

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 at the top of the Work Order, 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 Work Order header. Approved Vendor Proposal: Vendor Proposals tab > ⋮ > Create Trip . Review, then dispatch.	A new Trip on the same Work Order. Never a new Work Order.

Two places to start a Trip.

The screenshot shows the UtilizeCore interface. At the top, there's a navigation bar with various icons and buttons, including 'ASSIGN TRIP 1' and '+ TRIP'. Below this, there's a section for 'Photos', 'Receivables', 'Payables', 'Vendor Purchase Orders', 'Client Purchase Orders', and 'Client Proposals'. The main area displays a table with columns: Trip#, Assignee, Scheduled & Actual, ET, and Actions. A specific Trip is highlighted with a yellow icon and the number 1. The 'Assign' button is visible next to the Trip line, and the 'ASSIGN' action is shown in the Actions column, marked with a blue box and the number 2.

1 + TRIP at the top of the Work Order 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.