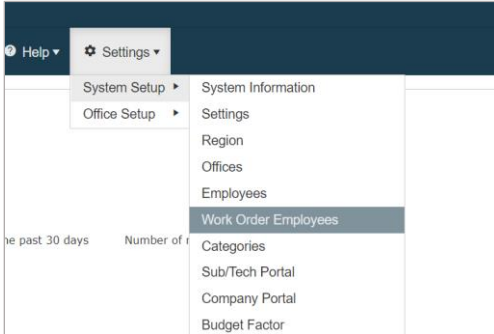




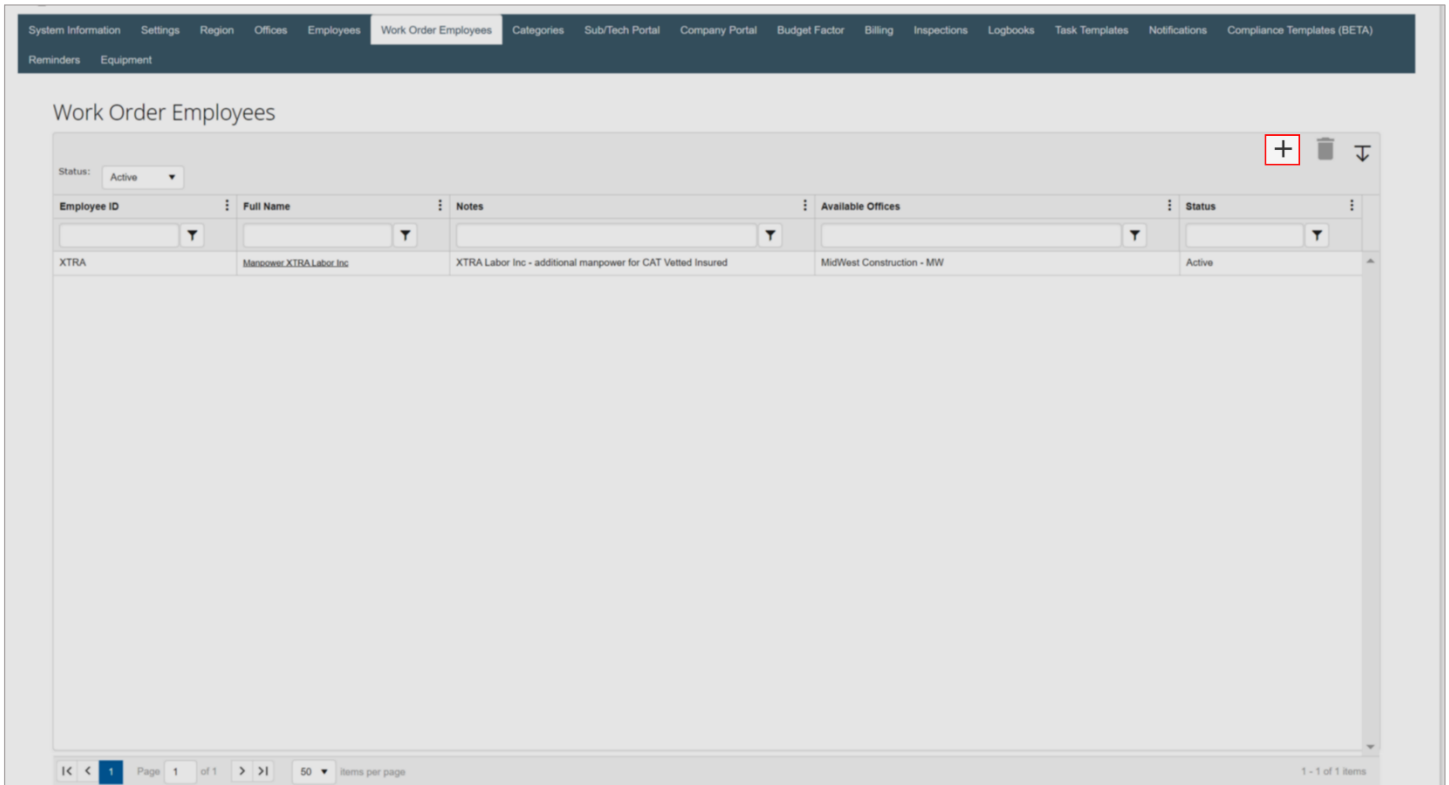
Work Order Employee - Setup

To setup Work Order Employees to be available for use go to Settings→System Setup→Work Order Employee

Note: Work Order Employees are typically external labor that will be assigned to work orders, internal employees that are included in your Employee database will not be required to be included in this area as they are already included for use in this field on Work Orders.



Click on the Add icon to create a new work order employees, this will provide a popup to include the information about the Work Order Employees.





Work Order Employee - Setup

Enter the Work Order Employees information, all fields are required *except* 'Notes' to save.

Work Order Employees

Information

Employee Id:

1 First Name:

Last Name:

Status:

Notes:

Office Information

2 Office :

3

4

1. Information –

- The Administrator will include an Employee Id, this may be an identifier such as an accounting number, nickname, etc.
- The First Name and Last Name must be entered for the system to save.
- The Status of a Work Order Employees may be adjusted by the Administrator, the Active status will allow this Work Order Employees to populate in the Employee field on a work order. The Inactive status will remove this Work Order Employees to not populate in the Employee field on a work order, it will remain in the area for future activation. The Administrator has the ability to change this status at any time.
- Notes may include various information such as seen above.

2. Office Information –

- This information will default to the office or offices that the Administrator is currently logged into at the time of the entry. The Administrator may include or remove the offices that this Work Order Employees are to populate for use on the work order.

3. Save Icon –

- Click the Save icon once the information is entered to complete action.

4. Cancel Icon –

- Click the Cancel icon to disregard and close this screen.



Work Order Employee - Setup

To edit an existing Work Order Employee, click once on the underlined 'Full Name' to open the information for the selected Work Order Employee to be edited.

Employee ID	Full Name	Notes	Available Offices	Status
XTRA	<u>Mansover XTRALabor Inc</u>	XTRA Labor Inc - additional manpower for CAT Vetted Insured	MidWest Construction - MW	Active
Valiant	<u>The Valiant Cleaners</u>	Insured Vetted	MidWest Construction - MW	Active

To Delete an existing Work Order Employees

Employee ID	Full Name	Notes	Available Offices	Status
XTRA	Mansover XTRALabor Inc	XTRA Labor Inc - additional manpower for CAT Vetted Insured	MidWest Construction - MW	Active
Valiant	The Valiant Cleaners	Insured Vetted	MidWest Construction - MW	Active

1. Click once on the selected Work Order Employee to be removed, this will activate the Delete icon for use.
2. Click on the Delete icon, this will provide a popup warning. To proceed with the deletion, click the OK button on the popup warning, the system will proceed with the deletion and remove the work order employee from the list.

rmtraining.restorationmanager.net says

Are you sure you want to delete this Work Order Employee?