

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



MRI COSTS VARY

Prices for a common MRI – of the lower back without dye – can vary wildly, even in the same area¹. A selection within a 100-mile radius of San Francisco:

Castro Valley Open MRI

\$475

Health Diagnostics

\$575

St. Mary's Medical Center

\$857

Norcal Imaging Walnut Creek

\$1,024

Valley Radiology Medical Associates

\$1,378

Norcal Imaging Oakland

\$1,706

Calif. Pacific Medical Center- Sutter Health-
Davies Campus

\$2,607

University of Calif., San Francisco, Mt. Zion

\$6,221

¹ - Prices are collected from consumers, healthcare providers and ClearHealthcosts.com staff research

SOURCE: Clearhealthcosts.com
Janet Loehrke, USA TODAY



$$\$475 - \$50 = \$425$$

$$\$425 \times .20 = \$85$$

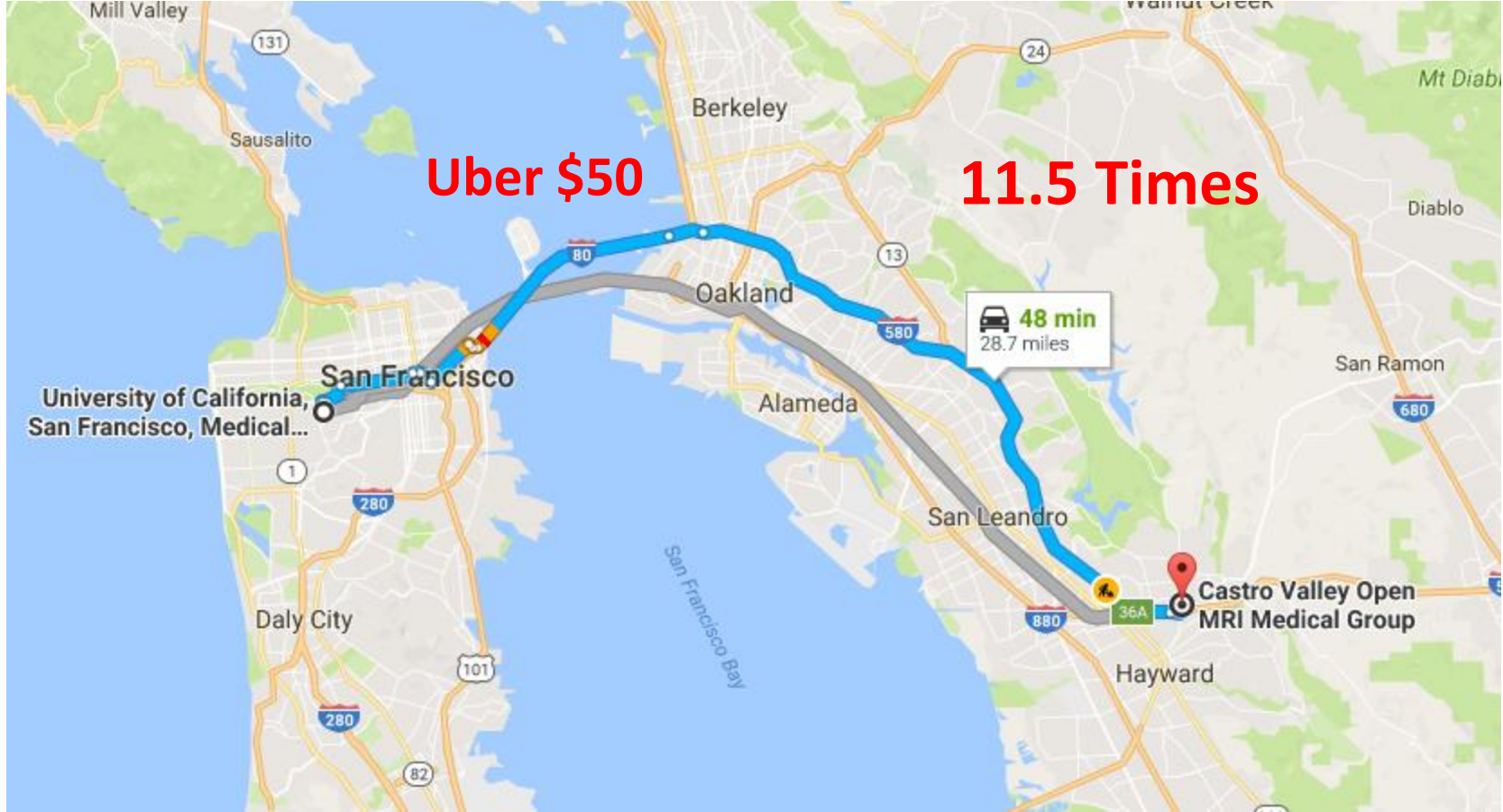
\$135 out of pocket

$$\$6221 - \$50 = \$6171$$

$$\$6171 \times .20 = \$1234.20$$

\$1284.20 out of pocket

Difference of **\$1,149.20**



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)













“hey can you get another hole in 77” – PJM
“ok” - Mike



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

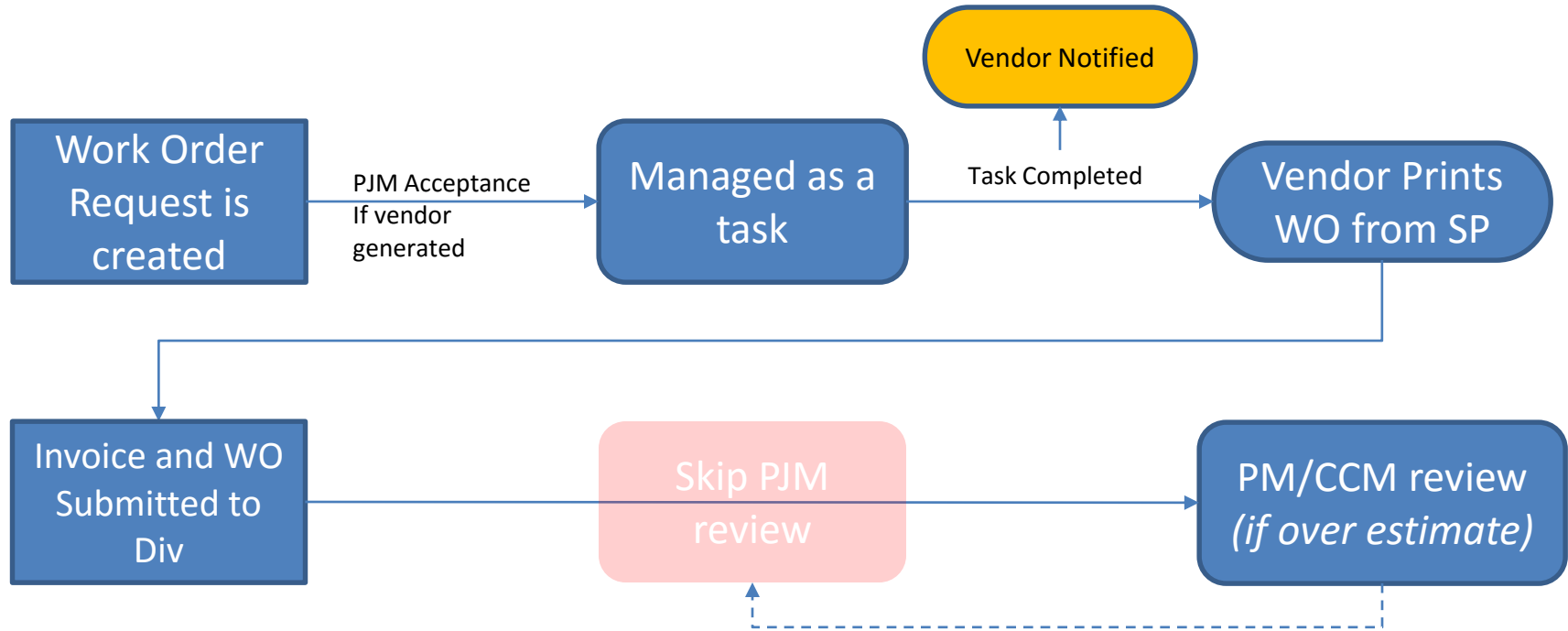
Payment is due within 15 days

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

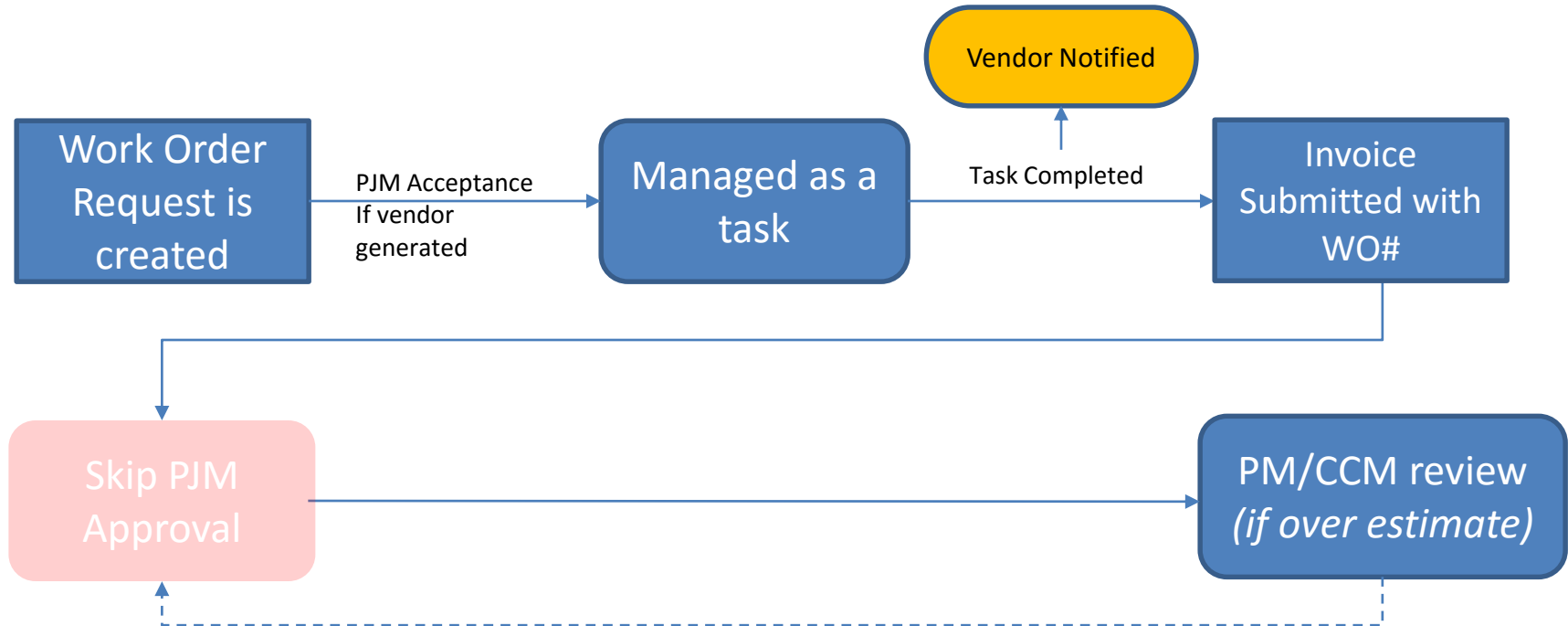


- Ask questions up front
- Know your options
- Know your cost
- Set Expectations
- Keep the process moving

Work Flow (Pre-iValua)



Work Flow (Post-iValua)



Creation

New Work Order
BLH-AR-0404E
Close

Vendor Name* Vendor # 82825

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"/>	10 Sheets of 5/8 Fire grade DW	240M - DRYV	\$ 340	Specification Change	✕
<input type="text" value="Fri, May 26, 2017"/>	Install 10 sheets of DW	240L - DRYV	\$ 455	Specification Change	✕
Total Amount:			\$ 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
- Users can be added to attention at anytime
- 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

Work Order Summary | **Run Report** + [Share]

✓	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

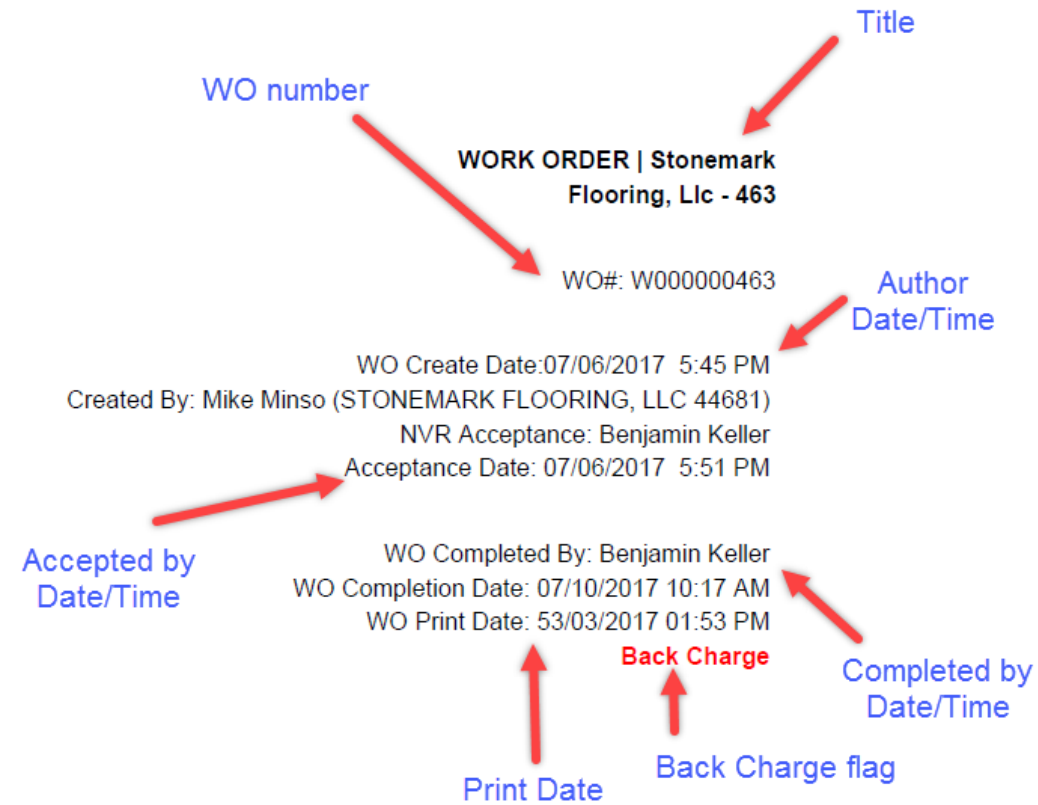
Work Order Report

WO#	Title	VendorID	Vendor	Div	Comm	Lot	Notes	Created By	Approved By	Attention	Tags	Date Range	Total
W000000258	Wayne Dryw all	82825	WAYNE DRYW	BLH	AR	0404	Code Change in Fairfax county	Sean Connagha	Sean Connagha	Jonas Guarino,		05/26/2017 - 05	\$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 Dryw all	82825	WAYNE DRYW	BLH	AR	0404E	Code Change	Sean Connagha	Sean Connagha	Jonas Guarino,		05/26/2017 - 05	\$795.00	240M - DRYWA	10 Sheets of 5/8	Friday May 26	\$340.00	Specification Ch
W000000258	Wayne Dryw all	82825	WAYNE DRYW	BLH	AR	0404E	Code Change	Sean Connagha	Sean Connagha	Jonas Guarino,		05/26/2017 - 05	\$795.00	240L - DRYWA	Install 10 sheets	Friday May 26	\$455.00	Specification Ch

Processing Work Order





SchedulePro Admin <noreply@nvrinc.com>

Connaghan, Sean

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

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](#)

who wants to
BE A VOLUNTEER?



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



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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

Drywall Repair

- Contact Vendor and tell them about the issue
- Vendor provides estimate price and date of completion
- PJM creates work order with details
- After confirmation work is completed PJM closes out WO
- Vendor gets notified
- Vendor prints out WO and submits for payment

Sewer Issue

- Vendor contact PJM and tell them about the issue (utilities in the way)
- Vendor provides estimated price and date of completion
- Vendor creates work order with details
- PJM accepts WOs and work begins
- Work is completed but took 50% longer
- Option #1
 - Submit WO and Invoice, PJM to approve passes along to PM
- Option #2
 - Regenerate WO with updated numbers, skips PJM, goes to PM

Back Charge

- Delivery agent drags refrigerator over hardwood
- PJM contacts vendor asking for estimate price and date of completion to replace 20 boards
- Vendor creates WO, and orders material
- PJM receives WO and accepts with Back Charge
- Work is performed and task is completed and submitted
- Office receives Invoice and places in PJM folder for coding

- 8/10 - Update User Profiles
 - NVR Users with Beta Flag
 - Vendor with Beta Flag and \$ Restriction (if applicable)
- 8/14 - Start generating WOs



There's nothing efficient about innovation. -Simon Sinek

Questions?