

Work Order Request & Projects

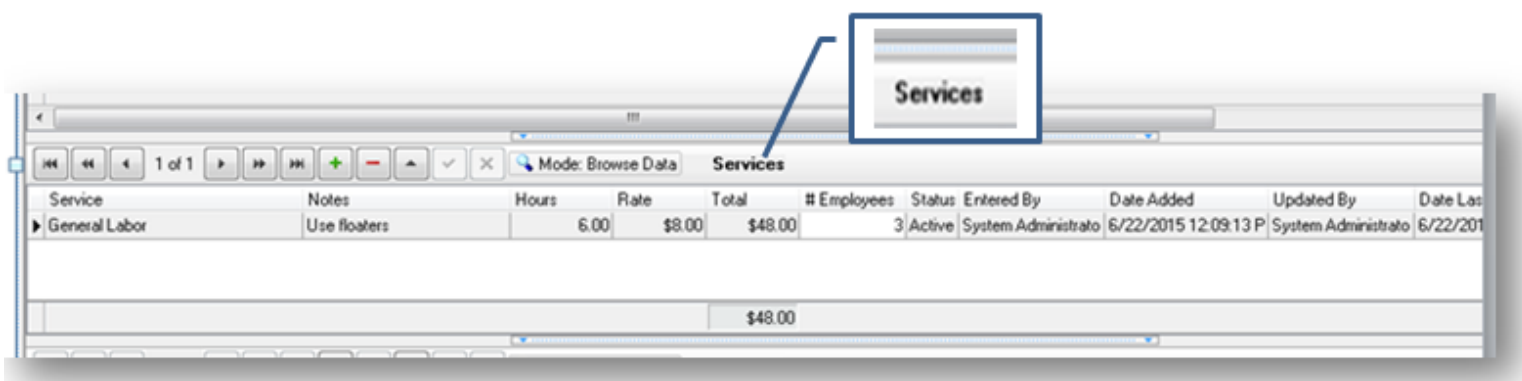
Before starting the “Work Order Request / Projects” feature you will need to set up the following information in the ExpressTime Data Manager.

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.

Note: 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)

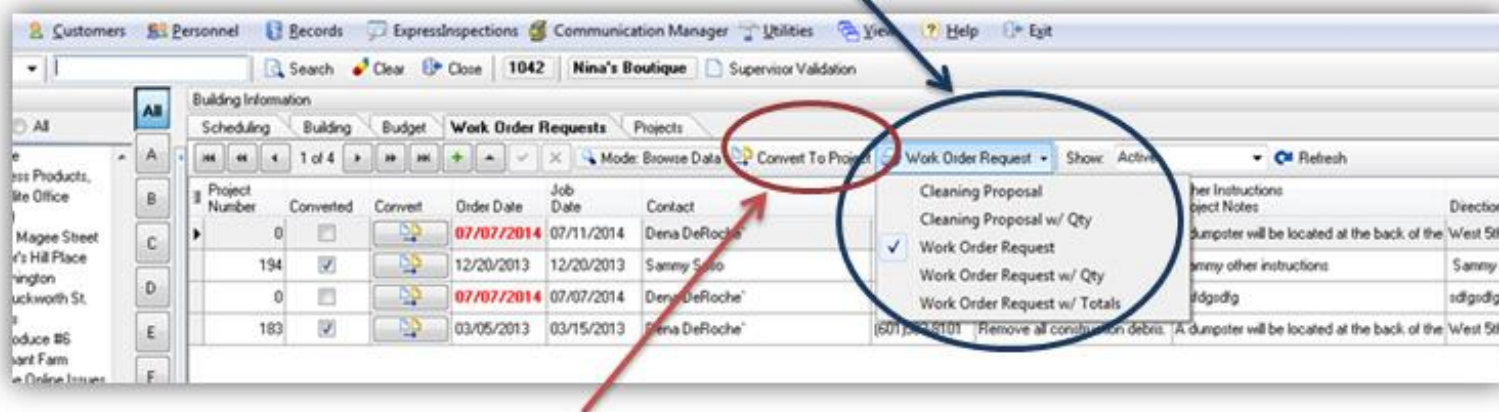


Service	Notes	Hours	Rate	Total	# Employees	Status	Entered By	Date Added	Updated By	Date Last
▶ General Labor	Use floaters	6.00	\$8.00	\$48.00	3	Active	System Administrator	6/22/2015 12:09:13 P	System Administrator	6/22/2015
				\$48.00						

- **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. Individual 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.



Note: 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.

Work Order Request Wizard

Step 1 of 3 - Assign Project Schedule Type

1042 Nina's Boutique
 OrderDate: 7/11/2014
 JobDate: 7/15/2014

Project Services			
Services	Hours	Rate	Total
Post Construction Clean Up	10.00	\$9.00	\$90.00
	10.00		\$90.00

Project Supplies			
Supplies	Quantity	Price	Total

Step 1 - Schedule
 Select One

One Time Project Work
 Recurring Project Work

Begin Date: 07/15/2014
 End Date: 07/15/2014

Cancel Next

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.

Work Order Request Wizard

Step 1 of 3 - Assign Project Schedule Type

1042 Nina's Boutique
 OrderDate: 7/11/2014
 JobDate: 7/15/2014

Project Services			
Services	Hours	Rate	Total
Post Construction Clean Up	10.00	\$9.00	\$90.00
	10.00		\$90.00

Project Supplies			
Supplies	Quantity	Price	Total

Step 1 - Schedule
 Select One

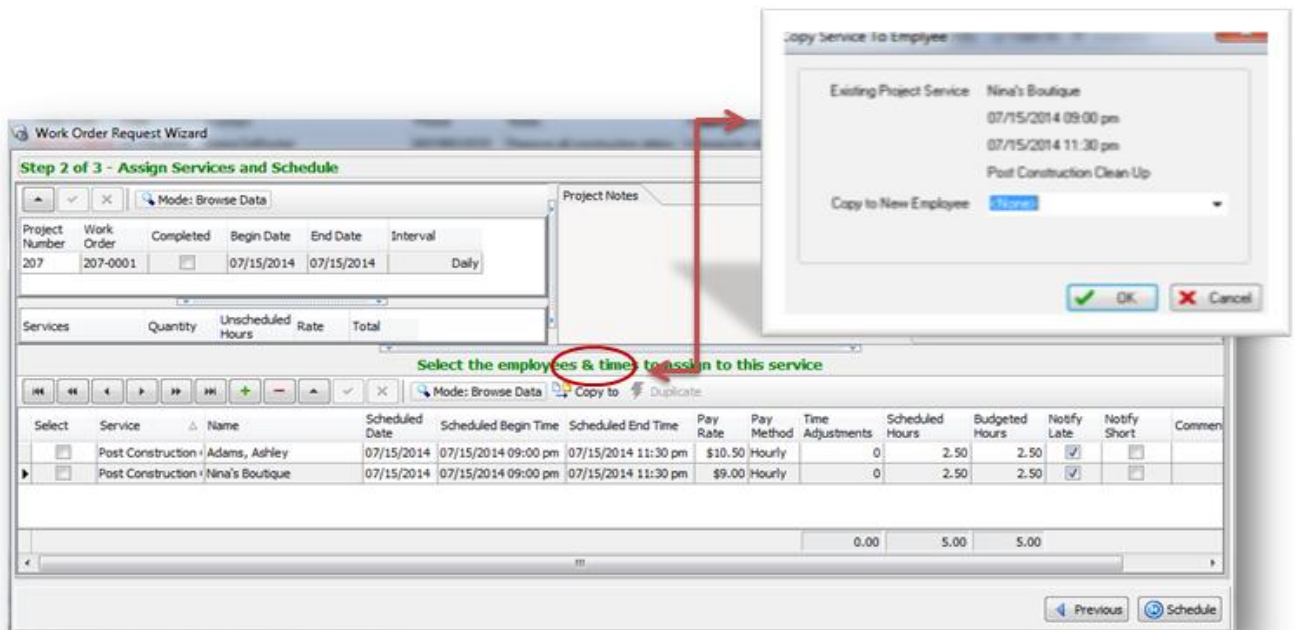
One Time Project Work
 Recurring Project Work

Begin Date: 07/15/2014
 End Date: 07/15/2014

Cancel Next

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.

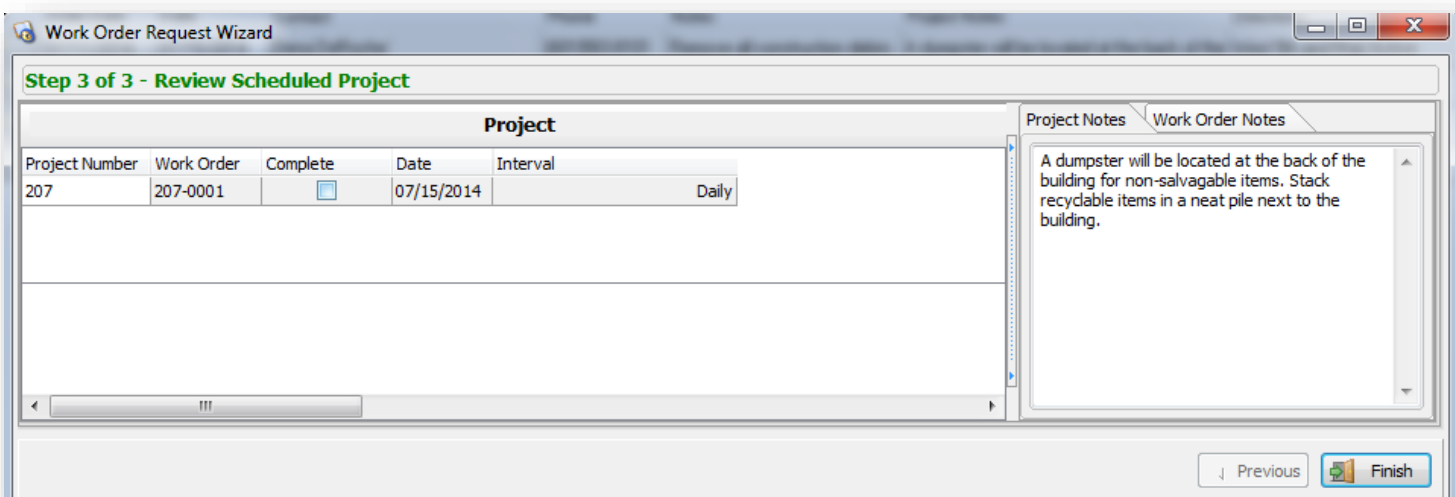


Note: If you have multiple employees working at the same times you can select *Copy to* and assign the same schedule to multiple employees without having to reenter the information.

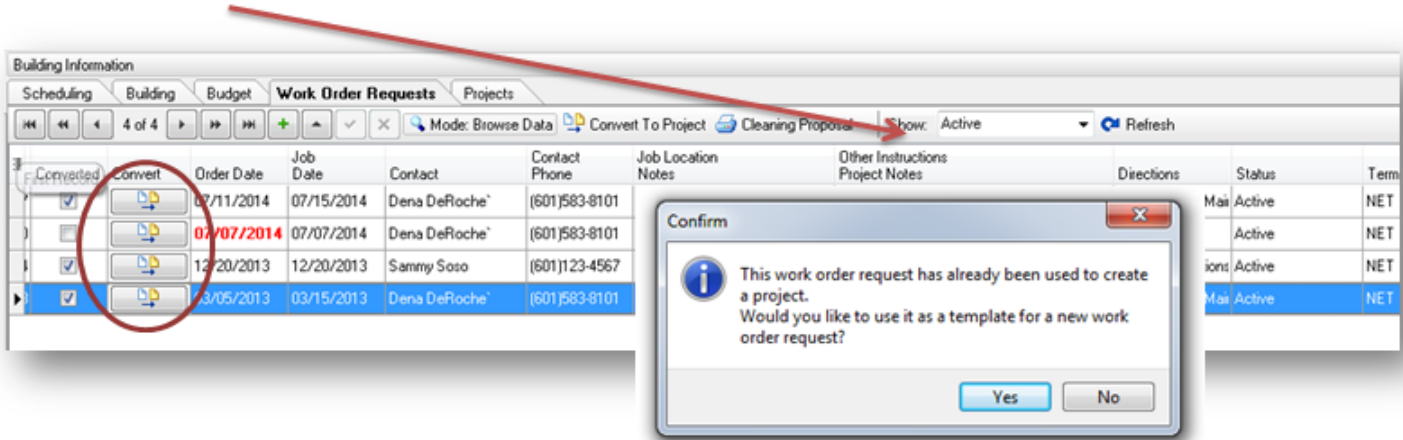
Then select *Schedule* on the bottom right hand side to continue.

Step 3 of 3 – Review Scheduled Project

Review and select *Finish* on the bottom right hand side.



Misc. Information: 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.



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.

