UtilizeCore

WORKFLOW GUIDE · WORK ORDERS

How a Work Order *Moves.*

A Work Order is a service request that needs to be completed. A Trip is sending someone to complete it, once or as many times as it takes. This guide follows one Work Order from arrival to paid.

APPLIES TO

Dispatchers, operations leads, department heads

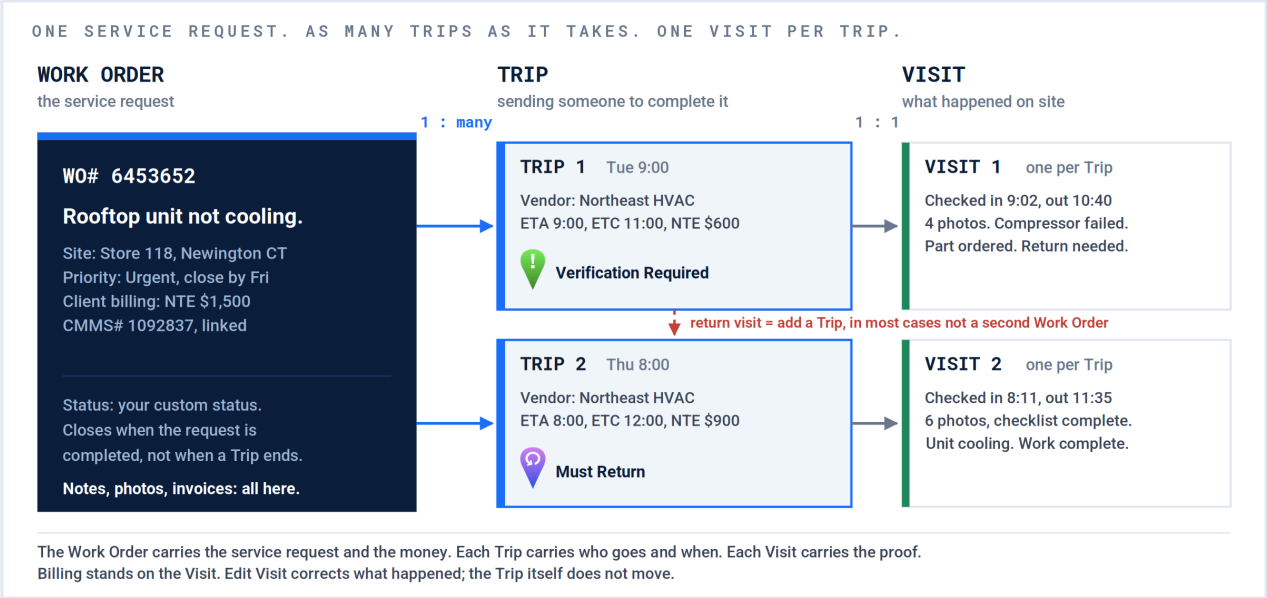
P1	P2	P3	P4	P5	P6	P7
Work Initiation	Qualification and Planning	Assignment and Dispatch	Service Execution	Validation and Resolution	Financial Processing	Reconciliation and Closure

Three objects, one job.

> THREE WORDS
>
> **A Work Order is the service request. A Trip is sending someone to complete it. A Visit is what happened on site.**
>
> Someone has to go back? Add a Trip; in most cases, not a second Work Order.

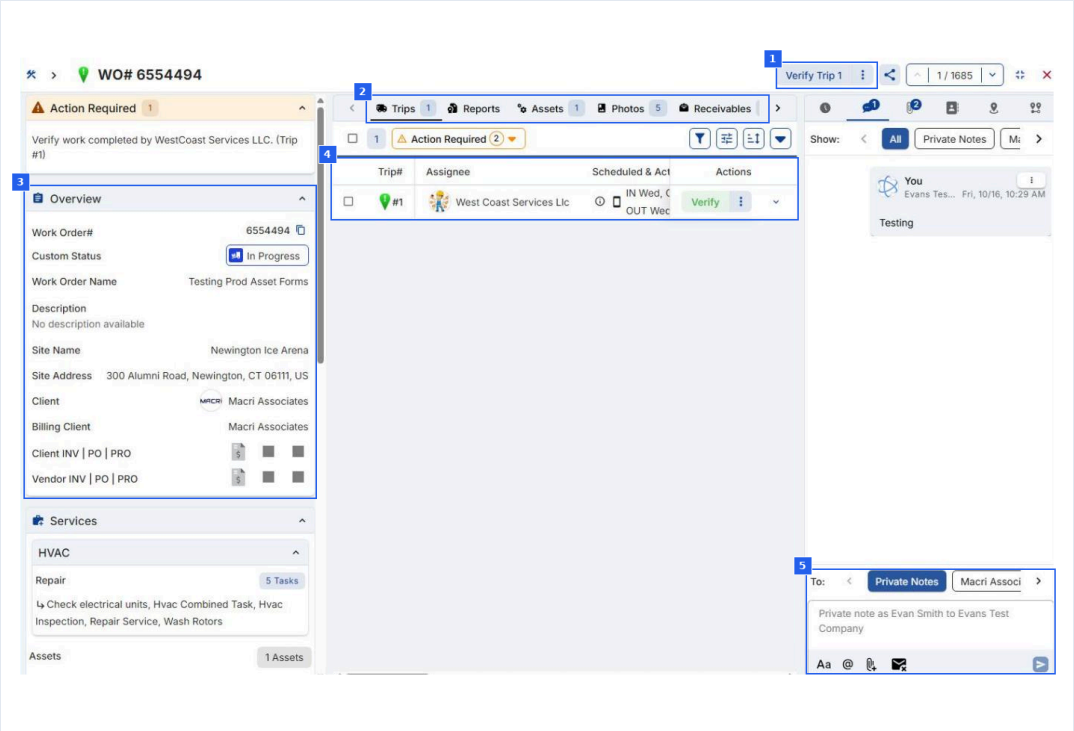
How to read this guide.

Each phase ends with a Result line. If you do not see it on screen, the phase is not done.



> **Work Order, Trip, Visit.** One service request, two Trips to complete it, one Visit record per Trip.

Here is where those three objects live on the screen. Every phase in Part B comes back to this page.



1. The header action: the next step, such as Verify Trip. The three-dot menu holds + Trip and more.
2. The resource tabs. Trips, Reports, Assets, Photos, Receivables, Payables, Purchase Orders, Proposals, Materials. The count on each tab is live.
3. The Overview panel: Client, Site, address, billing Client, the Invoice / PO / Proposal grid for both sides, Services and Tasks, Timeline.
4. The Trips list. One row per Trip with its pin, its origin icon, its scheduled and actual times, and the action the platform suggests next.
5. Notes, with the To chips. Private Notes stay internal; the Client chip and the Vendor chip send the note to that party.

> **The Work Order page.** Left, the Work Order itself. Center, its Trips. Right, its notes. The Action Filters across the top of the Trips list tell you what the Work Order needs next.

BEFORE PART A · THE LIFECYCLE MAP

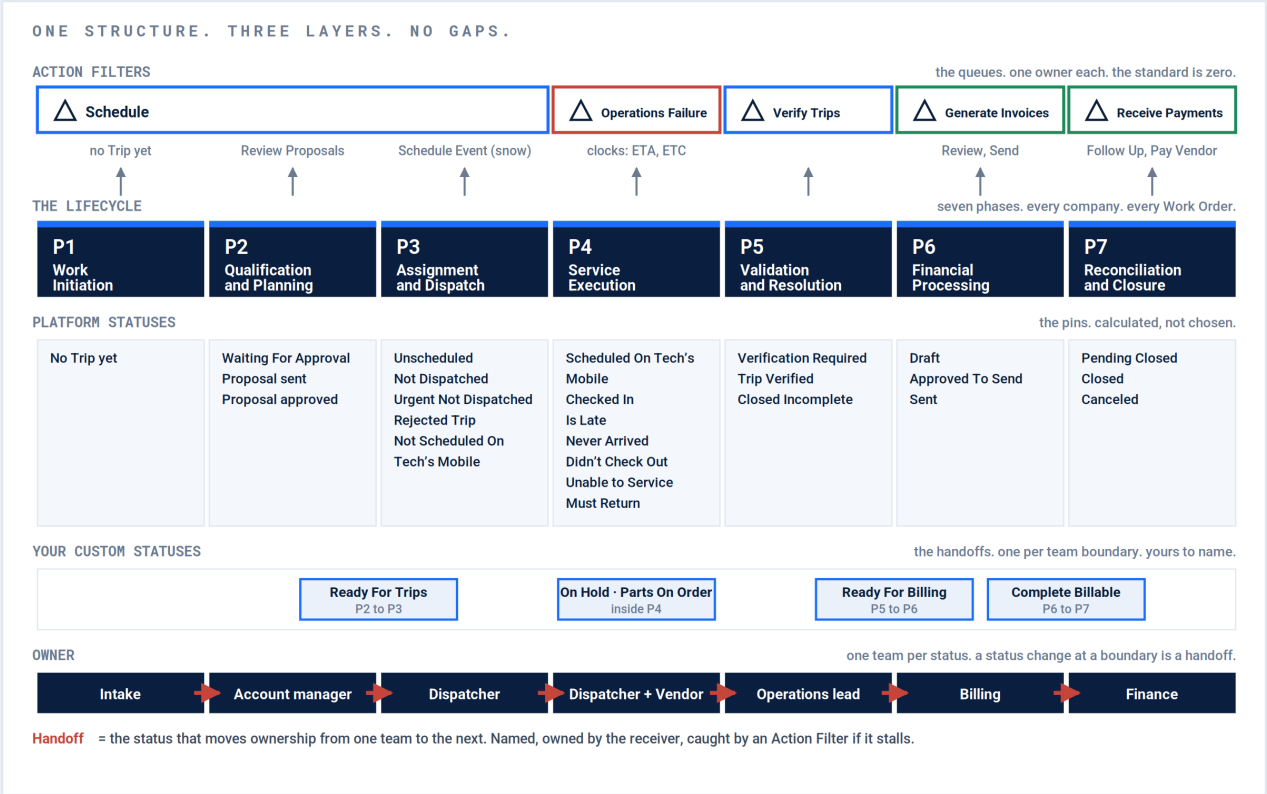
Lay out the lifecycle. No gaps.

Before the ten decisions below, lay out your lifecycle: who owns each phase, and which status hands it to the next team.

LAY THE LIFECYCLE OUT ON ONE PAGE

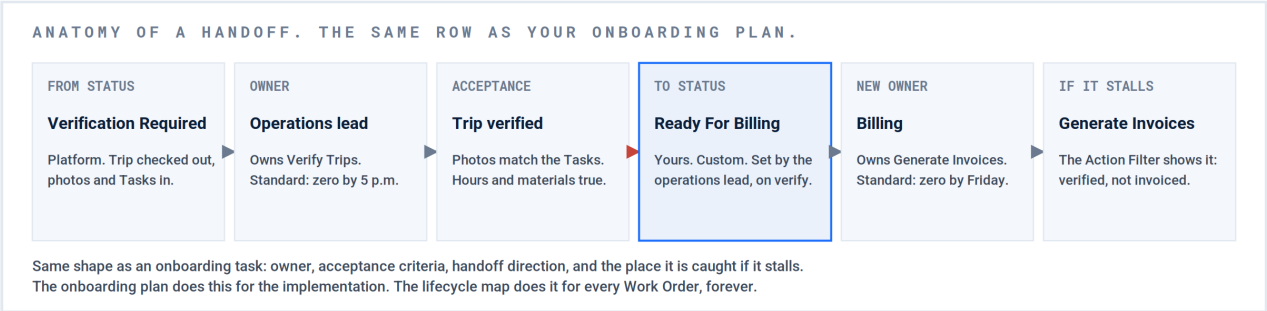
Every phase has one owning team, and every change of owner has a named status.

No blank cells means no Work Order can sit without someone expected to move it.



The lifecycle map. Action Filters on top, the seven phases in the middle, statuses and owners below. Your custom statuses sit where ownership changes hands.

A status is a handoff.



One handoff. Verified, the Trip becomes Ready For Billing and belongs to billing. If billing stalls, Generate Invoices shows it.

Every Trip status, and the Action Filter it lands in.

Two statuses have no Action Filter and no clock, and they are the only two places a Work Order can wait without being seen.

STATUS	PHASE	CAUGHT BY	OWNER	NOTE
No Trip yet	P1	Schedule	Dispatcher	
Unscheduled	P3	Schedule	Dispatcher	A Trip with no dates. Gray pin.
Urgent Not Dispatched	P3	Schedule	Dispatcher	
Not Dispatched	P3	Schedule	Dispatcher	
Rejected Trip	P3	Schedule	Dispatcher	The Vendor said no. Re-source.
Not Scheduled On Tech's Mobile	P3	Operations Failure	Dispatcher	Dispatched, not accepted on the phone.
Scheduled On Tech's Mobile	P4	Clock: ETA passes, no check-in › Operations Failure	Dispatcher + Vendor	Blue. Moving on its own.
Checked In	P4	Clock: ETC passes, no check-out › Operations Failure	Dispatcher + Vendor	Yellow. Moving on its own.
Is Late	P4	Operations Failure	Dispatcher	
Never Arrived	P4	Operations Failure	Dispatcher	
Never Arrived | Expired	P4	Operations Failure	Dispatcher	Past Trip Expiration. Not on the map.
Didn't Check Out	P4	Operations Failure	Dispatcher	
Unable to Service	P4	Operations Failure	Dispatcher	
Must Return	P4	**None.** Saved filter, named reader	Dispatcher	Add the return Trip; the Action Filter does not remind you.
Waiting For Approval	P2	**None.** Saved filter, named reader	Account manager	Waiting on a person outside the platform.
Verification Required	P5	Verify Trips	Operations lead	
Trip Verified	P5	Generate Invoices (once billable)	Billing	The handoff to money.

STATUS	PHASE	CAUGHT BY	OWNER	NOTE
Closed Incomplete	P5	Verify Trips until verified	Operations lead	
Pending Closed	P7	None needed. Closing.	Finance	Closes on its own when the money clears.
Canceled	P7	None needed. Out of every Action Filter.	Whoever canceled	

The Schedule Action Filter on the Work Orders row also carries Work Orders with no Trip at all. The Trips row cannot, because there is no Trip to list. Start the morning on the Work Orders row.

> **THE RULE**
>
> A custom status belongs only where ownership changes hands and no Action Filter already marks the moment. It is owned by the team that receives it.

Your lifecycle map.

The platform columns are filled in. The three on the right are yours.

PHASE	PLATFORM STATUSES	CAUGHT BY	OWNING TEAM	HANDOFF STATUS OUT	TRUE BEFORE IT MOVES
P1 Work Initiation	No Trip yet (Unscheduled)	Schedule			
P2 Qualification and Planning	Waiting For Approval, Proposal sent, Proposal approved	Review Proposals · Waiting For Approval has no Action Filter			
P3 Assignment and Dispatch	Unscheduled, Not Dispatched, Urgent Not Dispatched, Rejected Trip, Not Scheduled On Tech's Mobile	Schedule (the first four) · Operations Failure (Not Scheduled On Tech's Mobile) · Schedule Event			
P4 Service Execution	Scheduled On Tech's Mobile, Checked In, Is Late, Never Arrived, Didn't Check Out, Unable to Service, Must Return	Operations Failure, with the ETA and ETC clocks · Must Return has no Action Filter			
P5 Validation and Resolution	Verification Required, Trip Verified, Closed Incomplete	Verify Trips			
P6 Financial Processing	Draft, Approved To Send, Sent	Generate Invoices · Review Client Invoices · Review Vendor Invoice · Send Client Invoice			
P7 Reconciliation and Closure	Pending Closed, Closed, Canceled	Receive Payments · Follow Up on Client Invoices · Pay Vendor			

The gap test.

Six checks. The map passes when every one is true. The proof is a number you can read on the screen, not an opinion.

#	NO GAP WHEN	PROOF
1	**Every phase has an owning team, written down.** Not a person's name; a role that is staffed every day.	Seven owner cells, none blank, none "everyone".
2	**Every status has exactly one owner.** Platform statuses inherit their phase's owner. A custom status is owned by the team that receives it.	Custom Statuses list against the map: each one appears in one row.
3	**Every status is caught somewhere.** In an Action Filter, on a clock that leads to an Action Filter, or a custom handoff status with a saved filter the receiving team opens every morning.	Waiting For Approval, Must Return and every custom status have a saved filter and a named reader. Those two are in no Action Filter; everything else on the Trip is.
4	**Every boundary where the owner changes has a named handoff.** The status change, who sets it, and what has to be true first.	One custom status, or one Action Filter, per red arrow on the map. No boundary with neither.
5	**No two statuses mean the same thing, and none duplicates an Action Filter.** No Needs Dispatch, no Needs Verification, no Ready to Invoice next to Generate Invoices.	No custom status with zero Work Orders in 90 days. No name that restates an Action Filter.
6	**Every custom status has an action mapping you chose.** Open, Complete, Cancel or Close. A status mapped to Cancel cancels integrated Work Orders with incurred cost.	Action mapping column reviewed line by line. Every Cancel is one you meant.

> RESULT The map has no blank owner cells, every red arrow has a status or an Action Filter, and the Custom Statuses list matches the map line for line. Then the ten decisions.

PART A · FOR THE DEPARTMENT HEAD

Ten decisions before the first Work Order.

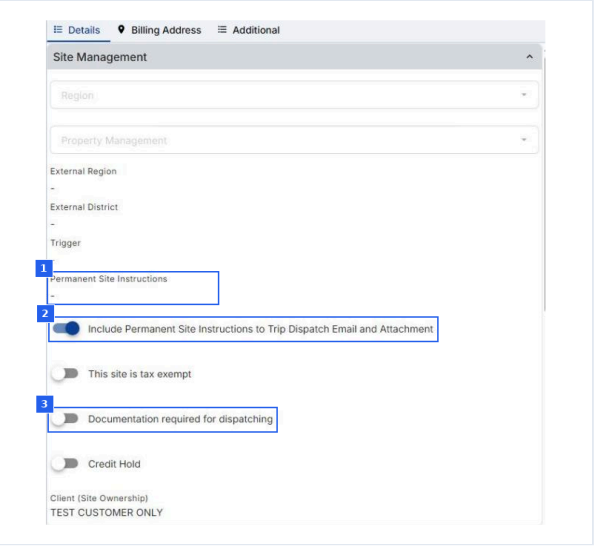
Most failures are setup decisions never made. One card per decision: where it lives, what it prevents, what proves it.

1 The Site carries the rules of engagement.

WHERE Network › Sites › open the Site › Details › Site Management.

EXCEPTION Access rules, gate codes, and “call the manager first” typed into each Work Order description. By the third Trip they are gone and the Vendor is at a locked gate.

CORRECTION Every active Site has Permanent Site Instructions, and the toggle to include them in the dispatch email is on.



1. Permanent Site Instructions. Write them for the technician, not for the office.
2. “Include Permanent Site Instructions to Trip Dispatch Email and Attachment”. On.
3. “Documentation required for dispatching”. On for Sites where a Vendor must carry a certificate or badge.

> **Site › Details › Site Management.** The instructions ride on every dispatch email and attachment for this Site once the toggle is on.

2 Every awarded Site has a priority Vendor.

WHERE Site › View Service Rates › add the assignee with a priority from 1 to 10.

EXCEPTION No assignment, so the dispatcher searched by distance, which ignores Trade. The closest Vendor got the job, not the right one. Auto-dispatch by Client stays off if even one Site lacks an assignment.

CORRECTION The Site Assignee export shows a priority 1 Vendor on every awarded Site. At dispatch, that Vendor shows first with its priority number on the avatar.

3 Trades and Services carry the task, photo, and form defaults.

WHERE Products and Services › Services & Rates › open the Service › Tasks and Advanced Settings.

EXCEPTION A Trip dispatched with no Asset does not enforce photos. The Trip auto-completed with nothing attached and the Vendor was blocked at invoicing.

CORRECTION Create a test Work Order: Tasks populate from the Service, and the app demands the photos you expect at check-out.

4 Priorities set the dates once.

WHERE Company Settings › Work Orders › priorities. Open Settings from the gear, then More Company Settings.

EXCEPTION When the priority does not match the Client's SLA, every date on the Work Order is typed by hand, and one of them is typed wrong.

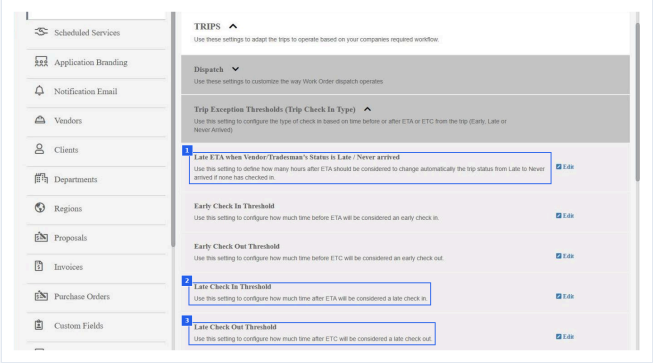
CORRECTION A P-2 Work Order created at 9:00 shows every date 48 hours out without anyone editing them.

5 Trip Exception Thresholds match how you operate.

WHERE Company Settings › Work Orders › Trips › Trip Exception Thresholds (Trip Check In Type).

EXCEPTION Thresholds left at defaults. Operations Failure fills with Trips that are fine, or stays empty while Vendors are missing appointments.

CORRECTION A test Trip with a passed ETA moves to Is Late after your Late Check In Threshold, then to Never Arrived after the hours you set.



1. "Late ETA when Vendor/Tradesman's Status is Late / Never arrived": hours after the ETA before Is Late becomes Never Arrived.
2. "Late Check In Threshold": how long after the ETA a missing check-in counts as late.
3. "Late Check Out Threshold": how long after the ETC a missing check-out makes the Trip Didn't Check Out.

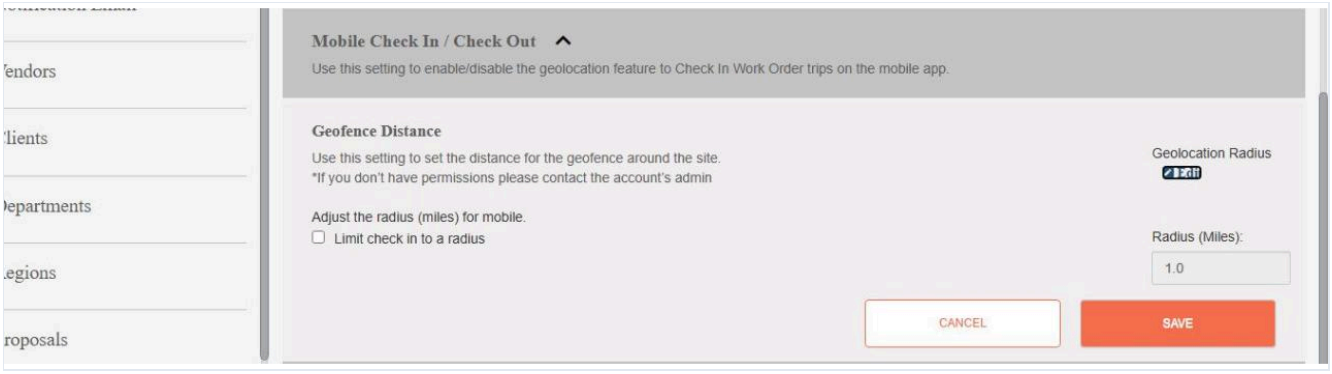
> **Company Settings › Work Orders › Trips.** Three clocks: the late check-in window, the hours from Is Late to Never Arrived, and the late check-out window. Scroll this screen with the scrollbar; the mouse wheel does not move it.

6 The geofence is on.

WHERE Company Settings › Work Orders › Trips › Mobile Check In / Check Out › Geofence Distance.

EXCEPTION Turned off for testing and never turned back on. Vendors checked in from the road, the Client's CMMS marked the check-ins Blocked, and no status ever advanced.

CORRECTION A radius is set (two miles is common) and a test check-in from outside it is refused by the app.



Mobile Check In and Check Out, under Company Settings › Work Orders › Trips. Edit opens the Radius (Miles) field; "Limit check in to a radius" is the switch that makes the app refuse a check-in from outside it.

7 Pause Trip is off. Must Return windows are set.

WHERE Products and Services › Services & Rates › the Service › Advanced Settings.

EXCEPTION A Vendor used Pause Trip instead of Must Return, and the Work Order looked stalled for days. Elsewhere a 24-hour return window expired and the Trips fell off the phone.

CORRECTION At check-out the app offers Complete, Must Return with a reason, or Unable to Service, and nothing else. Each Must Return reason has a window that matches your business.

8 A Work Order Manager is on every Work Order.

WHERE Company Settings › Work Orders (creator auto-assigned as Work Order Manager) › Notification Email.

EXCEPTION "How do I know a note came in? Nothing pinged." A note only emails when a Work Order Manager is set and the sender clicks the email icon.

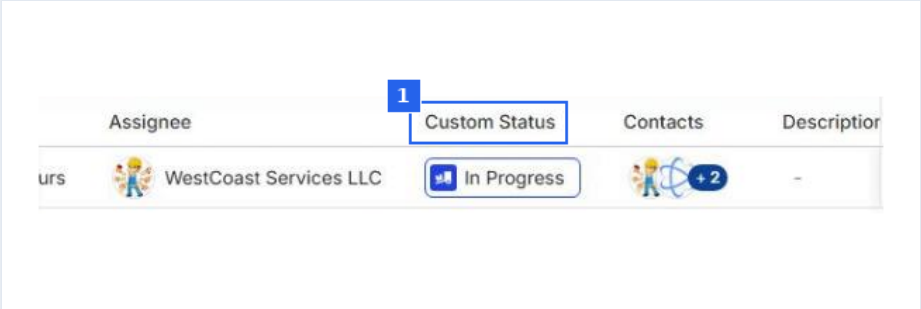
CORRECTION A test note sent with the email icon lands in the manager's inbox within a minute.

9 Custom statuses are yours, and two of them are the handoffs.

WHERE Company Settings › Work Orders › custom statuses, with action mapping.

EXCEPTION The Work Order was left at Complete, not at the billing trigger status, so nothing reached the billing filter or accounting.

CORRECTION Your list has a starting status, a billing trigger status (Ready for Billing, or Complete Pending Confirmation on integrated Clients), and nothing that duplicates a Trip status.



1 Custom Status. Sort your day by the Action Filters; use these to hand off between people.

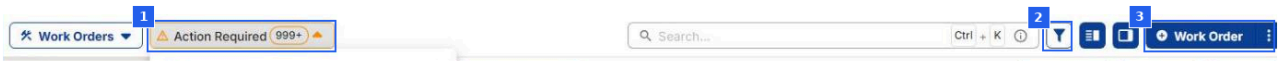
> **The Custom Status column on the Work Orders list.** Chips like Snow Exception Follow-up, In Progress, and Verified Waiting For Accounting are process labels you named. They never move a Trip and never change what an Action Filter shows.

10 **Vendor acceptance is a deliberate choice, and every dispatcher has a saved view.**

WHERE Company Settings › Vendors (require acceptance). Work Orders list › filter funnel › save as a template.

EXCEPTION With acceptance on, dispatched Trips sit at Waiting For Approval, which is in no Action Filter; nobody notices until the ETA passes. Without a saved template every dispatcher rebuilds their filters each morning.

CORRECTION Each dispatcher opens a My Work template with their Region or Clients pinned, and the Action Filter counts are theirs, not the whole company's.



1 Action Required. The dropdown lists the Action Filters. Schedule: Trips nobody in the field can see yet, plus Work Orders with no Trip. Operations Failure: the field did not do what the schedule said. Verify Trips: finished work that cannot bill until someone looks at it.

2 The filter funnel. Pin Region, Client, or Work Order Manager here and save it as your template.

3 WORK ORDER. The manual create button, which is Phase 2.

> **The Action Filter row on the Work Orders page.** This is the dispatcher's inbox. Three Action Filters drive the day; the funnel pins the view down to one person's territory.

PART B · FOR EVERYONE WHO RUNS WORK ORDERS

Run it, phase by phase.

Seven phases, one Work Order. Each phase names the screen, the fields that matter, the branch points, and the result you should see before moving on.

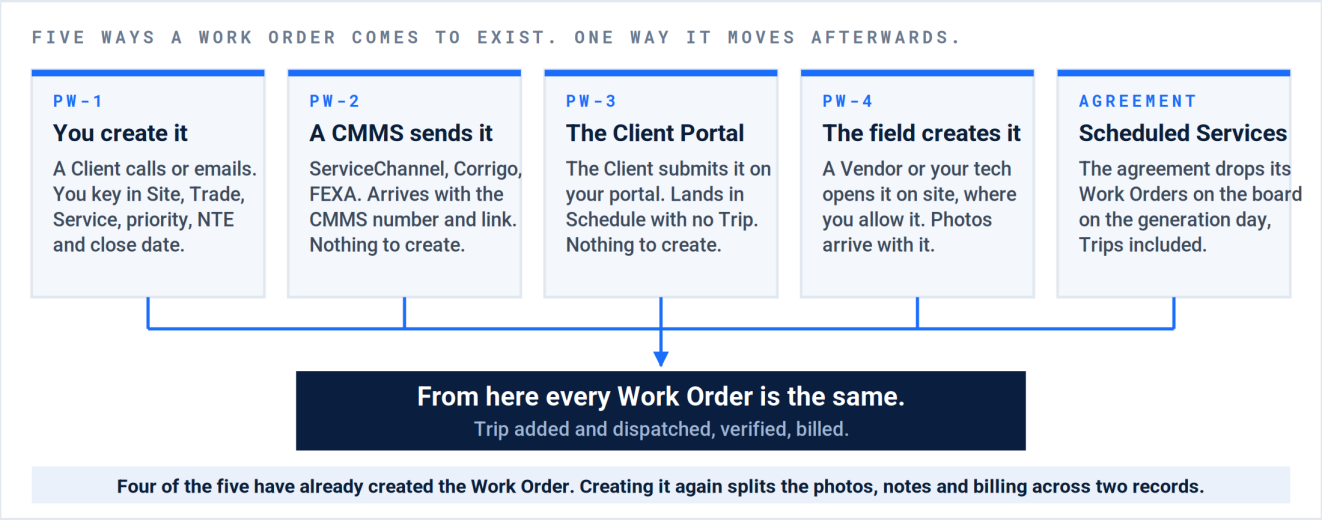
P1 · WORK INITIATION

Where Work Orders come from.

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.
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.

PATHWAY	HOW IT ARRIVES	YOUR FIRST MOVE
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 counts. You set Complete Pending Confirmation; the CMMS answers Complete Confirmed. A Client note saying "proceed with invoice" is a cue to verify the Trip, not 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

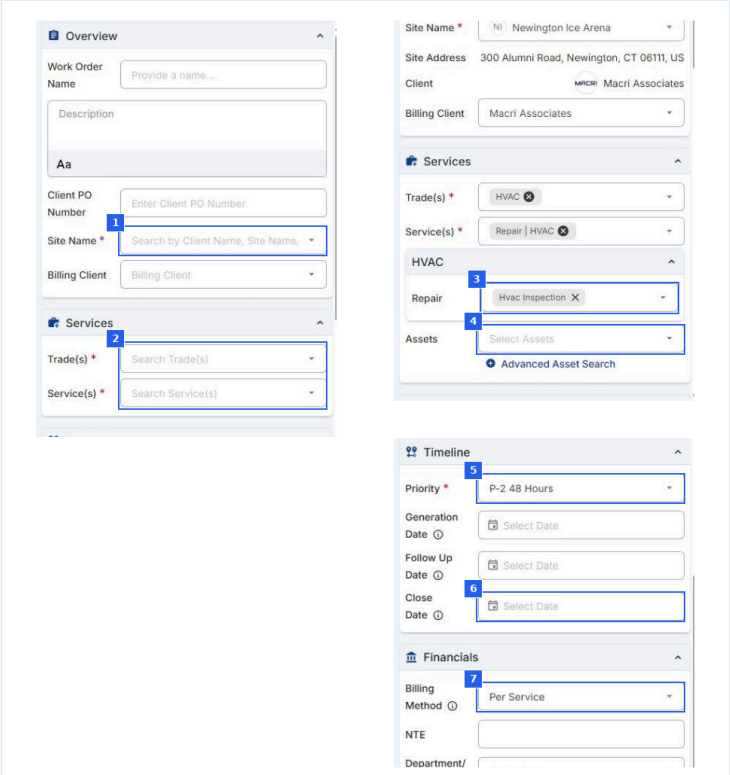
Qualify it, and set it up to succeed.

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.

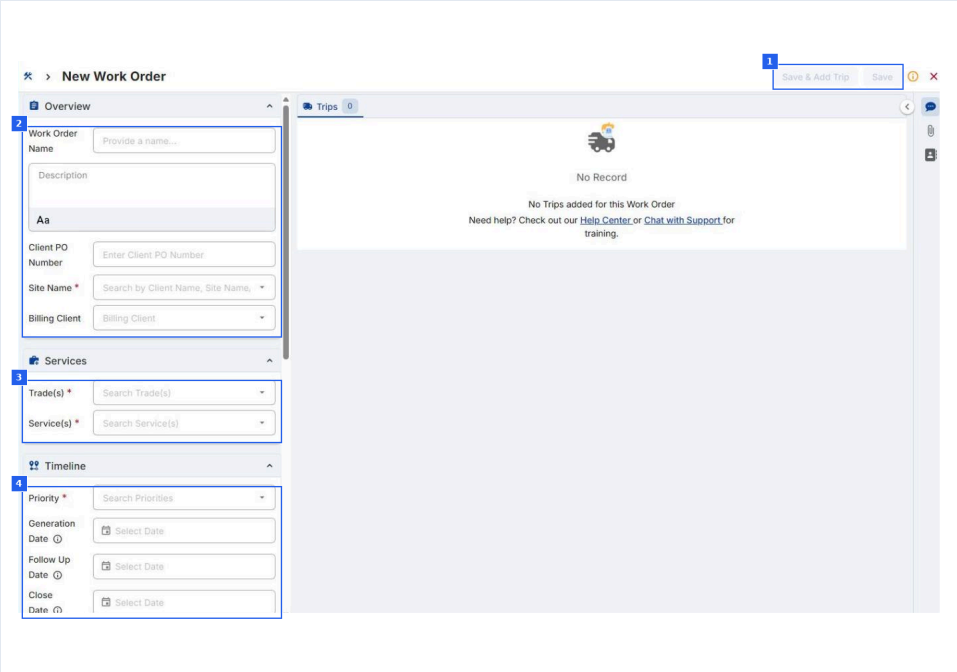
The new Work Order form, empty and filled. Left, the fields as they open. Right, the same form after the Site and Service are chosen: the Client, the address, and the Tasks filled themselves in.

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.



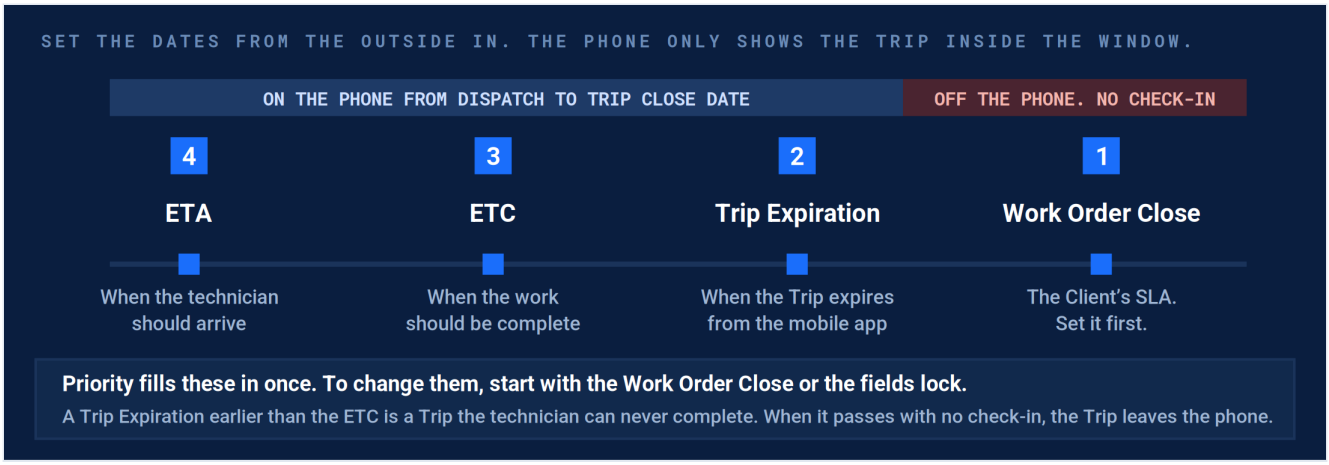
1. SAVE & ADD TRIP and SAVE. The first opens the Trip form with the Site, Trade and Service already filled in.
2. Overview: WO Name, Client PO Number, description, Site Name, Billing Client.
3. Services: one Trade, then the Services under it. Tasks follow from the Service.
4. Timeline: Priority fills the dates. Close Date is the Work Order Close.

The new Work Order form. The two save buttons sit in the header, not at the foot of the form. Overview, Services and Timeline are the left column; Financials is below them.

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.

Assign, set the dates, dispatch.

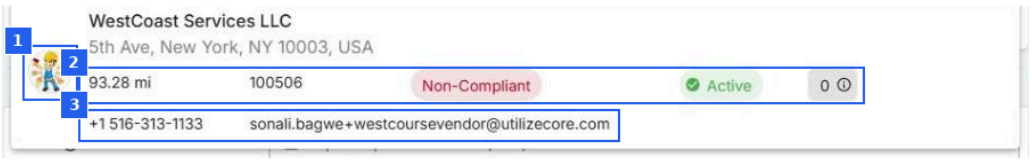
A Trip is what appears on a phone. Phase 3 decides whose phone, when, for how much, and for how long. The date order comes first because it is the most repeated teaching point on training calls.



> **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.

Priority Vendors for the Site show first, number on the avatar. Advanced Vendor Search sorts by distance, not Trade: read the row before you pick.

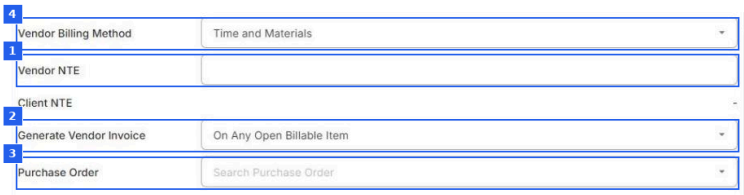


1. The priority number on the avatar: this Vendor was assigned to the Site with priority 1 in Part A.
2. Distance from the Site, platform id, compliance chip, active status. A Non-Compliant chip means documents are missing.
3. Phone and email, so the call in Phase 4 starts from here.

> **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.

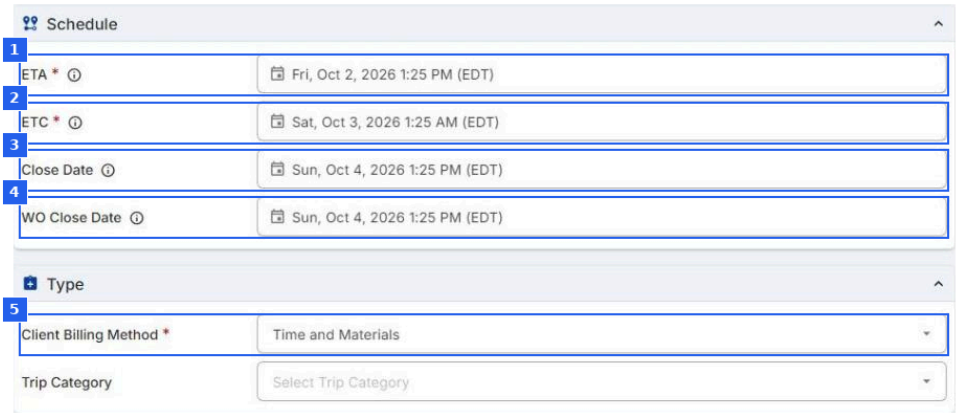
Two things get decided here and are hard to change after dispatch: how the Vendor bills, and how much they may bill without asking.



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.

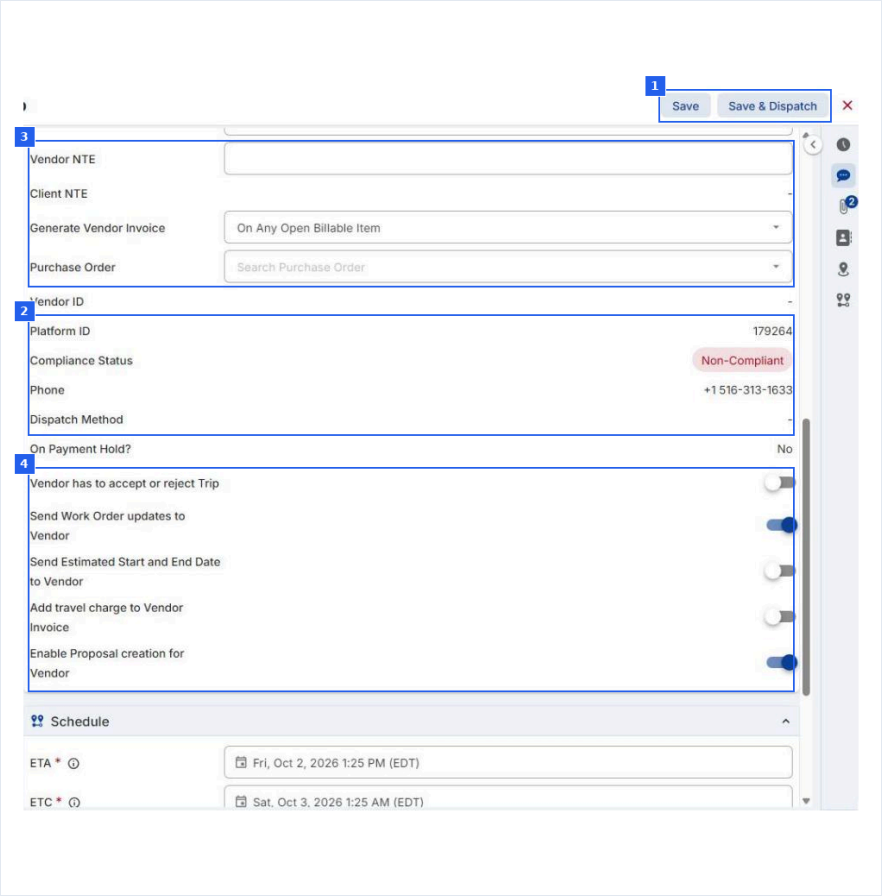
Schedule.



1. ETA. When the technician is expected. The late clocks in Part A count from here.
2. ETC. When the work should be done. The check-out clock counts from here.
3. Close Date. This is the Trip Expiration: the moment the Trip expires from 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.

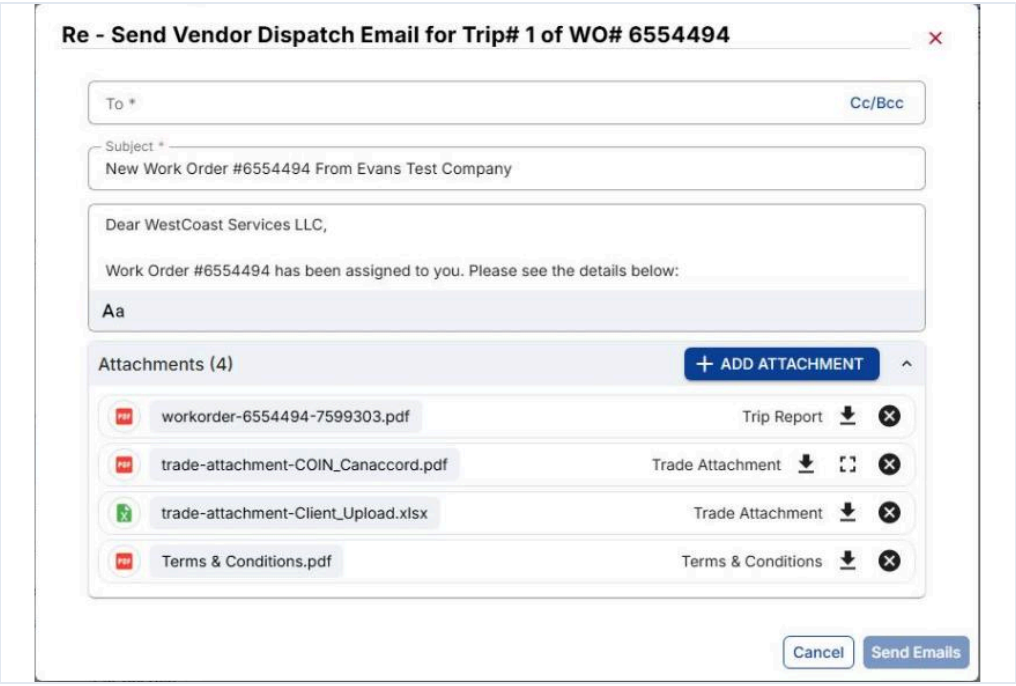
> **The Schedule and Type blocks.** Four dates and the Client billing method for this Trip.

> **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.



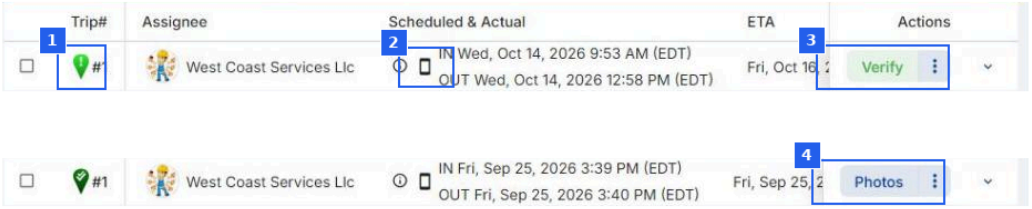
1. SAVE keeps the Trip at Not Dispatched. SAVE & DISPATCH sends the email and puts it on the phone.
2. The Vendor card once chosen: platform id, phone, email, dispatch method, compliance chip.
3. Vendor Billing Method, Vendor Not to exceed (NTE), Generate Vendor Invoice, Purchase Order.
4. Vendor Settings: “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

With Vendor acceptance on, a dispatched Trip shows the pink Waiting For Approval pin until the Vendor accepts. It sits in no queue: set a Follow Up Date, and reassign if the ETA is close.

GETTING A TIME WINDOW AFTER DISPATCH

The Trip has no arrival-window field. Call the Vendor and note the window, or put “confirm your window by reply” in 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.

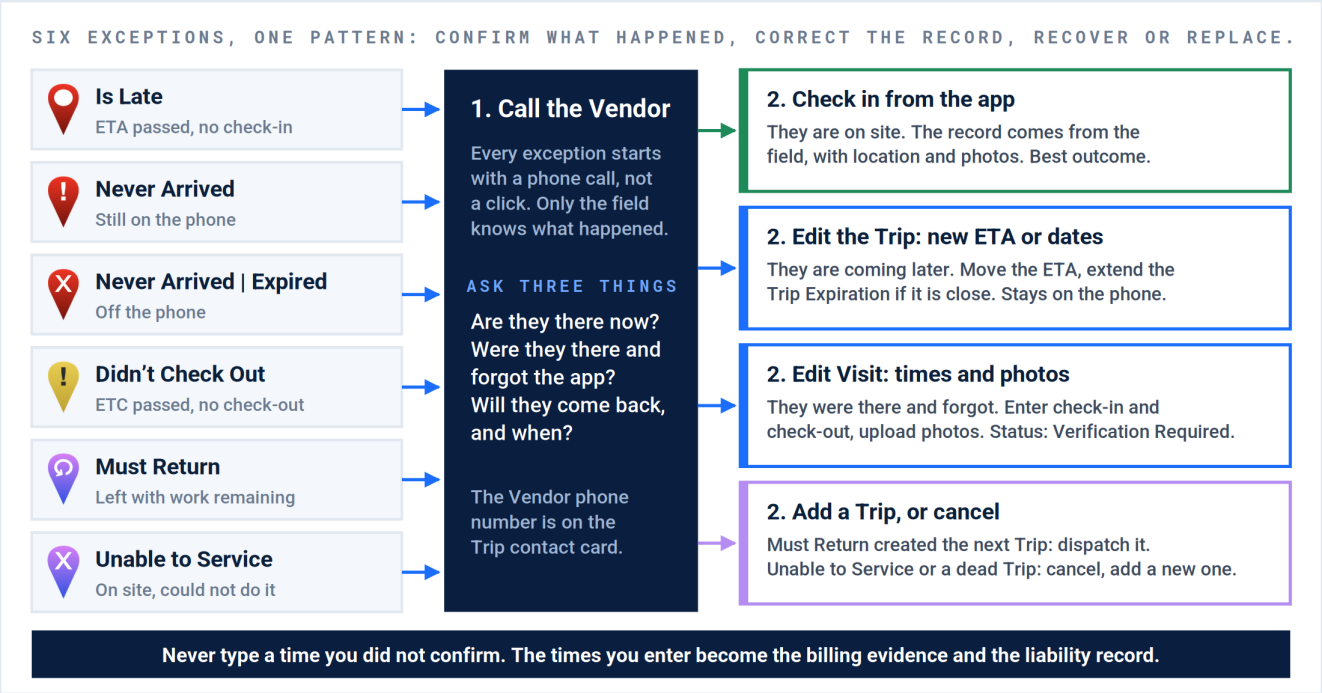
P4 · SERVICE EXECUTION

In the field, and the exceptions.

On a good day Phase 4 needs nothing from you: check in inside the geofence, Tasks, photos, check out. The check-out has three choices, and each 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.

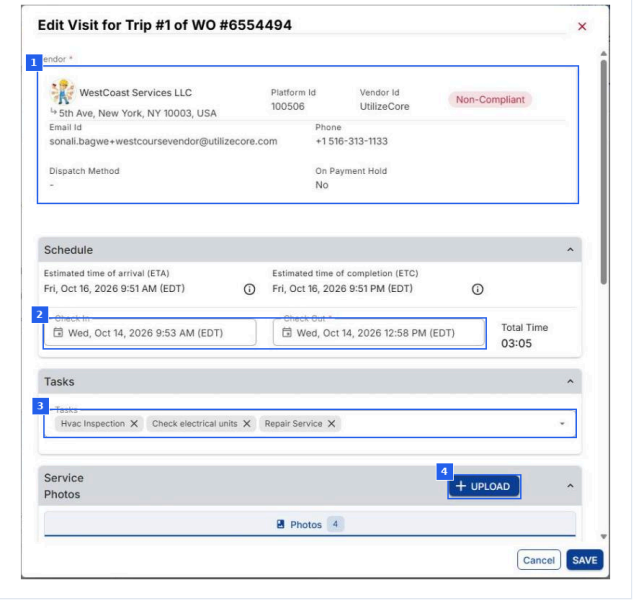
Dispatcher work in this phase is exception-only. You do not watch Trips that are on the phone; you watch the Operations Failure Action Filter, and when something lands in it you follow one pattern.



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.

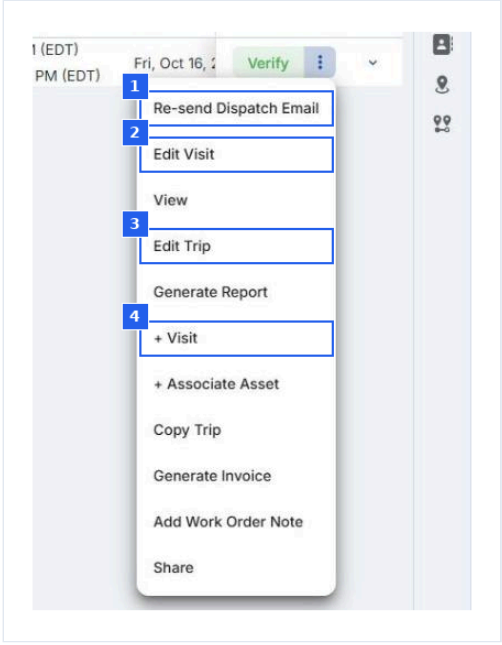
Edit Visit.

Edit Visit corrects the record: a forgotten app, a check-in from twenty miles away, a check-out that never happened. It changes the Visit, never the Trip. The times you enter here are what the invoice and the CMMS 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.

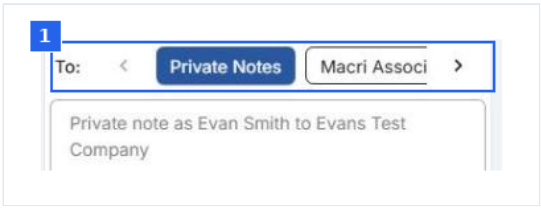


1. RE-SEND DISPATCH EMAIL. For when the Trip is on the phone and the Vendor says they never got it.
2. Edit Visit. Times, Tasks, photos.
3. Edit Trip. Assignee, ETA, ETC, Trip Expiration. Use it to push the ETA when the Vendor is coming later.
4. + Visit. A second check-in and check-out on the same Trip,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

A technician can check into the wrong one. The wrong Trip reaches Verification Required; the right one goes to Never Arrived. Edit Visit on the right Trip with the real times, then clear or cancel the wrong one.

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.

P5 · VALIDATION AND RESOLUTION

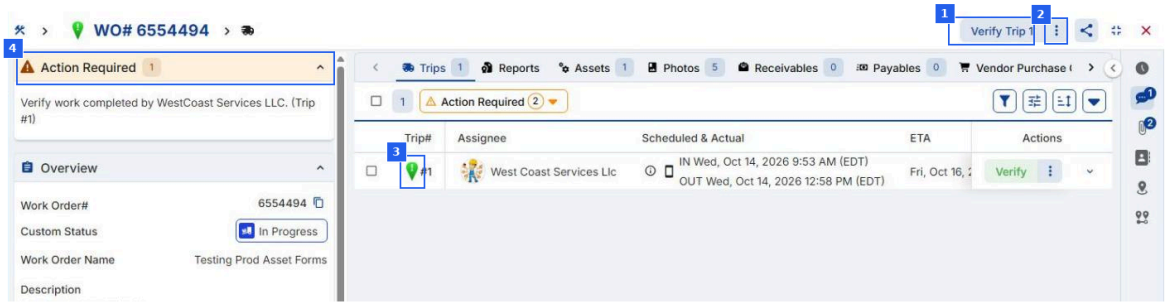
Verify.

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

VERIFICATION

Nothing bills on either side until a Trip is verified.

No photos means no verification, and no verification means no payment. That is the lever that changes Vendor behavior.



1. VERIFY TRIP 1. One click for this Trip; a confirmation follows.
2. The three-dot menu. + Trip adds the return visit if the review shows work is left.
3. The green pin on the Trip row: Verification Required.
4. Action Required, with a count. The Work Order is asking for something; the Action Filters say what.

The Work Order header with one Trip ready. The VERIFY TRIP button appears when a Trip is at Verification Required.

CHECK	WHERE YOU SEE IT	IT PASSES WHEN
Times	Trip row, Scheduled & Actual	Check-in and check-out sit inside the window, and the origin icon is a phone. A computer icon means someone typed them; read the note that says why.
Location	Visit, check-in origin	The check-in came from inside the geofence.
Photos	Photos tab, or the Visit	Before and after for every Task the Service asks for, and they show the right Asset.
Tasks	Visit, Tasks	Every Task the Client is paying for is ticked. Unticked Tasks come off the invoice.
Notes	Notes panel	Nothing from the technician that changes the scope, the price, or the need for a return.
Margin (finance)	Overview, Invoice grid; the Profitability export	The Vendor cost sits under the Client price. This is the only check finance owns.

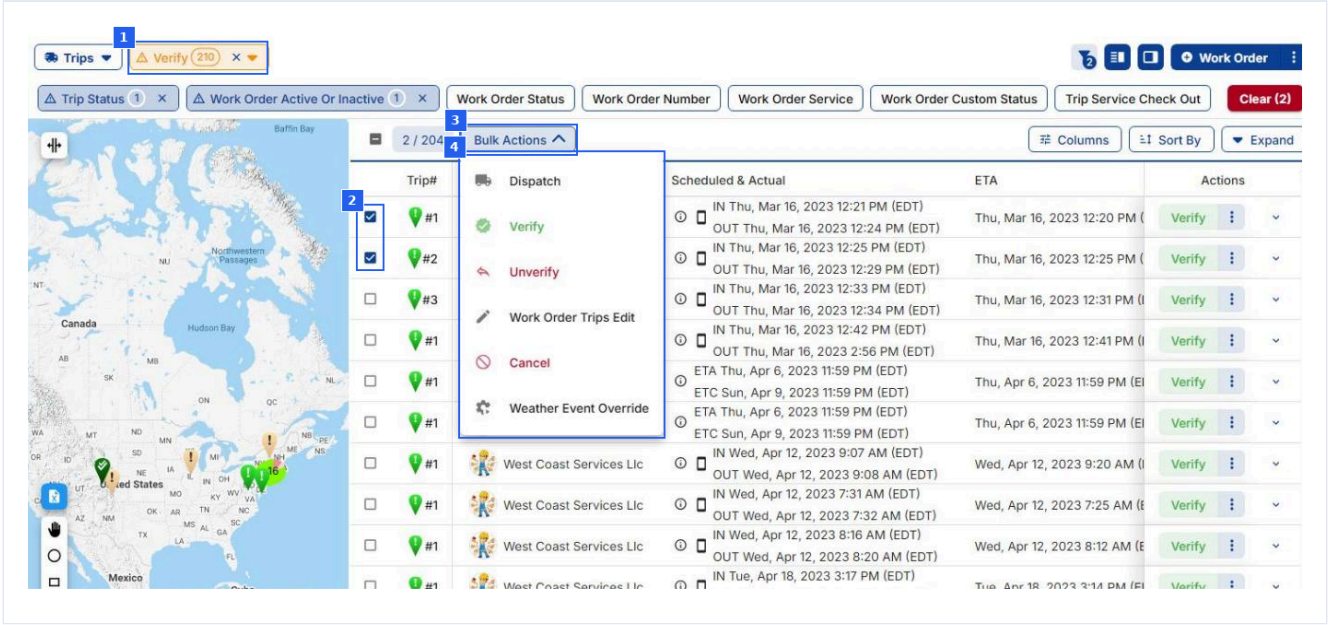


The confirmation. Verify locks the Visit for billing. If anything on the list above fails, Cancel here and leave the Trip where it is.

When it fails.

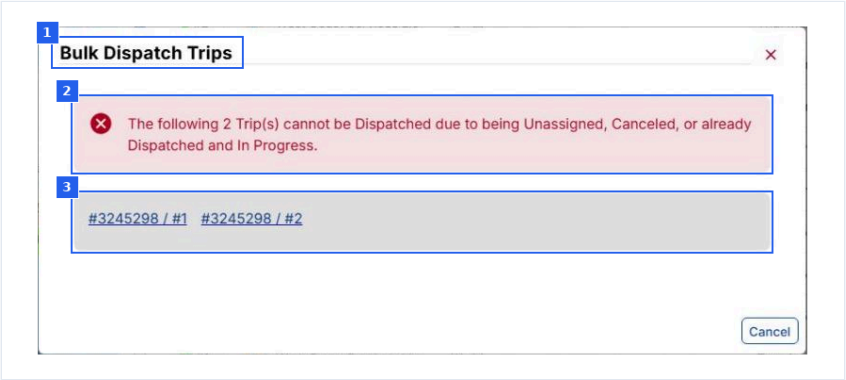
Never verify a Trip only to clear the Action Filter. Leave it at Verification Required and tell the Vendor exactly what is missing. If the work was done but the record is wrong, fix it with Edit Visit first.

> **VERIFY IN BULK**
>
> Operations › Trips carries the same Verify Action Filter. Tick the rows and verify together when you know the Service Provider and the work: a storm route of forty identical pushes. Bulk skips the photo look, so only where the Service needs none.



1. The Verify Action Filter. Only Trips at Verification Required are in the list.
2. Tick the rows. The count beside the toolbar reads 2 / 204: two chosen out of the filter's total.
3. Bulk Actions. Dispatch, Verify and Unverify live in this menu. One confirmation covers every ticked row.
4. The rest of the menu: Work Order Trips Edit, Cancel, Weather Event Override.

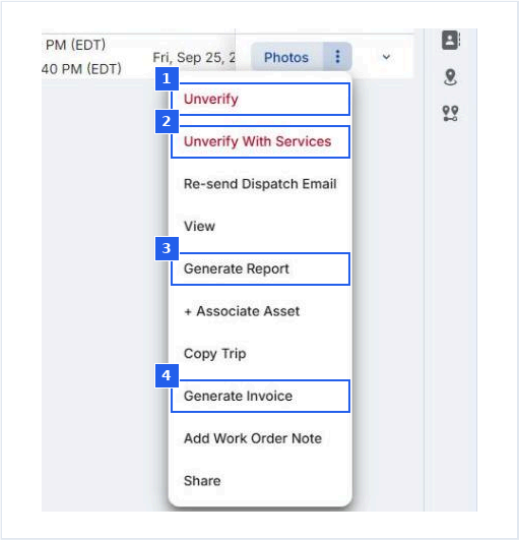
Operations › Trips with the Verify Action Filter on and two rows ticked. The Bulk Actions menu beside the count holds Dispatch, Verify, Unverify, Work Order Trips Edit, Cancel and Weather Event Override.



1. The action you ran. The same dialog shape appears for Verify, Approve, Pay and Generate.
2. The reason. A Trip has to be assigned and not yet dispatched for bulk Dispatch to take it.
3. The skipped Trips, each a link. Open them and fix them one at a time.

> **Every bulk action checks eligibility first.** Here Dispatch was run on Trips already dispatched or not yet assigned. The dialog lists the Trips it will skip, by Work Order and Trip number, and does nothing to them.

Undoing it.



1. UNVERIFY. Puts the Trip back at Verification Required so the Visit can be edited.
2. Unverify With Services. Also reopens the Services on the Trip, when a Task has to change.
3. Generate Report. The Client-facing service report for this Trip, with its photos and forms.
4. Generate Invoice. The start of Phase 6, from this Trip alone.

> **The Trip row menu on a verified Trip.** The menu changes once a Trip is verified: the field actions are gone and the billing actions arrive.

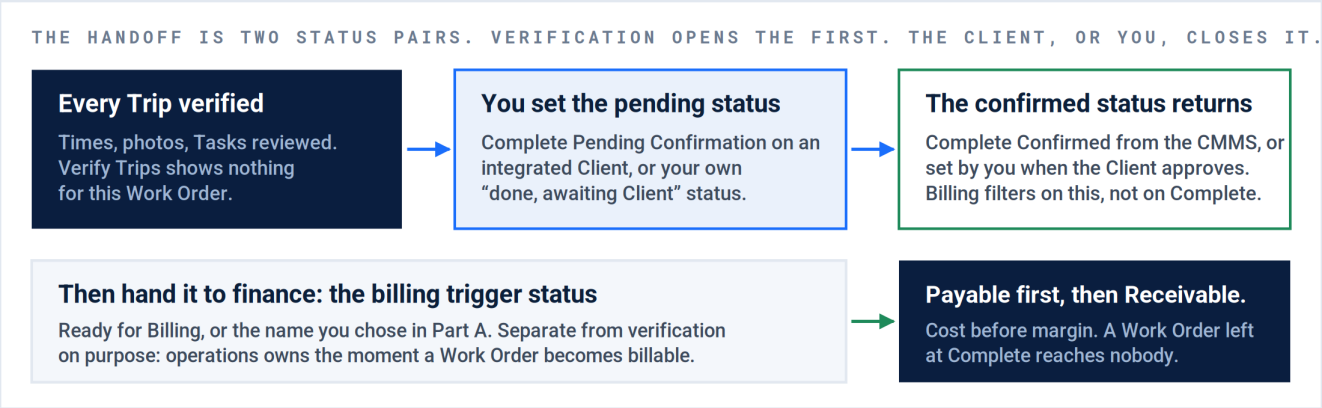
IF A RECEIVABLE OR PAYABLE ALREADY EXISTS

A verified Trip with an invoice on it cannot be unverified until that invoice is voided. That is by design: the invoice is built on the Visit, and the Visit cannot change under it.

RESULT The Trip reads Trip Verified with no pin. The Work Order header now shows Generate Invoices, Generate Receivable, and Generate Payable, and the Verify Trips Action Filter count is one lower.

Hand off to billing.

Phase 6 is a handoff. Two things, in this order: the status that tells the Client and accounting the work is done, then the invoices. The invoicing guide covers the second half.

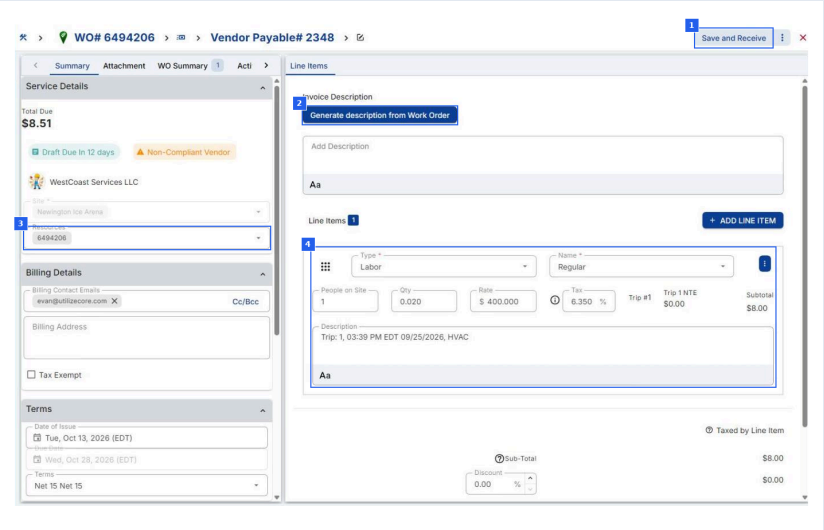


> **The two status pairs.** On an integrated Client the pair is Complete Pending Confirmation and Complete Confirmed, and the CMMS drives the second. Everywhere else the pair is your own billing trigger status and its confirmation.

Status first. CMMS Work Order: Complete Pending Confirmation, answered by Complete Confirmed. Everywhere else: your billing trigger status. Left at Complete, it reaches neither the billing filter nor accounting.

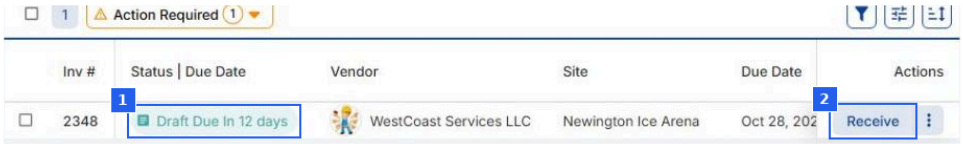
Payable first.

Vendor Payable before Client Receivable. The cost is known the moment the Trip is verified; the Client invoice is built on top of it. Client side first, and a job can be invoiced below cost.



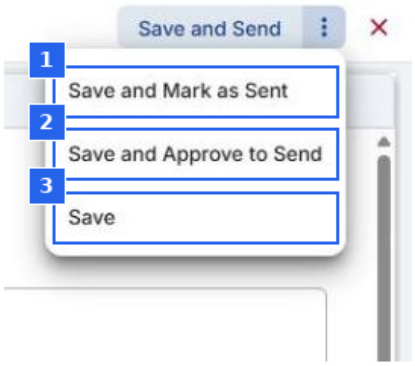
1. SAVE AND RECEIVE. The header button. The menu beside it offers Save on its own, for a second look.
2. Generate description from Work Order. Pulls the scope into the invoice description in one click.
3. Resources. The Work Order this Payable belongs to.
4. The line item. Type, name, quantity, rate, tax, and the Trip NTE beside it. A blank or $0 rate means the wrong item or the wrong rate level.

Create Vendor Payable, opened from the verified Trip. The line items come from the Trip's Tasks and the Vendor billing method chosen in Phase 3.



1. Status and due date. A draft shows Draft, with the day count to the due date.
2. RECEIVE. The suggested action on a draft Vendor invoice. Payment is covered in the invoicing guide.

The Payables tab on the Work Order. One row per Vendor invoice with its status and due date.



The Receivable's SAVE AND SEND split button. Save and Mark as Sent is for invoices delivered another way; Save holds it as a draft for review.

WHERE THIS GUIDE STOPS

Sending, following up, receiving payment, and the accounting sync are in *Invoicing: from verified Trip to paid*. Billing methods, and where each one pulls its lines from, are in *Billing Methods Explained*. Neither is repeated here.

RESULT The custom status reads the billing trigger. The Payables tab shows an approved Vendor invoice. The Receivables tab shows a Client invoice sent or drafted. The Work Order has left Generate Invoices.

P7 · RECONCILIATION AND CLOSURE

Close.

A Work Order closes when nothing is left: every Trip verified or canceled, every invoice out, Complete Confirmed received where a CMMS is involved. Closing removes it from every Action Filter at once, so closing early hides work instead of finishing it.

BEFORE YOU CLOSE	LOOK AT	PASS WHEN
Trips	Trips tab	Every Trip is Trip Verified or Canceled. No Must Return without a dispatched return Trip.
Money	Overview, Invoice / PO / Proposal grid	The Client invoice and the Vendor invoice icons are both lit. A Proposal, if there was one, is accepted.
Client	Custom status, CMMS link	Complete Confirmed on an integrated Client. The report was sent.
Follow-ups	Follow Up Date, notes	Nothing waiting on anyone.

WHAT CLOSING DOES

Closed or canceled means out of every Action Filter, still searchable by number and by Work Order Status. Reopen only to fix a record. New work gets a Trip on an open Work Order, not a reopened one.

RESULT The Work Order is out of every Action Filter and appears under the closed status in the Work Order Status filter. The Client has the report; the Vendor has been paid or is scheduled to be.

Where this usually goes wrong.

Ranked by how often it happens.

#	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	**The Vendor is blocked from invoicing though the Client said proceed.**	The Trip is unverified. The Client note is a signal, not a trigger.	Verify the Trip (Phase 5). Then the Payable can be created.
3	**“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.
4	**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 (Part A, card 6).
5	**“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.
6	**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).
7	**Nothing reached accounting or the billing filter.**	The Work Order was left at Complete instead of the billing trigger status.	Set the trigger status (Phase 6). Check the status list against card 9.
8	**No photos at verification.**	Photos went to the Attachments tab, or there was no Asset so the app did not enforce them.	Upload on the Visit. Associate the Asset at creation (card 3).
9	**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.
10	**“The date fields are frozen.”**	The outer date is empty.	Set Work Order Close, then Trip Expiration, then ETC, then ETA.
11	**“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.

#	WHAT YOU SEE	WHAT HAPPENED	THE FIX
12	**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.

Six things to check before a team 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.
One verification from the Action Filter	A Trip verified from the Verify Trips Action Filter, not from the Work Order, with photos on the Visit.
One handoff	A status change to the billing trigger, the Payable approved before the Receivable was drafted.
End of day	Operations Failure and Verify Trips counts recorded, and every Trip still open has a Follow Up Date on its Work Order.

QUESTIONS?

Contact your Customer Success team.

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

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