Work Order Request & Projects

Before starting the "Work Order Request / Projects" feature you will need to set up the following information in the ExpressTime Data Manager.

- 1. CONTACTS located on the Building set up tab
- 2. SERVICES located under Administration / Services with average service pay rates
- 3. SUPPLIES (Optional) Located under Administration / Supplies

After entering your *Contacts*, *Services* and *Supplies* you are ready to create a "Work Order Request". Go to Customers / Buildings and select a building in your list to the left. Then go to the "Work Order Requests" tab. Click + to insert a new record. Fill in the following information and post your record.

<u>Note:</u> First fill in the top portion of the record and post. Then go to the bottom portion of the record and fill out the Services and Supplies portions your record and post. The Services portion will need to be populated before you can convert the record to a project.

- Job Date This date will also be used for the begin date of work orders that will be repeated over a period of time such as jobs scheduled on a monthly basis.
- **Contact and Contact Phone** Contacts are selected from a drop list of contacts generated under the *Building / Contacts* screen.
- Job Location Notes (Optional) This information will appear on the work order request.
- Other Instructions (Optional) For additional information
- **Directions** to location, etc.... (Optional)

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	1 of 1 🕨 🗰 🛨 🗕 🔺 🗸	× Mode: Br	owse Data	Services						
Service	Notes	Hours	Rate	Total	# Employees	Status	Entered By	Date Added	Updated By	Date La
General Labor	Use floaters	6.0	\$8.00	\$48.00		3 Active	System Administrato	6/22/2015 12:09:13 P	System Administrato	6/22/20

- Service Select Service from the drop list to enter. Add additional lines for different types of services.
- Notes Anything related to the service to be preformed.
- Hours Total projected hours of the entire job for this particular service.
- Rate You can use actual/ average payrates for employees preforming the service or use a standard bidding rate.

- # Employees The total # of employees needed to complete the job. Individule schedules will be set up after converting the request to a project.
- **Supply** (Optional) Used to create a list of items needed to complete the job. Supplies are selected from a drop list generated under **Service** Services are selected from a drop list of services generated under the *Administration / Services* screen.
- Notes (Optional)
- Hours Total hours to do the service.
- **Rate** This can be either the service workers average pay rate or the rate charged to the client. The will default to the rate assigned in *Services* but can be changed. This field cannot be null.
- # of Employees # of employees assigned to this project.

After entering in this information an assortment Cleaning Proposals and Work Orders can be printed before converting the request into a scheduled project.



<u>Note</u>: At this point the information entered is nothing more than a project template, it will need to be converted to a project to schedule the work and to create the actual project/work order.

1042 Nina's Bout	ique			
OrderDate: 7/11/2014	a state of the second sec			
JobDate: 7/15/2014				-
	Project Services		SI	tep 1 - Schedule elect One
Services	Hours Ra	te Total		One Time Project Work
Post Construction Clean Up	10.00	\$9.00	\$90.00	Recurring Project Work
	10.00		\$90.00	\checkmark
	Project Supplies		/	Begin Date: 07/15/20
Supplies	Quantity Pr	ice Total	(End Date: 07/15/2

Converting your request to a Project:

To "Convert to Project" the following screen will appear.

Step 1 of 3 – Assign Project Schedule Type

First select either *One Time Project Work* if this isn't a recurring project or select *Recurring Project Work* if this is a job that you will do on a reoccurring basis.

1042 Nina's Boutiq OrderDate: 7/11/2014 JobDate: 7/15/2014	ue					
	Project Service	s		Step 1 - Sched Select One	ule	
Services	Hours	Rate	Total	💿 One Time Pr	oject Work	
Post Construction Clean Up	10.00	\$9.00	\$90.00	© Recurring P	roject Work	
▲	10.00		\$90.00]		
	Project Supplie	s		Begin Date:	07/15/2014	•
Supplies	Quantity	Price	Total	End Date:	07/15/2014	•
				-		

Second, choose the date to begin the project and the date to end. Then select *Next* at the bottom right hand side to continue. It should default to the Job Date already selected in the request set up.

Step 2 of 3 – Assign Services and Schedule - Select the Employees and their schedules below.

Work O	rder Request Wizard	-	-					Project Service	Nina's Bo 07/15/20 07/15/20	14 09:0	100	
Step 2 o	f 3 - Assign Services and Schedule								Post Con	ituction	Clean Up	
• •	X Mode: Browse Data		P	Project Notes		-	Copy to I	New Employee	Stores.			
	Work Completed Begin Date End Date	interval										
207	207-0001 07/15/2014 07/15/20	14 Daily	Y .									
-										-	OK	X Ca
	I brocked ded											
Services	Quantity Unscheduled Rate T	otal	2			-	-	- 10				
Services	Quentity Unit Rate T Hours	Select t		s & time to assi Copy to 🕴 Dupicat	te.							
	nours	Select t	Browse Data			Pay	Time	Scheduled Hours		Notify	Notify Short	Commen
Select	Hours	Select t Scheduled Date Sched 07/15/2014 07/15/	Browse Data	Copy to Duplicat Scheduled End Time 07/15/2014 11:30 pm	Pay Rate	Pay Method	Time	Hours 2.50	Hours 2.50	Late	Short	Commen
Select	Service $ imes$ Name	Select t Scheduled Date Sched 07/15/2014 07/15/	Browse Data	Copy to F Duplicat Scheduled End Time	Pay Rate \$10.50	Pay Method	Time	Hours 2.50	Hours 2.50	Late	Short	Commen
Select	Service $ imes$ Name Post Construction · Adams, Ashiey	Select t Scheduled Date Sched 07/15/2014 07/15/	Browse Data	Copy to Duplicat Scheduled End Time 07/15/2014 11:30 pm	Pay Rate \$10.50	Pay Method Hourly	Time Adjustments 0	Hours 2.50	Hours 2.50	Late	Short	Commen
Select	Service $ imes$ Name Post Construction · Adams, Ashiey	Select t Scheduled Date Sched 07/15/2014 07/15/	Browse Data	Copy to Duplicat Scheduled End Time 07/15/2014 11:30 pm	Pay Rate \$10.50	Pay Method Hourly	Time Adjustments 0	Hours 2.50 2.50	Hours 2.50	Late	Short	Commen

Note: If you have multiple employees working at the same times you can select *Copy to* and assign the same schedule to multiple employees without having to reenter the information.

Then select *Schedule* on the bottom right hand side to continue.

Step 3 of 3 – Review Scheduled Project

Review and select Finish on the bottom right hand side.

🔞 Work Order	Request Wiza	rd				-		X		
Step 3 of 3 -	Step 3 of 3 - Review Scheduled Project									
Project Votes Work Order Notes										
Project Number 207	207-0001	Complete	Date 07/15/2014	Interval Daily		buildi	mpster will be located at the back of the ng for non-salvagable items. Stack Jable items in a neat pile next to the ng.	*		
] Previous 🛃 F	nish		

<u>Misc. Information:</u> The information used to create the Work Order Request/ Project will remain as a template for future uses. To start a new Work Order Request/ Project using an existing record simply highlight the record you would like to use and click *Convert* and the following confirmation box will appear. You will be able to edit your record accordingly.

cheduling	Building	Budget V	√ork Order R	equests Projects							
	4 of 4 🕞			× A Mode: Brows	e Data 눷 Conve	ent To Projec	G Cleaning Proposal Show: Active	🔁 Refresh			
Converted	Convert	Order Date	Job Date	Contact	Contact Phone	Job Local Notes	n Other Instructions Project Notes	Directions		Status	Te
	<u> </u>	07/11/2014	07/15/2014	Dena DeRoche`	(601)583-8101	6		-×	Mai	Active	NE
	<u>_</u>	07/07/2014	07/07/2014	Dena DeRoche`	(601)583-8101	Con	m			Active	NE
	<u>_</u>	12/20/2013	12/20/2013	Sammy Soso	(601)123-4567		This work order request has already been used t	o create	ions	Active	NE
	<u> </u>	3/05/2013	03/15/2013	Dena DeRoche'	(601)583-8101		a project.		Mai	Active	NE
	\smile						Would you like to use it as a template for a new order request?	work			
-									100		
							Yes	No			

Work Orders can be printed by going to the *Projects* tab and selecting the project of your choice and then clicking on Work Order to select the report you would like to run.

uilding Info	mation		/							
Scheduling	<u> </u>	a Budgel	Work Dre	der Requests	Pu	jects				
From 7/11	· · ·	- Q Sei		G Work 0	_	× Delete				
Project Number 207 194	Work Order 207-0001 194-0007	Completed	Begin Date 07/15/2014 07/16/2014		Interv	A & B Express Product 216 W 5Th Ave Petal, MS 39465 Phone: 601-583-8101 Fax: 601-582-0456	s, LLC		Work Order WorkOrder: 207-0001 1042 - Nina's Boutique	
194	194-0008			12/31/2014		DATE OF JOB	CONTACT INFOR	MATION	ASSIGNED BY	ASSIGNED TO
						07/15/2014 NAME 1222 - Adams, Ashley 1042 - Nina's Boutique	Telephone: 601-583 DATE 7/15/2014 7/15/2014	3-8101 TOTAL HRS 0.00 0.00 0.00		debris. Sweep and mop. Run dust
						SERVICE	SERVICE ID			HOURS
						Post Construction Clean Up	E 009			10.00
						PROJECT NOTES A dumpster will be located at the be building. WORK ORDER NOTES DIRECTIONS TO JOB West 5th and Main Street. See Super JOB COMMENTS: (Example:	visor for more information	L.		the