Required pin, or a purple Must Return whose return Trip has been dispatched. Operations Failure does not list this Work Order.

Where this usually goes wrong.

Ranked by how often it happens, intake through the field.

#	WHAT YOU SEE	WHAT HAPPENED	THE FIX
1	**“The job disappeared from his phone.”**	The Trip Expiration passed, or the Must Return window ran out. Status Never Arrived | Expired, no pin.	Edit Trip: extend the dates and reassign, or add a new Trip. Set Work Order Close first next time.
2	**“He has to come back. New Work Order or new Trip?”**	Return visits opened as new Work Orders split the notes, photos, and CMMS number.	+ TRIP on the same Work Order. Teach Must Return at check-out so the platform does it.
3	**Checked in from twenty miles away, or never checked out.**	Geofence off, or the technician left without the app.	Call, then Edit Visit with the confirmed times. Turn the geofence on (How a Work Order Moves, Part A).
4	**“Nobody was notified.”**	The Trip was saved, not dispatched. Or the ETC was set after the Trip Expiration, so no check-in was possible.	Re-send Dispatch Email from the Trip row. Fix the dates from the outside in.
5	**A Work Order sat for days with the technician “still on site”.**	Pause Trip was used instead of check-out plus Must Return.	Edit Visit to record the real check-out. Turn Pause Trip off on the Service (card 7).
6	**The right Work Order is still unverified after the visit.**	Two open Work Orders at one Site; the technician checked into the other one.	Edit Visit on the right Trip with the real times; clear or cancel the wrong one.
7	**“The date fields are frozen.”**	The outer date is empty.	Set Work Order Close, then Trip Expiration, then ETC, then ETA.
8	**“I never saw the note.”**	No Work Order Manager, or the email icon was not clicked. Or the wrong To chip.	Set the manager (card 8). Choose the chip, click the icon.
9	**The dispatcher picked the closest Vendor, not the awarded one.**	No priority assignment on the Site, so Advanced Vendor Search sorted by distance.	Site › View Service Rates › assignee with priority 1 (card 2).

What good looks like.

Three things to check before a dispatcher goes live. Each one is the result line of a phase.

CHECKPOINT	EVIDENCE
A qualified Work Order	An Asset, Tasks from the Service, a priority, and a Follow Up Date. No dates typed by hand.
A dispatched Trip	Trip Expiration after the ETC, both before the Work Order Close, the dispatch email in the activity, and the blue pin on the row.
One corrected Visit	An Edit Visit with a note that says who confirmed the times. Origin icon shows a computer on that row.

QUESTIONS?

Contact your Customer Success team.

Or email **support@utilizecore.com** and a member of the team will get back to you.

UtilizeCore