

New Hire *Training Guide*.

The core objects, the main pages and the Work Order lifecycle, learned by completing each step in UtilizeCore.

Applies to: New UtilizeCore users in every role, before their role training guide

1. Access
15 min



2. Reading
40 min



3. Exercises
About 2 hours



4. Trainer review
1 business day



5. First week
5 working days

1. Prerequisites

Before you start, confirm

How to check

Your user account is active and the UtilizeCore Mobile App is installed

Sign in on the web and in the app with the same login. See [Log In for the First Time](#).

Your user role is assigned

Your menu shows the pages for your role.

The TRAINING Client, Site, Service and Vendor exist

Search for TRAINING Site and open it.

Your row on the training board is set up

Open your row and confirm the due dates.

2. Required Reading

#	Article	Key concept
1	UtilizeCore Basics	Work Order, Trip, Visit. Client, Site, Vendor.
2	The Main Pages at a Glance	Where each record lives.
3	How a Work Order Moves	The seven phases and who owns each one.
4	Action Filters	Every status that needs a person has an owner.
5	Trip Status and Pin Legend	Each status, its pin color and the action it needs.

3. Hands-On Exercises

Complete the exercises in order. Name each record exactly as shown, ending with your full name. When you finish an exercise, enter its Work Order ID or record name on your training board. Your trainer reviews it before you start the next.

Exercise 1: Get Your Bearings

30 min

Objective: Locate any record and set up the view you will use every day.

Tasks

1. Open each module: Work Orders, Trips, Sites, Clients and Vendors.
2. Search for a Work Order by its number or by Trade, and open it.
3. On the Work Orders page, edit your columns.
4. Apply a filter, then save it as a filter template named **TRAINING Exercise 1 - First Last**.

Check your understanding

- Which page lists every Trip, across all Work Orders?
- Why save a filter as a template instead of rebuilding it?

Apply it

List the three filters you expect to use most in your role, and save one of them.

Exercise 2: Run a Full Cycle

45 min

Objective: Take one service request through all seven phases.

Tasks

1. Create a Work Order on TRAINING Site with TRAINING Service, named **TRAINING Exercise 2 - First Last**. Select **Save & Add Trip**.
2. On the Trip, confirm the priority Vendor. Set the dates in order: Work Order Close, Trip Expiration, ETC, ETA. Select **Save & Dispatch**.
3. Sign in as TRAINING Vendor and accept the Trip.
4. In the UtilizeCore Mobile App: Check In, add a before photo, complete the Task, add an after photo, Check Out.
5. Start from the Verify Trips Action Filter and verify the Trip.
6. Generate the Payable, then the Receivable.

Check your understanding

- What is the difference between a Work Order, a Trip and a Visit?
- What status does a Trip show after Save, without Dispatch?
- Which Action Filter held the Work Order after Check Out, and why?

Apply it

Mark which of the six steps your role performs and who performs the others.

Exercise 3: Assess a Work Order

20 min

Objective: Read the record of what happened, who did it and when.

Tasks

1. Open your Exercise 2 Work Order.
2. Read the Trip status and its pin color.
3. Open the Activity tab. Find who dispatched, checked in and verified.
4. Note the Check In source icon and review the photos.
5. Open the Receivable and read the Rate Type on the line.
6. Add a note to the Work Order summarizing the service request and its outcome.

Check your understanding

- What does a computer icon beside a Check In mean?
- Where did the amount on the invoice line come from?

Apply it

Open a Work Order your team completed this month and review its Activity tab the same way.

Exercise 4: Find Your Work in the Action Filters

25 min

Objective: Understand how work reaches you and where it goes next.

Tasks

1. Open the Work Orders page and read the Action Filters from left to right.
2. Open each Action Filter your role owns. Your trainer names them.
3. Identify the custom status that hands work to you and the status you hand off.
4. Add a note to your Exercise 2 Work Order listing your Action Filters and those two statuses.

Check your understanding

- What is the standard for an Action Filter at the end of the day?
- What belongs on a row you cannot clear today?

Apply it

Confirm with your manager who owns the step before yours and the step after yours.

4. Skills Checklist

Skill	Confirmed in
Locate any Work Order, Trip, Site, Client or Vendor, and save a filter template	Exercise 1
Explain the difference between a Work Order, a Trip and a Visit	Exercise 2
Follow a Work Order through all seven phases, from request to invoice	Exercise 2
Read a Work Order's Activity, photos and invoice lines to see what happened	Exercise 3
Name the Action Filters your role owns and the handoff before and after you	Exercise 4
Find help: the help center or contact support	Required reading

5. First-Week Assignments

Assignment	Your trainer confirms
Sign in to UtilizeCore every working day	Your sign-in history
Complete one action in your role on a live Work Order	Your name in that Work Order's Activity
Start each day from your saved filter template or your Action Filters	Review with your trainer on day 5
Begin your role training guide	Its Exercise 1 recorded by day 5

6. Trainer Sign-Off

Item	Confirmed by	Date
Exercise 1 · Get Your Bearings		
Exercise 2 · Run a Full Cycle		
Exercise 3 · Assess a Work Order		
Exercise 4 · Find Your Work in the Action Filters		
First-week assignments complete		

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