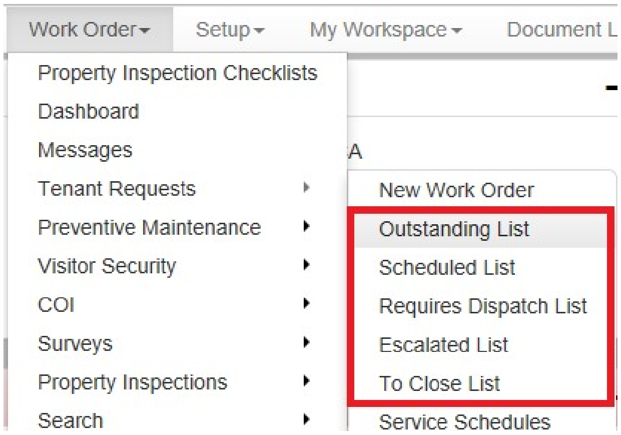
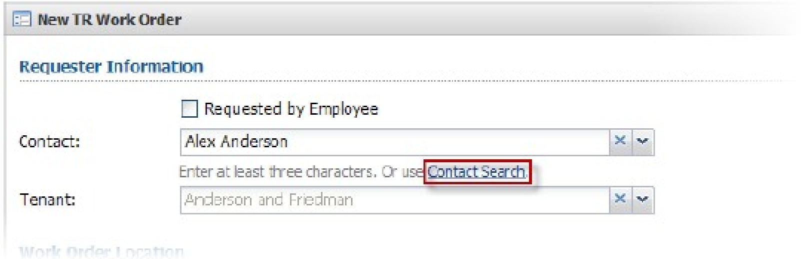
Adding a TR Work Order

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


Work Order
Setup
My Workspace
Document L
Property Inspection Checklists
Dashboard
Messages
Tenant Requests
Preventive Maintenance
Visitor Security
COI
Surveys
Property Inspections
Search
New Work Order
Outstanding List
Scheduled List
Requires Dispatch List
Escalated List
To Close List
Service Schedules

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.


New TR Work Order
Requester Information
Work Order Location

☐ Requested by Employee

Contact: Alex Anderson

Enter at least three characters. Or use Contact Search

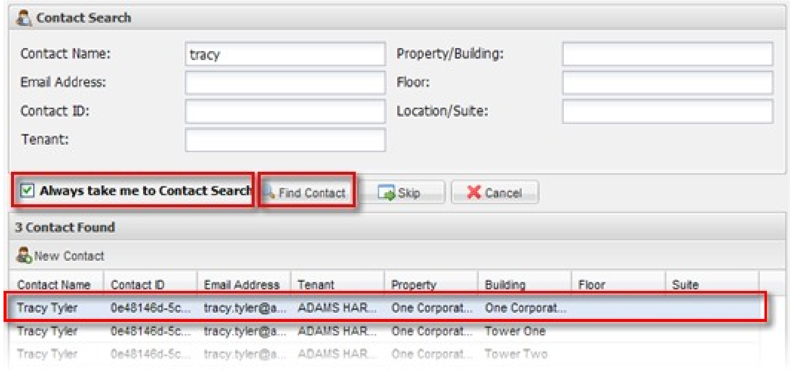
Tenant: Anderson and Friedman

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.


Contact Search
Find Contact
Skip
Cancel
New Contact

Contact Name: tracy

Email Address:

Contact ID:

Tenant:

Property/Building:

Floor:

Location/Suite:

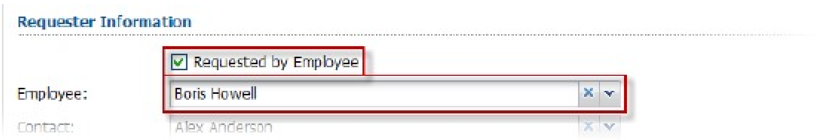
☑ Always take me to Contact Search

3 Contact Found

Contact Name	Contact ID	Email Address	Tenant	Property	Building	Floor	Suite
Tracy Tyler	0e48146d-5c...	tracy.tyler@a...	ADAMS HAR...	One Corporat...	One Corporat...		
Tracy Tyler	0e48146d-5c...	tracy.tyler@a...	ADAMS HAR...	One Corporat...	Tower One		
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.

New TR Work Order

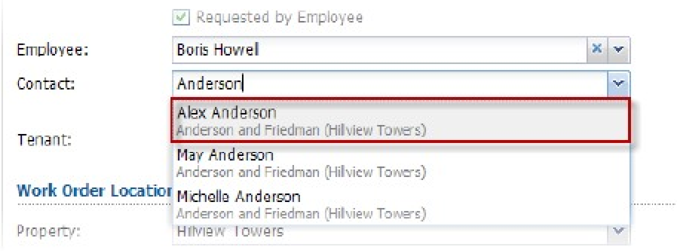

Requester Information

☑ Requested by Employee

Employee: Boris Howell

Contact: Alex Anderson

7. 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

Alex Anderson
Anderson and Friedman (Hillview Towers)

May Anderson
Anderson and Friedman (Hillview Towers)

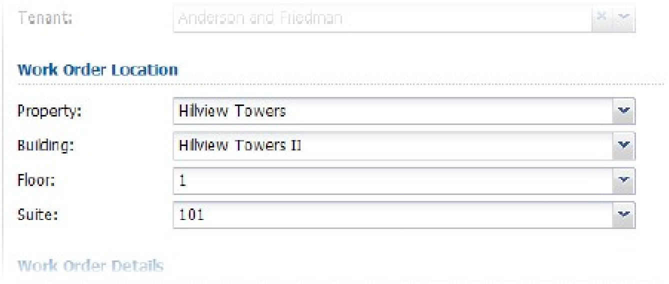
Michelle Anderson
Anderson and Friedman (Hillview Towers)

Tenant:

Work Order Location

Property: Hillview Towers

8. 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: Hillview Towers

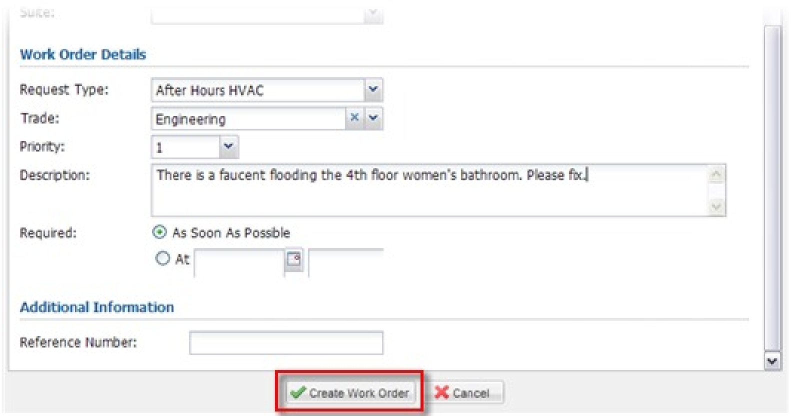
Building: Hillview Towers II

Floor: 1

Suite: 101

Work Order Details

9. Next, scroll down to the Work Order Details section.
10. Using the fields provided, select a **Request Type**, **Trade** and **Priority**.
11. Next, fill in a description for the work order.
12. 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.
13. When you are finished, click **Create Work Order**.


Work Order Details

Request Type: After Hours HVAC

Trade: Engineering

Priority: 1

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

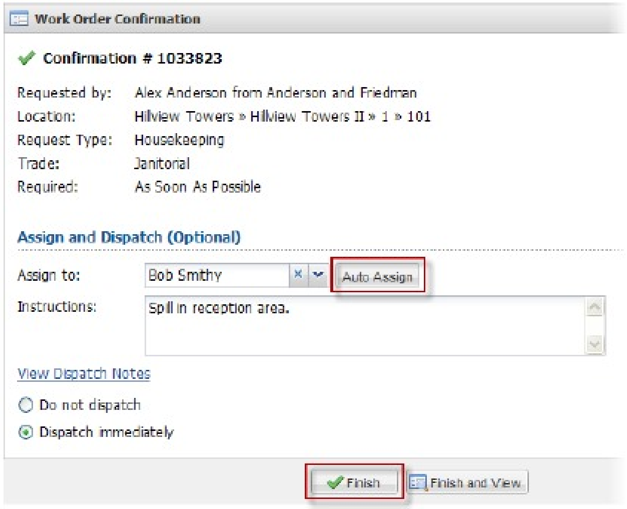
Required: ● As Soon As Possible

○ At

Additional Information

Reference Number:

14. The Work Order Confirmation screen is displayed. This contains a summary of all information entered.
15. 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.
16. If there are any dispatch notes, they will be listed beneath the Instructions field.
17. 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.
18. 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 Smithy
Instructions: Spill in reception area.

Auto Assign
View Dispatch Notes

○ Do not dispatch
● Dispatch immediately

Finish
Finish and View