

Work Order Guide (WO Summary Report)

Rev. 8-16-2017

Work Order Summary Run Report 2 1 8 9 10 11 + ↗										
<input checked="" type="checkbox"/>	DCLU 3	WO# ^	Title	Vendor	Attention 7	Total	Creation Date	Due Date	Status	Back Charge 12
<input checked="" type="checkbox"/>	CTCR77565	1083	Romanoff Heating & Cooling - 1083 4	ROMANOFF HEATING & COOLING	Michael Tidwell, William Headley, Rich Benson, Ryan Welch, Heather Gonzales, Bradford Cherry	\$0	8/15/2017 2:07 PM	Monday August 14	Open	No
<input checked="" type="checkbox"/>	CTSPK1014B	1078	Rite Rug Company - 1078	RITE RUG COMPANY	Kevin Foutz, Anna Spragins	\$75	8/15/2017 1:37 PM	Tuesday August 15	Completed	No
<input type="checkbox"/>	PTNP40226	1077	Rite Rug Company - 1077	RITE RUG COMPANY	Bradley Miller, Rob Desiderio, Kristen Metz	\$237.14	8/15/2017 12:50 PM	Wednesday August 16	Open	No
<input checked="" type="checkbox"/>	CTSPZ0030	1076	Gary R Rash Plumbing Inc - 1076	GARY R RASH PLUMBING INC	doug brooks, john kiser, Jay Cox	\$0	8/15/2017 12:49 PM	Tuesday August 15	Open	No
<input checked="" type="checkbox"/>	CTSP30255	1075	Rite Rug Company - 1075	RITE RUG COMPANY	Shelby Strickland, Anna Spragins	\$170	8/15/2017 12:47 PM	Wednesday August 16	Open	No
<input type="checkbox"/>	CTCED1027E	1074	Timberlake Cabinet Company - 1074 5	TIMBERLAKE CABINET COMPANY	Luke Huther, Brian Toye, Robert Davis, Elizabeth Salzman	\$390	8/15/2017 12:32 PM	Tuesday August 29	Open	No
<input checked="" type="checkbox"/>	CTSPK1014B 6	1073	Rite Rug Company - 1073	RITE RUG COMPANY	Kevin Foutz, Anna Spragins	\$115	8/15/2017 12:28 PM	Tuesday August 15	Rejected 13	No
<input type="checkbox"/>	CTCED1028D	1072	Timberlake Cabinet Company - 1072	TIMBERLAKE CABINET COMPANY	Luke Huther, Brian Toye, Robert Davis, Elizabeth Salzman	\$390	8/15/2017 12:27 PM	Tuesday August 29	Open	No
<input type="checkbox"/>	CTCED1028C	1071	Timberlake Cabinet Company - 1071	TIMBERLAKE CABINET COMPANY	Luke Huther, Brian Toye, Robert Davis, Elizabeth Salzman	\$480	8/15/2017 12:25 PM	Tuesday August 29	Open	No
<input type="checkbox"/>	CTCED1028B	1070	Timberlake Cabinet Company - 1070	TIMBERLAKE CABINET COMPANY	Luke Huther, Brian Toye, Robert Davis, Elizabeth Salzman	\$390	8/15/2017 12:23 PM	Tuesday August 29	Open	No
<input type="checkbox"/>	CTSPZ0018	1069	Rite Rug Company - 1069	RITE RUG COMPANY	Christopher Decorte, Anna Spragins	\$115	8/15/2017 12:22 PM	Wednesday August 16	Waiting for Approval	No

1. To access the WO report page, you can do so by two ways, either the report navigation button or the Landing Page or Dashboard
2. Clicking Run Report will allow you to search every WO you have access to from one screen (this should be done every time you come to this page)
3. The DCLU stands for Division-Community-Lot-Unit, it is how we identify lots on all of our paperwork, it is also the lot the WO was created for
4. Showing the WO #, these are unique and will never be the same
5. Shows the title of the WO, this generates as vendor name and WO# but can be edited when the WO is being created. This is also the name that shows up in the schedule
6. Checking the box to the left of the WO allows you to export the information three ways, select as many WOs as you need
 - a. PDF – This resembles a PO or invoice, if selected each WO will be its own file
 - b. Summary – This will be a summary of all of the information on each WO in an excel file, great for reporting
 - c. Details – This will be a detail of every item in the WO in an excel file, this might be used to upload into your accounting system.
7. Attention lists all of the SchedulePro users assigned to the WO, there always has to be 1 NVR and 1 Vendor.
8. Total represents the total amount of the WO, if there are several items then it will be the total of those individual items.
9. Creation date is the day/time that the WO was created. WOs should be Accepted or Rejected within 24 hours of their creation.
10. The Due Date is the range of days for each item in the WO
11. Clicking the + will create a new WO, please reference the New Work Order guide for directions on how to use it
12. Referring to #6 in this list, you can Export the WOs by clicking this button ↗
13. Status refers to the state of that specific Work Order, WOs can have the following
 - a. Draft – Created by a user but not active
 - b. Pending – Created and submitted by a vendor, waiting on NVR Acceptance
 - c. Open – Accepted but not Closed
 - d. Completed – Closed by a NVR user, ready for an invoice to be submitted
 - e. Cancelled – No longer Open, can be cancelled by either vendor or NVR users
 - f. Rejected – Created by a vendor and NOT accepted by a NVR user
 - i. A reason can be given when a WO is rejected, this is optional

*WOs should never be Pending more than 24 hours without an action taken, if this consistently happens please contact the PM

*WOs should never remain open more than 72 hours of the Due date if the work is complete, if the Due Date needs to be changed it can be done by adjusting the task. If this consistently happens please contact the PM