How To: Create a Work Order

This tutorial will demonstrate the two different ways to create a work order in the JobCheck system. Work orders can be created as products of the financial plan, or can be created independently from the financial plan and this guide will outline those approaches and the benefits of each.

A work order can be created anytime there a work-related task to be completed. Work orders are a way to keep track of what work needs to be completed and if that work is started, in progress or completed. Work orders can be scheduled in a timeline and can also have employee or sub-trade resources assigned to them for time management purposes.

1. |Open a web browser (Chrome , Firefox or Microsoft Edge) and navigate to: https://assuredsoftware.cloudforce.com.
2. |Log in with your username and password (username is usually your email address).
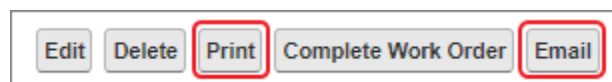3. Open the job you would like to create the work order for.

Create an Independent Work Order

Detail	Activity	Attachments	Financial	Work Orders	Schedule

Independent work orders are useful when there is no financial plan for the job or when only a high-level estimate has been entered into the financial plan. Independent work orders can have their status/progress updated via the desktop app or the mobile app and can be scheduled and assigned resources but have no ties to the financial progress of a job.

1. Click to open the "Work Order" tab within the job.
2. Click "New Work Order".
3. Select the **Type** of work order you would like to create: *Employee* or *Sub Trade*.
4. Give the work order a relevant **Name** (ie. General Demolition of 1st Floor).
5. Add a detailed description of the work to be completed relating to this work order.
6. Click "Save".

New work orders can then be printed or emailed directly from the system to the crew members assigned to complete the work onsite. Simply click the work order to view it and click to print or email from the menu.

Edit	Delete	Print	Complete Work Order	Email

Figure 1: An example of an independent, employee work order created from the Work Order tab. The work order has no financial estimate total because it is not associated with the financial plan.

Team members who are assigned work orders can access a work order from the desktop application or from their Salesforce mobile app. A work order's status can be updated to *In Progress* or *Completed* from either the desktop or the mobile app and progress total can also be updated.

> It is possible to associate a work order with a category of work from the financial plan if the financial plan is created later than the work order. Simply click to view the work order and add the associated category of work to tie it to the financial plan once it is available.

Create a Work Order from the Financial Plan

Detail	Activity	Attachments	Financial	Work Orders	Schedule

When managing job profitability is the main goal, tying work orders to the financial plan is the recommended workflow. When a work order is created from a category of work in the financial plan, completing the associated work order also updates the progress profit in the financial plan. In addition to helping project manage the profitability of the job, the categories of work can create a convenient guide for what work orders have been created and which have not.

1. Click to open the "Financial" tab within the job.
2. Click "New Work Order".
3. Select the **Type** of work order you would like to create: *Employee* or *Sub Trade*.
4. Select the Category(ies) of work that you would like to be included in your work order.
   Note: You will only be offered categories of work that have been specified for the Type of work order selected (ie. Employee vs. Sub Trade). .
5. Give the work order a relevant **Name** (ie. General Demolition of 1st Floor).
6. Add a detailed description of the work to be completed relating to this work order.
7. Click "Save".

Once the work order has been saved, you will notice a green work order symbol (*Figure 2*) appear in-line for the associated category of work in the financial plan. When this work order is completed in future, either via the desktop application or the mobile app, the progress total will be automatically updated in the financial plan and your total progress profit for the job updated.

Figure 2:   An example of a work order that is tied to a category of work in the financial plan. Categories of work that have associated work orders are indicated with a green work order symbol. Grey symbols indicate no work order has been created/associated.

Work orders created via the financial plan, just like independent work orders, can be managed and edited from the **Work Order** tab within the job and can either be assigned, scheduled or have resources assigned to them.

Scheduling of a work order can either be performed from the work order tab on a per each basis, or if applicable, from the scheduling tab within the job. (*See Tutorial 37-How to Schedule Events for Production*).

For additional support or assistance, visit our <u>online support portal</u>, contact our technical support team at 1-877-277-9933 or email us directly at support@assuredsoftware.com.