

Work Order Rollout

iValua/SchedulePro Integration | 2017



The big picture doesn't just come from distance; it also comes from time. - Simon Sinek

THE ECONOMICS OF TRUST

 Trust =  Speed  Cost

 Trust =  Speed  Cost

Current Issues

- Timeframe between work and invoice
- Discussion on different options
- Agree on price or come close
- Timing of invoice submission, approval and coding (tracking)

East Repair Inc.



432 Amsterdam Avenue
New York, NY 10023

Bill To	Ship To	Invoice #	00234
John Smith 2 Court Square Long Island City New York, NY 11201	John Smith 624 Lexington Avenue 6th Floor New York, NY 10022	Invoice Date 03/25/2014	
		P.O.# 17420514	
		Due Date 04/09/2014	

QTY	DESCRIPTION	UNIT PRICE	AMOUNT
1	Front and rear brake cables & Throttle cable	56.00	56.00
1	New set of pedal arms	182.00	182.00
3	Labor 3hrs	25.00	75.00
	Subtotal		313.00
	Sales Tax 5.0%		15.65
	INVOICE TOTAL		\$328.65

Terms & Conditions

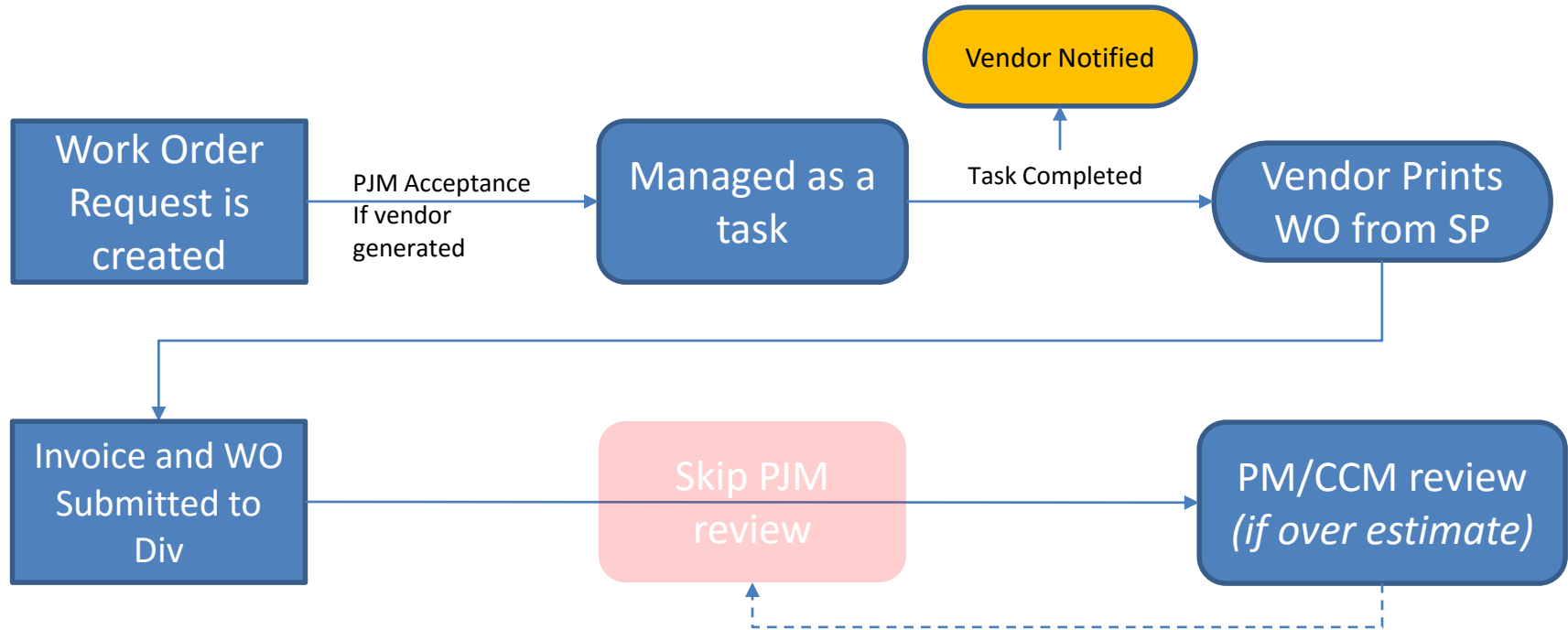
Payment is due within 15 days

Citybank, N.A.
Account number: 2345678
Routing: 23412

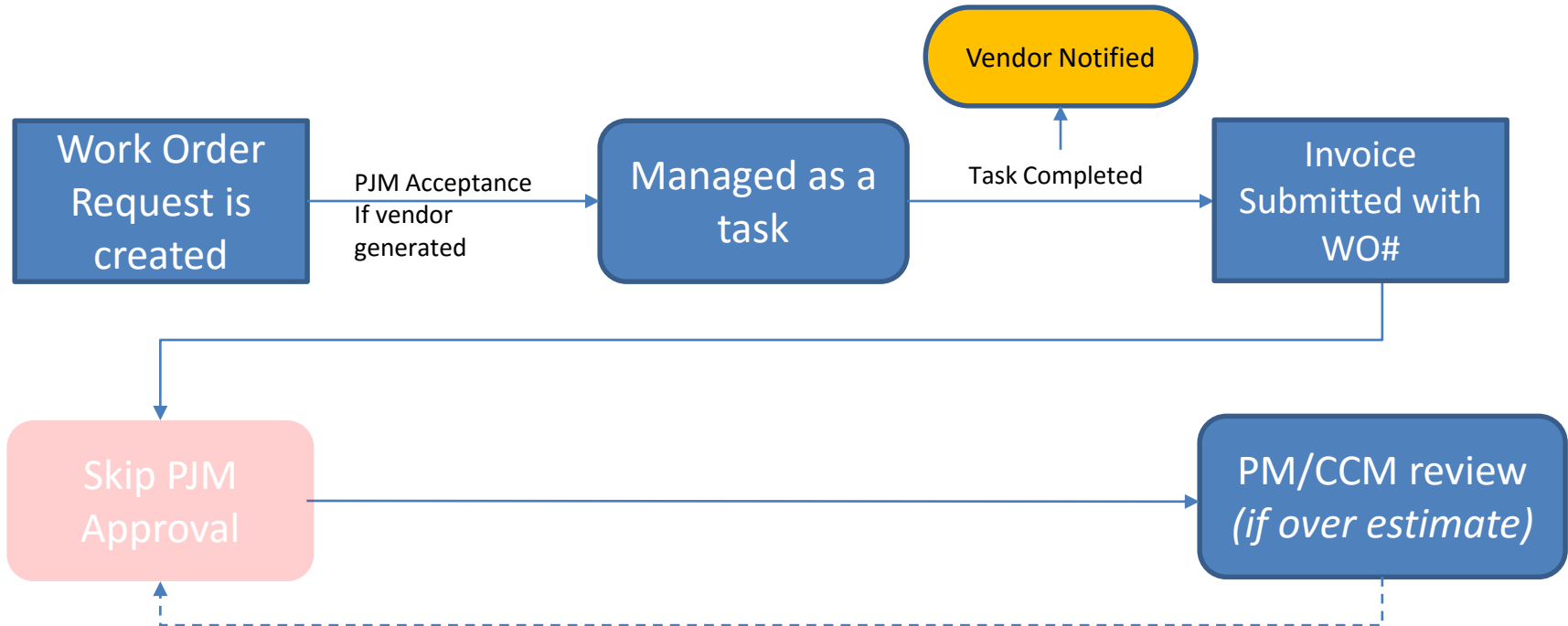


- Ask more questions up front
- Know your options
- Know your cost
- Set Expectations
- Keep the process moving

Work Flow (Pre-iValua)



Work Flow (Post-iValua)



Creation

New Work Order
BLH-AR-0404E
Close

Vendor Name* Vendor #

Attention*

@Jonas Guarino (jguarino) @Kevin Bowser (kbowser) @Bill Abshire (babshire@waynedrywall.com)
 @Steve Eshleman (seshleman@waynedrywall.com)

Items*

Due Date	Item	Ph/Act	Amount	Reason Code	
<input type="text" value="Fri, May 26, 2017"/>	<input type="text" value="10 Sheets of 5/8 Fire grade DW"/>	<input type="text" value="240M - DRYV"/>	<input type="text" value="\$ 340"/>	<input type="text" value="Specification Change"/>	<input type="text" value="X"/>
<input type="text" value="Fri, May 26, 2017"/>	<input type="text" value="Install 10 sheets of DW"/>	<input type="text" value="240L - DRYV"/>	<input type="text" value="\$ 455"/>	<input type="text" value="Specification Change"/>	<input type="text" value="X"/>
Total Amount:			<input type="text" value="\$ 795"/>		

+

Comment

Code Change in Fairfax county requires 5/8 fire rated drywall on exterior walls that are within 10' of BRL. Need to remove existing DW and install/finish new.

Tags

|

Files

No files attached

Attach File

Create
Save as Draft
Cancel

- Price Not Required
- Reason code for each item
- Items can have different due dates
- Phase/Activity can be anything in CVT
- Comments have no limit
- Tags are custom
- Attach Files
- Save as a draft
- See [Work Order Guide – New WO](#)
- See [Work Order Guide – Reason Codes](#)

Management

Work Order Summary Run Report									
✓	DCLU	WO#	Title	Vendor	Attention	Total	Due Date	Status	
<input type="checkbox"/>	BLHAR0251A	253	Abc/bradco Supply Corp - 253	ABC/BRADCO SUPPLY CORP	Sean Connaghan	\$0.01	Wednesday May 31	Waiting for Approval	
<input type="checkbox"/>	BLHAR0251A	255	Abc/bradco Supply Corp - 255	ABC/BRADCO SUPPLY CORP	Jonas Guarino	\$0.01	Wednesday May 24	Open	
<input checked="" type="checkbox"/>	BLHAR0404E	258	Wayne Drywall - 258	WAYNE DRYWALL	Jonas Guarino, Kevin Bowser, Bill Abshire, Steve Eshleman	\$795	Friday May 26 - Friday May 26	Open	
<input type="checkbox"/>	BLHAR0420G	225	Granite Source,inc. - 225	GRANITE SOURCE,INC.	Jonas Guarino	\$0.01	Wednesday May 31	Draft	
<input type="checkbox"/>	BLHAR0420G	200	Granite Source,inc. - 200	GRANITE SOURCE,INC.	Jonas Guarino, Melissa Miller	\$0.01	Tuesday May 30	Completed	
<input type="checkbox"/>	BLHAR0420G	133	W000000133	-	Jonas Guarino, Sean Connaghan, Nicole Sharrett	\$357699	Friday May 19 - Thursday May 25	-	
<input type="checkbox"/>	BLHAR0420G	257	Abc/bradco Supply Corp - 257	ABC/BRADCO SUPPLY CORP	Jonas Guarino	\$0.02	Friday June 2	Open	
<input type="checkbox"/>	BLHAR0420G	260	Abc/bradco Supply Corp - 260	ABC/BRADCO SUPPLY CORP	Jonas Guarino	\$0.03	Monday June 5	Open	

Work Order Report

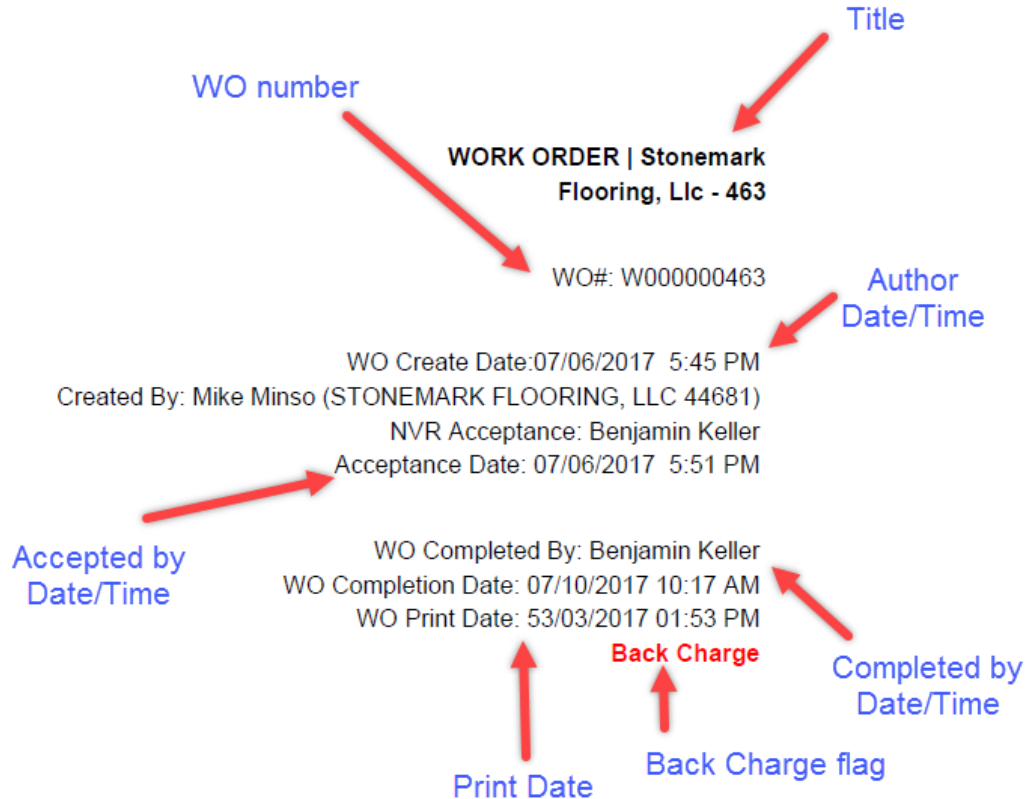
WO#	Title	VendorID	Vendor	Div	Comm	Lot	Notes	Created By	Approved By	Attention	Tags	Date Range	Total
W000000258	Wayne Drywall	82825	WAYNE DRYW	BLH	AR	0404	Code Change in Fairfax county	Sean Connaghan	Sean Connaghan	Jonas Guarino,		05/26/2017 - 05/26/2017	\$795.00

Work Order - Detail Report

WO#	Title	VendorID	Vendor	Div	Comm	Lot	Notes	Created By	Approved By	Attention	Tags	Date Range	Total	Ph/Act	Item	Due	Amount	Reason Code
W000000258	Wayne Drywall	82825	WAYNE DRYW	BLH	AR	0404E	Code Change in Fairfax county	Sean Connaghan	Sean Connaghan	Jonas Guarino,		05/26/2017 - 05/26/2017	\$795.00	240M - DRYWALL	10 Sheets of 5/8"	Friday May 26	\$340.00	Specification Change
W000000258	Wayne Drywall	82825	WAYNE DRYW	BLH	AR	0404E	Code Change in Fairfax county	Sean Connaghan	Sean Connaghan	Jonas Guarino,		05/26/2017 - 05/26/2017	\$795.00	240L - DRYWALL	Install 10 sheets	Friday May 26	\$455.00	Specification Change

See [Work Order Guide – Work Order Summary Report](#) And [Work Order Guide – Report Parameter](#)

Processing Work Order



SchedulePro Admin <noreply@nvrinc.com>

ACTION NEEDED - CTN-B3 | W000000715 (2M QUALITY, LLC)

■ Connaghan, Sean

Retention Policy 28 Day Inbox (4 weeks) Expires 8/25/2017

i This item will expire in 23 days. To keep this item longer apply a different Retention Policy.
You forwarded this message on 7/28/2017 2:28 PM.

WO #: W000000715
 WO Create Date: 07/28/2017
 Created By: vendor test (2M QUALITY, LLC 48816)

Charlotte North (CTN)
 Address: 9920 KINCEY AVE SUITE 190
 City, State, Zip: HUNTERSVILLE, NC, HUNTERSVILLE
 Business:

Sean Connaghan (NVR)
 vendor test (2M QUALITY, LLC 48816)

Community	Lot	Project Manager	Project Manager Email	Product
BETHESDA OAKS PHASE 3	0193	Mark Langford	sconnagh@nvrinc.com	MILAN (MLN00-07)

Item	Due Date	Reason Code	Ph / Act	Amount
Additional Siding	07/28/2017	Repair/Damage	480L - QUALITY INSPECT LBR	\$500.00
Shingles	07/28/2017	Repair/Damage	480L - QUALITY INSPECT LBR	\$125.00

Files Attached: 1

Total: \$625.00

View Work Order

Approve

Approve-Back Charge

Deny

Work Orders

17
Open

18
Pending

15
Overdue

12
New This Week

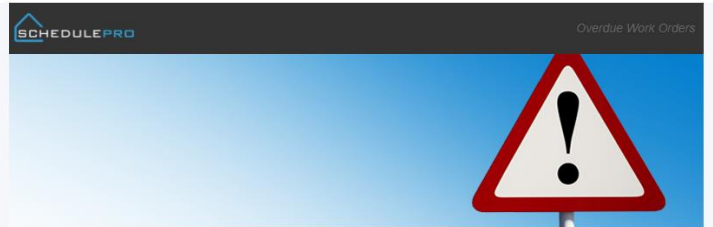
Work Order

Regenerate

Subject: SchedulePro Overdue Work Orders

Sent: 8/3/2017 3:00:02 PM

To: [Redacted]



Below is a list of your overdue work orders.

DCLU	Author	Vendor	WO Title	Production Manager	Due Date
HHS-SK-0417	Jeremy jrichter@rycoinc.net (RYCO PLUMBING LLC 65648)	RYCO PLUMBING LLC	Ryco Plumbing Llc - 678	[Redacted]	07/28/2017
HHS-SK-0421	Jeremy jrichter@rycoinc.net (RYCO PLUMBING LLC 65648)	RYCO PLUMBING LLC	Ryco Plumbing Llc - 679	[Redacted]	07/30/2017
HHS-SK-0418	Todd Brown	RYCO PLUMBING LLC	Ryco Plumbing Llc - 759	[Redacted]	08/02/2017



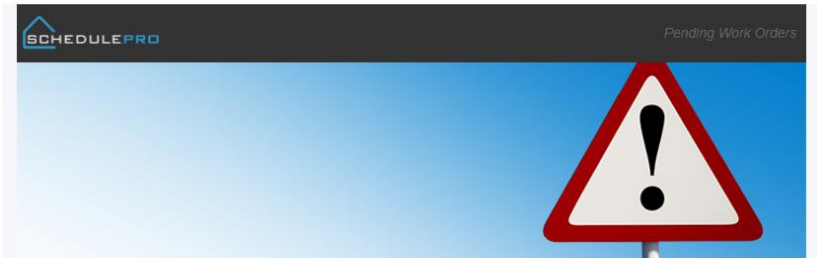
This is an automated email. Please do not respond.

This email is confidential and intended solely for the use of the individual to whom it is addressed. If you have received or copying of this email is strictly prohibited. The terms for the purchase and sale of any property and/or community,

Subject: SchedulePro Pending Work Orders

Sent: 8/3/2017 3:00:02 PM

To: Matthew Atwell (matwell@heartlandluxuryhomes.com)



Below is a list of your pending work orders.

DCLU	Author	Vendor	WO Title	Production Manager	Due Date	Submitted
HHS-H1-0002	Don Dobroski (MASCO AMERICAN BLDG PROD 46940)	MASCO AMERICAN BLDG PROD	Masco American Bldg Prod - 858		08/03/2017	08/03/2017

Training Aids












Work Order Rollout



Sean Connaghan

35 minutes ago

File

- >  [Work Order Guide - Work Order Summary Report.pdf](#)
- >  [Work Order Guide - Vendor invitation Email \(Sample\).pdf](#)
- >  [Work Order Guide - Roll out Plan \(sample\).pdf](#)
- >  [Work Order Guide - Report Parameters.pdf](#)
- >  [Work Order Guide - Regenerate Process.pdf](#)
- >  [Work Order Guide - Reason Codes.pdf](#)
- >  [Work Order Guide - PDF Guide.pdf](#)
- >  [Work Order Guide - New WO.pdf](#)
- >  [Work Order Guide - FAQ.pdf](#)
- >  [Work Order Rollout Schedule \(Phase 1\).pdf](#)
- >  [Work Order Guide - Email Notifications.pdf](#)

Phase 1

Paint and Drywall Vendors

2M – Re-inspection

PEG – Re-inspection

Concrete Pump Truck

Phase 2

Rest of Vendors

*Multi Region Vendors, 2M, PEG trained by Corporate

Work Order Rollout Schedule

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
13	14	15	16	Meeting #1 17	18	19
20	Meeting #1 (Alternative) 21	Meeting #2 22	Meeting #2 23	Meeting #2 (Alternative) 24	Meeting #3 25	26
27	Meeting #3 28	29	30	31	Sept.1	2
3	4	5	6	Meeting #4 7	8	9
10	Go-Live 11	12	13	14	15	16
17	18	19	20	21	Meeting #5 22	23

Meeting #1 – Kick Off

1 Big Meeting with everyone
Review the schedule
Explain training materials
Talk about WO process
ALL Team Members
WO = Work Order

Meeting #2 – Follow-Up

5 Smaller meetings
Q+A on Training Material
Team responsibilities
Corp Responsibilities
All Team Members

Meeting #3 Rollout

9 Smaller meetings
Regionally Led
Discuss unique questions
Talk about region rollout plan
Regional Leads Only

Meeting #4

Pre-Go Live
All Team Members

Meeting #5

Q+A
Performance Charts
Regional Leads Only

Alternative

Catch all meeting meant for those who cannot attend their scheduled call.

8/28-9/8 – Division/Vendor Training

Questions?