

Work Orders, *day to day.*

Four moves run most of the day: find your work, assign the Trip, record the Visit, and send the Vendor back.

APPLIES TO

Dispatchers, account managers

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.

MOVE 1 · FIND YOUR WORK

Save your filter templates *once*.

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

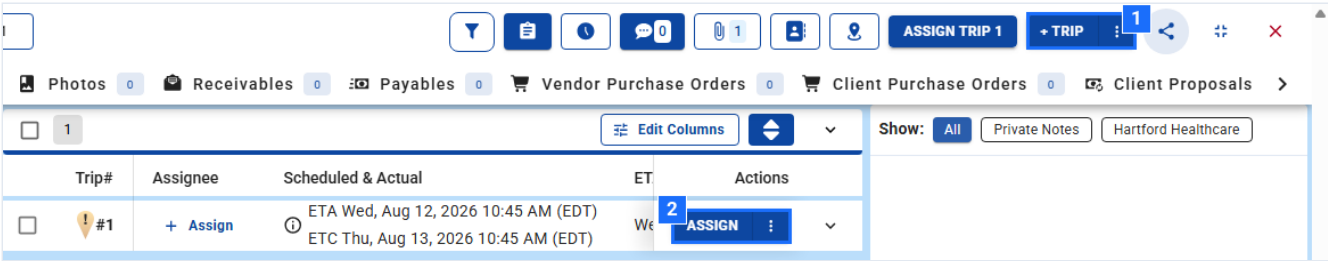
Filters. The funnel icon above the list.

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

Save it. Name it. Tick Shared Company Template to give it to the whole team.

- 1 Click the **Filter** icon. Pick a filter, tick the values, **Apply**. Then **Save Current Filters as Template** and name it.
- 2 Every morning: **Filter > Apply Filter Template**. Keep one template per Client, plus one for everything Action Required or In Progress.

Start from the Work Order *or the Trip line.*



- 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 Select **+ TRIP** at the top of the Work Order, or the action at the right of the Trip line (**Assign** when the Trip has no Vendor).
- 2 Choose the **Vendor**, then **Assign**.
- 3 Click **Dispatch**. The Trip goes to the Vendor's phone and email.
- 4 Let the Vendor accept in the app or portal. Accept for them only when they confirm by phone, and add a note saying who confirmed.

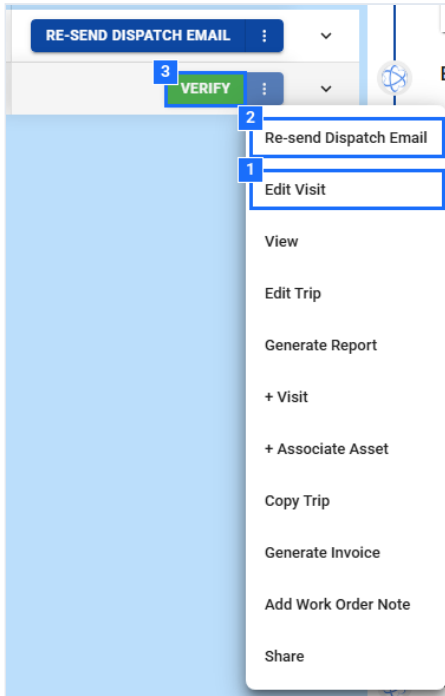
What the Trip line is telling you.

The action at the right of each Trip line changes with where the Trip is.

BUTTON	WHERE THE WORK ORDER IS	WHAT TO DO
Create Trip	No Trip yet.	Add a Trip and assign a Vendor.
Assign Trip	A Trip exists with no Vendor.	Choose the Vendor, then dispatch.
Re-send Dispatch Email	Dispatched, not yet accepted.	Wait for the Vendor, or call. Re-sending only repeats the email; it changes nothing on the Trip.
Verify Trip	The Vendor has checked out.	Review photos and times, then verify.
Gener Inv Trip	Verified, not yet billed.	Generate the invoice.

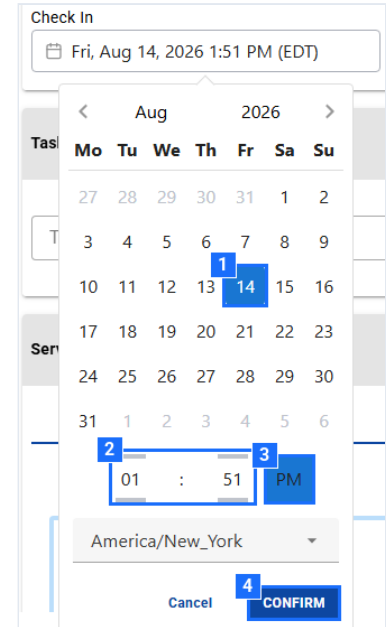
No app? *You are the app.*

When a Vendor reports by phone, email or text, enter what happened on the Visit so the Work Order stays the record.



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

Trip menu. The three dots on the Trip row.



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

Date picker.

- 1 On the Trip, click **⋮** > **Edit Visit**.
- 2 **Check In:** pick the day, set the hour and minute, **check AM or PM**, click **CONFIRM**.
- 3 **Check Out:** the same way. Then read **Total Time**.
- 4 **Service Photos** > **UPLOAD** the photos the Vendor sent you.
- 5 Click **SAVE**. You can edit it again later; Activity records every change.

CHECK THE AM AND PM

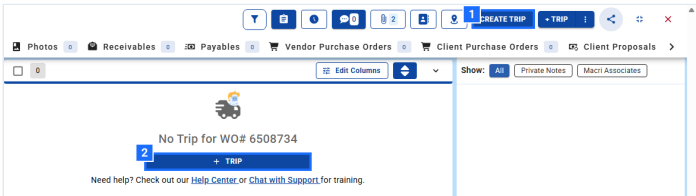
A check-out that will not save, or a negative Total Time, almost always means AM or PM is wrong on one side.

Same Work Order, *new Trip*.

THE RULE

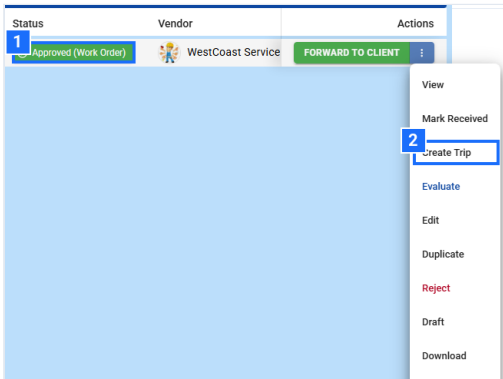
A return visit is a *new Trip* on the same Work Order. Never a new Work Order.

IF	DO THIS	WHAT CARRIES OVER
No Proposal	+ TRIP in the Work Order header. Choose the Vendor, set the dates, dispatch.	Trade, Service and Tasks from the Work Order.
Vendor Proposal approved	Vendor Proposals tab > Create Trip . Review, then dispatch.	The Vendor, and the approved amount as the Vendor NTE.



- 1 Header
- 2 Trip panel

+ **TRIP**. On the Work Order header, or in the middle panel when there is no Trip. Both open the same New Trip form.



- 1 Approved
- 2 Create Trip

Create Trip on an approved Vendor Proposal.

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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