

UtilizeCore *Basics.*

The words everyone on the platform uses, and how the records fit inside each other. Read this before any other guide.

APPLIES TO

Everyone who uses UtilizeCore

THE THREE WORDS THAT MATTER MOST

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. A **Visit** is what happened on site.

1 · THE THREE PARTIES

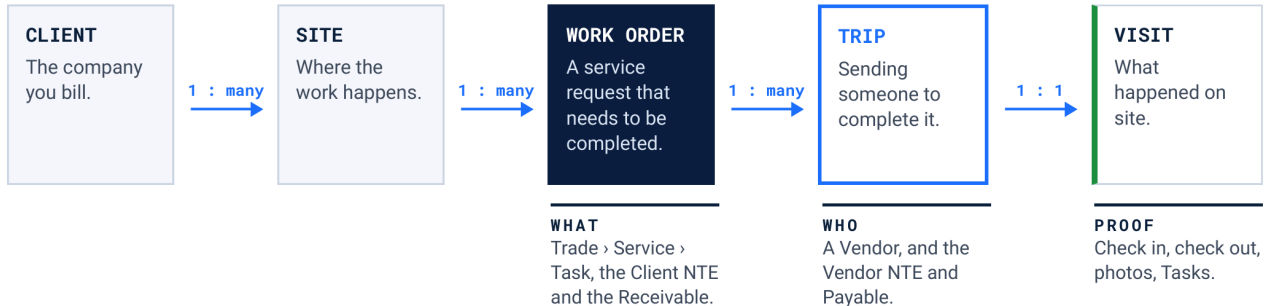
Three companies, *one Work Order.*

PARTY	WHO THEY ARE	WHAT THEY SEE
You	The service company running UtilizeCore. You take the service request, send someone to complete it, and bill for it.	Everything.
Client	The company you bill.	Their own Work Orders, in the Client Portal or in their own CMMS.
Vendor	The company that performs the work. Its Service Providers are the people on site, or your own team when you do the work yourself.	Their own Work Orders and Trips, with less data than you see. In the Vendor Portal and the mobile app.

2 · HOW THE RECORDS NEST

Client, Site, *Work Order*, *Trip*, *Visit*.

HOW THE RECORDS NEST. EACH ONE LIVES INSIDE THE ONE BEFORE IT.

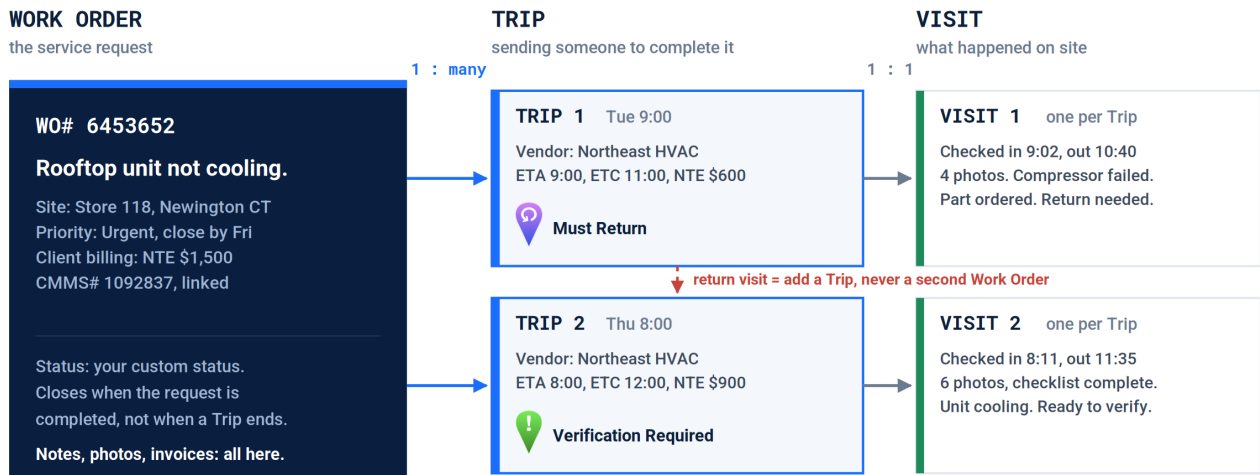


Someone has to go back? Add a Trip to the same Work Order. Never a second Work Order.

3 · ONE WORK ORDER, TWO TRIPS

The return visit *is a Trip*.

ONE SERVICE REQUEST. AS MANY TRIPS AS IT TAKES. ONE VISIT PER TRIP.



The Work Order carries the service request and the money. Each Trip carries who goes and when. Each Visit carries the proof. Billing stands on the Visit. Edit Visit corrects what happened; the Trip itself does not move.

One service request, two Trips, one Visit per Trip. The Work Order closes when the request is completed, not when a Trip ends.

Trade, Service, *Task*.

LEVEL	WHAT IT IS	EXAMPLE
Trade	The kind of work.	HVAC
Service	The work being ordered. Rates hang off the Service.	Preventive Maintenance
Task	One step done on site, ticked at check-out.	Replace filters

Say it the way *the platform does*.

WORD	WHAT IT MEANS
Site	The physical location where the work is performed.
Client NTE, Vendor NTE	Not To Exceed. Two separate limits: what the Client will pay, and what the Vendor may charge.
Proposal	A quote, to a Client or from a Vendor, approved before the work is billed.
Receivable, Payable	The two sides of an Invoice: a Receivable to the Client, a Payable from the Vendor.
Purchase Order	A cost-control record on the Work Order. Not a billing method.
Agreement	The contract record behind Scheduled Services and seasonal billing.
Scheduled Service	Generates Work Orders on a schedule, such as preventive maintenance.
Action Filter	The filters above every list: Schedule, Verify Trips, Generate Invoices and the rest. Each one is a queue with an owner.
Check In, Check Out	The Service Provider's clock in and clock out on a Trip.
Verify	The review of a completed Trip before it can be billed.
Work Order Close	The date everything on the Work Order must be done by: the Client's deadline.
Trip Expiration	When the Trip comes off the technician's phone. Always before the Work Order Close.
Client Portal, Vendor Portal	Always say which one.

Read next: How a Work Order Moves, then Action Filters.

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