

Managing a *Work Order*.

Every click for the daily job: find the right Work Orders, assign and dispatch the Trip, record the Visit, file the photos, and send the Vendor back.

APPLIES TO

Dispatchers, account managers, operations leads

BEFORE ANYTHING ELSE

A Work Order is the problem. A Trip is sending someone to solve it, once or as many times as it takes.

A Visit is what happened on site during one Trip. The Work Order is the parent; its Trips are the children, and everything on a Trip rolls up to the Work Order.

In this guide.

#	PART	YOU WILL BE ABLE TO
1	The list	Read the Work Orders list, expand Trips, and sort.
2	Filters	Filter the list and save it as a template you load in one click.
3	Columns	Show, hide and order the columns you need.
4	The Work Order	Find everything on the Work Order page.
5	Assign and dispatch	Put a Vendor on the Trip and send it.
6	Record the Visit	Enter check-in, check-out, photos and notes for a Vendor not on the app.
7	Photos and attachments	File proof on the right Trip.
8	Send the Vendor back	Add a return Trip two ways.
9	Notes and Activity	Communicate on the record and read its history.

The Work Orders *list*.

Open **Work Orders** from the main menu. Everything you need to find and act on a Work Order is on this screen.

The screenshot shows the 'Work Orders' list interface. At the top, there are filters for 'Schedule' (556), 'Schedule Event' (999+), 'Operations Failure' (422), 'Verify Trips' (180), and 'Generate Inv'. A 'Show Map' button and a 'WORK ORDER' button are also present. Below the filters is a table with columns: Work Order#, Work Order Name, For, Trades, Services | Tasks, and Actions. The table contains four rows of work orders. A dropdown menu is open for the first row, showing options: 'EDIT WORK ORDER', 'CREATE TRIP', 'VERIFY TRIP 1', and 'CREATE TRIP'. Numbered callouts indicate: 1. Action Filters; 2. Filter; 3. Edit Columns, Sort, and Expand; 4. Actions.

Work Order#	Work Order Name	For	Trades	Services Tasks	Actions
6524787	-	Newington Ice Arena 300 Alumni Road, Newington, CT 06111, US	Signage	Site Survey ↳ 7100 - Refresh & Recolor +3	EDIT WORK ORDER CREATE TRIP VERIFY TRIP 1 CREATE TRIP
6508734	-	Newington Ice Arena 300 Alumni Road, Newington, CT 06111, US	HVAC	HVAC Inspection ↳ Check Pumps +3	
6494206	-	Newington Ice Arena 300 Alumni Road, Newington, CT 06111, US	HVAC	HVAC Inspection ↳ Check Pumps +3	
6482416	testing v labels	Champions Skating Center 6 Progress Drive, Cromwell, CT 06416, US	HVAC	Repair ↳ Check electrical units +4	

1 Action Filters: one per stage, with a live count

2 Filter

3 Edit Columns, Sort, and Expand

4 Actions: the next step for that row

The top of the list.

THE ACTIONS COLUMN

The action on each row is **the next thing that Work Order needs**.

Create Trip, Assign Trip, Verify Trip, Generate Invoice. Click it and the system takes you to the right screen.

Sort the list.

The screenshot shows the 'Sort By' dropdown menu. It lists various fields for sorting: Priority, Work Order Status, Custom Status, Trip Status, Creation Date, Due Date, Generation Date, Close Date, Expiration Date, Follow Up At, Work Order # (selected), Trip ETA, and Trip ETC. A 'Descending' dropdown is also visible. An 'Apply' button is at the bottom right.

1 Click the **Sort** button.

2 Pick the field, such as **Priority**, **Trip ETA** or **Follow Up At**.

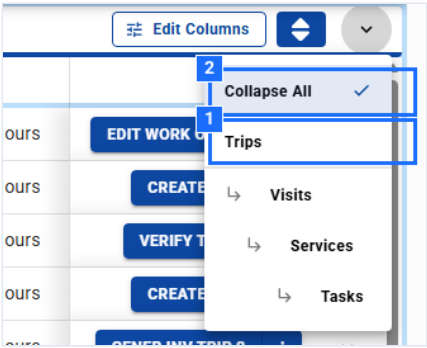
3 Choose **Ascending** or **Descending**, then **Apply**.

TIP

Sort by **Trip ETA** in the morning to see who is due on site first.

Sort. The up-and-down arrow beside Edit Columns.

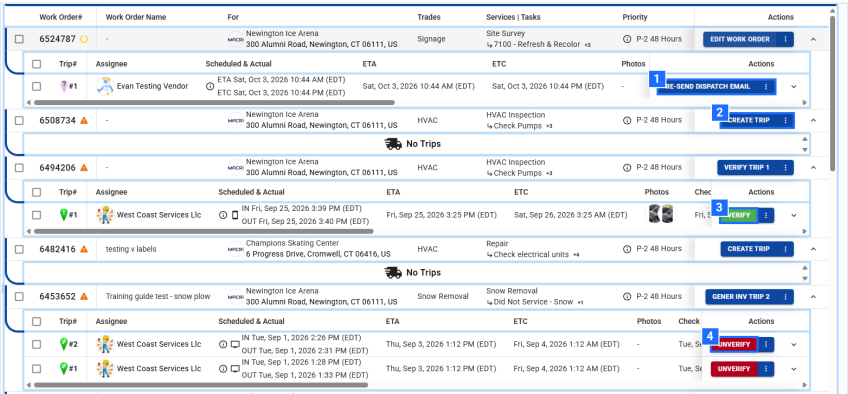
See every Trip without opening anything.



1 Trips

2 Collapse All

Expand. The arrow at the right of the toolbar.



1 Re-send Dispatch Email: dispatched, not accepted

2 Create Trip: no Trip yet

3 Verify: the Vendor checked out

4 Unverify: already verified

Trips expanded. Each Work Order opens to show its Trips, the Vendor, check-in and check-out.

- 1 Click the **arrow** at the right end of the toolbar.
- 2 Choose **Trips** to open every row at once, or **Visits**, **Services** or **Tasks** for more detail.
- 3 Choose **Collapse All** to close them again. It works the same for 10 rows or 1,000.

What the Actions column is telling you.

BUTTON	WHERE THE WORK ORDER IS	WHAT TO DO
Create Trip	No Trip yet.	Add a Trip and assign a Vendor (Part 5).
Assign Trip	A Trip exists with no Vendor.	Choose the Vendor, then dispatch (Part 5).
Re-send Dispatch Email	Dispatched, not yet accepted.	Wait for the Vendor, or call. Re-sending only repeats the email.
Edit Trip	Accepted, the Vendor is due on site.	Watch the ETA. Change dates or the Vendor if plans move.
Verify Trip	The Vendor has checked out.	Review the times and photos, then verify.
Gener Inv Trip	Verified, not yet billed.	Generate the invoice.

Filter once, *save it, reuse it.*

Build the view you use every day once, save it as a template, and load it in one click instead of rebuilding it each morning.

- 1 Apply Action Filter
- 2 Apply Filter Template
- 3 Standard filters
- 4 Save Current Filters as Template

- 1 Values to pick
- 2 Selected

Pick the values. Ticked values move to Selected Result(s).

Filters. Click the funnel icon above the list.

- 1 Click the **Filter** icon.
- 2 Click a filter, for example **Work Order Status**. Use **+ Add Filters** for Client Name, Trade or Service.
- 3 Tick the values (here **Action Required** and **In Progress**), then click **Apply**.

- 1 Applied filter chip
- 2 Save Current Filters as Template

The applied filter. It shows as a chip above the list with the number of values. The x removes it; Clear removes them all.

Save it as a template.

- 1 Template name
- 2 Shared Company Template
- 3 SAVE

Save Filter Template.

- 1 With your filters applied, click **Save Current Filters as Template**.
- 2 Name it so a colleague would know what it shows, for example **Client name · Active**.
- 3 Leave **Shared Company Template** unticked for yourself. Tick it to give the template to the whole team.
- 4 Next time: **Filter > Apply Filter Template**, then click the name.

- 1 Apply Filter Template
- 2 Company Specific

Apply Filter Template. Your saved templates. Company Specific shows the ones shared with everyone.

A GOOD SET TO START WITH

One template **per Client**, plus one for **everything active**.

Start at the highest level (Client, Service, Trade), then narrow. When a template proves itself, share it so a new teammate starts with it on day one.

Show the columns *you use*.

Customize Columns

Search Columns

- ☒ Work Order Name
- ☒ For
- ☒ Trades
- ☒ Services | Tasks
- ☒ Priority
- ☒ Assignee
- ☒ Trips
- ☒ Custom Status
- ☒ Contacts
- ☒ Description
- ☒ Close Date
- ☒ Follow Up Date
- ☒ Service Date
- ☒ Photos
- ☒ NTE

Reset Defaults Cancel Apply

- 1 Click **Edit Columns** above the list.
- 2 Untick what you never read. Fewer columns means less scrolling.
- 3 Drag the handle at the right of a column to move it.
- 4 Click **Apply**. **Reset Defaults** puts everything back.

SET IT AND FORGET IT

Your columns are saved for you on that screen. The Trip table inside a Work Order has its own **Edit Columns**; set it once there too, for example to bring the **Assignee** column forward.

CAN'T SEE THE VENDOR?

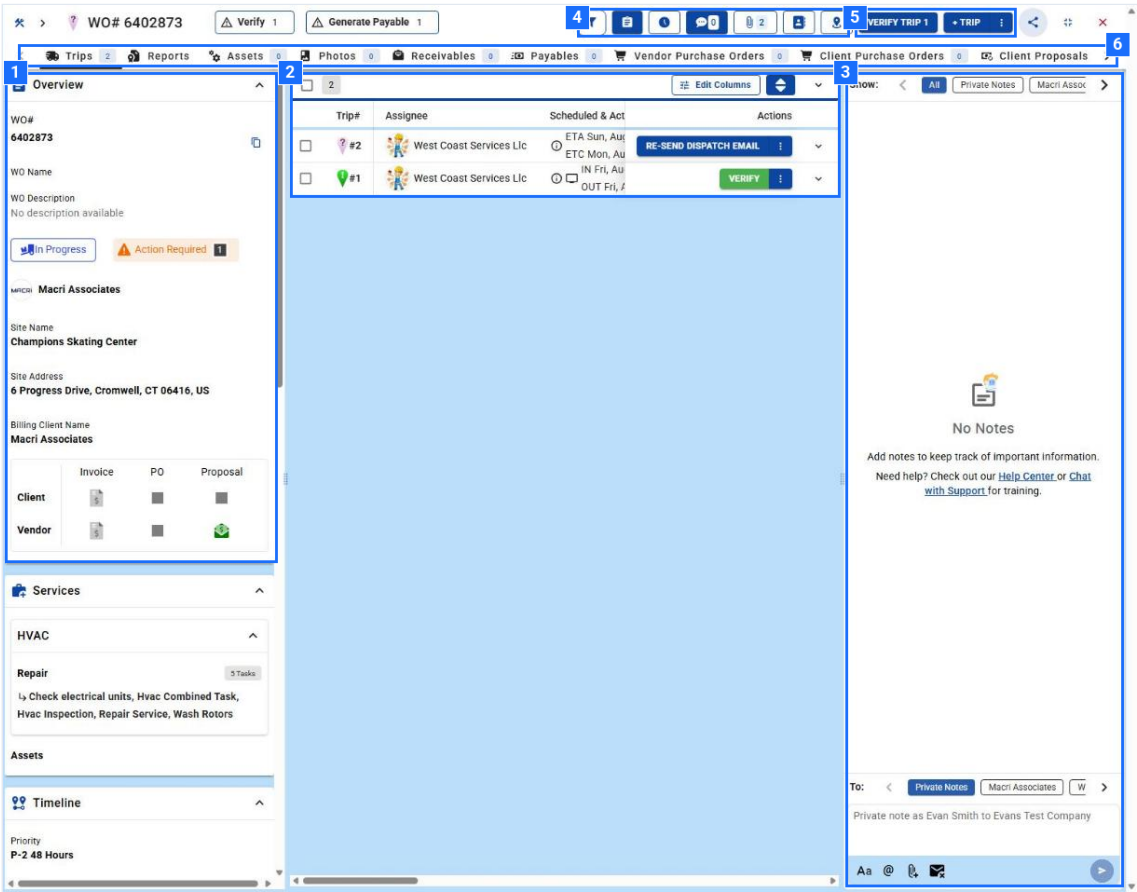
If the Vendor or Assignee column is off to the right, it has been pushed over by other columns. Drag it forward in Edit Columns instead of scrolling every time.

- 1 Tick to show, untick to hide
- 2 Drag to reorder
- 3 Reset Defaults
- 4 Apply

Customize Columns.

One page, *three panels*.

Click a Work Order number to open it.

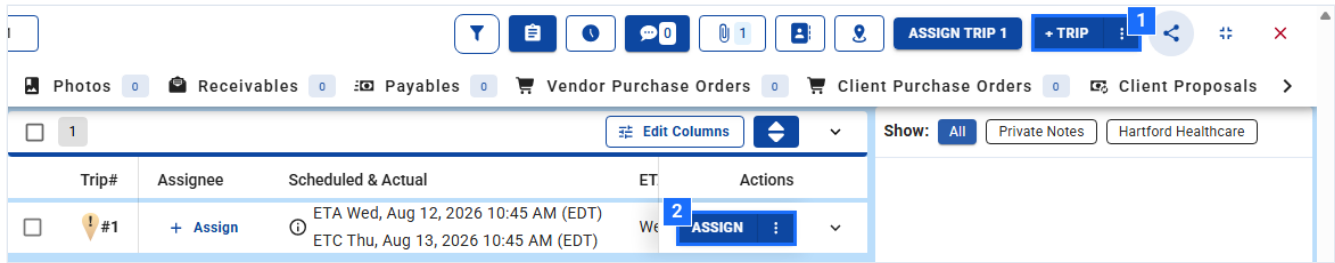


- 1 Overview: Client, Site, status, Services
- 2 Trips, with the next action at the right
- 3 Notes, Activity or Attachments
- 4 Filter, Overview, Activity, Notes, Attachments, Contacts, Map
- 5 The next action and + TRIP
- 6 Tabs: Photos, Proposals, Invoices and more

The Work Order page.

HEADER ICON	OPENS	USE IT TO
Clock	Activity	See who did what and when. Your first stop when something went wrong.
Speech bubble	Notes	Write to your team, the Client or the Vendor on the record.
Paperclip	Attachments	Documents on the Work Order: quotes, forms, PDFs.
Pin	Map	Where the Site is, and where the Vendor checked in.

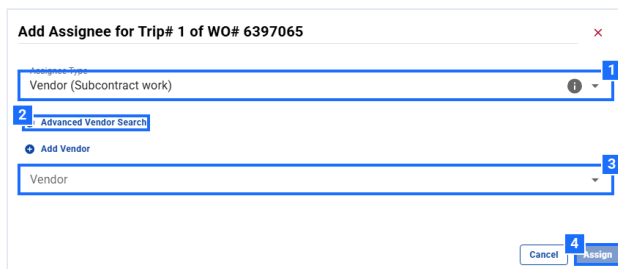
Put a Vendor *on the Trip*.



1 + TRIP: top of the Work Order

2 The Trip line: right side

Two places to start. + TRIP at the top of the Work Order adds a Trip. The action at the right of the Trip line acts on that Trip.



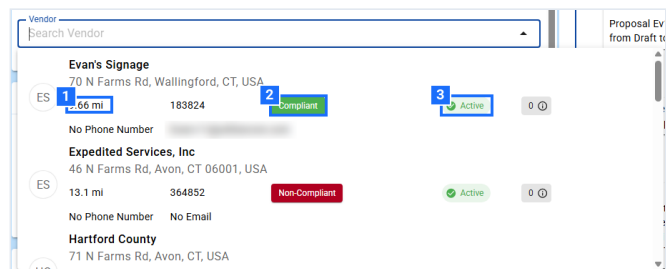
1 Assignee Type

2 Advanced Vendor Search

3 Vendor

4 Assign

Add Assignee.



1 Distance

2 Compliant or Non-Compliant

3 Active

Pick the Vendor. Each Vendor shows distance from the Site, compliance and status.

- 1 Select **+ TRIP** at the top of the Work Order, or **Assign** at the right of the Trip line.
- 2 Leave **Assignee Type** on Vendor (Subcontract work).
- 3 Open **Vendor** and pick one. **Advanced Vendor Search** searches by Trade and distance.
- 4 Click **Assign**, then **Dispatch**. The Trip goes to the Vendor's mobile app and email.

ACCEPTING

Let the Vendor *accept it themselves*.

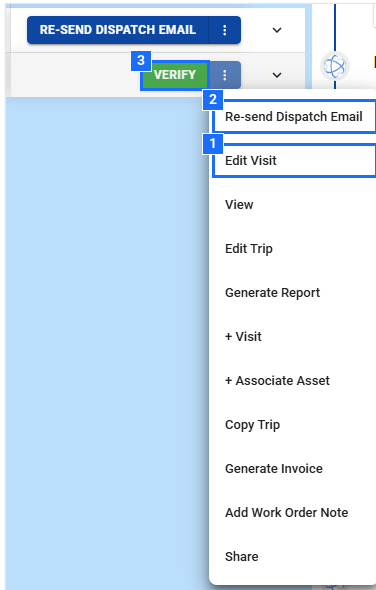
The point is that the Vendor uses the app. Accept on their behalf only when they confirm by phone, and add a note saying who confirmed and when.

RE-SEND DISPATCH EMAIL

Sends the dispatch email and Work Order PDF again, for a Vendor who lost it or needs it in the field. It does not create a new Trip or change the Trip in any way.

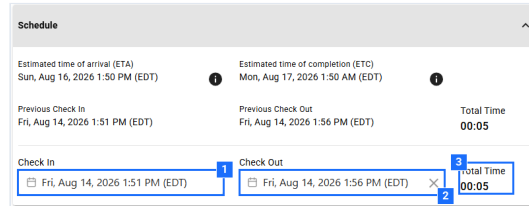
No app? *You are the app.*

When a Vendor does not use the mobile app, the times and photos still belong on the Trip. Enter them from the Vendor's phone call, email or text so the Work Order stays the record.



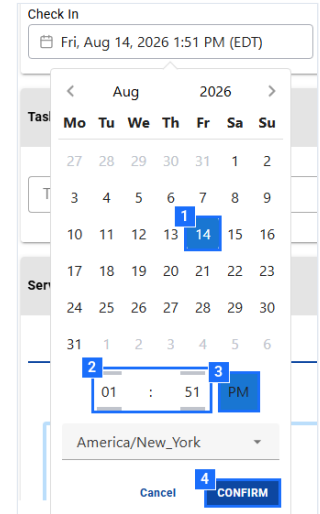
- 1 Edit Visit
- 2 Re-send Dispatch Email
- 3 Verify

Trip menu. The three dots on a Trip row.



- 1 Check In
- 2 Check Out
- 3 Total Time

Edit Visit: the times. Previous times show above.



- 1 Day
- 2 Hour : minute
- 3 AM or PM
- 4 CONFIRM

Date picker.

- 1 On the Trip, click **:** > **Edit Visit**.
- 2 Click **Check In**. Pick the day, set the hour and minute, and check **AM or PM**.
- 3 Click **CONFIRM**. The time is not kept without it.
- 4 Do the same for **Check Out**.
- 5 Read **Total Time**. If it looks wrong, one of the times is wrong.

CHECK THE AM AND PM

The picker can default to PM. If a check-out will not save, or Total Time is negative, a check-out is earlier than its check-in: one side has the wrong AM or PM.

YOU CAN CHANGE IT

Edit Visit can be opened and saved again as often as needed. Every change is recorded in Activity, so the history is never lost.

Add the photos and say where the times came from.

The screenshot shows a web form titled 'Edit Visit'. It has several sections: 'Tasks' at the top, 'Service Photos' in the middle, and 'Additional Information' at the bottom. In the 'Service Photos' section, there is an 'UPLOAD' button with a blue callout '1'. Below it is a 'Photos' area showing 'No Photos' with a message to check the Help Center or Chat with Support. In the 'Additional Information' section, there is a 'Notes' text area with a blue callout '2'. Below the notes are two dropdown menus: 'Change Reason' with a blue callout '3' and 'Hour Description' with a blue callout '4'. At the bottom right, there are 'Cancel' and 'SAVE' buttons, with a blue callout '5' over the 'SAVE' button.

- 1 UPLOAD the Vendor's photos
- 2 Notes: who gave you the times
- 3 Change Reason
- 4 Hour Description
- 5 SAVE

Edit Visit: photos and notes. Scroll down in the same window.

- 6 Under **Service Photos**, click **UPLOAD** and add the photos the Vendor sent.
- 7 In **Notes**, write where the times came from, for example **Per Vendor email, 10/6**.
- 8 Pick a **Change Reason** and **Hour Description** if your company uses them.
- 9 Click **SAVE**.

RESULT The Trip shows the check-in and check-out with a computer icon (entered in the office, not from the phone), and the photos sit on that Trip.

When to use Edit Visit.

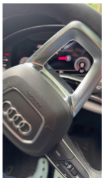
SITUATION	WHAT TO ENTER
The Vendor does not use the app	Check-in, check-out and photos for every visit, from what the Vendor sends you.
Parts are needed, a return is coming	Record the first visit now so Trip 1 is complete, then add Trip 2 (Part 8).
The Vendor forgot to check out	The real check-out time, with a note saying who confirmed it.

Put proof *on the Trip*.

PARENT AND CHILD

Photos added on a Trip **roll up to the Work Order**. Attachments added to the Work Order **stay general**.

Both are visible on the Work Order. Only Trip photos tell you which visit they came from.



before-photos-2-17522493-s5464452-1p79sm

Date
Fri, Sep 25, 2026 3:40 PM (EDT)

Trip#
1

Latitude
41.7777229666667

Longitude
-72.84654454999999

Service
HVAC Inspection

Task
-

Service Action
Before Photos

Photo Name
before-photos-2-17522493-s5464452-1p79sm

Description
Where does this show up



before-photos-1-17522493-s5464452-wfsjho

Date
Fri, Sep 25, 2026 3:40 PM (EDT)

Trip#
1

Latitude
41.7777112166667

Longitude
-72.8465467833332

Service
HVAC Inspection

Task
-

Service Action
Before Photos

Photo Name
before-photos-1-17522493-s5464452-wfsjho

- 1 Trip number
- 2 Where it was taken
- 3 Service Action

Photos tab. Every photo is stamped with its Trip.

1 + ADD DOCUMENT

2 Attachments type
All Attachments

Trade Document from Evan Smith
test PDF attachment
Tue, Aug 29, 2023 1:10 PM (EDT)
COIN_Canaccord.pdf
test PDF attachment

Trade Repair Form from Evan Smith
Test Attachment
Tue, Aug 29, 2023 1:05 PM (EDT)
Client_Upload.xlsx
Test Attachment

- 1 ADD DOCUMENT
- 2 Attachments Type

Attachments. The paperclip. General documents for the Work Order.

PUT IT	WHEN	WHY
On the Trip	Photos and checklists from a visit: before, during, after.	You can tell Trip 1 photos from Trip 2 photos. For integrated Clients (ServiceChannel, Corrigo, Fexa and others) Trip photos go across in the right category with their details.
On the Work Order	Quotes, signed forms, Client documents that are not about one visit.	They belong to the problem, not to one visit.

Same Work Order, *new Trip*.

THE RULE

A return visit is a **new Trip** on the same Work Order. **Never a new Work Order.**

A second Work Order splits the notes, photos and Client reference across two records.

Example: the Vendor visited, found the part was needed, and left. First record Trip 1 with Edit Visit (Part 6). When the part arrives, add Trip 2 one of two ways.

A. No Proposal: + TRIP.

- 1 Trade and Service
- 2 Tasks

New Trip: what carries over. From the Work Order, already filled in.

- 1 Assignee Type
- 2 Advanced Vendor Search
- 3 Vendor
- 4 ETA and ETC
- 5 Close dates

New Trip: assign and schedule.

- 1 Click **+ TRIP** in the Work Order header. If there is no Trip yet, the button reads **Create Trip**; it opens the same form.
- 2 Check the Trade, Service and Tasks, which come from the Work Order.
- 3 Choose the **Vendor**, set the **ETA** and **ETC**, then **SAVE** and dispatch.

B. Approved Vendor Proposal: Create Trip.

Proposal#	Status	Vendor	Actions
☐ Ev1522731965	1 Approved (Work Order)	WestCoast Service	FORWARD TO CLIENT 2 Create Trip View Mark Received Evaluate Edit Duplicate Reject Draft Download

- 1 Approved
- 2 Create Trip

Create Trip from the Proposal.

- 1 Approve the Client Proposal, then the Vendor Proposal.
- 2 Open the **Vendor Proposals** tab.
- 3 Click > **Create Trip** on the approved Proposal.
- 4 Review the Trip and dispatch.

WHY THIS WAY
The Vendor and the approved amount as the Vendor NTE are filled in for you. + TRIP would make you enter both.

Talk on the record. *Read the history.*

1 Private Notes: your team only

2 The Client

Notes. The To chips set who sees the note.

Activity. The clock icon. Every action, by whom, newest first.

WHEN TO OPEN ACTIVITY

When something went wrong and you need who did what and when. It is the history, not a to-do list.

- 1** Open the **Notes** panel (speech bubble).
- 2** Choose who sees it with the **To** chips. **Private Notes** stays inside your company.
- 3** Type and send. Use @ to mention a teammate.

What you see, *and the fix.*

#	WHAT YOU SEE	WHAT HAPPENED	THE FIX
1	Check-out will not save, or Total Time is negative.	AM or PM is wrong on one side.	Open the picker again and check AM or PM on both times.
2	Times entered, but nothing changed.	CONFIRM was not clicked in the picker, or SAVE was not clicked.	Edit Visit again: CONFIRM each time, then SAVE.
3	The return visit is a second Work Order.	A new Work Order was created instead of a Trip.	Use + TRIP or Create Trip on the original Work Order.
4	Photos are on the Work Order, not the visit.	They were added through Attachments.	Add visit photos through Edit Visit > UPLOAD.
5	Re-sent the dispatch, still one Trip.	Re-send Dispatch Email only sends the email again.	Add a Trip for a new visit.
6	Rebuilding the same filters every morning.	No saved template.	Save Current Filters as Template; share the good ones.
7	The Vendor's name is missing from the Trip row.	The column is pushed off to the right.	Edit Columns on the Trip table; drag Assignee forward.
8	The Vendor never uses the app.	Someone accepts and checks in for them every time.	Accept for them only on a verbal yes, with a note. Ask your Customer Success team about Vendor training.

WHAT GOOD LOOKS LIKE

Four checks *before you call it done.*

CHECKPOINT	EVIDENCE
A dispatched Trip	A Vendor on the Trip, accepted by the Vendor in the app.
A recorded Visit	Check-in and check-out that add up, photos on the Trip, and a note saying where office-entered times came from.
One Work Order per problem	Return visits are Trip 2 and Trip 3, never a second Work Order.
A one-click morning	Your saved filter template loads your list.

QUESTIONS?

Contact your Customer Success team.

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

UtilizeCore

