

Integrated Client *Day*.

The Work Order came from the Client's system and goes back to it. Your day is the same three Action Filters as any Client, plus three checks that exist because nobody typed the Work Order.

Morning, three checks.

#	CHECK	WHERE	PROOF
1	Nothing unmapped, nothing flagged	Work Orders › the Not Mapped filter, then filter to the fail-safe Service	Both at zero. A Not Mapped row never became work: send it to the mapping owner. A fail-safe row did: set the real Service, then map it.
2	Nothing undispatched	Schedule Action Filter › the Client	Zero, or a placeholder Vendor and a sourcing note.
3	Nothing aged	Custom status Completed Pending Confirmation, sorted oldest first	Nothing past the Client's SLA. Older than that, call the Client contact; the invoice is waiting on them.

The Work Order, in order.

#	DO THIS	THE CLICK	WHAT THE CLIENT SEES
1	Read it	The CMMS number under the Work Order number; the PO field; the deep link to their Work Order.	Their own Work Order number, unchanged.
2	Accept, one of two ways	Hands off: it arrives dispatched, already blue. Hands on: it arrives accepted in Schedule; dispatch when you choose. On Fexa, vet first, then set Scheduled.	Scheduled, or Dispatch Confirmed. Either way one Work Order there, one here, 1:1, for the life of the job.
3	Dispatch (hands-on path), and phone for the ETA	Priority Vendor, Save & Dispatch. Then the call: their system will not ask the Vendor for a window. On the hands-off path this step is already done; make the call anyway.	Nothing yet.
4	Let the field talk	Nothing. Check-in and check-out change the status here and, on most integrations, in their system at the same moment; photos and notes cross as they happen, within your policy. Nobody retypes a status on either side.	On Site at check-in, the completion status at check-out, then the photos and notes if they push.
5	Verify	Verify Trips Action Filter, photos open, Verify.	Nothing yet, unless check-out is mapped to completion.
6	Tell them it is done	Custom status Completed Pending Confirmation.	Done, awaiting their confirmation.
7	Wait for Confirmed, then bill	Completed Confirmed arrives on its own. Receivable here; the same invoice entered or uploaded in their system.	Confirmed, then invoiced.

When it is not moving.

YOU SEE	DO THIS
A status did not push	Add a note to the Work Order. The note is an event and carries the status with it.
Their Work Order closed in their system and you are not done	Check-out is mapped to completion for this Client. Must Return next time; tell whoever owns the mapping.
A Work Order they sent is not here	Not Mapped filter first. Then the Site's location ID. Then ask whether they recalled it before go-live; if so, create it here and attach their number.
The Work Order arrived looking done	Some Clients send Work Orders already in Pending Confirmation. It is not done. Dispatch it and verify it like any other.

Questions? Contact your Customer Success team or email support@utilizecore.com.