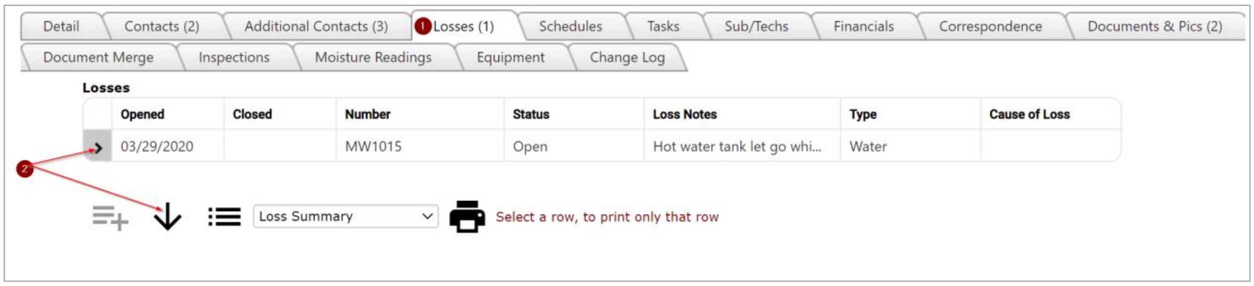
Restoration Manager™

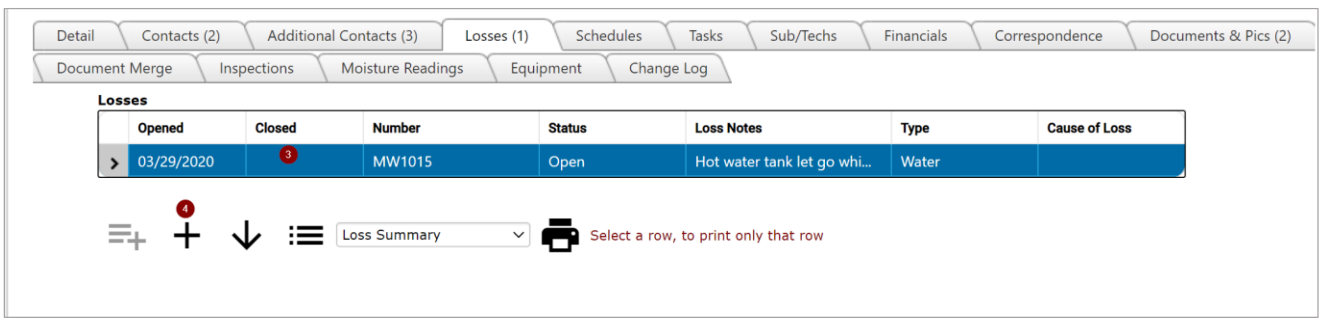
Work Order Creation - Manual

To create a work order manually within the job please review the following steps:

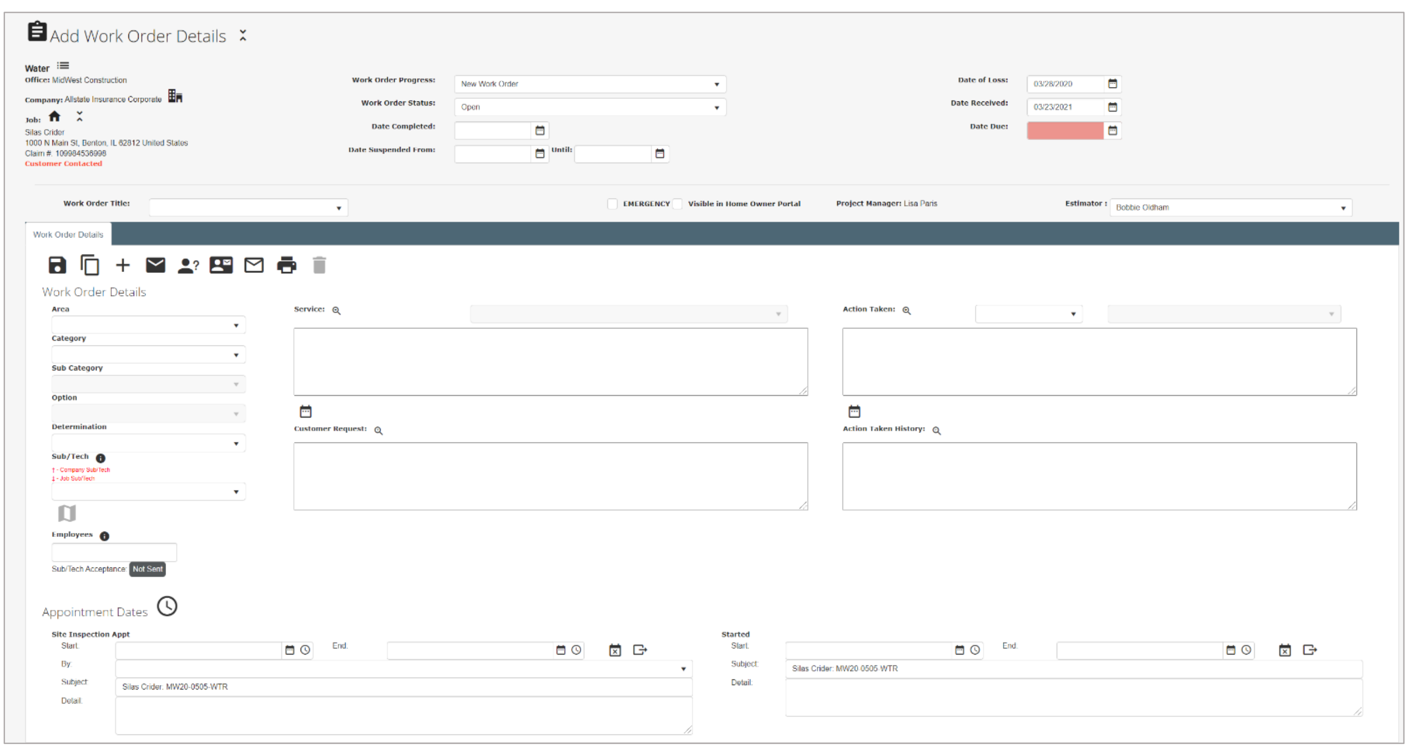
1. Select the job and click on the Loss Tab
2. Expand the Loss Detail by clicking on the > symbol to the left of the Loss Detail or by clicking on the ↓ symbol at the bottom of the screen. Here the user will review existing work orders prior to possibly re-creating an existing work order, once the existing work orders are reviewed the user may proceed with the creation of the new work order.



3. Single click on the Loss Detail to highlight the item in blue and to populate the Add icon (+).
4. Click on the now populated Add icon (+), this will open a new blank work order screen for the user to create.



New Work Order Screen:



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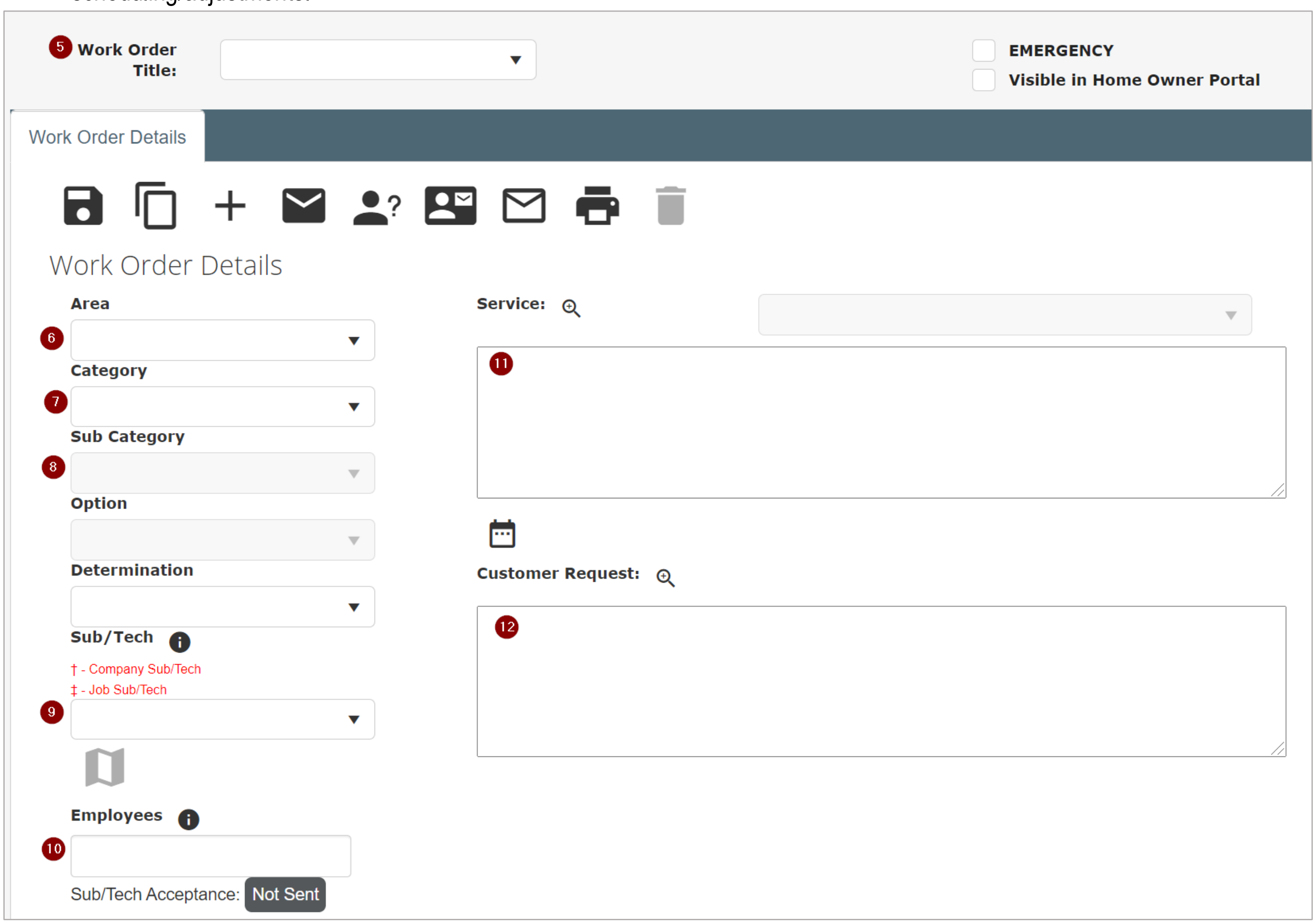
5. Select Work Order Title from dropdown. *Note: This dropdown is created and managed by the Administrator. Go to Settings→System Setup→Settings→Various Lists→Work Order Settings→Work Order Titles*
6. Select Area services are to be performed from the dropdown. *Note: This dropdown is created and managed by the Administrator. Go to Settings→System Setup→Settings→Various Lists→Work Order Settings→Work Order Area*
7. Select the Category of services to be performed from the dropdown. *Note: This dropdown is created and managed by the Administrator. Go to Settings→System Setup→Settings→Categories*
8. Select the SubCategory of services to be performed from the dropdown. *Note: This dropdown is created and managed by the Administrator. Go to Settings→System Setup→Settings→Categories*
9. Select Sub/Tech from dropdown, if this information is not known or is not applicable to this work order then proceed to step 10.
10. Input Employee/s assigned to this work order, if this information is not known or is not applicable to this work order then proceed to step 11. *Note: The user will receive a popup stating the employee will be removed from the Work Order if a schedule date/time is not input on the work order.*
11. Input services to be performed by the assigned Sub/Tech and/or Employee/s. The user may choose to manually input this information or select services from the dropdown. *Note: This dropdown is created and managed by the Administrator. Go to Settings→System Setup→Settings→Categories*
12. Input any specialized customer requests, if this information is not applicable to this work order then proceed to step 13 to input date/time schedule. If date/time is not known at this time proceed to the Save icon to save the work order for future scheduling/adjustments.



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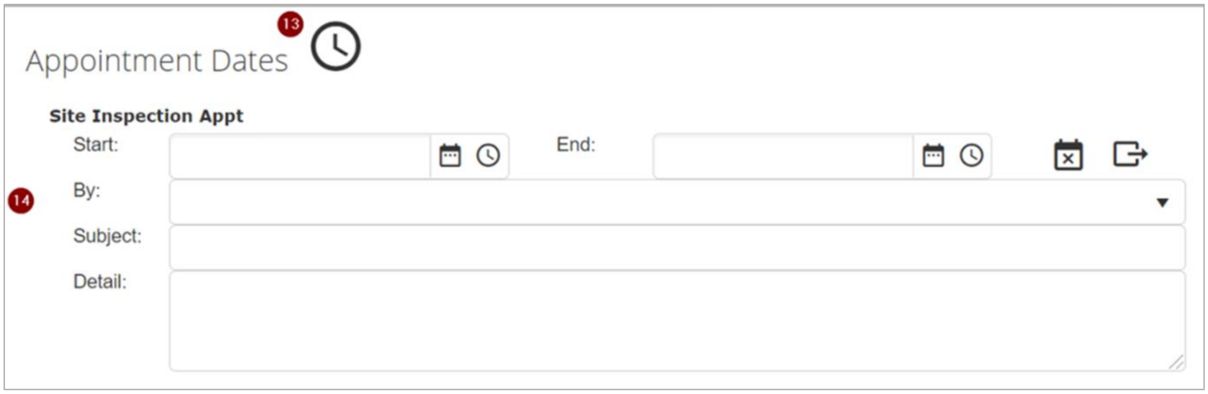
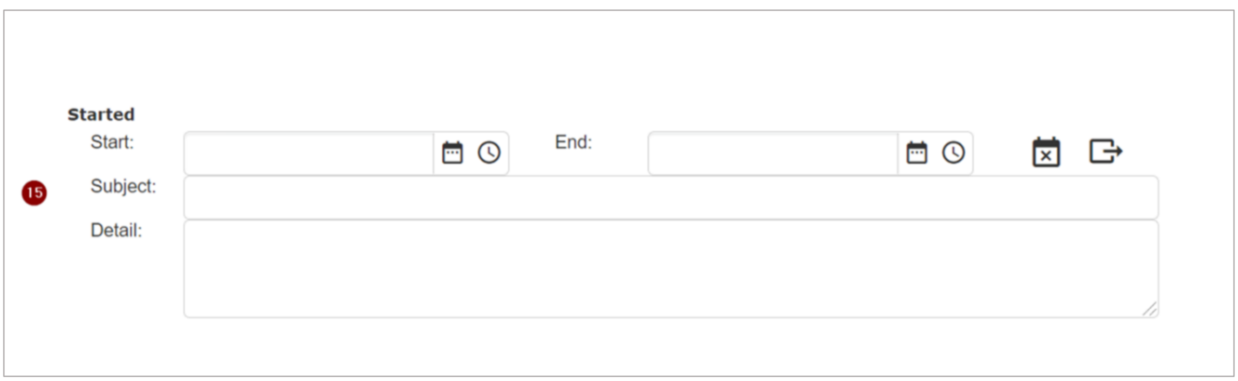
13. The user may opt to click the View Schedule icon to open the Schedule another screen. Here the user will be able to view the Employee, Job, Sub/Tech and/or Production schedule prior to scheduling this work order.
14. Site Inspection Appt provides the user the ability to schedule an employee a date/time and subject of their inspection. Should this not be a necessary schedule for this work order proceed to step 15.



15. Schedule the sub/tech and/or employees to perform the services described in the Service box (see step 11). Select the Date/Time the services are to begin, select the Date/Time the services are to end. Select this information into these fields by selecting the calendar icon and the time dropdown. Once the date/time are in place the user may opt to input the subject and/or add any details to the schedule. Click the Save icon to complete these actions.



Once the work order is saved the user may opt to adjust/add additional information to the Work Order such as a Budget, Documents, Pictures, etc.