

Your first week *on UtilizeCore.*

A service company you work for runs its work on UtilizeCore. Each job you are sent is a Trip. This page is the six things your office does once, and the three things it does every week. Your technicians have their own page.

Once.

#	DO THIS	HOW	DONE WHEN
1	Accept the invite	The email from the company that invited you. If it never arrived, ask them to resend it.	You are on the Terms page.
2	Read the Terms to the bottom	The Accept button stays gray until you have scrolled the whole way.	The button turns blue.
3	Create your company	Name, address, the trades you perform. The trade list is broad; add the detail on your profile afterward.	Your company page exists.
4	Upload your documents	W-9, certificate of insurance, and whatever the company that invited you requires. Until they are approved, you may not be dispatched.	Each document reads Approved.
5	Choose how your team logs in	See the three choices below. Pick one before you add anyone.	Written down.
6	Add your technicians	Team members with the Field Force role. Set the app language per person. Send them The Field Guide.	Each technician has opened the app once.

THREE WAYS TO LOG A TEAM IN. WHAT EACH ONE EXPOSES.

One shared admin login

Everyone signs in as the owner. Fastest. Every tech sees pricing, invoices and every other tech's Trips.

Avoid

One shared Field Force login

One field account for the whole team. Sees Trips and the app only; no pricing. Nobody knows who checked in.

Small teams

A login per technician

Each tech is a team member with the Field Force role. Check-ins carry a name. One more thing to manage.

The standard

Every week.

DO THIS	WHERE	DONE WHEN
Accept or reject new Trips	The email, the Portal, or the app. All three are the same button.	Nothing waits on you overnight. Give a two-hour arrival window when you accept.
Invoice completed Trips	Portal › Generate Receivables. A Trip appears there once the company that sent it has verified the visit. The paper plane sends it. If the company generates it for you, confirm or deny it there instead.	Every verified Trip has an invoice sent or confirmed.
Answer proposal requests	Portal › Proposals. A Trip that needs a quote before the work waits here. Price it, attach the backup, send it.	No proposal request older than two days.
Answer a rejection	The email that arrives when a photo, a visit or an invoice is rejected. It carries the reason.	Fixed and resent the same day.

If it is not working.

A technician cannot see a Trip	Check the app filters first: Week or Month, never Day. Work Orders tab, location on. Then call the company; the Trip may have expired.
You cannot invoice a Trip	The company that sent the Trip has not verified the visit yet. Only they can. Ask them.
Photos did not arrive	The technician closed the app before the upload finished. Open it on wifi and leave it open until the red cloud clears.

Questions? Call the company that sent you the Trip. App trouble: support@utilizecore.com.