

Work Orders

Create and Edit Work Orders

1. To edit or create work orders, select **Vendors/Work Orders**. The *Work Order List* screen displays.

Exhibit 93: Work Order List Screen

Work Order List

Vendor: (All Vendors) ABC Condo association

Status: (All Open Statuses) Work Order #:

Work Location: (All Work Locations) For Dates: To:

WO Type: (All Types)

☐ Common Area ☐ Unlinked Work Location ☐ Unlinked/No Vendor

☐	WO #	Created	Printed / Emailed	Due	Type / Description	Vendor	Work Location	Status
☐	3369	05/21/2020	P/E: 05/21/2020	06/11/2020	Common Area / test	A Bright Idea	Jason Stevenson 6566 Purple Lane	Awaiting Quote
☐	3370	05/26/2020	P/E: 05/26/2020	06/16/2020	Common Area / cinc test	1 Swipe Window Cleaning (Insurance Expired)	Jason Stevenson 6566 Purple Lane	Open

Total #: 2 / Selected: 0

2. Select an association or choose **All Associations**.
3. Select a vendor or choose **All Vendors**.
4. Click the **New** button to create a new work order or click any information (IE created date) on an existing work order to edit.
 - For new work orders, select a **Category** and **Maintenance Item** from the **Work Order** screen, or click Skip to proceed.
 - For billable items, the **Homeowner – Billable Responsibility** screen appears with a disclaimer regarding billing of the homeowner. Click **Continue** to proceed with a billable item, click **New Request** to start over, or click **Cancel** to close.
5. Fill in or edit the required fields:

Exhibit 94: Work Order Screen

Work Order

Save Save & New Refresh Cancel Quick Message Dashboard

Association 123 Test HOA

Work Order # 0

Type (Select Type) Status Pending Review

Description

Estimate Total \$0.00 Due Date Follow Up Date

Work Location

Name Select Homeowner or Common Areas

Address

City, State, Zip

Contacts Add Remove

Contact (Address Type)	Email	Phone

Work Assigned To

Maint. Category / Item Painting / Paint Pre-Approved No

Vendor

Vendor Contact	Phone	Cell	Fax	Email
No data to display				

Attachments Files over 50 MB will not be uploaded. Remove

Date	File Name	Size
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- **Work Order #** populates automatically upon saving.
- **Type** of work to be done from the dropdown (these selections are populated via **System/Dropdown Options: Work Order Type**).
- **Status** (default is *Open*)
- **Description** of the work to be done.
- **Estimate Total**
- **Due Date**
- **Follow-up Date**
- **Work Location** default is the current property. If this is a new work order, a work location must be assigned (e.g. a common area like the clubhouse).

- **Contact** info is displayed. Add additional contacts by clicking **New (A)**. It can be anyone, such as someone who is going to let the repairman in. The contact can be saved as an additional contact.

Exhibit 95: Contact Info

Contacts		Add	Remove
Contact (Address Type)	Email	Phone	

- **Work Assigned To:** Assign the work to a vendor that is already set up **(B)**.
 - **Attachments:** Upload attachments.
 - Add Work Order Notes **(C)** if desired.
 - If **Public** is checked **(D)**, this work order will display on the website.
6. Click the **Save** button. Once saved, a work order number is assigned. The work order will now show up in the homeowner's work order list.

Changing the Work Order Association

You can reassign a work order to a different association by using the association search bar and clicking **Save** on the **Vendors / Work Orders / Work Order Details** screen.

- This feature is controlled by the **Vendor / Work Orders – Change Association**
- You can only change the association on work orders in an **Open** status with no linked **Work Location**.

Exhibit 96: Changing Work Order Association

Work Order				Quick Message	Dashboard
Save Save & New Completed Print Email Refresh Cancel					
Briar Cliff Falls at River Park 05					
Work Order #	9789	Created By	on 03/05/2022 04:47:29 AM		
Type	Carpentry	Status	Open		
Description	Fix Fence				
Estimate Total	\$0.00	Due Date	03/10/2022	Follow Up Date	03/04/2022
Work Location					
Name		Select Homeowner		or Common Areas	
Address					
City, State, Zip					

Work orders Status and Completion

1. You can update the status of a work by either:
 - Selecting the checkbox for the work order on the **Vendors / Work Orders / Work Order List** screen and clicking the **Completed** button.
 - Clicking the **Completed** Button from the specific **Work Order** screen.
2. Enter in the required information on the **Complete Work Order** screen.

Exhibit 97: Complete Work Order

The screenshot shows the 'Complete Work Order' form. At the top, there's a green header bar with the title 'Complete Work Order' and a close button (X). Below the header, the form is divided into several sections. The first section has a 'Status' dropdown menu set to 'Completed'. Below that, there are three checkboxes: 'Email' (checked), 'Work Location' (checked), and 'Vendor' (checked). The 'Public' checkbox is also checked. Below these is a large text area for 'Note' with a character count '0 / 7000'. A red note below the text area reads: 'NOTE: This Note may be visible to either the Homeowner or Vendor. Please use appropriate language.' The next section is titled 'Vendor Rating' in green. It contains three rows of star ratings: 'Global Average Rating' (4 stars), 'Your Average Rating' (4 stars), and 'Your Last Rating' (4 stars). Below these is a 'New Rating' section with a star rating of 4 stars. At the bottom, there is a 'Rating Note (Optional)' text area. The form ends with 'Save' and 'Cancel' buttons.

Complete Work Order

Status: Completed

Email: ☒ Work Location ☒ Vendor

Public: ☒

Note:
0 / 7000

NOTE: This Note may be visible to either the Homeowner or Vendor. Please use appropriate language.

Vendor Rating

Global Average Rating: ★★★★★ (4 ratings)

Your Average Rating: ★★★★★ (4 ratings)

Your Last Rating: ★★★★★

New Rating: ★★★★★

Rating Note (Optional):

Save Cancel

- **Status:** Select the status of the work order, this will help you sort and filter the **Work Order List** screen.
- **Email:** Select Work Location or Vendor if you wish to generate an email related to the changes on the work order.
- **Public:** This allows users to see the note in WebAxis.
- **Note:** Enter any additional notes. This may be visible to either the homeowner or the vendor.

3. If the work order is linked to a vendor, rate the vendors work.
 - **Global Average Rating:** Average rating across all vendors.
 - **Your Average Rating:** Average of ratings you have given.
 - **Your Last Rating:** The last rating you gave to a vendor.
 - **New Rating:** Select the number of stars for the **New Rating**.
 - **Rating Notes:** Enter any additional notes about the vendor's work.
4. Click the **Save** button.

Reopening Completed Work Orders

You can reopen a completed work order to update the record or if the vendor is required to redo any work.

1. From the Work Order screen, click the **Reopen** button.
2. Enter the required information on the **Reopen Work Order** screen. This information is similar to what is entered on the Complete Work Order screen with two key differences: