

Setting Up *Your Company*.

Settings rarely get their own support call. They show up as the reason something else failed: nobody got the email, or every new Work Order came in as Per Hour (T&M). This guide is those decisions, in the order to make them.

APPLIES TO

Administrators and operations leads

COMPANY SETTINGS, SEGMENT BY SEGMENT. THREE-DOT MENU, COMPANY SETTINGS.			
SEGMENT	WHAT IT DECIDES	IN THIS GUIDE	WEIGHT
Work Orders	Default billing method, priority types, custom statuses and their action mapping, creator as Manager, duplicate detection.	Step 2	■ ■ ■
Trips	Vendor acceptance, late and check-out thresholds, geofence, web check-in, T&C on the dispatch email, adjustment window.	Step 3	■ ■ ■
Notification Email	Which status changes send email, how often they repeat, who receives them when no one is assigned, COI expiration.	Step 4	■ ■ ■
Vendor and Client Portals	Net terms, confirm or deny, mandatory invoice number, NTE block and override users, what the Client sees.	Step 5	■ ■ ■
Sites, Regions, Departments	Account roles and auto-assign, Regions on the employee, region-specific data.	Step 1	■ ■ ■
Proposals, Invoices, Accounting	Document templates and the T&C footer, markup or margin default, verify before invoice, margin colors.	Step 5	■ ■ ■
Emails and Compliance	Sending domain verification, invite and signed-up emails, compliance requirements by Trade.	Step 5	■ ■ ■

Weight: how often this segment is the cause on the 135 settings calls of March to September 2026. Three squares: most weeks. One: rare.

The segments. Three-dot menu, Company Settings. One row per segment: what it decides, the step in this guide that covers it, and how often it turns out to be the cause of a support call.

One idea runs through every segment: set each default as high as it is true, override as low as it needs to be. Company, Trade and Service, Client, Site, record. A setting with no effect is being overridden lower down.

WHERE A SETTING COMES FROM. ONE QUESTION: WHICH BILLING METHOD DOES THIS TRIP GET?

LEVEL	WHERE IT IS SET	THIS EXAMPLE
Company	Company Settings, Work Orders. The answer when nothing below says otherwise.	Per Hour (T&M) the fallback
Trade and Service	The Service dialog. Billing defaults, verification, field rules.	Per Event overrides Company
Client	The Client's defaults. Loaded in bulk with the Default Billing Methods uploader.	empty falls through
Site	The Site rate row and account roles. What one address needs.	Per Service overrides the Service
Work Order, Trip	The record itself. What the invoice reads.	Per Service from the Site

The lowest filled level wins. An empty level changes nothing; the value above it falls through.
So set every default at the highest level where it is true, and override only where a lower level is different. When a setting seems to do nothing, something lower is overriding it.

Where a setting comes from. One question, five levels. The Site row beats the Service default, which beats Company Settings; the empty Client level changes nothing. The Trip reads Per Service because the Site said so.

STEP 0

Decide on paper.

Four questions, answered before Company Settings is opened. Every one of them changes a dozen settings.

QUESTION	IF YES	IF NO
Do Vendors do the work?	Vendor acceptance on, compliance enforced or advisory, Vendor Portal controls, vendor track documents.	Team members, Field Force roles, Regions, time tracking. The Vendor sections stay default.
Are Clients integrated?	Inbound defaults per Client, custom statuses only where the mapping needs them, Client contact email removed so nothing leaves by email.	Client Portal on, sending domain verified, Work Order report template.
Do Vendors invoice themselves?	Enable it, confirm or deny, mandatory custom invoice number, NTE block with named override users.	You generate the Payable from rates; the Vendor confirms.
Who is allowed to see whom?	Regions on the employee, account roles on the Site, region-specific data off until every Site is assigned.	Everyone sees everything. Templates per person do the narrowing.

STEP 1

People: users, roles, regions, account roles.

Who can do what, and who sees whom. The two are different mechanisms and get confused on every account.

1 Every role has the permissions its job needs, written down first.

WHERE Company Settings › Roles. Start from the shipped roles; a custom role is a copy with a written list.

EXCEPTION A custom field role could not create Work Orders or open Time Tracker, and nobody found out until the day before go-live.

CORRECTION A user in each role has done each of that role's daily actions on the test Client.

2 Regions live on the employee. Visibility comes from account roles on the Site.

WHERE Employee › Region. Site › account roles (account manager, dispatcher) with auto-assign.

EXCEPTION A manager was given a second region to QA another manager's accounts; her calendar filled with every employee in that region. Region is a territory, not a permission.

CORRECTION Each manager's Calendar filtered to their region is saved as a template, and the Manager filter returns their people from the Site account roles.

3 Nobody is "not joined".

WHERE Employees, filtered to not joined. Resend the invites.

EXCEPTION A team of cleaners went live with a third of them never having accepted the invite.

CORRECTION The not-joined count is zero the day before go-live.

RESULT Roles match the written list, regions are on employees, account roles are on Sites, and everyone has joined.

Work Order defaults: billing, priorities, statuses.

What every new Work Order inherits. Wrong here is wrong on every record until someone notices. Statuses come last in this step and first in importance: lay the lifecycle out before you create one.

4 The default billing method is set at the level it is true, and the Client level is loaded in bulk.

WHERE Company Settings › Work Orders for the + button default. The Service dialog per Service. The Default Billing Methods uploader for Clients.

EXCEPTION The default was Per Hour (T&M) at the company level only. Every integrated Work Order came in as Per Hour (T&M) on a Per Task Client and was corrected by hand.

CORRECTION A new Work Order for each Client type shows the contract's method on both sides without editing.

5 Priorities are few, all active, and each sets the four dates.

WHERE Company Settings › Work Orders › Priority Types. Set start time, ETA, ETC and expiration, with a two to five day buffer after ETC. A default priority catches anything the API sends without one.

EXCEPTION A dozen priorities, half unused, and an expiration equal to ETC so every late completion expired the Work Order.

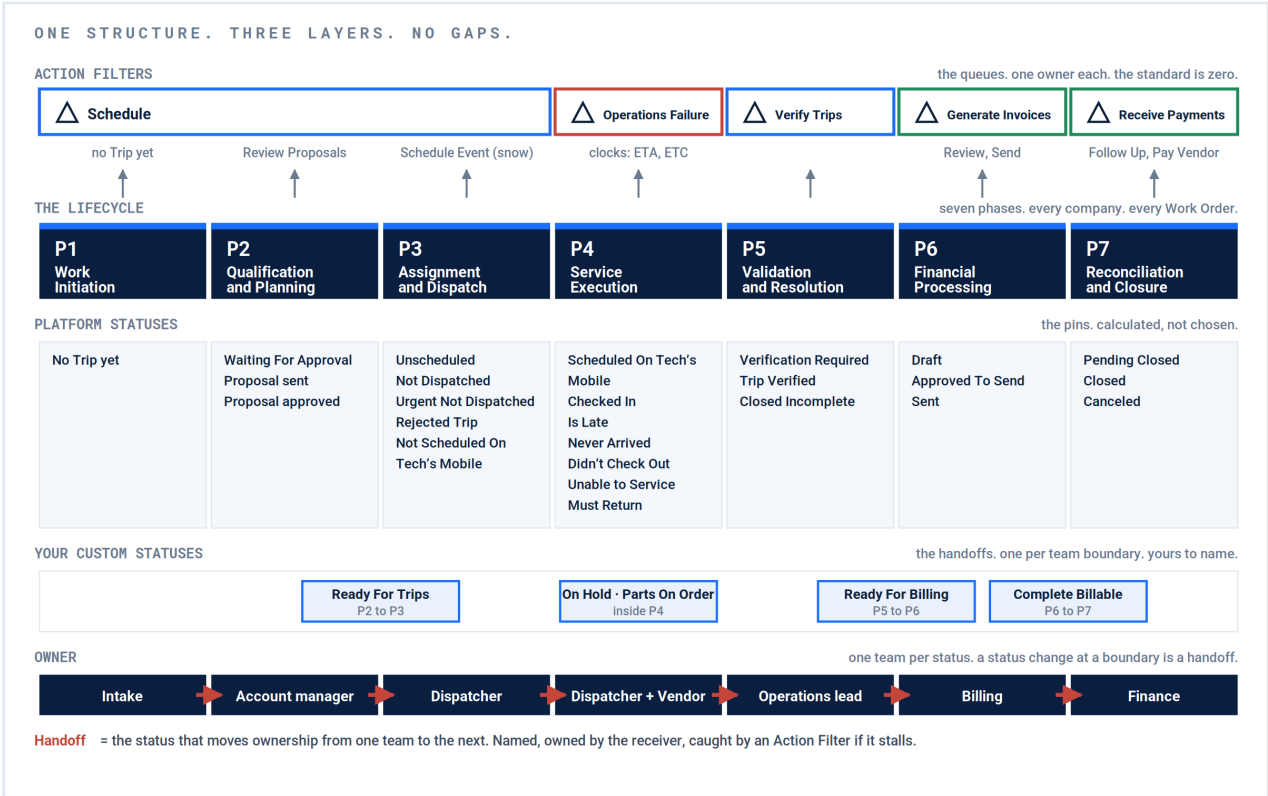
CORRECTION Under eight priorities, every one used this quarter, and a test Work Order at each shows the four dates filled.

The lifecycle before the statuses.

BEFORE YOU BUILD A CUSTOM STATUS

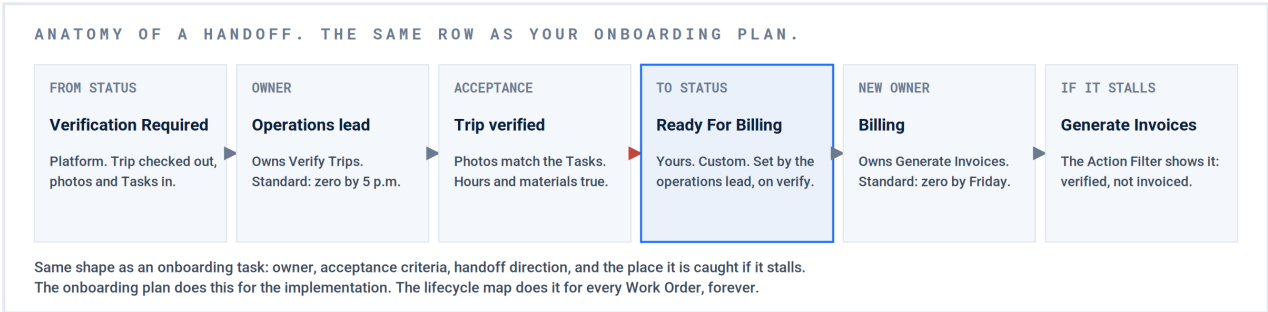
A custom status is a **handoff**: the moment work moves from one team to the next.

Lay the lifecycle out first, then build only the statuses it needs.



The lifecycle map. Action Filters on top, the seven phases in the middle, statuses and owners below. Your custom statuses sit where ownership changes hands.

A status is a handoff.



One handoff. Verified, the Trip becomes Ready For Billing and belongs to billing. If billing stalls, Generate Invoices shows it.

Every Trip status, and the Action Filter it lands in.

Two statuses have no Action Filter and no clock, and they are the only two places a Work Order can wait without being seen.

STATUS	PHASE	CAUGHT BY	OWNER	NOTE
No Trip yet	P1	Schedule	Dispatcher	
Unscheduled	P3	Schedule	Dispatcher	A Trip with no dates. Gray pin.
Urgent Not Dispatched	P3	Schedule	Dispatcher	
Not Dispatched	P3	Schedule	Dispatcher	
Rejected Trip	P3	Schedule	Dispatcher	The Vendor said no. Re-source.
Not Scheduled On Tech's Mobile	P3	Operations Failure	Dispatcher	Dispatched, not accepted on the phone.
Scheduled On Tech's Mobile	P4	Clock: ETA passes, no check-in › Operations Failure	Dispatcher + Vendor	Blue. Moving on its own.
Checked In	P4	Clock: ETC passes, no check-out › Operations Failure	Dispatcher + Vendor	Yellow. Moving on its own.
Is Late	P4	Operations Failure	Dispatcher	
Never Arrived	P4	Operations Failure	Dispatcher	
Never Arrived Expired	P4	Operations Failure	Dispatcher	Past Trip Expiration. Not on the map.
Didn't Check Out	P4	Operations Failure	Dispatcher	
Unable to Service	P4	Operations Failure	Dispatcher	
Must Return	P4	None. Saved filter, named reader	Dispatcher	Add the return Trip; the Action Filter does not remind you.
Waiting For Approval	P2	None. Saved filter, named reader	Account manager	Waiting on a person outside the platform.
Verification Required	P5	Verify Trips	Operations lead	
Trip Verified	P5	Generate Invoices (once billable)	Billing	The handoff to money.

STATUS	PHASE	CAUGHT BY	OWNER	NOTE
Closed Incomplete	P5	Verify Trips until verified	Operations lead	
Pending Closed	P7	None needed. Closing.	Finance	Closes on its own when the money clears.
Canceled	P7	None needed. Out of every Action Filter.	Whoever canceled	

- i** The Schedule Action Filter on the Work Orders row also carries Work Orders with no Trip at all. The Trips row cannot, because there is no Trip to list. Start the morning on the Work Orders row.

THE RULE

A custom status belongs only where ownership changes hands and no Action Filter already marks the moment. It is owned by the team that receives it.

Your lifecycle map.

PHASE	PLATFORM STATUSES	CAUGHT BY	OWNING TEAM	HANDOFF STATUS OUT	TRUE BEFORE IT MOVES
P1 Work Initiation	No Trip yet (Unscheduled)	Schedule			
P2 Qualification and Planning	Waiting For Approval, Proposal sent, Proposal approved	Review Proposals · Waiting For Approval has no Action Filter			
P3 Assignment and Dispatch	Unscheduled, Not Dispatched, Urgent Not Dispatched, Rejected Trip, Not Scheduled On Tech's Mobile	Schedule (the first four) · Operations Failure (Not Scheduled On Tech's Mobile) · Schedule Event			
P4 Service Execution	Scheduled On Tech's Mobile, Checked In, Is Late, Never Arrived, Didn't Check Out, Unable to Service, Must Return	Operations Failure, with the ETA and ETC clocks · Must Return has no Action Filter			
P5 Validation and Resolution	Verification Required, Trip Verified, Closed Incomplete	Verify Trips			
P6 Financial Processing	Draft, Approved To Send, Sent	Generate Invoices · Review Client Invoices · Review Vendor Invoice · Send Client Invoice			
P7 Reconciliation and Closure	Pending Closed, Closed, Canceled	Receive Payments · Follow Up on Client Invoices · Pay Vendor			

The gap test.

Six checks. The map passes when every one is true. The proof is a number you can read on the screen, not an opinion.

#	NO GAP WHEN	PROOF
1	Every phase has an owning team, written down. Not a person's name; a role that is staffed every day.	Seven owner cells, none blank, none "everyone".
2	Every status has exactly one owner. Platform statuses inherit their phase's owner. A custom status is owned by the team that receives it.	Custom Statuses list against the map: each one appears in one row.
3	Every status is caught somewhere. In an Action Filter, on a clock that leads to an Action Filter, or a custom handoff status with a saved filter the receiving team opens every morning.	Waiting For Approval, Must Return and every custom status have a saved filter and a named reader. Those two are in no Action Filter; everything else on the Trip is.
4	Every boundary where the owner changes has a named handoff. The status change, who sets it, and what has to be true first.	One custom status, or one Action Filter, per red arrow on the map. No boundary with neither.
5	No two statuses mean the same thing, and none duplicates an Action Filter. No Needs Dispatch, no Needs Verification, no Ready to Invoice next to Generate Invoices.	No custom status with zero Work Orders in 90 days. No name that restates an Action Filter.
6	Every custom status has an action mapping you chose. Open, Complete, Cancel or Close. A status mapped to Cancel cancels integrated Work Orders with incurred cost.	Action mapping column reviewed line by line. Every Cancel is one you meant.

6 Custom statuses exist only for handoffs, and each one has an action mapping.

WHERE Company Settings › Work Orders › Custom Statuses. Action mapping: complete, cancel, close. Notifications per status.

EXCEPTION "Dispatched" as the status for new Work Orders, and a status mapped to Cancel that canceled integrated Work Orders carrying incurred cost. Custom statuses used as a to-do list that the Action Filters already were.

CORRECTION No custom status duplicates an Action Filter (no Needs Dispatch, no Needs Verification). None has zero Work Orders in 90 days. Every one mapped to Cancel is one you meant.

RESULT New Work Orders arrive with the right method, the right dates, and a status that means a handoff.

STEP 3

Trips: acceptance, thresholds, geofence.

The settings that decide when a Trip turns red, and what a Vendor has to do before it turns blue.

7 The two clocks are set to your SLA.

WHERE Company Settings › Work Orders › Trips: Late Check In Threshold, the hours from Is Late to Never Arrived, Late Check Out Threshold.

EXCEPTION Left at defaults, Operations Failure lit up on Trips that were twenty minutes behind and stayed dark on ones that were a day behind.

CORRECTION A Trip that misses its ETA by your tolerance turns Is Late. Past your cutoff it turns Never Arrived. A missed check-out turns Didn't Check Out.

1 "Late ETA when Vendor/Tradesman's Status is Late / Never arrived": hours after the ETA before Is Late becomes Never Arrived.

2 "Late Check In Threshold": how long after the ETA a missing check-in counts as late.

3 "Late Check Out Threshold": how long after the ETC a missing check-out makes the Trip Didn't Check Out.

Company Settings › Work Orders › Trips. The three thresholds. Scroll with the scrollbar; the mouse wheel does not move it.

8 Vendor acceptance is on, the geofence is on for go-live, and Pause Trip is off.

WHERE Trips: "Vendor has to accept or reject trip". Mobile Check In / Check Out: Geofence Distance. The Service's Advanced Settings: Enable Pause Trip.

EXCEPTION Geofence was left off after testing, and a Client rejected check-ins from the road. Pause Trip on; Work Orders looked stalled for days.

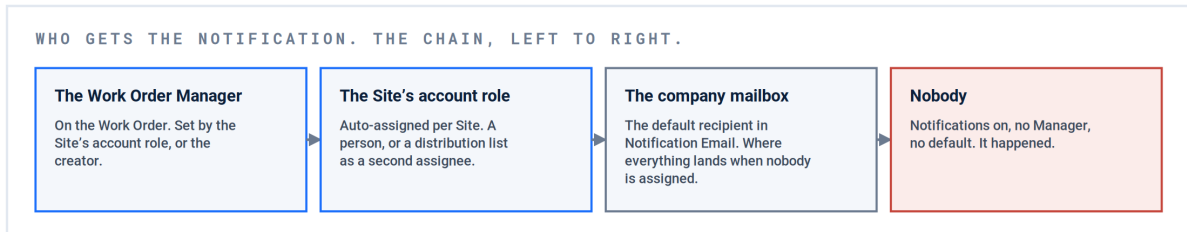
CORRECTION A test dispatch to the test Vendor waits at pink until accepted. A check-in from outside the radius is refused, and the app offers Must Return and no Pause.

RESULT Red means what your SLA says it means, and blue means the Vendor accepted.

STEP 4

Work Order Managers and notifications.

The most common settings failure: notifications on, nobody assigned, nothing sent.



The chain. A notification goes to the Work Order Manager. If none, the Site's account role. If none, the default mailbox. Break the chain and it goes nowhere.

9 Every Site has a Work Order Manager, loaded in bulk.

WHERE Sites export, fill the account role column, re-import. A distribution list can be a second assignee. Company Settings > Work Orders: creator auto-assigned as Manager.

EXCEPTION Status notifications were on and most Sites had no Manager. Nothing sent for a month.

CORRECTION Sites with a blank Manager: zero.

10 Only the real notifications are on, and they repeat the right number of times.

WHERE Company Settings > Notification Email. Is Late, Never Arrived, Must Return, COI expiration to the compliance owner. Check-in emails off. Repeat interval and "stop after one". Save in the pop-up and again on the page.

EXCEPTION Every check-in emailed everyone, so everyone stopped reading. The default repeat was every three hours. The text was saved in the pop-up and lost on the page.

CORRECTION A late test Trip emails the Manager once. A check-in emails nobody.

11 The sending domain is verified.

WHERE Company Settings > Emails > the DNS record, added by whoever owns your domain.

EXCEPTION "Why are no emails going out?" The domain was never verified.

CORRECTION The domain reads Verified, and a test dispatch email arrives from your address.

RESULT Every Site has an owner, the owner gets the three notifications that matter, and the emails arrive.

Portals, documents, branding.

What Vendors and Clients see, and what your paperwork looks like.

12 The Vendor Portal enforces the invoice rules you want.

WHERE Company Settings › Vendor Portal: net terms, confirm or deny, mandatory custom invoice number, NTE block with named override users, T&C acceptance.

EXCEPTION Vendor self-invoicing was turned off because Vendor invoices sat in Pending Review unseen. The fix was to enable it with a mandatory invoice number and read the Action Filter.

CORRECTION A test Vendor invoice arrives with a number, is blocked over the NTE, and one named user can override it.

13 The logo is in both places and the templates are yours.

WHERE Company Settings › Profile for the logo. Proposals and Invoices for the document templates, the T&C footer, and the markup or margin default.

EXCEPTION The profile logo did not carry to Proposals; a Client received a quote with the wrong logo.

CORRECTION A test Proposal, a test invoice and a test Work Order report each carry your logo and your terms.

"TEMPLATE" MEANS THREE THINGS. SAY WHICH.

Upload template

The blank spreadsheet from the cloud icon on a list. Download fresh; the columns change with your settings.

Filter template

A saved set of filters and columns on a list. Per person, or company-specific for everyone.

Document template

The PDF layout for a Proposal, invoice or Work Order report. Under Proposals and Invoices.

Three templates. When someone says template, ask which.

RESULT A test Client and a test Vendor exist, and a full Work Order was run between them as a restricted user, from dispatch to invoice, with every document read.

Where this usually goes wrong.

#	WHAT YOU SEE	WHAT HAPPENED	THE FIX
1	Nobody got the email.	Notifications on, no Work Order Manager on the Site, or the domain never verified.	Step 4.
2	A manager sees every employee in a region.	Region was used as a permission.	Region on the employee, account roles on the Site, a saved template per manager.

#	WHAT YOU SEE	WHAT HAPPENED	THE FIX
3	Every new Work Order is Per Hour (T&M).	The default was set at company level only.	The Default Billing Methods uploader, per Client.
4	A custom status canceled a live integrated Work Order.	The status was mapped to Cancel.	Audit action mappings. Cut statuses that duplicate an Action Filter.
5	The upload template columns do not match.	An old template. Settings change the columns.	Download fresh from the cloud icon every time.
6	The Vendor email has no PDF.	"Send attachments" on and the T&C not attached, or a defect.	Check the Trips setting; report it if it persists.
7	Call Type carries billing instructions.	A prior implementer used it as a field.	Call Type classifies. Billing lives on the method and the Responsible Billing Party.
8	Everyone sees zero.	"Show region-specific data" on before every Site had a region.	Off until every Site is assigned.

What good looks like.

CHECKPOINT	EVIDENCE
Roles match the written list	One user per role has done the role's daily actions.
Everyone has joined	Employees not joined: zero.
Every Site has a Manager	Sites with a blank Manager: zero.
The domain is verified	And a test email arrived.
Statuses mean handoffs	None duplicates an Action Filter; none unused in 90 days.
A test Work Order ran end to end	Test Client, test Vendor, restricted user, every document read.

QUESTIONS?

Contact your Customer Success team.

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

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