
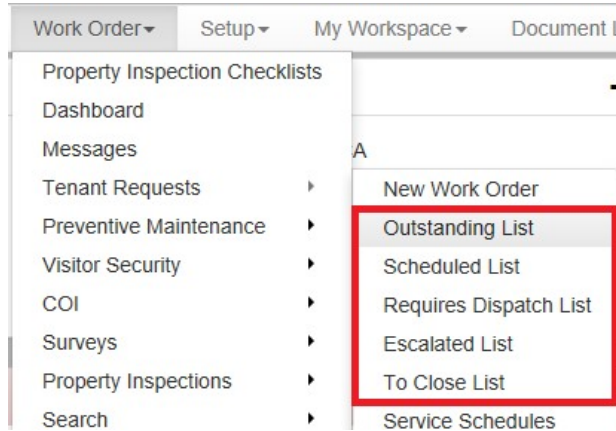







## Adding a TR Work Order

1. Click [Control Panel > Work Order > Tenant Requests > New Work Order](#) or the (  ) button from any of the applicable TR Lists as seen below.



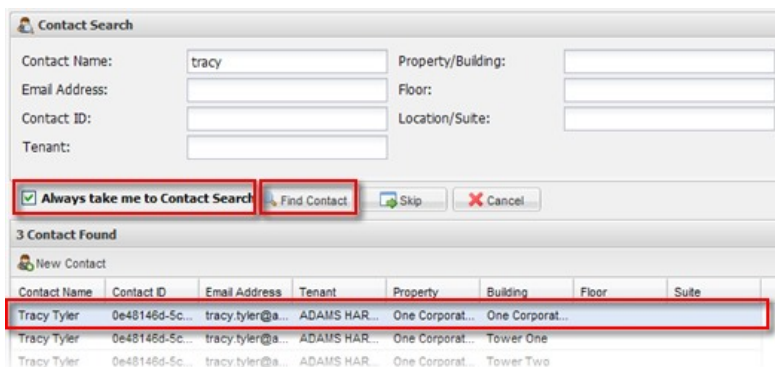
2. The New TR Work Order screen is displayed.
3. If you do not have call center mode enabled but would like to use the Contact Search interface, click **Contact Search** (otherwise, proceed to Step 6). If you have call centre mode enabled, you will be taken to the Contact Search screen first, as described in Step 4.

A screenshot of the 'New TR Work Order' screen. The 'Requester Information' section is visible. It includes a checkbox for 'Requested by Employee'. Below this, there are two dropdown menus: 'Contact:' and 'Tenant:'. The 'Contact:' dropdown is set to 'Alex Anderson' and the 'Tenant:' dropdown is set to 'Anderson and Friedman'. A red rectangular box highlights the 'Contact Search' button, which is located below the 'Contact:' dropdown. The button text is 'Enter at least three characters. Or use Contact Search'.

4. If you have call center mode enabled, you will be taken directly to the contact search screen. To locate a contact, fill one or more of the provided fields and click **Find Contact**. Next, double-click a contact in the Contacts Found section to proceed to the next step. If the contact's name is already known, you can optionally click **Skip** and proceed to the next step.
  - You can also enable or disable Call Centre mode by checking or unchecking **Always take me to Contact Search first** on this screen.

### Note:

- You must enter at least 3 characters in to one of the following fields: Contact Name, Email Address or Contact ID. All other fields are optional.
5. Once you have double-clicked on a contact, or if you do not have call center mode enabled, you will be taken to the New TR Work Order screen.

A screenshot of the 'Contact Search' screen. It features several input fields: 'Contact Name', 'Email Address', 'Contact ID', 'Tenant', 'Property/Building', 'Floor', and 'Location/Suite'. Below these fields, there is a checkbox labeled 'Always take me to Contact Search' which is checked. To the right of this checkbox is a 'Find Contact' button, which is highlighted with a red rectangular box. Other buttons visible are 'Skip' and 'Cancel'. Below the input fields, there is a section titled '3 Contact Found'. It contains a table with columns: 'Contact Name', 'Contact ID', 'Email Address', 'Tenant', 'Property', 'Building', 'Floor', and 'Suite'. The first row of the table is highlighted with a red rectangular box. The data in the first row is: 'Tracy Tyler', '0e48146d-5c...', 'tracy.tyler@a...', 'ADAMS HAR...', 'One Corporat...', 'One Corporat...'. The second row is: 'Tracy Tyler', '0e48146d-5c...', 'tracy.tyler@a...', 'ADAMS HAR...', 'One Corporat...', 'Tower One'. The third row is: 'Tracy Tyler', '0e48146d-5c...', 'tracy.tyler@a...', 'ADAMS HAR...', 'One Corporat...', 'Tower Two'.

6. If the Work Order has been proactively reported by an employee, click **Requested by employee**, then click on the drop-down menu and select the employee.

A screenshot of the 'New TR Work Order' screen. The 'Requested by Employee' dropdown menu is visible, showing a list of employees. The dropdown is open, and the first employee listed is 'Tracy Tyler'.

**Requester Information**

☒ Requested by Employee

Employee: Boris Howell

Contact: Alex Anderson

- Click the contact field, and enter the contact's name (this information will already be filled in if you made use of the Contact Search screen described above). After entering at least three letters of the contact's name, you will be presented with a drop-down list of possible matches. Select the appropriate contact from the list.

☒ Requested by Employee

Employee: Boris Howell

Contact: Anderson

Tenant: Alex Anderson  
Anderson and Friedman (Hilview Towers)

**Work Order Location**

Property: Michelle Anderson  
Anderson and Friedman (Hilview Towers)

Property: Hilview Towers

- Once a contact has been selected, the Tenant and Work Order Location fields are automatically filled in. If needed, the work order location can be overridden by using the drop-down menus provided.

Tenant: Anderson and Friedman

**Work Order Location**

Property: Hilview Towers

Building: Hilview Towers II

Floor: 1

Suite: 101

**Work Order Details**

- Next, scroll down to the Work Order Details section.
- Using the fields provided, select a **Request Type**, **Trade** and **Priority**.
- Next, fill in a description for the work order.
- In the Required section, select either **As Soon as Possible** or **At** and use the menus provided to select a date and time that the work is required.
- When you are finished, click **Create Work Order**.

Suite:

**Work Order Details**

Request Type: After Hours HVAC

Trade: Engineering

Priority: 1

Description: There is a faucet flooding the 4th floor women's bathroom. Please fix.

Required: ☒ As Soon As Possible ☐ At

**Additional Information**

Reference Number:

- The Work Order Confirmation screen is displayed. This contains a summary of all information entered.
- You can assign the work order from this screen either by selecting an employee from the drop-down list, or by clicking **Auto-Assign**. The auto-assign feature will attempt to assign the work order based on your routing table.
- If there are any dispatch notes, they will be listed beneath the Instructions field.
- Depending on when the work was required, you will have the following dispatch options to choose from:
  - If the work order is required immediately, you can select either **Do not dispatch** or **Dispatch immediately**.
  - If the work order is required at a future date, you can select either to dispatch the work order a certain number of days and hours in advance, or to dispatch immediately.
- Click **Finish** to complete the process and return to the work order lists, or **Finish and View** to instead display the newly-created work order.

Work Order Confirmation

✔ Confirmation # 1033823

Requested by:

Alex Anderson from Anderson and Friedman

Location:

Hilview Towers » Hilview Towers II » 1 » 101

Request Type:

Housekeeping

Trade:

Janitorial

Required:

As Soon As Possible

Assign and Dispatch (Optional)

Assign to:

Bob Smyth

Auto Assign

Instructions:

Spill in reception area.

View Dispatch Notes

☐ Do not dispatch

☒ Dispatch immediately

✔ Finish

Finish and View