UtilizeCore

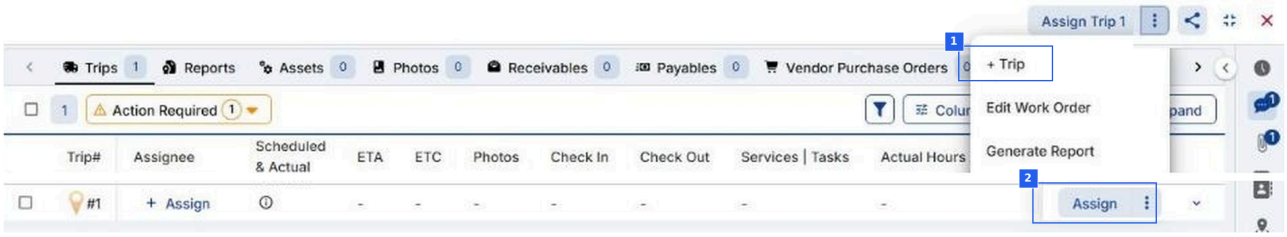
Managing a Work Order *in One Page.*

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. Four moves run most of the day.

Four moves, in order.

#	MOVE	DO THIS	DONE WHEN
1	**Find your work**	**Filter › Apply Filter Template**. Keep one template per Client, plus one for Action Required or In Progress. Build each once with **Save Current Filters as Template**; tick **Shared Company Template** to give it to the team.	Every open Work Order sits in a saved view you check each morning.
2	**Assign and dispatch**	**+ Trip** in the header three-dot menu, or the action at the right of the Trip line. Choose the **Vendor**, **Assign**, then **Dispatch**.	The Trip is on the Vendor's phone and email. Accept for them only when they confirm by phone, with a note naming who.
3	**Record the Visit**	Vendor not on the app? On the Trip, ⋮ **› Edit Visit**. Set **Check In** and **Check Out** (check AM or PM), **Service Photos › UPLOAD**, then **SAVE**.	Total Time is positive and the photos are attached. Activity records every change.
4	**Send the Vendor back**	No Proposal: **+ Trip** in the header three-dot menu. Approved Vendor Proposal: **Vendor Proposals** tab › ⋮ **› Create Trip**. Review, then dispatch.	A new Trip on the same Work Order. **In most cases, not a new Work Order.**

Two places to start a Trip.



1 + Trip in the header three-dot menu adds a Trip.

2 The action at the right of the Trip line acts on that Trip.

What the Trip line is telling you.

BUTTON	WHERE THE TRIP IS	WHAT TO DO
Create Trip	No Trip yet.	Add a Trip and assign a Vendor.
Assign Trip	A Trip exists with no Vendor.	Choose the Vendor, then dispatch.
Re-send Dispatch Email	Dispatched, not yet accepted.	Wait for the Vendor, or call. Re-sending only repeats the email.
Verify Trip	The Vendor has checked out.	Review photos and times, then verify.
Gener Inv Trip	Verified, not yet billed.	Generate the invoice.

A check-out that will not save, or a negative Total Time, almost always means AM or PM is wrong on one side. Full walkthrough: **Managing a Work Order: The Basics**. Questions? Contact your Customer Success team or email **support@utilizecore.com**.