

Storm Day.

The storm in the order it happens: the control, the click, and the data point that proves it. One rule above the rest: the storm name goes in every Work Order name, spelled the same way every time, because every filter below keys on it.

The day before.

#	DO THIS	WHERE	THE CLICK	PROOF IT HAPPENED
1	Name the storm	Anywhere your team sees it	Date first, then the name: 2026-01-12 Nor'easter. Nobody varies it.	The Trips page filtered by that name returns the storm and nothing else.
2	Find the Sites	Sites page › Schedule Event Action Filter	Open Site Forecast, set Snow & Ice, the threshold, and the windows the storm falls in. Select all.	The count beside the checkbox matches the Sites in the path.
3	Create in bulk	Bulk Schedule icon beside the count	Trade, Service, Tasks, Priority, the storm name. Apply. Read the grid: no blank Vendor, right billing method. Schedule.	One Work Order per Site carrying the storm name, one Trip each, a Vendor on every row.
4	Dispatch, or hold	Trips page › Schedule Action Filter › storm name	Select all, Dispatch. Or leave them as shells and send the heads-up.	Blue pins across the storm, or a Schedule Action Filter that holds exactly the storm's Trips.
5	Tell the Service Providers	Your pre-storm email	Update the app, open it on wifi tonight, check out with Must Return while it is still snowing, photos before and after.	No Never Arrived at dawn from a phone that never synced.

During: four filters, in a loop.

i Pin the storm name in the filter first. Every row below assumes the list is already narrowed to this storm.

FILTER	YOU WANT TO SEE	IF NOT
Trip Status: Scheduled On Tech's Mobile	The count falling as Service Providers check in.	An hour past the ETA with no movement is a Service Provider that has not started. Call.
Trip Status: Must Return	Every purple Trip with a dispatched return Trip beside it.	The return Trip sits in Schedule as Not Dispatched. Dispatch it. A Site can cycle three or four times in a long event.
Operations Failure Action Filter	Empty.	Call the Vendor. Then: Edit Trip for a new ETA, Re-send Dispatch Email, Edit Visit for times they forgot, or Cancel and + TRIP. In that order of preference.
Verify Trips Action Filter	Draining through the day.	Verify as you go so a Site can be re-sent. Open photos on anything with Did Not Service or Must Return; bulk verify the routine pushes.

After: put a total on every Per Event Trip.

i Only if the billing is tied to snow totals, which means Per Event. Per Service and Per Task Trips need no total; skip to Bill and close.

SNOWFLAKE	WHAT HAPPENED	WHAT YOU DO
 Event attached	The report landed and one event matched the check-in window, or someone picked it.	Hover to read the total. Nothing else.
 Override applied	A total was typed over the event. It wins at invoicing.	Hover to confirm the number. Make sure a note says where it came from.
 No data yet	The report lands 24 to 48 hours after the storm, or the Site is not synced.	Wait, or override: click the snowflake and type the total. Many at once: select rows, three-dot menu, Weather Event Override.
Two events, wrong one	Two storms fell inside the association window; the Auto Assign rule picked one.	On the Work Order's Trips list click the snowflake, pick the right Weather Event ID, Save. If this is every Trip, the window in Company Settings › Sites is too wide.

Bill and close.

CHECK	PASS WHEN
Nothing left to associate	Trips page › storm name › Weather Event Relation: Available to Associate returns zero.
Payables before Receivables	Generate Payable first, then Generate Receivable, filtered to the storm name and the Clients that bill per storm. No \$0 Vendor line.
Billing trigger set	Every storm Work Order carries Ready for Billing (or your name for it), not Complete.
Gaps fixed on the Site	Every blank Vendor, missing range, and unsynced Site found today is corrected on the Site record before the next forecast.

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