



## Work Order Detail Page - Overview

The following is a breakdown of the Edit Work Order information including fields, pulldowns, etc.

### Edit Work Order Details Screen

The screenshot shows the 'Edit Work Order Details' screen. At the top, there's a navigation bar with 'Edit Work Order Details' and a close icon. Below this, the 'Reconstruction' dropdown is set to 'MW1011-037'. The 'Office' is 'MidWest Construction 3'. The 'Company' is 'Allstate Insurance Corporate 4'. The 'Job' is 'MacAfoos 5'. The 'Work Order Progress' is 'New Work Order 10'. The 'Work Order Status' is 'Open 11'. The 'Date Completed' is '12'. The 'Date Suspended From' is '13'. The 'Date of Loss' is '10/15/2019 14'. The 'Date Received' is '02/09/2021 15'. The 'Date Due' is '02/09/2021 16'. The 'Project Manager' is 'Kathleen Mitscher'. The 'Estimator' is 'NOT ASSIGNED'. The 'Work Order Title' is 'Work Order Updated by LP on 02/09/2021'. The 'EMERGENCY' and 'Visible in Home Owner Portal' checkboxes are present. The 'Work Order Details' section includes 'Area', 'Category', 'Sub Category', 'Option', 'Determination', 'Sub/Tech', and 'Employees'. The 'Appointment Dates' section includes 'Site Inspection Appt' and 'Started'.

### Edit Work Order Details Header:

This close-up screenshot shows the header section of the 'Edit Work Order Details' screen. It includes the 'Reconstruction' dropdown (1), the 'MW1011-037' dropdown (2), the 'Office: MidWest Construction 3', the 'Company: Allstate Insurance Corporate 4', the 'Job: MacAfoos 5', the 'Work Order Progress: 10', the 'Work Order Status: 11', the 'Date Completed: 12', the 'Date Suspended From: 13', the 'Date of Loss: 14', the 'Date Received: 15', and the 'Date Due: 16'.

1. View Loss – Click on this icon to review the Loss Details
2. Work Order List – Click on pulldown to select Work Order to quickly access work order for adjusting
3. Office/Site – Informational only
4. Company – Company associated with this job, click on icon to quickly access Company  
*Note: Choosing this option will exit the user from the Edit Work Order Details*
5. Job – Click on the Job icon to quickly access Job  
*Note: Choosing this option will exit the user from the Edit Work Order Details*
6. Show/Hide Contacts – Click on the icon to display the Job Contacts, click once again to hide the Job Contacts from the view
7. Job, Loss Address & Claim # - Informational only
8. Job Progress & Flags – Informational, to view Flag details hover over flag to allow program to display
9. Show/Hide Edit Work Order Header – Click on the icon to hide the header, click once again to display header
10. Work Order Progress - Progress may be selected at this pulldown
11. Work Order Status - Open or Closed selected with this pulldown
12. Date Completed - The date work order services have been completed
13. Date Suspended From - A work order may be created in advance and suspended until the work order is to be issued to the Sub/Tech and/or Employee. This suspended work order is tracked on the Dashboard Loss/Work Order Summary
14. Date of Loss – Date captured from Job Snapshot dates



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15. Date Received – Date captured from Job Snapshot or Administrator has set the date to be captured at the time of the work order creation.

*Note: Administrator may opt to set 'Date Received' to the date of the time of creation. Go to Settings → System Setup → Settings, scroll down to Other Options, check mark 'Use the date received of the loss for a new work order instead of today?'*

16. Date Due – Date work order is to be completed

1. Work Order Title – Provides title to work order

*Note: Titles are created and managed by the Administrator. Go to Settings → System Setup → Settings → Various Lists → Work Order Settings → Work Order Titles*

2. Work Order Update – Record of employee that last updated the work order

3. Emergency – Check mark to denote the work order is requiring immediate attention or action

4. Visible in the Home Owner Portal - Check mark to enable Homeowner to view this work order in the Homeowner Portal

5. Project Manager – Employee assigned as the project manager on the job

*Note: To edit Project Manager, user must go into the Job Details of the job and re-assign the employee*

6. Estimator – Employee assigned as the estimator on the job, this field is editable on the work order by selecting from the provided pull-down.

### Work Order Detail Tab:

1. Save Icon – Clicking on this icon will save any adjustments that were made on this screen.

2. Save & Copy Icon – Save the existing work order and copy information to a new work order to assign, this provides the user the ability to create multiple work orders with the same information.

3. Save & Add Icon – Save the existing work order and open a blank work order for new information.

4. Send WO Icon – Work Order will be sent to Sub/Tech & Employee that have an email included in their record in the database

5. Request Sub/Tech Icon – Clicking on this icon will send an Acceptance Request email to the assigned Sub/Tech on the work order.

6. Email Icon – Opens 'Build Email' function

7. Mail Merge Icon – Opens Mail Merge function

8. Print Icon

9. Delete Icon

10. Area – Select the area from the pull-down

*Note: Area pull-down is created and managed by the Administrator. Go to Settings → System Setup → Settings → Various Lists → Work Order Settings → Work Order Area*



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11. **Category** – Select the category of the trade for services to be performed  
*Note: Category pulldown is created and managed by the Administrator. Go to Settings→System Setup→Categories*
12. **Sub Category** – Select the sub category of the trade services to be performed  
*Note: Sub Category pulldown is created and managed by the Administrator. Go to Settings→System Setup→Categories or to created/manage individual office/sites go to Settings→Office Setup→Categories*
13. **Option** – Not applicable
14. **Determination** – If utilized, this is used primarily by the person performing the services in the field. This is an Employee Permission, should the employee be required to only create work orders it is recommended that this permission be left unchecked.  
*Note: Employee Permissions are provided by the Administrator. Go to Settings→System Setup→Employees to manage Employee Permissions. Also, the admin can edit the Determination descriptions by going to Settings→System Setup→Other Settings; Determinations*
15. **Show Information Detail** – Click on this icon to show the details of the Sub/Tech that is in the Sub/Tech field
16. **† and ‡** - The † symbol represent Sub/Tech that have been approved to perform services on this job by specific Companies, the ‡ symbol represent Sub/Tech that have been approved to perform services on this job.  
*Note: Sub/Tech approved by Companies have been entered into the Company file in the database under the Sub/Tech tab of that Company.*  
*Note: Sub/Tech approved on the Job have been entered into the Job file in the database under the Sub/Tech tab.*
17. **Sub/Tech** – Select the Sub or Tech from the intuitive search this is populated by the sub/techs that have been entered as a Sub/Tech in the database.
18. **Sub/Tech Mapping** – Click on this icon to view the Sub/Tech business locations measured by distance relative to the job loss location. The user may select the Sub/Tech from the Mapping grid screen and be assigned to the work order.
19. **Employees** – Assign more than one Employee to a work order.
20. **Sub/Tech Acceptance** – Allows the user to view if a Sub/Tech has accepted the service work.
21. **Enlarge Icon:** Clicking on this icon will provide the user with enlarged window of the field for the user to review.
22. **Service Pulldown** – Provides the user with pre-set services available in the Category/Sub Categories, these created and managed by the Administrator.  
*Note: To create/manage the Services the Administrator must go to Settings→System Setup→Category*
23. **Enlarge Icon:** Clicking on this icon will provide the user with enlarged window of the field for the user to review.
24. **Action Pulldown** – Provides the user with the ability to record any actions they have taken regarding this work order with pre-set verbiage created and managed by the Administrator.  
*Note: The Administrator may create/manage these pulldowns at Settings→System Setup→Settings→Various Lists→Work Order Settings→Work Order Action Taken*
25. **Action Taken Pulldown** – Provides the user the option to select the pre-set verbiage created and managed by the Administrator.  
*Note: The Administrator may create/manage these pulldowns at Settings→System Setup→Settings→Various Lists→Work Order Settings→Work Order Action Taken*
26. **Service** - Provides the assignee with the services to be performed, this field may be populated by manual entry or thru the Create WO. When Create WO is used the line items will be located in the Estimate Line Items tab.
27. **Action Taken Description** – Provides the user the ability to record any actions they have taken regarding this work order, upon saving the work order this information is automatically moved into the Action Taken History.
28. **Name/Date/Time Stamp Icon** - Clicking on this icon will create in the field the date, time and the employee's name for documenting the individual responsible for the service and/or the action taken. This particular icon may be determined by the Administrator to be automated for ease of the user.  
*Note: Go to Settings→System Setup→Settings→Other Options, check mark "Auto-stamp name/date/time when entering action taken?" and/or "Auto-stamp name/date/time when entering service?"*
29. **Name/Date/Time Stamp Icon** - Clicking on this icon will create in the field the date, time and the employee's name for documenting the individual responsible for the service and/or the action taken. This particular icon may be determined by the Administrator to be automated for ease of the user.  
*Note: Go to Settings→System Setup→Settings→Other Options, check mark "Auto-stamp name/date/time when entering action taken?" and/or "Auto-stamp name/date/time when entering service?"*
30. **Customer Request** – Provides the user with the ability to record any special requests the client may have noted or require of the team performing the Services for this work order.
31. **Action Taken History** – This is the diary of actions that have been performed on this specific work order this history will include the Employee, Technician, Sub/Vendor, etc. that have the access to the work order. Some actions will be automated or manually input by the users.



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### Work Order Detail Tab: Appointment Dates

Appointment Dates <sup>1.</sup>

**Site Inspection Appt** <sup>2.</sup>

Start: 02/15/2021 08:00 AM End: 02/15/2021 11:00 AM

By: Lisa Paris

Subject: Insulation Inspection

Detail: Meet with city inspector for insulation signoff.  
Inspector: [Miley Crosshew](#)  
Telephone #: 555-555-5555

**Started** <sup>3.</sup>

Start: 02/15/2021 08:00 AM End: 02/15/2021 05:00 PM

Subject: MacAfoos: MW19-0005-STR

Detail: All Sub Trade: Review the following Line Items. Total Hours: 19.73

1. View Schedule Icon – Clicking on this icon will provide the user a popup screen to view the Job scheduling. At this time the user may opt to choose another scheduling tab within this popup screen to perform scheduling of this work order.
2. Site Inspection Appt – This section of the schedule on the work order houses the possible manager functions such as meeting inspectors, adjusters, homeowners, etc. Once the Start, End (date/time), By (Employee), Subject and Detail are entered, and work order is saved this information will be found in the Schedule in the Employee tab.
3. Started – This section of the schedule on the work order houses the Service schedule for the Assignees. Once the Start, End (date/time), Subject and Detail are entered and saved this information will be found in the Schedule in the Job, Sub/Tech tabs. This information will be auto-filled should the user have scheduled within the Create WO function, otherwise this is a manual entry by the user.
4. Clear Schedule Icon – Clicking on this icon will clear the entered information in the fields and from the Employee schedule, the user will receive a popup asking for confirmation of the clearing.

### Estimate Line Items Tab:

The Estimate Line Items tab provides the user the ability to view, adjust and/or remove line items from the work order.

Work Order Details | Estimate Line Items | Sign Offs | Notes | Budget\*\* | Pictures | Billing | Request For Bid | Documents

1.

Service: <sup>4.</sup> Review the following Line Items. Total Hours: 56.13

<sup>5.</sup> <input type="checkbox"/>	Level	Room	Cat.	Qty	Hours	Unit	Act	Description
<sup>6.</sup> ▶ <input type="checkbox"/>	Roof		FRM	23.67	1.08	LF	-	Truss - 12/12 slope
▶ <input type="checkbox"/>	Roof		FRM	23.67	1.09	LF	+	Truss - 12/12 slope
▶ <input type="checkbox"/>	Roof		FRM	24.67	1.12	LF	-	Overbuild/Valley Truss - 12/12 slope
▶ <input type="checkbox"/>	Roof		FRM	24.67	1.26	LF	+	Overbuild/Valley Truss - 12/12 slope
▶ <input type="checkbox"/>	Roof		FRM	159.78	1.79	SF	-	Sheathing - OSB - 1/2"
▶ <input type="checkbox"/>	Roof		FRM	159.78	1.83	SF	+	Sheathing - OSB - 1/2"
▶ <input type="checkbox"/>	Roof	Main Roof	RFG	809.84	9.09	SF	-	Sheathing - OSB - 1/2"
▶ <input type="checkbox"/>	Roof	Main Roof	RFG	809.84	8.38	SF	+	Sheathing - OSB - 1/2"
▶ <input type="checkbox"/>	Roof	Main Roof	RFG	10.67	12.04	SQ	+	Laminated - High grade - comp. shingle rfg. - w/ felt
▶ <input type="checkbox"/>	Roof	Main Roof	RFG	9.7	1.02	SQ	-	Additional charge for high roof (2 stories or greater)
▶ <input type="checkbox"/>	Roof	Main Roof	RFG	9.7	1.4	SQ	+	Additional charge for high roof (2 stories or greater)

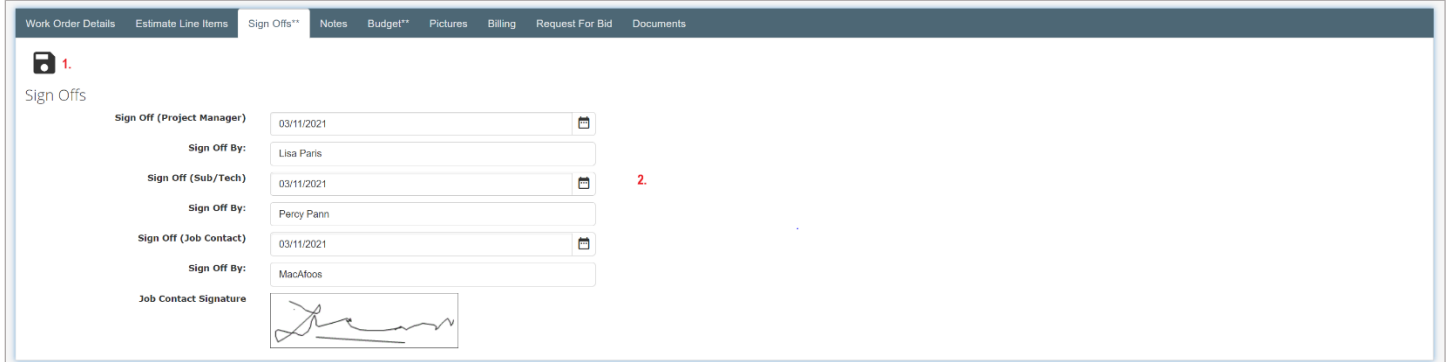
1 | All | Items per page | 1 - 18 of 18 Items

1. Save Icon – Clicking on this icon will save any adjustments that were made on this screen.
2. Delete Icon – Clicking on the delete icon provides the user with a popup that will give the user the ability to remove selected line items from the work order. This action will return these line items to the Create WO in the Unassigned Line Items for future assignment to work orders.
3. Move Line Items Icon – Clicking on the move icon provides the user with a popup to choose the existing active work order to move the selected line items to be placed.
4. Service description box – The service description box appears on this screen as well as the Work Order Details screen. Any adjustments performed in either screen in this description box will adjust the other automatically.
5. Select All line items – This provides the user the ability to select all lines when check marked.
6. Line Items – The line items are viewable by user, the user may opt to click on ▶ to expand the line item to view the Assemblies, Hours, Quantity and Actions. Each column header (Level, Room, Cat., Qty, etc.) has the ascend/descend function.

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### Sign Offs Tab:

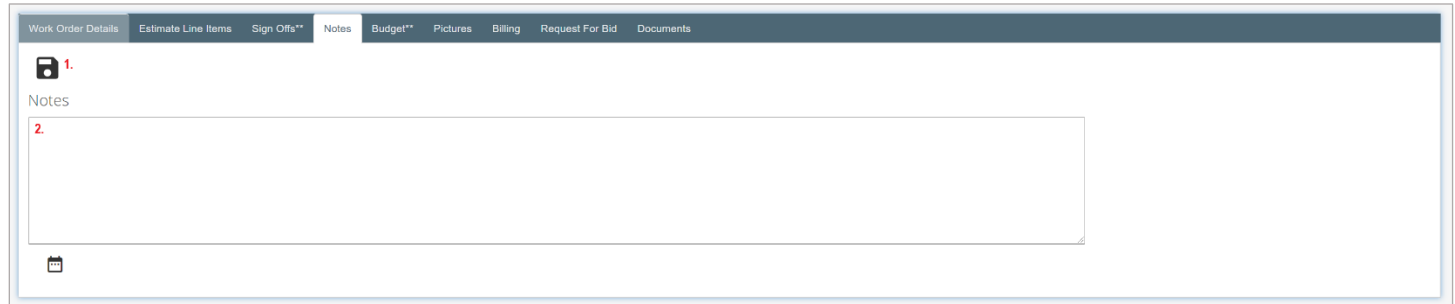
The Sign Offs tab provides the user the ability to view and/or adjust the sign offs (Name/Date/Time) on the selected work order.



1. Save Icon – Clicking on this icon will save adjustments performed on this screen.
2. Name/Date – These fields provides the user the ability to view the sign offs performed or the ability to enter sign offs name/date/time.

### Notes Tab:

This provides the user with any internal notes on this work order. Notes are only displayed in this section and nowhere else, also this area is not reportable.



1. Save Icon – Clicking on this icon will save adjustments performed on this screen.
2. Notes Field – The user may opt to include in this area internal notations regarding this work order.



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### Budget Tab:

The budget tab provides the user the ability to view, adjust and/or remove the created budget on the selected work order. This tab will also provide the user the ability to create a Purchase Order for the assigned work order Sub/Tech.

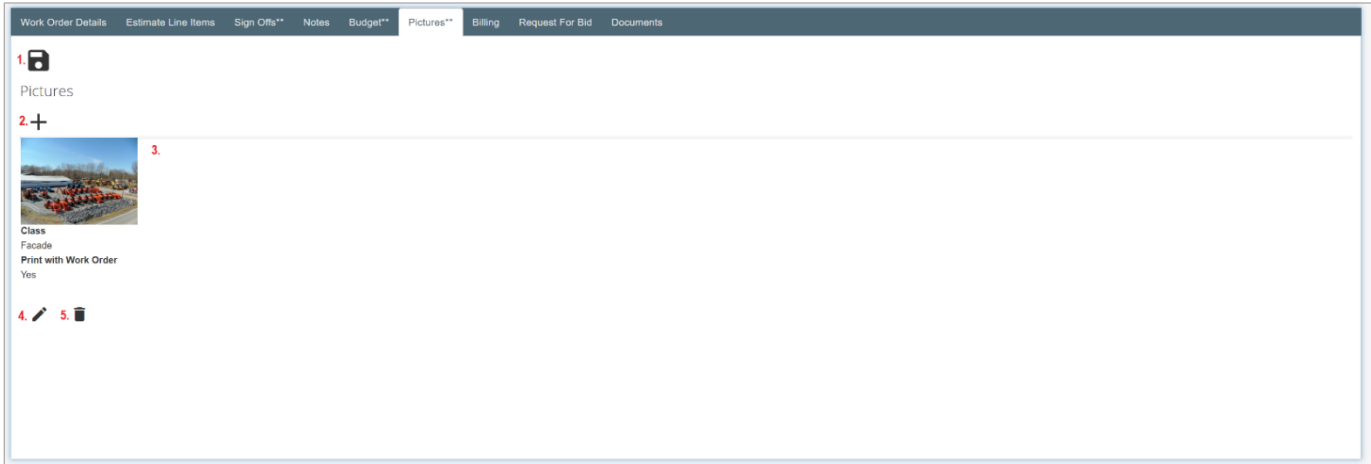
1. Save Icon – Clicking on this icon will save adjustments performed on this screen.
2. Print PO Icon – Clicking on this icon will provide the user the ability to print the PO
3. Print Backcharge Icon – This provides the user the option to backcharge a ‘faulty’ vendor.
4. Delete Budget Icon – Clicking on this icon will delete the created budget.
5. Void PO Icon – Clicking on this icon will void the created PO
6. Send WO Icon – Clicking on this icon will email the WO to the Sub/Tech and Employees.
7. Send PO Approval Icon – Clicking on this icon will email the applicable party to approve the created PO
8. Responsible Party – Not applicable in Restoration Manager
9. Percent Responsible – Not applicable in Restoration Manager
10. PO Number – This field will default to the work order number, the user has the option to adjust this field if necessary.
11. Faulting Work Order – This pulldown provides the user the ability to select the work order the Budget is applicable.
12. Faulting Sub/Tech – This pulldown provides the user the ability to select the Sub/Tech the Budget is applicable.
13. Go to Faulting Work Order – Selecting this icon will exist the budget tab and open the faulting work order.
14. Status – This pulldown provides the user the ability to assign the status of the PO.
15. Approval Level (1, 2, 3) – Provides the user the ability to approve PO’s that are above or between a certain monetary
16. Invoice Number – This is a manual entry by the appropriate accounting party, this will record the invoice number the PO has been paid to the vendor.
17. Invoice Date – This is a manual entry by te appropriate accounting party, this will record the date of the invoice date to the vendor.
18. Payment Date – This is a manual entry by the appropriate accounting party, this will record the date of payment to the vendor.
19. Budget – This area contains the budget that was created by either Create WO or a manual budget entry.
20. Notes – This area provides the user the ability to record notes for the budget/PO
21. Name/Date/Time Stamp Icon - Clicking this icon provides the user with the ease of applying the name/date/time that an adjustment note has been included on the Budget tab.



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### Picture Tab:

The user has the ability to include up to six (6) pictures onto a work order.



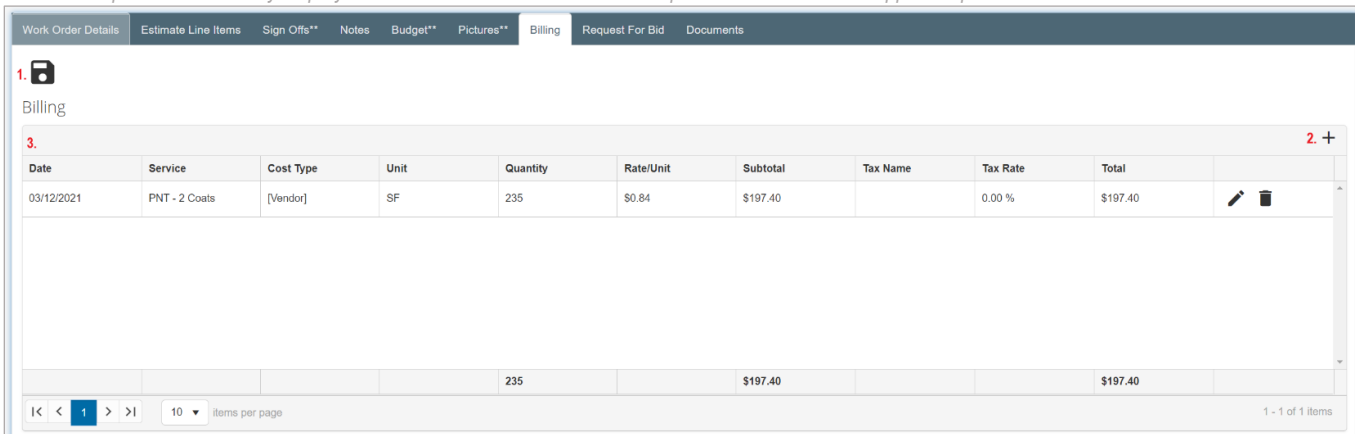
Save Icon – Clicking on this icon will save adjustments performed on this screen.

1. Add Picture Icon – Clicking on this icon will provide the user with ability to upload a picture, denote the picture class and option to print with the work order.
2. Picture Thumbnails – Pictures that are uploaded onto the work order will appear in a thumbnail for viewing, the user has the ability to view the individual thumbnail in full screen by clicking once on the picture. The picture will appear in a new browser tab for viewing.
3. Edit Icon – Clicking on this icon provides the user the ability to change the picture, class and the option to print with the work order.
4. Delete Icon – Clicking on this icon provides the user the ability to remove the picture from the work order.

### Billing Tab:

This tab provides the user the ability to create an estimated cost of services for the selected work order.

*Note: This optional tab will only display when the Administrator submits a request to the Technical Support Department to have this function turned on.*



1. Save Icon – Clicking on this icon will save adjustments performed on this screen.
2. Add Icon – Clicking on this icon provides the user with a popup to manually create the cost line item, this popup contains fields for Date, Service, Cost Type, Unit (sf, lf, ea, etc), Quantity, Rate/Unit, SubTotal, Tax Name and Total. The popup is created and managed by the Administrator.  
*Note: Go to Settings→System Setup→Categories for single office users, Settings→Office Setup→Categories for multiple office users.*
3. Items List Grid - The cost items are viewable by user, the user may opt to click on each column header (Date, Service, Cost Type, etc.) has the ascend/descend function. The user has the ability to adjust the list of cost items using the Edit and/or Delete icon on each cost item.





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### Request for Bid Tab:

The Request for Bid provides the user the ability to send email bid requests to multiple Sub/Techs, once the bids are received from the Sub/Techs the user may award the selected Sub/Tech the services.

Note: This tab is optional for the user, the Administrator is required to adjust the System Settings to allow this tab to be viewable in the database. Go to Settings→System Setup→Settings→Other Options→Check mark 'Show Work Order Request for Bid' and include the Award Email Template & Threshold Amount.

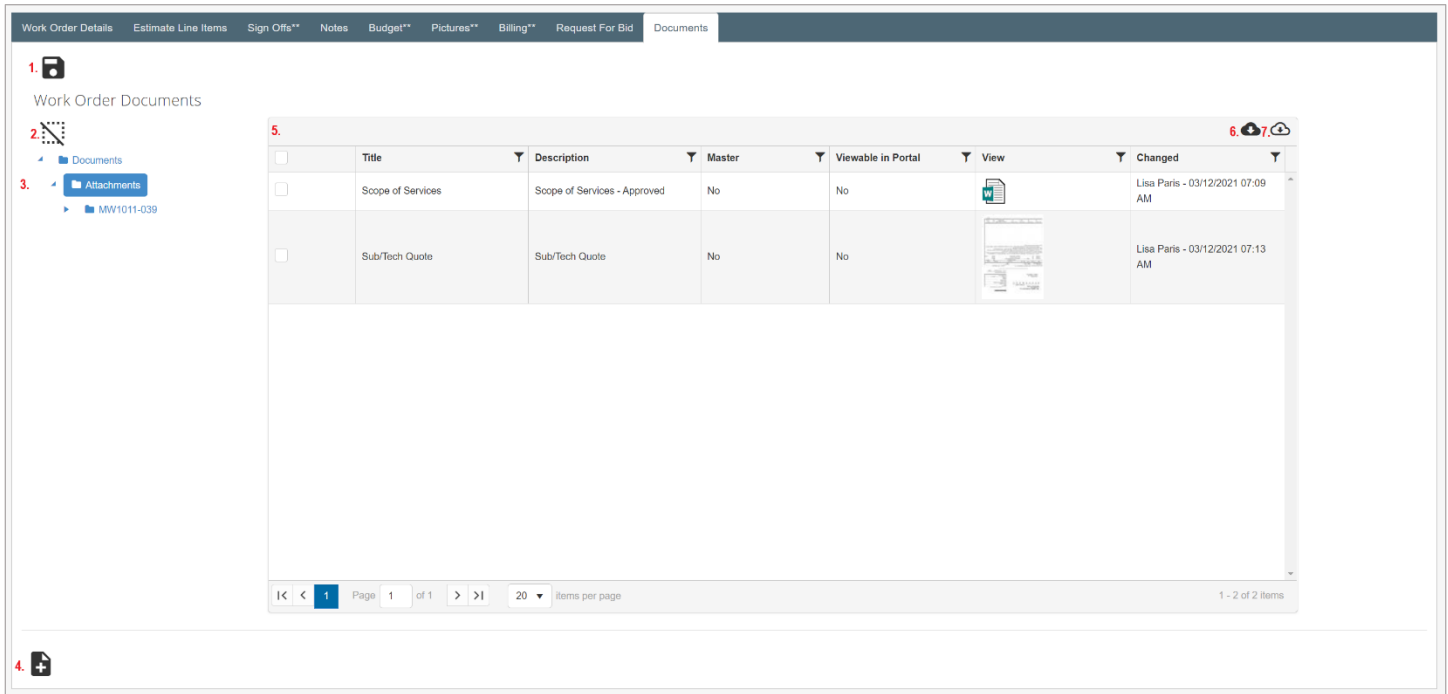
1. Save Icon – Clicking on this icon will save adjustments performed on this screen
2. Send Selected Icon – Clicking on this icon will send the selected Sub/Tech/s the Request for Bid email, email includes the Work Order as an attachment.
3. Print Selected Icon – Clicking on this icon will print the Work Order with the selected Sub/Tech information included on the work order header.
4. Award Sub/Tech Icon – Clicking on this icon will email an Award Email to the selected Sub/Tech, the remaining unselected Sub/Tech/s in the grid will receive a Cancel Email alerting them that the bid has been closed.
5. Sub/Tech Selection Pulldown – This pulldown contains all Sub/Techs that are included in the database.
6. Select Sub/Tech Icon – This icon becomes active for use once the user selects the Sub/Techs to be included in the grid and have been check marked to receive the Request for Bid email.
7. Sub/Tech Mapping Icon – Clicking on this icon provides the user the ability to view the Sub/Techs mileage calculated to the loss address. The user may choose to select the Sub/Techs from this list of Sub/Techs.
8. Sub/Tech Selected View Grid – The grid provides the user the ability to view, adjust Bid Amount and delete Sub/Techs.



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### Documents Tab:

The user has the ability to include documents within the work order, these documents are included with Send WO and the option is provided when using Email.



	Title	Description	Master	Viewable in Portal	View	Changed
<input type="checkbox"/>	Scope of Services	Scope of Services - Approved	No	No		Lisa Paris - 03/12/2021 07:09 AM
<input type="checkbox"/>	Sub/Tech Quote	Sub/Tech Quote	No	No		Lisa Paris - 03/12/2021 07:13 AM

1. Save Icon – Clicking on this icon will save adjustments performed on this screen
2. Deselect Icon – Clicking on this icon will deselect existing selected items
3. Document Folders – System default folders
4. New Document Icon – Clicking on this icon will provide the user to include documents into selected folders
5. View Document Grid – The grid provides the user the ability to view, adjust and/or delete documents. Each column header has the convenience of filter search.
6. Download Selected – Clicking on this icon will download selected documents onto the users' device.
7. Download All – Clicking on this icon will download all documents present in the document grid onto the users' device.