

2023

Work Order Playbook



Service Department

2023

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PURPOSE

Define the responsibilities of each role in the service department. Provide step by step instructions for the work order process from the creation of a new work order to the final billing and close out. Clearly define who is responsible for the information entered into a work order. Show which information is visible to which roles internally and which information is visible to clients.

RESPONSIBILITIES

ACCOUNT MANAGER

- Sales process
- Technical consultation to clients
- Promotion of key services
- Establish and maintain intimate client relationship
- Client information
- Site information
- Vendor quotes
- Determine the scope of work
- Enter work ordered notes - detailed scope
- Enter work summary - brief scope summary and scheduling details
- Create estimates
- Create work orders with complete and accurate information
- Upload all relevant documents into Spectrum - proposal, drawings, product data sheets, quotes, etc.
- Provide complete and accurate work order information to operations team at turnover
- Answer scope questions from service technicians

SERVICE MANAGER

- Review work orders
- Schedule work order
- Coordinate workforce
- Manage projects
- Look ahead and understand project pipeline
- Manage department

SERVICE SUPERVISOR

- Review work orders
- Ensure work orders are ready to schedule
- Manage service technicians
- Answer methods and code questions from technicians

-
- Coordinate workforce
 - Coordinate shutdowns
 - Ensure work is done safely

SERVICE COORDINATOR

- Review work orders
- Schedule work orders
- Coordinate workforce
- Monitor and update assignment dispatch statuses – Go back, Unassigned, Finished

SERVICE TECHNICIAN

- Uphold service pledge
- Verify scope
- Check all notes sections field connect
- Perform work
- Enter notes - Daily Summary, 100% Complete
- Update contact information
- Closeout assignments in Field Connect
- Update dispatch statuses - Assigned, Go Back, Finished
- Call supervisor for - Methods, safety, anything non scope related
- Call account manager for -Scope questions and changes

PROJECT ENGINEER

- Submittals
- Purchase orders
- Tracking material
- RFI's
- Permits
- Subcontracts
- Reports
- Update dispatch statuses - Needs Parts, Parts Ordered, Unassigned

PROJECT ACCOUNTANT

- Bill work orders
- Close work order
- Create sites
- Create customers
- Accounts receivable/collections
- Setup service technicians in Spectrum
- Payroll functions
- Inventory

DISPATCH STATUS DEFINITIONS

Description	Dispatch Code	WO Status	Step	Denver
Assigned	A	Assigned	Schedule	WO is assigned to a technician
Ryan	C	Hold	Review	Ryan has placed WO in a hold because it is not ready to schedule.
Finished	F	Finished	Perform	Assignment is finished. This removes the assignment from techs assignment list in field connect on tablet. If there are no more assignments in Field Connect for the WO, the work order is put into "Finished" status in spectrum. There can be multiple assignments for one work order. Tech should not put assignment in finished status unless assignment is finished. Otherwise use "GoBack" status.
NeedsParts	K	Hold	Review	Indicates parts need to be ordered before work can be scheduled.
Manager	M	Hold	Review	Indicates the need for service supervisor review prior to scheduling. (Permits, long lead material, manpower, subcontractors, shutdowns, safety, engineered drawings, documentation, project engineer support, permitting, scheduling, and anything else that is required to perform the work.)
PartOrdered	P	Hold	Review	Material has been ordered and has not yet shipped.
Go Back	R	Hold	Perform	Return trip is needed to complete assignment. This keeps assignment on tech's assignment list in field connect. Keeps work order open in spectrum. Requires communication with service coordinator. What are you going back for and when?
Scheduled	S	Assigned		Used for specific date required date by customer
Cust Hold	T	Open	Review	WO is on hold due to customer request
Unassigned	U	Open	Schedule	WO is ready to schedule. All material received and review has taken placed.
WO Recvd	W	Finished	Bill	Project accountant uses this code to indicate invoice has been sent to customer
% Billing	Z	Assigned	Bill	Used for progress billing when a work order can be billed as the work is being done instead of a lump sum when the work is complete. This is determined case by case and is typically based on the value of the contract.

SPECTRUM INFORMATION VISIBILITY

Information entered in Spectrum is visible to other Encore employees only except for **Invoice Notes**. **Invoice Notes** are used by project accountants to create invoices for customer billing which are visible to customers.

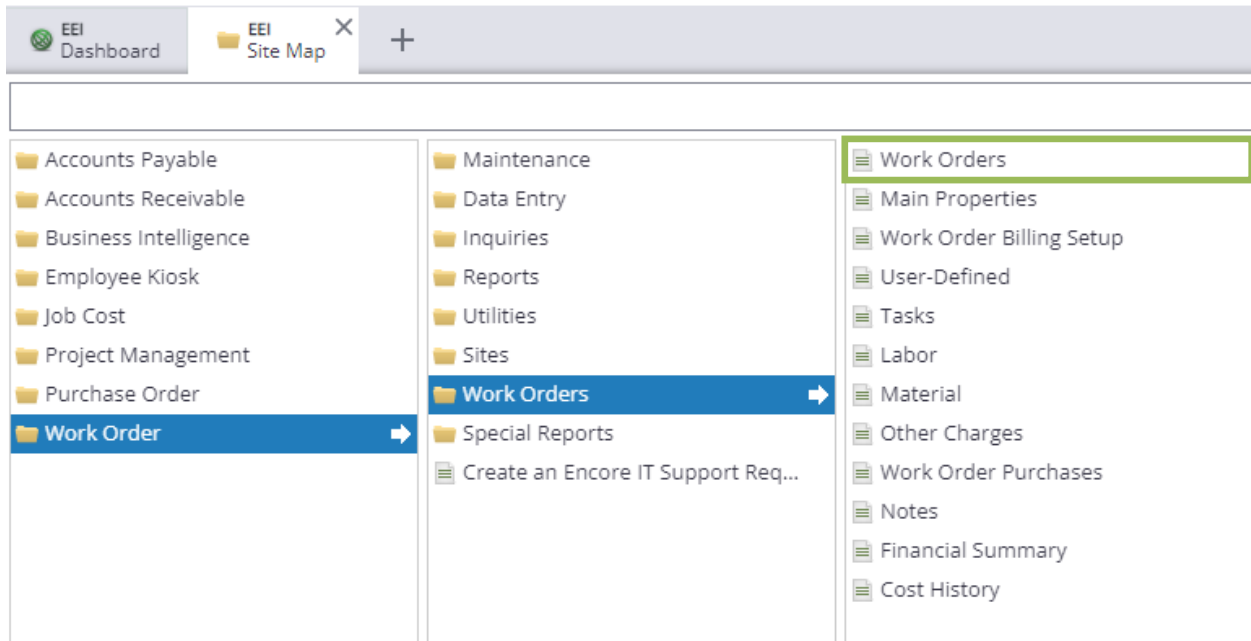
SALES PROCESS

- Customer requests work
- Account managers request customer, site, work order contact information.
- Determine scope of work.
- Understand specific requirements and considerations.

CREATE WORK ORDER

CREATE NEW WORK ORDER

1. Go to work orders on the site map.



2. For existing sites and customers, select new and search existing sites and customers in the drop-down menus. For new customers and sites, fill out the new customer or site form and send the request form to the project accountant. Project accountants are responsible for creating sites and customers.

Search Work Order Types

Type	Description
01	Troubleshooting & Repair
02	MOVES/ADDS/CHANGES
03	Svc & Dist Upgrade (Major)
04	Fire Alarm (Only)
05	Major Remodel & Additions
06	After Hours Emergency
07	Warranty
08	Lighting Retrofit/Upgrades
09	Site Lighting
10	Snow Melt / Heat Tape
11	EM Power Systems (Gen/UPS)

OK Cancel

- Search for the appropriate customer from the dropdown if different from the default and select OK.

New Work Order

Work order: 62236 For Site
 Site code: 2714 Lakewood Office
 Work order type: 02 MOVES/ADDS/CHANGES
 Customer: 2434 Encore Electric

OK Cancel



- Enter information as prompted in the **Info** on the **Main** tab. Phone and Contact note are the primary contact information for the work order and should be the first call for the service technician. Contact note and phone number are critical information and should be checked for accuracy when each work order is created. Customer job number is rarely utilized.

Info

Work order type	02	MOVES/ADDS/CHANGES
Name	Lakewood Office	
Service contract		
Customer P.O.	TESTPO	
Customer's job	TESTJOB	
Phone	720 123-4567	720 486-5311
Contact note	Gabe Green	
Customer code	2434	Encore Electric

6. Enter information under **Dispatch** section.

Dispatch

Zone	HQ		Lakewood Internal WO
Priority	04		Schedule
Case type	COJW		Colorado Journeyman License
Price method	T+M		
Quote	1.00	Hours	1.00
Est. arrival	TEst		


Priority is how soon the work order needs to be scheduled.


Search Case Types

Case type	Description
BFA	Boulder Fire Alarm License
CHB	Centura Health Badge
COJW	Colorado Journeyman License
CSA	Co Safety/Coors Badge
CSFA	Co Springs Fire Alarm License
DFA	Denver Fire Alarm License
DIV17	Tele/Data Experience
EWC	Energized Work Certification
FAA	FAA Clearance
FACPR	First Aid/CPR Certification
FLC	Fork Lift Certification
GSA	Government Security Clearance
HCC	Healthcare Certification
IND	Industrial Experience
IR	IR Certification
MTJW	Montana Journeyman License
NEJW	Nebraska Journeyman License
PSFH	Penrose St. Francis Badge
UTJW	Utah Journeyman License
VVH	Valley View Hospital Badge
VVMC	Vail Valley Medical Badge
WYJW	Wyoming Journeyman License

7. Select the appropriate **Dispatch Code**.

Status _____

Dispatch code  Assigned

Status type  Assigned

This section contains dispatch codes used by all business units that create work orders such as Technology Solutions and Prefabrication. The relevant codes for Denver service are indicated below.

Search Dispatch Status Codes				
<input type="text" value="New"/>				
Dispatch status	Description	W.O. status type	Flag color	Custom icon
A	Assigned	Assigned	GREEN	
B	NotDeliver	Open	OLIVE	
C	Ryan	Hold	ORANGE	
D	Rejected	Hold	RED	
E	Follow Up	Open	RED	
F	Finished	Finished	BLACK	
G	Delivered	Open	BLACK	
H	Parts Here	Open	OLIVE	
I	In Progres	Arrived	BLUE	
J	PF Open	Open	PURPLE	
K	NeedsParts	Hold	YELLOW	
M	Manager	Hold	GRAY	
P	PartOrderd	Hold	PURPLE	
Q	Quote Pend	Hold	VIOLET	
R	Go Back	Hold	MAROON	
S	Scheduled	Assigned	CYAN	
T	Cust Hold	Open	GREEN	
U	Unassigned	Open	PINK	
W	WO Recvd	Finished	GOLD	
X	Flex	Assigned	YELLOW	
Z	% Billing	Assigned	PINK	P

All newly created work orders should be put in **Unassigned**, **NeedsParts**, or **Manager**.

Needs Parts indicates that parts should be ordered before the work can be scheduled.

Manager indicates the need for service supervisor review prior to scheduling. (Permits, long lead material, manpower, subcontractors, shutdowns, safety, engineered drawings, documentation, project engineer support, permitting, scheduling, and anything else that is required to perform the work.

Unassigned indicates that the work order is ready to schedule. Simple work order with no special requirements and does not require supervisor review. (changing a receptacle)

8. Complete the 'Work Summary' section with any information that affects scheduling. This section is limited to 250 characters and should contain the following:
 - a. Brief scope description in 10 words or less
 - b. Number of technicians and estimated time required to complete work (2 techs for 1 day or 1 tech for 2 days)
 - c. Start date – only specified if customer requests specific date

-
- d. Any other relevant information: lifts needed, critical dates, after hours, long material lead times, who supplies material, etc.

Work summary (customer request) _____

Brief scope in 10 words or less- 2 techs 2 days - Any specific information above standard service call that affects scheduling. Long lead times, number of technicians, Lift needed, Special Hours, Who is supplying material. Any special requirements.]

- 9. Start dates specified by customers should be entered into **Requested Date** in the **Dates** section. Use this section only for dates requested by customer. Service coordinator is responsible for scheduling.

Dates _____

Ordered date	05/31/22 ▼	07:32:11
Requested date/time	▼	
Scheduled date/time	▼	
Assigned date/time	▼	
Arrived date/time	▼	
Finished date/time	▼	

- 10. Upload all relevant documents to **Document Imager** by dragging and dropping or selecting **Attach**. This section should contain vender quotes, proposal, change orders, executed contract, client PO, drawings, and any other documents necessary for operations to be successful. Once uploaded, the documents must also be properly labeled inside of spectrum by clicking the wrench icon at the top right of the screen. Label documents to clearly indicate the type of document.

Document Imaging

Lighting Controls Submittals Approved 16 documents

Attach Batch Refresh Proposal

Proposal

ELECTRICAL PROPOSAL

February 8, 2022

Intercom Building,
1800 West 127th Ave,
Aurora, CO 80012

Attn: Ed Mankofsky

Reference: UHealth AMC ADP EP 12 Equipment Relocation

Mr. Mankofsky,

Encore Electric appreciates the opportunity to provide pricing on the above referenced project. Our proposal was based on our best interpretation of the electrical drawings and specifications provided by Adam Beckwith on 1/15/22 and Philips Drawings dated 11/15/21. We include all required materials and labor for a complete electrical installation. All other contract documentation provided was reviewed for reference only and taken into consideration as coordination construction documents per award.

We acknowledge receipt of Addendum(s): None

Electrical Scope for the Item of: **110127M**

DEMOLITION	\$1,400
CONSTRUCTION	\$1,262
PANELS	\$4,279
LIGHTING	\$15,206
BRANCH CIRCUITING	\$2,000
ROOM CONNECTIONS	\$7,000
LIGHTING CONTROL	\$5,677
WIRE RACEWAYS	\$45,707
LABORED WORK PER 12.2	\$5,000

Accubid

ADT Quote for Fire Alarm

Daily Huddle

Drawings

INV 61308

JCI Permit Letter

LTG Controls Submittals Approved NET

LTG Submittal Exceptions as Noted

Permit

Phillips Drawings

Prelim Lighting Control Drawings

Proposal

QED Lighting Bid

Schedule

Stryker Drawings

Subcontract

Modify Image Information

TRANSACTION	
Description	Lighting Controls Submittals Approved
Cabinet	WO
Drawer	SITE WO
Folder	6266
IMAGE	
Created by	ZAM
Create date	2022-02-25
Last changed by	undefined
Last changed date	2022-02-25
Image description	<input style="width: 90%; border: 1px solid gray;" type="text" value="Proposal"/>

OK
Cancel
Delete
Download

11. Go to **Work Ordered Notes** under the **Notes** tab. This section contains detailed scope information. Details come directly from proposal and any additional details that are useful to operations. Such as site contact information, who they are seeing on site, access codes, covid, check in, containment, and any special requirements.

Work order 62183 Lakewood Office

<ul style="list-style-type: none"> AR FOLLOW UP DAILY SUMMARY ● INVOICE NOTES ● PARTS LIST WORK COMPLETED WORK ORDER NOTES ● WORK ORDERED WORK SCHEDULED 	<p>This section contains detailed scope information. Details come directly from proposal and any additional details that are useful to operations. Such as site contact information, who they are seeing on site, access codes, COVID protocol, check in, containment, Any special requirements</p> <p>Example:</p> <p>Scope of Work: **** LUH Birthplace Renovation 11 Rooms 2 West **** Budget is based upon one room at a time being released for construction: Remove and make safe Heat fixture and controls above patient bed Relocate electrical and lighting controls in headwall Replace wall sconces with owners stock</p> <p>Please see Nate on Site he is on call 720-934-1234</p>
---	--

12. Go to **Parts List** in the **Notes** tab. Enter a generalized parts list from Accubid to give service technicians a general idea of what was included in the estimate to complete the work order. Service techs determine exactly what they want to use to complete the work. **DO NOT ORDER OFF THIS LIST**

Work order 62183 Lakewood Office

AR FOLLOW UP	
DAILY SUMMARY	
INVOICE NOTES	
PARTS LIST	
WORK COMPLETED	
WORK ORDER NOTES	
WORK ORDERED	
WORK SCHEDULED	

Example:

```
#12/2C SOLID CABLE MC - STLARMOR 880
#12/3C SOLID CABLE MC - STLARMOR 880
DEVICE CKT LABEL 132
WIRE CONN RED (22 TO 8 AWG) 627
WP CONN GRAY/RED (18 TO 8 AWG) 198
3/8" CABLE SUPPORT FOR ROD OR FLNG 88
NMC OR MC/AC SUPPORT TO WOOD OR MTL STUD 176
CABLE/CONDUIT ANTI-RATTLE SUPPORT FOR MTL STUD 352
3/8" CONN SADDLEGRIP DC FOR FLEX / AC-90 / MC 264
4x 1 1/2" SQ BOX COMB KO W/ FLUSH MTL STUD BRKT 132
4" SQ 1G PLSTR RING 5/8" RISE 88
4" SQ 2G PLSTR RING 5/8" RISE 44
4x 1 1/2" OCT BOX COMB KO 66
4" OCT BOX EXT RING 1/2" KO 66
GROUND SCREW W/ INSUL #12 LEAD 132
1/4-20 MACHINE SCREW ANCHOR 264
1/4x 1 1/4 FENDER WASHER - PLTD STL 264
1/4-20x 1 1/4 R/H SLOT/PHILLIPS MACHINE SCREW 264
#8x 1/2 WAFER HEAD SHEET MTL SCREW 616
T-BAR CLIP FOR UPTURNED LIP LAY-IN FIXTURE 44
2' x 4' DROP-IN T-BAR 11
UP TO +/- 175W WALL MOUNT - INTEGRAL LED LAMP 66
#14/3C - 6' FIXTURE WHIP 11
20A 125V DUP REC - ISO GRD ORG (SG) 132
20A 120-277V S/P SW - TOGGLE IVY (SG) 44
1G TGL SWITCH PLATE - 302 S/S 44
1G DUPLEX REC PLATE - 302 S/S 44
2G DUPLEX REC PLATE - 302 S/S 44
```

13. Go to the **UDF** (user-defined fields).

Prompt	Current setting
C&A WO Checklist	00
Category	
PE	Gabe Green
Quantity	
Supervisor	
Turnover?	00

- a. **C&A WO Checklist** enter 00 – Complete & Accurate. Any other value will put the work order into the “Unschedulable” Dashboard in spectrum. This is used by other roles to flag work orders with incomplete information.

Dialog box titled "Edit Work Order User-Defined Field". It shows "Site" as 62170 and Site 2714. The "C&A WO Checklist" dropdown menu is set to "00". There are "OK" and "Cancel" buttons at the bottom.

Dialog box titled "Search User-Defined Validation Codes". It contains a table with the following data:

Valid entry	Description
00	Complete & Accurate
01	Missing Mat'l List
02	Missing Details
03	Missing Drawing/Pics
04	Unclear Scope
99	Other

There are "OK" and "Cancel" buttons at the bottom.

- b. **Category** UDF is for prefab and is not used for service work orders.
 c. **PE** is entered if known at this point but can be assigned later by the service manager.
 d. **Quantity** is not required for service work orders
 e. **Supervisor** can be assigned at this point if known or assigned by the service manager later if unknown at this point. Typically assigned based on which service supervisor has the most knowledge about this site.

Dialog box titled "Edit Work Order User-Defined Field". It shows "Site" as 62170 and Site 2714. The "Supervisor" dropdown menu is empty. There are "OK" and "Cancel" buttons at the bottom.

Search User-Defined Validation Codes

Valid entry	Description
Allen Thompson	AT
Brendan Campbell	BC
Casey Thompson	CT
Darrell Fisher	DF
Dusty Giles	DG
Kyle Gilbert	KG
None Assigned	NA
Patrick Wirkus	PW
Ryan Janness	RJ
Scott Peterson	SP

OK Cancel

- f. **Turnover?** is required at this point. Indicate if turnover has been completed or is required. No value puts the work order into the “Unschedulable” dashboard.

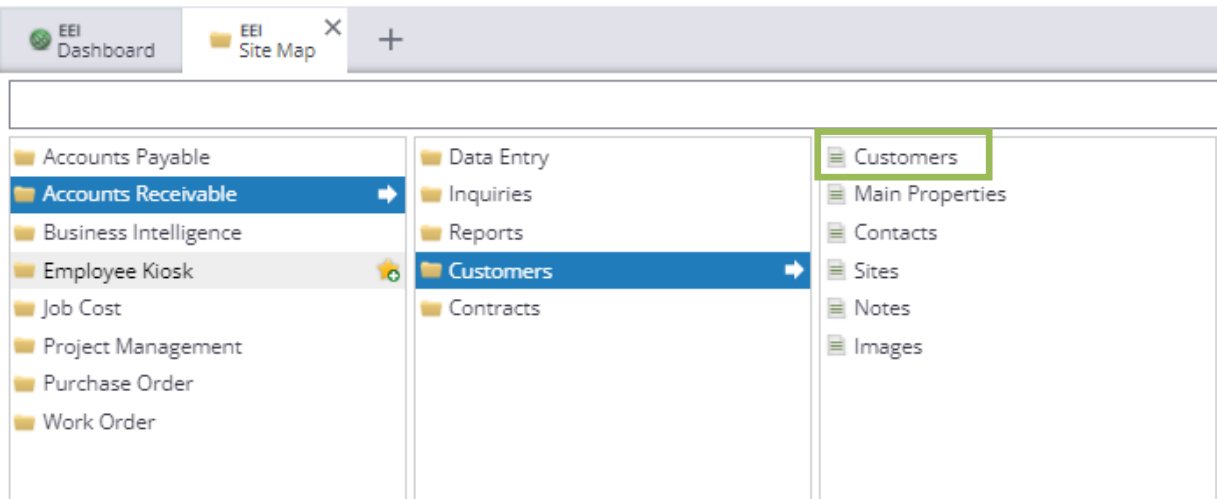
Search User-Defined Validation Codes

Valid entry	Description
00	Complete
01	Not Required
02	Yes with Ops
03	Yes with Tech
04	Missed Turnover

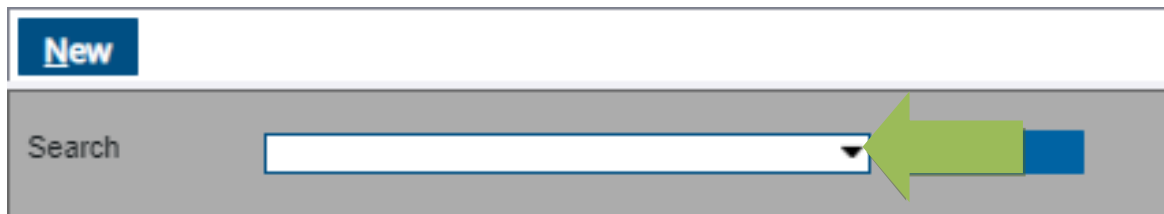
OK Cancel

CREATE NEW CUSTOMER

1. Go to **Customers** on the Spectrum site map.



2. Make sure that the customer does not exist in the system by clicking the dropdown menu and searching for the customer.



Advanced Customer Search Options

Enter selections to limit search, or leave blank to search all.

Selections _____

Customer code	<input type="text"/>
Customer name	<input type="text"/>
Alpha code	<input type="text"/>
Address	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Zip	<input type="text"/>
Phone	<input type="text"/>
Type	<input type="text"/>
Contact	<input type="text"/>
Salesperson code	<input type="text"/>
Organization attribute	<input type="text"/>
Cost Center	<input type="text"/>

User-defined fields

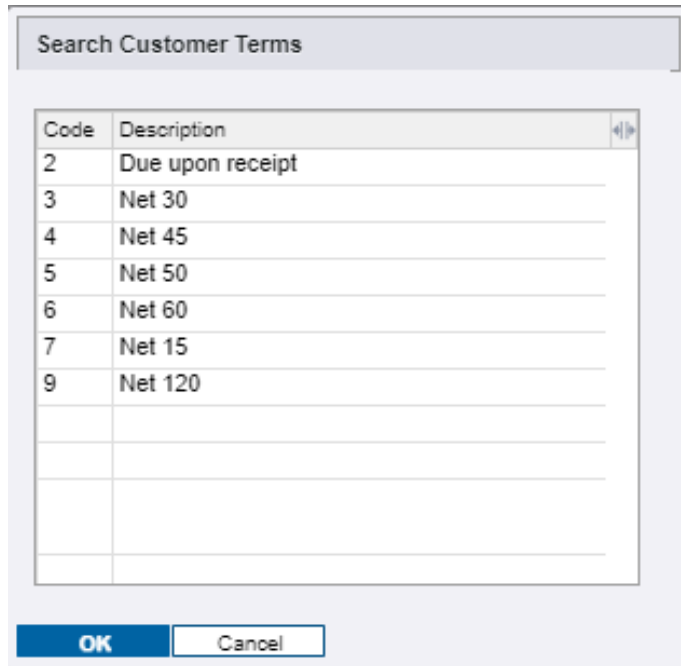
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

3. Click new and press enter to autogenerate the next customer code number and enter the name of the new customer.

New Customer

Customer code	<input type="text" value="5333"/>
Name	<input type="text" value="Test Do Not Use"/>
Terms code	<input type="text"/>
Sales tax code	<input type="text"/>

4. Click the drop down next to terms code and enter the appropriate term. This will typically be net 30.



5. Click the sales tax code dropdown menu and enter NT into the search field. Scroll down and select NT-100 which is the default code used at the customer level. Sales tax codes are assigned at the site level and not the customer level because tax is dependent on location. For instance, one customer could have multiple sites in different locations with different sales tax codes.

Search Sales Tax Codes

Search

Code	Description	Percent
HONOLULU	State + County	4.5000
LONGMONT	Longmont	8.5150
LONGMONTBOULDER	Longmont no State	4.6300
LONGMONTNOSTATE	CO exempt Longmont	5.6150
MINTURN	Minturn + Eagle Cty	8.4000
MONUMENT	Monument/EI Paso/CO	7.6300
NT	DO NOT USE FOR WO	.0000
NT-100	Non-Taxable Englewoo	.0000
NT-200	Non-Taxable COSpring	.0000
NT-300	Non-Taxable Avon	.0000
NT-400	Non-Taxable MT	.0000
NT-500	Non-Taxable Northern	.0000
NT-700	Non-Taxable Mfg	.0000
PARKER	Parker/Douglas Count	8.0000
SAN ANTONIO	City and Bexar Cty	8.2500
SCOSPELPASOEX	Co Springs County Ex	7.0200
SJEFFCO	State and County	5.0000
SPUEBLO	Pueblo, County, CO	7.6000
STATE/EAGLE	State & Eagle County	4.4000

- On the **Main** tab of customer **properties**, enter the address and contact information from the customer setup form. The customer type field can be left blank or enter "Service".

▼ CUSTOMER

Name
Test Do Not Use

Address
7125 W Jefferson Ave

City/State/Zip
Lakewood, CO 80235

Telephone
1 (303) 934-1234

▼ PROPERTIES

Main

Contacts

▶ FINANCIALS

Customer code 5333

Alpha reference

Customer type

Communication _____ Primary contact _____

Address

Telephone

Fax

Customer e-mail

Web site

Status _____

Active

Inactive

Not used

- Enter any customer specific information such as who to contact for billing into the work order warning field. Work order warning is shown on the main page of every Work order created under the customer. **Resale** and **Attributes** are not utilized.

Resale _____

Number

Expiration

Attributes _____

Work order warning _____

- Select **Defaults** under the properties menu and enter the correct account manager in the Salesperson dropdown menu.

▼ CUSTOMER

Name
Test Do Not Use

Address
7125 W Jefferson

City/State/Zip
Lakewood, CO 80235

Telephone

▼ PROPERTIES

Main

Defaults

Contacts

Bill-to Addresses

Unit Billing Items

User-Defined

Cost Centers

► FINANCIALS

► DOCUMENTATION

► ENTRY

► REPORTS

Save
Cancel

Customer code 5331 Test Do Not Use

Invoice defaults

Salesperson CK Casey Kerr Related-Party G/L Accounts: No

Terms code 3 Net 30

Retention

Taxable No default

Sales tax code NT-100 Non-Taxable Englewoo

Credit and collections

Date established 05/10/22

Credit limit

Finance charge code

Finance charge

Send statements?

Pricing codes

Material

Labor

W/O material markup

Search Salesperson Codes

Code	Name
AT	Allan Thompson
BF	Bill Frye
BK	Bill Kolson
CA	Chris Anderson
CC	Chris Clark
CK	Casey Kerr
CSH	Colo Springs House Account
CT	Casey Thompson
DF	Darrell Fisher
DH	Denver House Account
EB	Eric Bankert

OK
Cancel

9. Select if the work order is taxable. Default setting is **“Yes”** because tax exempt status requires a tax-exempt certificate. It is critical to know if a job is tax exempt as soon as possible. Always ask the account managers tax exempt status.

Invoice defaults

Salesperson	CK ▼ Casey Kerr	Related-Party G/L Accounts: No
Terms code	3 ▼ Net 30	
Retention		
Taxable	Yes ▼	
Sales tax code	NT-100 ▼ Non-Taxable Englewoo	

10. Leave **Credit and Collections** fields in their default state.

Credit and collections

Date established	05/10/22 ▼
Credit limit	
Finance charge code	
Finance charge	
<input checked="" type="checkbox"/> Send statements?	

11. Enter the **Material** and **Labor** values from the customer setup form into the dropdown menus.

12. Click **W/O material markup** drop down, click “go” next to the blank search field and select the correct markup code.

Pricing codes

Material	1 ▼
Labor	1 ▼
W/O material markup	

New Contact


Properties | Addresses | Jobs

Contact name: Status:

Title:

Remarks:

Attributes:

E-mail:  0 More

Not authorized to access Spectrum.

Default as a job contact on contracts / subcontracts?

Telephone

New Contact

Properties Addresses Jobs

New Edit Remove Set as Primary Organization Status: Active

Description	Relationship	Address	City	State/pr
Test Do Not Use	Customer	7125 W Jefferson Ave	Lakewood	CO

OK Cancel

15. Go to **Main** under properties and click **save** to save the new customer.

Save Cancel

CUSTOMER

Name
Test Do Not Use

Address
7125 W Jefferson Ave

Address
Lakewood, CO 80235

City/State/Zip
Lakewood, CO 80235

Telephone
1 (303) 934-1234

PROPERTIES

Main

Contacts

FINANCIALS

DOCUMENTATION

REPORTS

Customer code 5333 Test Do Not Use Status Active Inactive Not used

Alpha reference Test Do

Customer type Service

Communication

Address 7125 W Jefferson Ave Lakewood, CO 80235 Primary contact

Telephone 303 934-1234

Fax

Customer e-mail

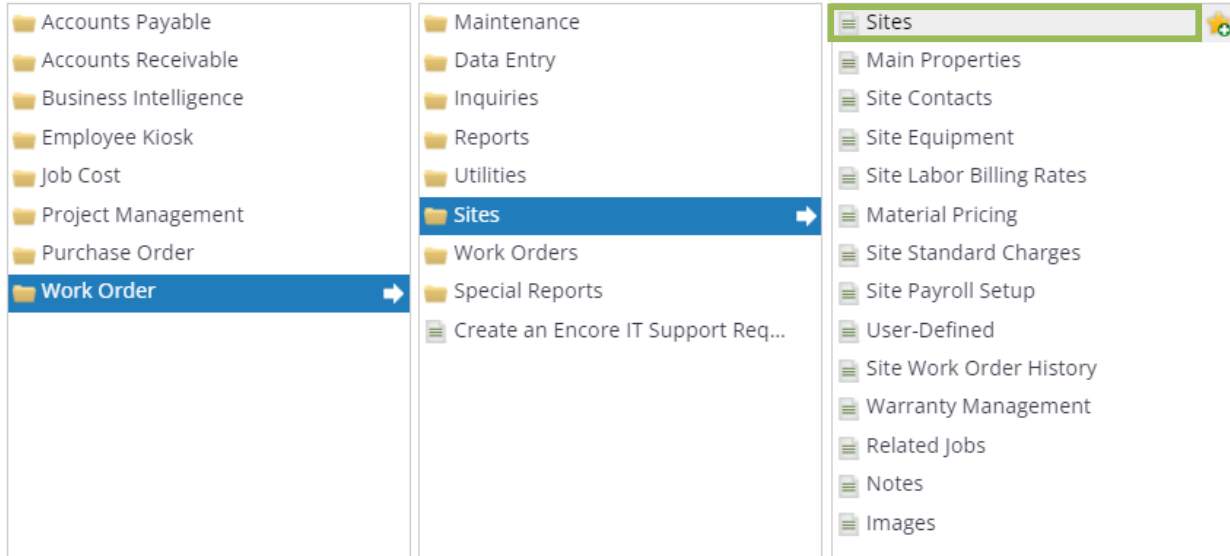
Web site

Resale

Number

CREATE NEW SITE

1. Go to **Sites** on the site map.



2. Use the search function to search key words or click the drop down for advanced search options to determine if the site already exists in the system.

New			
Search <input type="text" value="UCH"/> <input type="button" value="New Search"/>			
<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Send E-Mail"/>			
Site	Name	Status	Customer
4202	TS-UCH HRH Technology	Active	4111 (TeamLinx)
4012	TS-UCHealth Longs Peak	Active	1238 (Univ Of Colorado Hospital-UCH)
6950	UCH Gastroenterology	Active	3129 (Poudre Valley Hospital)
6913	UCH Loveland Pediatric	Active	3727 (UCHealth)
6838	UCH Family Med Center OE2059	Active	3129 (Poudre Valley Hospital)

Advanced Site Search Options

Enter selections to limit search, or leave blank to search all.

Selections

Site ID	<input type="text"/>
Name	<input type="text"/>
Address	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Zip	<input type="text"/>
Site phone	<input type="text"/>
Other phone	<input type="text"/>
Contact	<input type="text"/>
Customer code	<input type="text"/>
Customer name	<input type="text"/>
WO type	<input type="text"/>

User-defined fields

<input type="text" value="NAICS Code"/>	<input type="text"/>
<input style="width: 45%;" type="text" value="Incentive (%)"/>	<input type="text"/>

- Click **New** and then press enter to autogenerate a new site number.

New

Search

New Site

Site code	<input type="text" value="6960"/>
Site name	<input style="width: 90%;" type="text"/>
Customer	<input type="text"/>
Cost Center	<input type="text"/>

-
5. Enter the site contact information from the site setup form.

Site code	6962
Site address	
Name	<input type="text" value="Test Do Not Use"/>
Address	<input type="text"/>
Site phone	<input type="text"/> Ext <input type="text"/>
Other phone	<input type="text"/> Ext <input type="text"/>
Customer	<input type="text" value="5333"/> Test Do Not Use

6. Enter the lead source information from the site setup form.

Work order defaults	
Lead source	<input type="text"/>
Requested tech	<input type="text"/>
Type	<input type="text"/>
Zone	<input type="text"/>
Case type	<input type="text"/>
Customer's job	<input type="text"/>
Sales tax code	<input type="text" value="NT-100"/> Non-Taxable Englewoo
Use tax code	<input type="text"/>
Cost Center	<input type="text" value="120"/> Front Range Service

Search Lead Sources

Lead source	Description
AD 1	Ad Campaign 1
AD 2	Ad Campaign 2
AD 3	Ad Campaign 3
ADVERTISEMENT	Local Advertisement
BILLBOARD	Billboard
EXISTING	Existing Customer
INTERNET	Internet
MEDIA	Media (Radio/TV)
REFERRAL	Referral
REPUTATION	Reputation
TRADE SHOW	Trade Show

OK Cancel

- 7. Enter the **Zone, Case Type, and Sales Tax code** fields under the work order defaults section. Other fields in this section are not entered at the site level.

Search Case Types

Case type	Description
BFA	Boulder Fire Alarm License
CHB	Centura Health Badge
COJW	Colorado Journeyman License
CSA	Co Safety/Coors Badge
CSFA	Co Springs Fire Alarm License
DFA	Denver Fire Alarm License
DIV17	Tele/Data Experience
EWC	Energized Work Certification
FAA	FAA Clearance
FACPR	First Aid/CPR Certification
FLC	Fork Lift Certification
GSA	Government Security Clearance
HCC	Healthcare Certification
IND	Industrial Experience
IR	IR Certification
MTJW	Montana Journeyman License
NEJW	Nebraska Journeyman License
PSFH	Penrose St. Francis Badge
UTJW	Utah Journeyman License
VVH	Valley View Hospital Badge
VVMC	Vail Valley Medical Badge
WYJW	Wyoming Journeyman License

8. Sales tax information can be found using entering the site address into the Geotax website. Enter the appropriate sales tax information into the search field in the **Sales Tax Code** dropdown.

- Make sure the check the **Default new work orders to be taxable** and **Material subject to sales tax** checkboxes.

Taxability

- Default new work orders to be taxable (sales tax)?
- Labor subject to sales tax?
- Material subject to sales tax?
- Material subject to use tax?

- Go to **Contacts** under the **Properties** menu to add new site contacts and designate the primary contact. Enter as much identifying information as possible when adding contacts such as title and who to call first.

The screenshot shows a software interface for managing site contacts. On the left is a dark blue sidebar with a navigation menu. Under the 'SITE' section, there are fields for Name (Test Do Not Use), Address, Site Phone (720 123-4567), and Primary Site Contact. Under the 'PROPERTIES' section, 'Contacts' is selected. The main area has a 'New' button and a 'Switch' button. Below these are fields for 'Site code' (6962) and 'Test Do Not Use'. A section titled 'Site contacts' contains a table with columns for 'Pri...', 'Contact name', 'Phone', and 'Contact attributes'. Above the table are buttons for 'Add Contact', 'Edit', 'Set as Primary', 'Remove', and 'E-Mail'. At the bottom right of the table area are two arrow buttons (down and up). Below the table, it says 'All contacts for this customer'.

- Equipment** is not utilized, and **labor billing rate** is entered at the customer level.

12. Go to **Payroll Setup** and enter the correct work state.

The screenshot displays a software configuration window. On the left is a dark blue sidebar with a tree view. Under the 'SITE' section, the following fields are visible: Name (Test Do Not Use), Address, Site Phone (720 123-4567), Primary Site Contact, and Customer Name (Test Do Not Use). Under the 'PROPERTIES' section, the following options are listed: Main, Contacts, Equipment, Labor Billing Rates, Material Pricing, Standard Charges, Payroll Setup (highlighted in light blue), and User-Defined. The main content area has a light gray background and contains a 'Save' button and a 'Cancel' button at the top. Below these buttons, the 'Site code' is set to '6962' and the site name is 'Test Do Not Use'. A section titled 'Defaults' contains several configuration items: 'Worker's compensation' (dropdown), 'Work state' (dropdown), 'Work county' (dropdown), 'Work local' (dropdown), 'Rate level' (text input), and 'Pay group' (dropdown).

Edit Site User-Defined Field

Site code 6962 Test Do Not Use

NAICS Code

OK Cancel

Search User-Defined Validation Codes

Valid entry	Description
713940	Fitness & Rec Facili
721110	Hotels
721120	Casinos
722510	Restaurants
813110	Religious Facilities
921100	Exec & Legislative
922110	Courts
922120	Police Protection
922140	Correctional Insti
922160	Fire Protection
926110	Admin Gen Econ Pro
928110	Military Base

OK Cancel

- Go to **Notes** under the **Documentation** menu. Copy the account manager contact information into the **Account Manager** field. This is visible to the service technician in field connect.

Save Cancel
 Site code 6962 Test Do Not Use
 Account Manager
 DIRECTIONS
 FYI
 Sam Harrison
 Email: Sam.Harrison@EncoreElectric.com
 Phone: (303)638-2781

15. Click **Save** to save the new site.

REVIEW WORK ORDER

REVIEW WORK ORDER

1. Service supervisors should review their assigned work orders daily.
2. Account manager receives notice to proceed from customer and notifies the service supervisor that a work order is ready for review if supervisor assignment is known at that point. The customer purchase order is sent to service supervisor.
3. Work orders that are created without assigning a service supervisor are put into **Unassigned, Manager, or Needs parts** dispatch status. Emergency calls are put into **Unassigned** and the service coordinator is notified.

Status _____
 Dispatch code Unassigned
 Status type

New

Search

Work order	Dispatch status	WO summary	Job/Site
61309	<input type="checkbox"/> (U) - Unassigned	4-27 / RETURN WHEN DOOR OPENER ARRIVES - Exte...	4743 (Highlands Ranch Hospital)
62134	<input type="checkbox"/> (U) - Unassigned	4th Floor Remodel - Small. Permit BLD22-0283 May Start.	2966 (Craig Hospital)
59192	<input type="checkbox"/> (U) - Unassigned	5/16 - SEAN STILL WAITING ON CUSTOMER TO FINISH ...	3497 (Veolia Environmental)
60861	<input type="checkbox"/> (U) - Unassigned	6-1 waiting on hot work permit for Kenny to return - ARRI...	2833 (KCNC)
61931	<input type="checkbox"/> (U) - Unassigned	Add 2 2x4 in aluminum welding shop - fixtures are in the c...	5884 (MKS Instruments)
62609	<input type="checkbox"/> (U) - Unassigned	Add dimming/replace fixtures in 4 migraine exam rooms ...	535 (University of CO Hospital)
62590	<input type="checkbox"/> (U) - Unassigned	Add outlet	6978 (Bellevue Heights)
62589	<input type="checkbox"/> (U) - Unassigned	Add outlet per	6977 (Peakview Senior Living)
59603	<input type="checkbox"/> (U) - Unassigned	Concourse A- Semi Annual Testing- Electrical System Ser...	2134 (DIA Data Center)
62540	<input type="checkbox"/> (U) - Unassigned	Darrell & Charles will run this one. Scope of Work: **...	1664 (Lockheed Martin Deer Creek)
62606	<input type="checkbox"/> (U) - Unassigned	Install 1/2" conduit and customer supplied cable from ATS...	5918 (West Littleton ED)
62345	<input type="checkbox"/> (U) - Unassigned	Install 2 new circuits and connections to IStar Controllers i...	535 (University of CO Hospital)
62516	<input type="checkbox"/> (U) - Unassigned	Install 3 new duplex receptacles for display monitors in ga...	535 (University of CO Hospital)
62652	<input type="checkbox"/> (U) - Unassigned	Install fire alarm cable from BAS panel in mech space abo...	3393 (Littleton Adventist Hospital)
62103	<input type="checkbox"/> (U) - Unassigned	Install new circuit and receptacle for crypto coin ATM, call ...	6911 (Loaf N Jug #750083)

4. Supervisor assignments are determined by the service manager in the weekly work order review meeting or as needed. Work orders in **Manager or Unassigned** dispatch statuses are assigned to service supervisors in the **user defined fields (UDF)** tab based on availability and familiarity with customers. The goal is to keep same supervisors with their same customers.

Work order 62170 Site 2714

*

Prompt	Current setting
C&A WO Checklist	02
Category	
PE	Gabe Green
Quantity	
Supervisor	
Turnover?	

Search User-Defined Validation Codes	
Valid entry	Description
Allen Thompson	AT
Brendan Campbell	BC
Casey Thompson	CT
Darrell Fisher	DF
Dusty Giles	DG
Kyle Gilbert	KG
None Assigned	NA
Patrick Wirkus	PW
Ryan Janness	RJ
Scott Peterson	SP

OK Cancel

5. Work orders requiring material order prior to start are put in **NeedsParts** dispatch status.

Status

Dispatch code NeedsParts

Status type

6. Work orders requiring review by service supervisors are put into **Manager** status.

Status

Dispatch code Manager

Status type

New			
Search <input type="text"/> <input type="button" value="New Search"/>			
Edit	Delete	Form	Bill Now
Work order	Dispatch status	WO summary	Job/Site
62613	(K) - NeedsParts	20 MR16 drivers. Todd will deliver to site	5492 (Gaylord Rockies Hotel)
62093	(K) - NeedsParts	A Riser Breakers and Installation	5520 (Lockheed Martin)
62582	(K) - NeedsParts	Add new and panel and wire split sytesms	6101 (Sacred Heart of Jesus School)
62274	(K) - NeedsParts	Bid Project to BOA Technology, Dusty will PM this work, tu...	6598 (BOA Technology Inc- HQ Office)
62371	(K) - NeedsParts	Furnish and install 120V power from Emergency Power s...	388 (Craig Hospital)
62427	(K) - NeedsParts	Install new heater in fire riser room. Need to order heater....	6297 (116 Inverness Drive East)
62538	(K) - NeedsParts	Remove and reinstall light poles.	6982 (Sorrel Ranch)
62039	(K) - NeedsParts	Replace (2) Panelboards in the Pool House. Quotes and ...	497 (William Pauls)
62542	(K) - NeedsParts	Scope of Work: **** Indigo UPS Installation of 2 - 8kVA UP...	6983 (Richard Rodriguez - Indigo U...
55246	(K) - NeedsParts	Strut Cuts	20068 (Confidential COS - NG Sub)
61844	(K) - NeedsParts	housings for over head lights are loose in the ceiling and ...	2177 (Cheesecake Factory-Littleton)
62623	(K) - NeedsParts	tech needed for (3) small projects. no lift needed, 16 hou...	3691 (Elevations Credit Union)

7. The service supervisor reviews the customer purchase order, proposal, quotes, work order notes, and documents to determine material, manpower, subcontractors, shutdowns, safety, engineered drawings, documentation, project engineer support, permitting, scheduling, and anything else that is required to perform the work. There may be additional communication with the account manager and customer for clarification at this point.
8. Reviewed work orders that are waiting for parts, permitting, or anything else are put into **Parts Ordered** status until they arrive. Otherwise, they are put into **Unassigned** to indicate they have been reviewed and are ready to schedule.

Search Dispatch Status Codes				
New				
Dispatch status	Description	W.O. status type	Flag color	Custom icon
A	Assigned	Assigned	GREEN	
B	NotDeliver	Open	OLIVE	
C	Ryan	Hold	ORANGE	
D	Rejected	Hold	RED	
E	Follow Up	Open	RED	
F	Finished	Finished	BLACK	
G	Delivered	Open	BLACK	
H	Parts Here	Open	OLIVE	
I	In Progres	Arrived	BLUE	
J	PF Open	Open	PURPLE	
K	NeedsParts	Hold	YELLOW	
M	Manager	Hold	GRAY	
P	PartOrderd	Hold	PURPLE	
Q	Quote Pend	Hold	VIOLET	
R	Go Back	Hold	MAROON	
S	Scheduled	Assigned	CYAN	
T	Cust Hold	Open	GREEN	
U	Unassigned	Open	PINK	
W	WO Recvd	Finished	GOLD	
X	Flex	Assigned	YELLOW	
Z	% Billing	Assigned	PINK	P



OK Cancel


9. Service supervisors communicate with service coordinators in manpower meetings to forecast upcoming work and confirm unassigned work orders are ready to be scheduled.














SCHEDULE WORK ORDER

MANPOWER PLANNING

1. Use the shared monthly manpower spreadsheets in the **Service Superstars** channel in **Microsoft Teams** to plan workforce needs. Manpower meetings are held weekly where service supervisors, service coordinator and service manager discuss upcoming workforce needs.
2. Service supervisors fill out their manpower planning sheet weekly and email to service manager, other service supervisors, and service coordinator. The template contains dates, job name, requested service tech, and work order number.

 Service Super Stars ...
 General
 Account Managers
Manpower Meetings 
 Service Ops Team
 WO Tracking
[1 hidden channel](#)

Manpower Meetings 

 Name ▼	Modified ▼	Modified By ▼
 2020	November 1, 2021	Konnie Terry
 2021	December 22, 2021	Konnie Terry
 APRIL 2022.xlsx	April 28	Konnie Terry
 AUGUST 2022.xlsx	May 11	Konnie Terry
 DECEMBER 2021.xlsx	December 27, 2021	Konnie Terry
 FEBRUARY 2022.xlsx	March 15	Konnie Terry
 JANUARY 2022.xlsx	February 3	Konnie Terry
 JULY 2022.xlsx	May 11	Konnie Terry
 JUNE 2022.xlsx	Yesterday at 2:26 PM	Konnie Terry
 MARCH 2022.xlsx	March 30	Konnie Terry
  MAY 2022.xlsx	... Yesterday at 2:55 PM	Konnie Terry

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1															
2	Week of: MAY 16, 2022									= Scott's changes	= need WO	= waiting to confirm	= scheduled - don't move	= RYAN'S change	= Dusty's change
3		16th	17th	18th	19th	20th	21st	22nd							
4		MON	TUE	WED	THU	FRI	SAT	SUN		Projects / Notes:					
5	Bernie Avila	DCPA - 62263 w/KEN	UCH FAMILY 61969	UCH FAMILY 61969	UCH FAMILY 61969	UCH FAMILY 61969		UCH FAMILY 61969							
6	Curtis Kohout	LAH - 62321	LAH - 62321	ST. Joes 59901	VACATION - PTO	VACATION - PTO	VACATION - PTO								
7	Daniel Murphy	CPI - 60682	ROSE MED CTR - 60883	ROSE MED CTR - 60883	ROSE MED CTR - 60883	LOCKHEED 60093									
8	Eric Autret	VACATION - PTO	VACATION - PTO	Hunter Douglas - 60179	Hunter Douglas - 60179	Hunter Douglas - 60179				VILLAGE CENTER STATION - 62252					
9	Forest Goody	LOCKHEED - 59346	LOCKHEED SHAKER - 60512	PREFAB - GET TRANSFORMER 59346		LOCKHEED - 59346 / CPI				McKesson - 60667 - see Zack if they approved quote					
10	Jal Staples	ROSE MED CTR - 60883	ROSE MED CTR - 60883	ROSE MED CTR - 60883	ROSE MED CTR - 60883	ROSE MED CTR - 60883									
11	James McKnown	HOME / SICK	HOME / SICK	HOME / SICK	HOME / SICK	HOME / SICK									
12	James Schultes	UCH - 62203	W/JORDAN	UCH W/JORDAN	UCH W/JORDAN	UCH W/JORDAN									
13	Jason Wicker	BANDIT	BANDIT	BANDIT	BANDIT	BANDIT									
14	Jordan Heefle	UCH	UCH	UCH	UCH	UCH									
15	Justin O'Rourke	UCH W/JORDAN	UCH W/JORDAN	VAIL RESORTS - 62104	VAIL RESORTS - 62104	RESORTS - 62104									
16	Kenny Goerd	VACATION - PTO	VACATION - PTO	1/2 day DIA / 116 INVERNESS 61964	residential	KUSA / TITAN 61696 (reschedule)				VACATIONS:					
17	Ken Pease	DCPA - 62263 w/KBERNIE	ROSE MED CTR - 60883	ROSE MED CTR - 60883	ROSE MED CTR - 60883	ROSE MED CTR - 60883	RTD SHUT DOWN 59693			JAL - 7/5 THROUGH 7/8					
18	Malone Snyder	100 ST. PAUL - 62189	100 ST. PAUL - 62189	100 ST. PAUL - 62189	Vail reports 62047	100 st paul 62189	BALL AMC - SHUT DOWN 61683			KEN PEASE - 7/22 only					
19	Manuel Lovato	McGREGOR - 58959	MUSEUM - 60232 / 60659	McGREGOR - 58959	McGREGOR - 58959	McGREGOR - 58959				KEN PEASE - 6-19 - 6-26					
20	Rich VonDuyke	LUH - 62083	LUH - 62083			KUSA / TITAN 61696 (reschedule)				ERIC AUTRET - 5/13 - 5/17					

The manpower board in Teams is used for longer term forecasting and changes frequently. Assignments are put into Field Connect for the upcoming week when assignments are definite.

- a. After the overall manpower plan has been created in teams, then use spectrum to assign technicians to work orders.
- b. Use Field Connect to create multiple assignments for each day when necessary.

UNASSIGNED WORK ORDERS

1. Review unassigned work orders daily to understand the scope of each work order and when they should be scheduled.

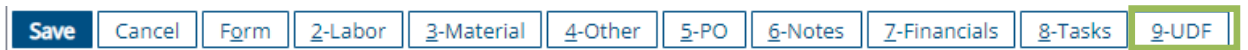
New

Search

showing 24 of 24 records

Work order	Dispatch status	WO summary	Job#
62429	<input type="checkbox"/> (U) - Unassigned	Relocate conduit and wiring for fire riser room. 2-3 days work to complete.	629
62424	<input type="checkbox"/> (U) - Unassigned	Summer work at Brush Schools Dist. We are going to help install (3) split units over the summer. need to coordinate with Sc...	635
62420	<input type="checkbox"/> (U) - Unassigned	Rose OR 1 boom lights	676
62400	<input type="checkbox"/> (U) - Unassigned	Exterior Conduit for Card Reader, Boring quote and proposal attached to work order. Will turnover with Ryan Janness.	427
62395	<input type="checkbox"/> (U) - Unassigned	tech needed to install outlets and change smoke detectors at Unit 2030 at Four Seasons. Still waiting HOA approval, 05.16....	695
62345	<input type="checkbox"/> (U) - Unassigned	Install 2 new circuits and connections to IStar Controllers in AIP COMM rooms on 5th and 8th floors	535
62332	<input type="checkbox"/> (U) - Unassigned	SUMMARY SCOPE OF WORK: We have noticed a high rate of ELM and Q17 breaker trips onsite. Please MEGGER test ...	629
62330	<input type="checkbox"/> (U) - Unassigned	Scope Details: Description: 100123-02- Non-Session- Damage-Fastener Long Problem Description: Electrify Americ...	629
62284	<input type="checkbox"/> (U) - Unassigned	Install TV in conference room	694
62170	<input type="checkbox"/> (U) - Unassigned	Brief scope in 10 words or less- 2 techs 2 days - Any specific information above standard service call that affects scheduling. ...	271
62166	<input type="checkbox"/> (U) - Unassigned	SCHEDULE IN JUNE - Disconnect and Reconnect of pumps. Work to happen during summer	692
62151	<input type="checkbox"/> (U) - Unassigned	UPS Replacement - 15kVa to a 10kVa Start after July 4th	691
62083	<input type="checkbox"/> (U) - Unassigned	Furnish and install Power for DI in SPD. 30 Day Metering required.	385
62073	<input type="checkbox"/> (U) - Unassigned	Special Project - DMNS Tunnel Lighting	221
61704	<input type="checkbox"/> (U) - Unassigned	Install power on window wall and connection to powered furniture, try to use existing circuits if possible, no one has visited th...	631
61662	<input type="checkbox"/> (U) - Unassigned	Provide and install (1) new sample fixture to replace 18" cans in main lobby-fixture is 2 weeks out. Once it comes we will nee...	235
61607	<input type="checkbox"/> (U) - Unassigned	RETURN WHEN WE RECEIVE THE LIGHTS & CUSTOMER FINISHES DRYWALL - Lighting changes in Office	361
61540	<input type="checkbox"/> (U) - Unassigned	SPD Decontamination room remodel	579
61444	<input type="checkbox"/> (U) - Unassigned	5/16 WAITING ON CUSTOMER TO COMPLETE WORK - Tech needed for 3-4 days of work to install conduit and control cabl...	345
61309	<input type="checkbox"/> (U) - Unassigned	4-27 / RETURN WHEN DOOR OPENER ARRIVES - Extend existing life safety circuit and provide connection to auto operato...	474
60682	<input type="checkbox"/> (U) - Unassigned	LEAVE OPEN - SEE SCOTT - Relocate 1 40 amp, 400 volt circuit and add 1 new 40 amp 400 volt circuit for new and relocate...	221
59603	<input type="checkbox"/> (U) - Unassigned	Concourse A- Semi Annual Testing- Electrical System Service INSPECTION DATE 4/25/22	213
59583	<input type="checkbox"/> (U) - Unassigned	South Data Center- Quarterly Testing- Electrical System Service INSPECTION DATES 1/22/22, 4/13/22, 7/7/22	213
59192	<input type="checkbox"/> (U) - Unassigned	5/16 - SEAN STILL WAITING ON CUSTOMER TO FINISH REPAIRS - Sean needed to repair outdated disconnect by using p...	345

- Confirm that **Unassigned** work orders have been reviewed by the assigned supervisor and they are ready to be assigned. The supervisor is assigned in the UDF tab in spectrum.



Work order **62429** 116 Inverness Drive East

Prompt	Current setting
C&A WO Checklist	00
Category	
PE	
Quantity	
Supervisor	Dusty Giles
Turnover?	01

- Communicate with technicians, service supervisors, and service managers to understand when technicians will be finished with work orders and available to start new work orders.

- Use **Work Order Summary** scheduling information and estimated hours along with conversations with the service supervisor to determine the right technician, material, and safety equipment for the job.

Work order 62429 Site 6297
 116invernessAP@cushwake.com

Info
 Work order type: 02 MOVES/ADDS/CHANGES
 Name: 116 Inverness Drive East
 Service contract:
 Customer P.O.: signed proposal
 Customer's job:
 Phone: 303 662-0800
 Contact note: Jake Garcia
 Customer code: 5060 MG-116 Inverness, LLC

Status
 Dispatch code: U Unassigned
 Status type: Open

Work summary (customer request)
 Relocate conduit and wiring for fire riser room. 2-3 days work to complete.

Dispatch
 Zone: FR Front Range
 Priority: 04 Schedule
 Case type: COJW Colorado Journeyman License
 Price method: Flat Rate
 Quote: 3,121.59 Hours: 23.00
 Est. arrival:

Dates
 Ordered date: 05/18/22 10:27:31
 Requested date/time:
 Scheduled date/time:
 Assigned date/time:
 Arrived date/time:
 Finished date/time:

- Ensure that the work order has accurate contact information, an accurate work summary, and a detailed scope in the **Work Ordered Notes**.
- Special equipment like a lift should be ordered at this time.
- Change the **Dispatch code** to **Assigned** and click into the **Code** column drop down to search and assign a technician to the work order. The first assigned technician is designated as the lead, and all others are Second. Click the **Scheduled Date** column to enter the time of the work order. Enter the estimated number of hours for the assignment in the **Hours** column.

Requested technician at this site 1566 - Dale Vaughan Bochert

Code	Technician name	Responsibility	Scheduled date	Scheduled time	Hours
966	Jason L Wicker	Lead	04/01/22	07:00	1.00

Advanced Technicians Search Options

Enter selections to limit search, or leave blank to search all.

Selections _____

Technician	<input style="width: 95%;" type="text"/>
Name	<input style="width: 95%;" type="text"/>
Labor category	<input style="width: 95%;" type="text"/>
Labor category description	<input style="width: 95%;" type="text"/>
Labor bill code	<input style="width: 95%;" type="text"/>
Labor bill description	<input style="width: 95%;" type="text"/>

OK
Cancel

8. If a work order requires more than 8 hours or more than one assignment for return trips, those additional assignments must be entered in Field Connect. In Field Connect Gateway, click find and search for the work order number.

Dispatch
Planning
Scheduling
Map
Messaging
Availability
Find

Search Criteria

Find Orders by Number/Date
Find Orders by Customer
Find Orders by Site
Find For

All Search Dates are Entered Date

Work Order Number _____

Number: Search

- Click **Edit** on the correct work order in the search results. Click **New assignments** to add additional assignments.

Search Results

	Work Order	Entered	Requested	Status	WO Type	Zone	Priority	Customer	Service Site	Address
Detail Edit	62170	4/29/2022 10:25 AM	1/1/1900 12:00 AM	Unassigned	MOVES/ADDS/CHANGES	Front Range	Schedule	Encore Electric	Lakewood Office	7125 W Jefferson Ave , Lakewood, CO 80235

New Assignment

Assignments on the Work Order

Go To	Description	Tech	Scheduled	Status
<input type="button" value="Properties"/> <input type="button" value="Dispatch"/>	Test Description	Jason L Wicker	4/1/2022 7:00 AM	Assigned

- Enter the information for the additional assignments and click save. Create one assignment for each day of work.

Description:

Technician:

Equipment:

Scheduled: Date: Time:

Duration: Hours: (decimal format i.e. 2.5)

FINISHED AND GO BACK WORK ORDER ASSIGNMENTS

It is important to monitor work order assignments to ensure they are in the correct dispatch status.

- Go to the **Planning** tab in Field Gateway to look for assignments in Assigned status that are green or Goback status that are red.



Monday	Tuesday	Wednesday
11	12	13
63192 Assignment:392637, SCL Health West Sub		63230 Assignment:392752, SCL Health West Sub
63191 Assignment:392636, SCL Health West Sub	63225 Assignment:392723, Heart of the Rockies Medical	63231 Assignment:392753, PH Filter Line Expansion
		63194 Assignment:392642, SCL Health West Sub
57405 Assignment:391501, Northglenn High School	63226 Assignment:392724, Aspen Wood Lodge	63232 Assignment:392756, Wiggins 3-6 (Sub 110)
63184 Assignment:392562, CSU Water Resource Center	63227 Assignment:392725, One Arrowhead Plaza	58801 Assignment:392480, SCL St. Joseph's Midtown
63198 Assignment:392649, SCL Health West Sub	63183 Assignment:392705, Roosevelt High School	57964 Assignment:392759, Mondelez Nabisco Aurora
58801 Assignment:392478, SCL St. Joseph's Midtown		
63159 Assignment:392514, St. Joseph Hospital-Facilities	59901 Assignment:392508, SCL St. Joseph's Midtown	60179 Assignment:392467, Hunter Douglas Plrn. 4
61849 Assignment:392651, PVH Arc Flash Studies	62167 Assignment:392488, PVMC - SCL	61595 Assignment:392728, Scott Elem FA Renlarc/Inn
62493 Assignment:392583, Loxo Oncology	61775 Assignment:392658, Banner Health FPMC OR#3	62181 Assignment:392456, Lockheed Martin Webster Canyon
60704 Assignment:392647, Linden St Phase 2	62167 Assignment:392489, PVMC - SCL	60280 Assignment:392582, Loxo Oncology (Sub 110)
61585 Assignment:392656, Scott Elem FA	60711 Assignment:392774, Leppert United	62720 Assignment:392482, St. Anthony North

- Review assignments in **GoBack** status and communicate with technician to determine the reason for the return trip and when it will happen. Then put the work order in the correct dispatch status.

62554 Assignment:390931, Ball AMC

- Review any open **Assigned** assignments to determine if they should be in **Finished** status and ask technicians to close them. When the assignments are known to be complete and needs to be billed, put all assignments for the work order into **Finished** status.

62992 Assignment:392143, Longmont United Hospital

PERFORM WORK ORDER

SERVICE PLEDGE

We will...

- o Arrive on-time at our jobsites
- o Call ahead to confirm every appointment
- o Thoroughly review the work to be performed with our customer before starting
- o Maintain an orderly jobsite free of hazards and clutter
- o Clean-up after ourselves daily
- o Draft a thorough plan for any return trips
- o Inform the customer of when we shall return to complete the job

- Always review the work we've done with the customer upon completion
- Make our customer aware of any items needing future attention
- Thank the customer for choosing Encore Electric!

FIELD CONNECT ASSIGNMENTS



REVIEWING ASSIGNMENTS

Review your assignments in Field Access daily. Depending on your schedule you may be required to do the following several times a day.

1. Each morning log into Field Access and review your schedule and assignments. At the end of each day review your schedule and assignments for the following day.

Assignments - All		[Log out]
61570 Details	Site: 4278 - Idex Band IT-Service Address: 4799 Dahlia St, Denver CO 80216 Contact: Brandon Ochs 720-322-6385 Description:	Scheduled: 5/20/22 11:00 AM Status: A - Assigned Work Summary: Tech needed for multiple service projects (7). See notes for more information. Priority: Schedule
61568 Details	Site: 4278 - Idex Band IT-Service Address: 4799 Dahlia St, Denver CO 80216 Contact: Brandon Ochs 720-322-6385 Description:	Scheduled: 5/20/22 7:00 AM Status: A - Assigned Work Summary: Priority: Schedule
62338 Details	Site: 4278 - Idex Band IT-Service Address: 4799 Dahlia St, Denver CO 80216 Contact: Brandon Ochs 720-322-6385 Description:	Scheduled: 5/19/22 11:00 AM Status: A - Assigned Work Summary: New 480c Feed for Laser Robot Machine. To be added to Jason W's work load at Band it. Priority: Schedule

2. Review the **Assignment Details** tab for an overview of the work order.
 - a. Contact Information: The primary contact information for the work order is listed under "Phone" and "Contact Note". Additional contacts for the site are listed under "Contact" and the "Site Contacts" link in blue. Contact the account manager to verify or update contact information for work orders.
 - b. Work Summary: Contains a brief scope description and any other details that affect scheduling. For the full scope description, see the "Work Ordered Notes" or open the proposal for flat rate work orders under "Attachments".
 - c. Estimated hours: Shows hours for the individual assignment and the total for the work order on flat rate work orders.

Assignment Details			
Assignment Description:		Work Order:	61570
Customer:	4140 - Idex Band It	Work Summary:	Tech needed for multiple service projects (7). See notes for more information.
Address:	4799 Dahlia St, Denver CO 80216 	Site:	4278 - Idex Band IT-Service 
Scheduled:	5/20/2022 11:00:00 AM	Contact:	Brandon Ochs 720-322-6385 Site Contacts
Work Order Type:	02 - MOVES/ADDS/CHANGES (Flat-Rate)	Estimated Hours:	4.00 - (estimated for work order: 290.00)
Contract:		PO Number:	106158
Phone:	303-320-4555	Contact Note:	Brandon Ochs
		Priority:	Schedule

WORKING WITHOUT WIFI OR CELL SERVICE

If you know you will be in an area without cell service or access to WIFI you will need to follow the following procedure

1. You will need to connect to the available WIFI (cell phone hot spot or other) touch the menu bar



on the left-hand side of Field Access and select

Go offline

NOTE: during offline mode any changes made in the system office side or field side will not be synced until you are back online

2. To cancel offline mode simply touch the upload data tab in the left-hand corner of you tablet.

Upload Data

ARRIVING ON SITE FOR AN ASSIGNMENT

1. Open the assignment .
2. Review all work order notes and attachments. Review all site notes and any other comments from other technicians.

Attachments contain: quotes, proposals, change orders, executed contract, client pos, drawings, permits, submittal, RFI'S, invoices, COIS, tax exempt certificates, cut sheets, one lines, daily huddles and any other forms completed in field connect.

Attachments







There are 23 attachments

Type:

File: No file chosen

Name:

Description:

Type	Name	Date	Description	
Work Order	22019169.pdf	3/17/2022 10:14 AM	PO	
Work Order	22019171.pdf	3/17/2022 10:15 AM	proposal - lunchroom workstations	
Work Order	22019173.pdf	3/17/2022 10:15 AM	Proposal - Office Data Drop (1)	
Work Order	22019174.pdf	3/17/2022 10:16 AM	Proposal - Deburring Machine Relocate	
Work Order	22019176.pdf	3/17/2022 10:17 AM	Proposal - Water Treatment Exhaust Fan	
Work Order	22019177.pdf	3/17/2022 10:17 AM	Proposal - Machine 214 and 215	

Proposals: Contain full scope that was agreed on with the customer. Review and understand the work description that was sold to the customer to understand their expectations.

Work Ordered Notes: Contains detailed scope from proposal and detailed job specific information such as access codes, COVID protocols, check-in requirements, containment, and any other special requirements.

Daily Summary: Completed daily by technicians. Brief description of work performed, job difficulties and or any other pertinent information.

- Fill out your daily huddle form in Field Access and save, (Make sure you identify the appropriate job hazards for tasks that day)
- Select the **Forms** tab to access all required forms to complete the work order. Select **New** to create a new form. On each form, **Save** allows you to return to the form later while **Complete** adds the forms to the attachments for the work order.

Forms There are 14 forms available ⌆

Name	Title	Status	Controls
CS	Customer Survey	N/A	New
DH	Daily Huddle	N/A	New
EE Permit	Energized Electrical Permit	N/A	New
Energized Work Permit	Energized Work Permit (TEST)	N/A	New
Equipment Operators Checklist	Equipment Operators Checklist	N/A	New
Excavation Permit	Excavation Permit (TEST)	N/A	New
JHA	Job Hazard Analysis	N/A	New
Job Time 1	Job Time 1	N/A	New
MTH	Material Handling Form	N/A	New
MOP	Method Of Procedure	N/A	New
Missed Rest Period	Missed Meal or Rest Period	N/A	New
PRF	Payroll Reimbursement Form	N/A	New
Service Pledge	Service Division Pledge	N/A	New
Energization Permit Form	Service Energization Permit	N/A	New

COMPLETING ASSIGNMENTS FOR THE DAY

1. Enter labor for you and your crew. The labor tab also indicates your individual labor hours entered for the work order and the total labor hours entered for by everyone on the work order.

Labor Total Hours: 292.50 - My Hours: 111.00

Labor There are no labor hours entered. ⌆

Date	Tech	Hours	Pay Type	Equipment	Task
<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Pay Type: Regular ▼</p> <p>Labor Date: 5/18/2022</p> <p>Hours: </p> <p>Task: <input type="button" value="Filter"/></p> <p><input type="checkbox"/> Task completed?</p> <p>Equipment: ▼</p> <p>Technicians: Jason L. Wicker Timothy Lee Koons Mauricio Vargas Ramirez Jonathan Schultz ▼</p> <p><input type="button" value="Add Labor"/></p> </div> <div style="width: 45%; text-align: right;"> <p><input type="button" value="Advanced"/></p> </div> </div>					

2. Enter material (this is for material from your van stock, meaning anything you pulled off your van. Material pulled from co-worker's vans needs to be entered via their field connect portal to properly track inventory for individual van warehouses.

Material There are no parts entered ⬆

Item	Quantity	Equipment	Task
------	----------	-----------	------

Search

Item

Quantity

Task

Task completed?

Equipment

3. Enter any non-stock material (this would be anything purchased outside a PO for this assignment – this would also include any material ordered to van stock that is not in the commodity list)

If purchasing material with a credit card you must enter the description and cost in invoice notes field. Van inventory is updated when the job is billed and is not updated real time. Enter **INC** as the **Item** value. Enter the lump sum plus tax of a few items (**Unit Cost**) and entering 1 for **Quantity and EA** **Unit Of Measure**. Add receipts/invoices as attachments and start your reimbursement form at this time.

Non-Stock There are no non-stock items entered ⬆

Item	Quantity	Unit Of Measure	Unit Cost	Equipment	Task
------	----------	-----------------	-----------	-----------	------

Item

Description

Quantity

Unit Of Measure

Unit Cost

Task

Task completed?

Equipment

Other Charges (if you have questions on what goes in here, please call you supervisor)

4. Enter **Daily Summary**: This is a description of work completed today.
5. Choose the correct **Status** when you have completed your work for the day.
 - a. **Finished**: Select when the assignment is complete. This removes from assignment from your tablet. There can be multiple assignments associated with a single work order. Putting the last assignment for a work order into **finished** status puts the entire work order into finished status which indicates it is ready to be billed.
 - b. **Go back**: Select when work order is not finished and requires a return trip later and you have no future assignments for the work order. Assignments in **GoBack** status stay in

your assignment list in Field Connect. The service technician is responsible for communicating with the service coordinator about when they will return to the work order and why the return trip is needed. The service coordinator is responsible adding additional assignments and putting the work order in correct dispatch status

6. When a work order is completed, and all assignments are in the finished status (there can be several assignments for one work order) complete the following:
 - a. In the **Daily Summary**, write **100% COMPLETE** followed by a brief summary of the work completed in layman's terms. This is used to create the invoice for billing by the project accountant and will be visible to the customer.
 - b. Change to **Finished** status and verify all assignments have been changed to finished status. Service technicians can view all assignments under the **WO assignments** tab to verify that open assignments are not assigned to others

WO Assignments There are 10 assignments for this work order ⤴

Tech	Status	Scheduled
Jason L Wicker	Assigned : 5/12/2022 9:44:23 AM	5/20/2022 11:00:00 AM
Jason L Wicker	Assigned : 5/9/2022 12:30:09 PM	5/13/2022 11:00:00 AM
Jason L Wicker	Finished : 5/12/2022 1:45:04 PM	5/6/2022 11:00:00 AM
Jason L Wicker	Finished : 5/2/2022 7:21:22 AM	4/29/2022 11:00:00 AM
Jason L Wicker	Finished : 4/25/2022 7:51:42 AM	4/22/2022 10:30:00 AM
Jason L Wicker	Finished : 4/16/2022 1:25:06 PM	4/14/2022 7:00:00 AM
Jason L Wicker	Finished : 4/11/2022 7:24:14 AM	4/7/2022 7:00:00 AM
James P McNown	Finished : 4/8/2022 2:47:00 PM	4/1/2022 11:00:00 AM
Jason L Wicker	Finished : 4/4/2022 8:53:43 AM	3/31/2022 7:00:00 AM
Jason L Wicker	Finished : 3/25/2022 5:05:34 PM	3/22/2022 7:00:00 AM

ORDERING MATERIAL

For special projects and work orders you must order material via a purchase order. A purchase order for material is obtained from the office for a special project or a work order. You do this in one of four ways.

1. Technicians are responsible for ordering their own commodities. Supervisors typically write PO's for quoted material. Supervisors place large orders of pipe and wire when it is required.
2. Before going to the supply house, request a PO in Field Connect by going to the PO tab in the assignment in WO details. Create a new PO by selecting the vendor and assigning the PO a number using the correct numbering sequence (WO#.000#). The system will not let you create duplicate PO's.

Purchase Orders

3. To create a new PO, select **New PO** and enter the next available PO# in **PO#**. Enter the PO# and order total and in **additional comments**. **Additional comments** generate an email to office personnel indicating there is a new open PO.

Purchase Orders There are no purchase orders for this work order

New PO

PO Request

Vendor:	<input type="text"/>	<input type="button" value="Search"/>
	<input style="width: 100%;" type="text"/>	
Item:	<input type="text"/>	<input type="button" value="Search"/>
	<input style="width: 100%;" type="text"/>	
Quantity:	<input type="text"/>	<input type="button" value="Add To List"/>

Additional Comments:

PO# assigned being used and order total

Anytime you pull a PO number yourself you need to also submit a PO request with the dollar amount of the PO so that we may update Spectrum with the correct dollar amount for the PO.

Emergency calls: for an emergency call after hours, you must order the material to the call address and office personnel will transfer it to the work order later.

MATERIAL RETURN OR RESTOCK PROCESS

Unused material ordered for a work order can be returned, disposed of, or restocked back to the van. Do not return material if it is not worth your time. Material can be thrown away on flat rate work orders.

Return material: return all overstock material that can be returned to the vendor and notify the project manager for that job that you have returned material from that project.

Restocking material: If you need to restock material to your van it must fall into the following categories.

1. It must be a small quantity of material that can be used within 6 months.
2. It cannot be a stock item.
3. The material must be in a condition to be sold as new.

Ordering van inventory: Requires a supervisor for the process.

1. Get quote for van inventory from vendor
2. Material must be in inventory items list (must have a code in our system)
3. Only a supervisor can enter P.O. for van inventory

4. Requires a twostep invoice entry
5. Material must also be received in twostep process
6. Service Electrician can pick up inventory

ORDERING TOOLS

1. Obtain approval from your Service Manager or Project Manager prior to ordering the tool
2. Provide a proper PO number to the vendor 5556-120-(your employee number)
3. Notify the Service Manager or Project manager of the tools identification number and location once received.

BILL WORK ORDER

ACCOUNTING SCHEDULE

Accounting schedules indicating important dates are created annually and revised periodically. The example schedule below is for 2022 and should be updated in this document annually. The most up to date copies are found in the accounting shared network drive.



Change PR w/e 02.06.22 to post as week ending date
Change PR w/e 06.05.22 to post as week ending date

ACCOUNTING SCHEDULE - 2022

# PR Weeks	4 January 4	5 February 4	6 March 5	7 April 4	8 May 4	9 June 4	10 July 5	11 August 5	12 September 4	1 October 5	2 November 4	3 December 4
Last Work Date Posted [PM Information]	Jan 30 22	Feb 28 22	Mar 31 22	Apr 30 22	May 29 22	Jun 30 22	Jul 31 22	Aug 31 22	Sep 30 22	Oct 31 22	Nov 30 22	Dec 31 22
Payroll Weekending Date	Jan 30 22	Mar 6 22	Apr 3 22	May 1 22	May 29 22	Jul 3 22	Jul 31 22	Sep 4 22	Oct 2 22	Nov 6 22	Dec 4 22	Jan 1 23
Open AR Module for Month (closing month and next month open)	Feb 1 22	Mar 1 22	Apr 1 22	May 2 22	Jun 1 22	Jul 1 22	Aug 1 22	Sep 1 22	Oct 3 21	Nov 1 22	Dec 1 22	Jan 3 23
Construction / WO Billings / Budget Updates Completed in Spectrum	Feb 2 22	Mar 9 22	Apr 6 22	May 4 22	Jun 1 22	Jul 6 22	Aug 3 22	Sep 7 22	Oct 5 22	Nov 8 22	Dec 7 22	Jan 4 23
AR Closed for Current Month	Feb 3 22	Mar 10 22	Apr 7 22	May 5 22	Jun 2 22	Jul 7 22	Aug 4 22	Sep 8 22	Oct 6 22	Nov 8 22	Dec 8 22	Jan 5 23
AP Cut-Off (Monthly Vendor Check Run)	Jan 25 22	Feb 25 22	Mar 25 22	Apr 25 22	May 25 22	Jun 27 22	Jul 25 22	Aug 25 22	Sep 30 22	Oct 31 22	Nov 30 22	Dec 31 22
All Invoices Entered in AP - email will be sent	Jan 27 22	Mar 3 22	Mar 31 22	Apr 28 22	May 26 22	Jun 30 22	Jul 28 22	Aug 31 22	Oct 4 22	Nov 3 22	Dec 5 22	Jan 3 23
Invoice Approval for Contract Labor & Utilities [PM]	Weekly	Weekly	Weekly	Weekly	Weekly	Weekly	Weekly	Weekly	Weekly	Weekly	Weekly	Weekly
All A/P Invoices Approved (AP Close) - by NOON	Jan 31 22	Mar 7 22	Apr 4 22	May 2 22	May 31 22	Jul 5 21	Aug 1 22	Sep 6 22	Oct 6 22	Nov 7 22	Dec 8 22	Jan 5 23
Equip/Tool Rentals updated & emailed to Asst. Controller [PM]	Jan 31 22	Mar 7 22	Apr 4 22	May 2 22	May 31 22	Jul 5 22	Aug 1 22	Sep 6 22	Oct 3 22	Nov 7 22	Dec 5 22	Jan 3 23
Misc Transfers	Jan 31 22	Mar 7 22	Apr 4 22	May 2 22	May 31 22	Jul 5 22	Aug 1 22	Sep 6 22	Oct 3 22	Nov 7 22	Dec 5 22	Jan 3 23
Job Cost Closed - email will be sent to PA's & PM's * Attach Bond List *	Feb 3 22	Mar 10 22	Apr 7 22	May 5 22	Jun 2 22	Jul 7 22	Aug 4 22	Sep 8 22	Oct 6 22	Nov 9 22	Dec 8 22	Jan 5 23
Work Order Reconciliation Complete (by noon)	Feb 4 22	Mar 11 22	Apr 8 22	May 6 22	Jun 3 22	Jul 8 22	Aug 5 22	Sep 9 22	Oct 7 22	Nov 11 22	Dec 9 22	Jan 6 23
AR Follow-up & Documentation in Spectrum Notes [PA]	Feb 4 22	Mar 11 22	Apr 8 22	May 6 22	Jun 3 22	Jul 8 22	Aug 5 22	Sep 9 22	Oct 7 22	Nov 11 22	Dec 9 22	Jan 6 23
Start CTC Process [PM] Leave JC month-end date open	Feb 4 22	Mar 11 22	Apr 8 22	May 6 22	Jun 3 22	Jul 8 22	Aug 5 22	Sep 9 22	Oct 7 22	Nov 10 22	Dec 9 22	Jan 6 23
Start CTC Job Reviews [PM & PA]	Feb 8 22	Mar 15 22	Apr 12 22	May 10 22	Jun 7 22	Jul 12 22	Aug 9 22	Sep 13 22	Oct 11 22	Nov 11 22	Dec 13 22	Jan 10 23
CTC Projections complete & UPDATED in Spectrum [PM]	Feb 10 22	Mar 17 22	Apr 14 22	May 12 22	Jun 9 22	Jul 14 22	Aug 11 22	Sep 15 22	Oct 13 22	Nov 15 22	Dec 14 22	Jan 12 23
Balance Sheet Account Reconciliations	Feb 11 22	Mar 18 22	Apr 15 22	May 13 22	Jun 15 22	Jul 15 22	Aug 12 22	Sep 16 22	Oct 14 22	Nov 11 22	Dec 16 22	Jan 13 23
Final Financials	Feb 18 22	Mar 21 22	Apr 20 22	May 20 22	Jun 20 22	Jul 20 22	Aug 19 22	Sep 20 22	Oct 20 22	Nov 21 22	Dec 20 22	Jan 20 23

Timesheets are due to Payroll by noon every Monday.

FISCAL YE

Notes:
Our fiscal year end - 9/30

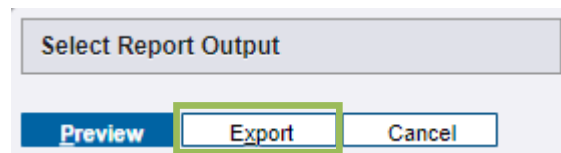
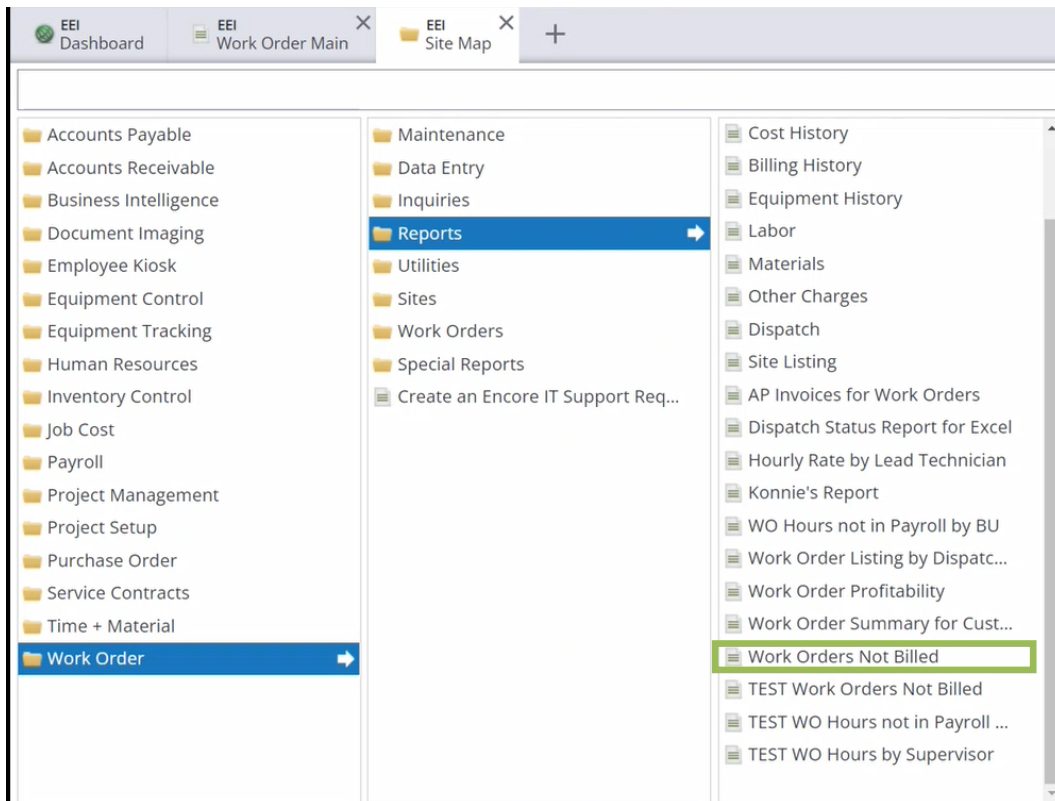
BILL WORK ORDER DISPATCH STATUSES

Dispatch Status	Dispatch Code	WO Status	Work Order Process Block	Definitions
Assigned	A	Assigned	Schedule	WO is assigned to a technician.
% Billing	Z	Assigned	Bill	Used for progress billing
Finished	F	Finished	Perform/Bill	Assignment is finished. This removes the assignment from techs assignment list in Field Connect on the tablet. If there are no more assignments in Field Connect for the WO, the work order is put into Finished status in spectrum. There can be multiple assignments for one work order. Tech should not put assignment in finished status unless assignment is finished. Otherwise use GoBack status.
WO Recvd	W	Finished	Bill	Project accountant uses this code to indicate invoice has been sent to customer

BILL WORK ORDER

A work order is ready to bill if for all assignments, including other co-worker assignments.

- **Finished** dispatch status
 - **100% Complete** technician notes in **Daily Summary**
1. Run the **Work Orders Not Billed** report and export from Spectrum to excel. Filter by status to find finished, complete, and progress billing status.



Export Report

Export format

Acrobat (PDF)
 Crystal report (RPT)
 Rich text format (RTF)
 Separated values (CSV)
 Microsoft Excel (XLS)

Options

Export file name .xls

Export data only?

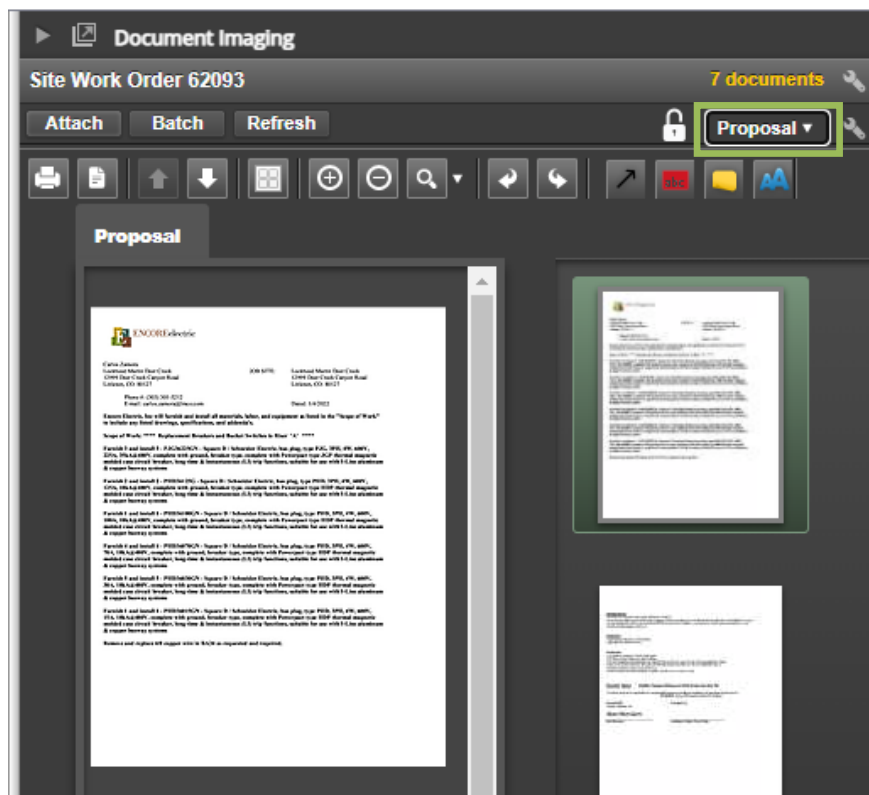
WO Number	Customer #	Name	WO Ordered Date	Status	Dispatch Status	Complete Date	Last Labor Date	5/28/2022	Quote	Notes
1										
2	60340	1086 Longmont United Hospital	12/15/2021	F	F	02/09/2022	01/28/2022	118	0.00	Talk to Ryan before transfer
3	60792	4732 Ball Corporation	01/20/2022	F	F	05/11/2022	02/11/2022	104	0.00	TRANSFER - Warranty for 19040
4	61091	4599 Southern Glazer's Wine & Spiri	02/10/2022	F	F	05/17/2022	03/04/2022	83	0.00	Asked Scott for a summary
5	61410	2584 Swinerton Builders	02/28/2022	F	F	03/22/2022	03/17/2022	70	0.00	Honeywell
6	61316	2434 Encore Electric	02/25/2022	F	F	03/23/2022	03/18/2022	69	0.00	Will be a transfer
7	60795	2904 Emcor Facility Services	01/20/2022	F	F	05/13/2022	03/24/2022	63	0.00	Need to e-mail Scott about this one
8	60758	1238 Univ Of Colorado Hospital-UCH	01/19/2022	F	F	04/01/2022	03/31/2022	56	0.00	Note that says this could be warranty
9	60645	2538 Randy Sewald	01/11/2022	F	F	05/17/2022	04/02/2022	54	0.00	#N/A
10	61819	5112 Lone Rock Foundation	03/31/2022	F	F	04/15/2022	04/08/2022	48	0.00	Waiting to hear back from Ryan - he is confirming that the work completed notes are correct.
11	61881	2584 Swinerton Builders	03/31/2022	F	F	04/11/2022	04/08/2022	48	0.00	Honeywell Warranty
12	61992	2434 Encore Electric	04/18/2022	F	F	04/21/2022	04/13/2022	43	0.00	Will be a transfer
13	61482	2920 Flintco LLC	03/09/2022	F	F	04/21/2022	04/22/2022	36	4,908.00	Ready to bill
14	61817	2905 Vertex Builders	04/03/2022	F	F	04/26/2022	04/22/2022	34	0.00	Not able to bill for labor, just half of material cost. Confirm with ZM if we should markup material after cost hit
15	61681	1848 Colorado Plasticard Inc	03/25/2022	F	F	05/12/2022	04/25/2022	31	2,980.00	Waiting on PO
16	62017	4599 Southern Glazer's Wine & Spiri	04/19/2022	F	F	04/26/2022	04/25/2022	31	0.00	#N/A
17	62082	3791 Kimpton Hotel Born	04/25/2022	F	F	04/27/2022	04/25/2022	31	0.00	#N/A
18	62057	1849 KUSA	04/21/2022	F	F	04/27/2022	04/26/2022	30	0.00	#N/A
19	62109	2871 Central Platte Valley Metro	04/26/2022	F	F	05/05/2022	04/26/2022	30	0.00	#N/A
20	62102	4631 At Your Service LLC	04/26/2022	F	F	04/29/2022	04/27/2022	29	0.00	#N/A
21	62103	4631 At Your Service LLC	04/26/2022	F	F	04/29/2022	04/27/2022	29	0.00	#N/A
22	62019	1208 Saint Joseph Hospital	04/19/2022	F	F	05/05/2022	04/28/2022	28	0.00	#N/A
23	62095	4047 Costco-Parker	04/25/2022	F	F	05/09/2022	04/28/2022	28	0.00	#N/A
24	62135	3095 City & County of Denver	04/27/2022	F	F	05/24/2022	04/28/2022	28	0.00	#N/A
25	62149	4480 IKON EFS	04/28/2022	F	F	05/03/2022	04/28/2022	28	0.00	#N/A
26	61668	1848 Colorado Plasticard Inc	03/24/2022	F	F	04/29/2022	04/29/2022	27	5,115.00	Sammy sending the PO
27	61777	5112 Lone Rock Foundation	03/31/2022	F	F	05/24/2022	04/29/2022	27	9,875.97	#N/A
28	62127	5187 BOA Technology Inc	04/27/2022	F	F	05/03/2022	04/29/2022	27	0.00	#N/A
29	62175	2942A The Cheesecake Factory	04/29/2022	F	F	05/02/2022	05/02/2022	24	1,000.00	#N/A
30	62092	5229 RCC Associated General Contrac	04/25/2022	F	F	05/09/2022	05/03/2022	23	0.00	#N/A

- Sort by the number of days since cost has hit jobs to prioritize billing oldest work orders first. This allows time for invoiced cost to hit purchase orders in the work order so the cost is accurate before billing. This is especially important for T&M work orders. Typically, do not bill less than 25 days out on T&M work orders.

T&M work orders with quoted dollar amounts indicate do not exceed this amount.

	A	B	C	D	E	F	G	H	I
	WO Number	Customer #	Name	WO Ordered Date	Status	Dispatch Status	Complete Date	Last Labor Date	5/26/2022
1									
2	60340	1086	Longmont United Hospital	12/15/2021	F	F	02/09/2022	01/28/2022	118
3	60792	4732	Ball Corporation	01/20/2022	F	F	05/11/2022	02/11/2022	104
4	61091	4599	Southern Glazer's Wine & Spiri	02/10/2022	F	F	05/17/2022	03/04/2022	83
5	61410	2584	Swinerton Builders	02/28/2022	F	F	03/22/2022	03/17/2022	70
6	61316	2434	Encore Electric	02/25/2022	F	F	03/23/2022	03/18/2022	69
7	60795	2904	Emcor Facility Services	01/20/2022	F	F	05/13/2022	03/24/2022	63
8	60758	1238	Univ Of Colorado Hospital-UCH	01/19/2022	F	F	04/01/2022	03/31/2022	56
9	60645	2538	Randv Sewald	01/11/2022	F	F	05/17/2022	04/02/2022	54

- For quoted work orders that are ready to bill, compare the technician **Daily Summary** notes to the proposal to determine if everything in the proposal was completed. Verify that the work order is finished and ready to bill. Sometimes work orders are put into **Finished** dispatched status to remove it from technician's iPad when the work order is not ready to bill.



AR FOLLOW UP

DAILY SUMMARY

INVOICE NOTES

PARTS LIST

● WORK COMPLETED

WORK ORDER NOTES

● WORK ORDERED

WORK SCHEDULED

Tech: Eric Joseph Autret, Date: 4/12/22 7:06 AM - 4/11/2022 cut in a new box for the new location of the GFCI helped Flintco demo out the old receptacles, and roughed in the new locations for recepts.

Tech: Eric Joseph Autret, Date: 4/12/22 7:07 AM - Met with Flintco to tie in the new receptacles to the existing circuit. All receptacles are working and finished!

Tech: Justin James ORourke, Date: 4/20/22 10:08 AM - Cut in new receptacle tied into existing circuitry. Fixed existing receptacle.

4. Enter **Work Completed** notes that will be used to generate invoice based on proposal and technician notes. Flat rate relies more on proposal and T&M relies heavily on the **100% COMPLETE** summary in layman's terms from technician in "Daily Summary".

AR FOLLOW UP

● DAILY SUMMARY

INVOICE NOTES

PARTS LIST

WORK COMPLETED

WORK ORDER NOTES

● WORK ORDERED

WORK SCHEDULED

CE #007 - 018 - Lime Light Panorama Ortho Casting Room

Cut in a new box for the new location of the GFCI. Helped Flintco demo out the old receptacles and roughed in the new locations for receptacles.

Met with Flintco to tie in the new receptacles to the existing circuit.

Cut in a new receptacle tied into existing circuitry. Fixed existing receptacle and verified receptacles are in good working order.

5. Compare quoted hours on **Main** tab to actual labor entered under **Labor** tab to confirm all work is completed. These numbers should be in the same range.

Dispatch

Zone: FR Front Range

Priority: 04 Schedule

Case type: COJW Colorado Journeyman License

Price method: Flat Rate

Quote: 4,908.00 Hours: 16.00

Est. arrival:

New	Switch	1-Main	3-Material	4-Other	5-PO	6-Notes	7-Financials	8-Tasks	9-UDF
Work order 61482 Panorama Castle Rock									
Edit		Edit All		Re-price		Delete		Stat	
Work date	Bill #	Source	Technician	Pay type	Hours worked	Hrs billed to customer			
04/20/22		Entry	1614 (Justin James ORourke)	R	3.50	3.50			
04/12/22		Entry	1726 (Eric Joseph Autret)	R	1.00	1.00			
04/11/22		Entry	1726 (Eric Joseph Autret)	R	8.00	8.00			

6. Under the **Material** tab, select new and add 1% of quoted material cost for miscellaneous supply fee to flat rate work orders. This is internal and is not visible to customers. Uncheck the taxable box to not charge tax on this fee.

New	Switch	1-Main	2-Labor	4-Other	5-PO	6-Notes	7-Financials	8-Tasks	9-UDF	✓
Work order 61482 Panorama Castle Rock										Transactions available to bill
Edit		Edit All		Re-price		Delete		Status: All		
Bill #	Source	Vendor	P.O.	Item	U/m					
	Entry			G017 (3/8 MC/AC CONNECTOR SAD...	EA					
	Entry			G022 (#0 ANTI SHORT BUSHING)	EA					
	Entry			K018 (12-2 HCF CABLE SOLID)	EA					
	Entry			N018 (KX CADDY)	EA					

New Material Transaction

Item code: Misc Hardware / Supply Fee

Quantity: Unit of measure:

Details

G/L Department: SERVICE WORK ORDERS

Task:

Task completed?

Equipment:

Component:

Contract:

Accrue use tax?

Customer billing: _____

Bill customer for this material?

Taxable on customer invoice?

Show this item on A/R invoice in detail?

Unit cost:

Unit price:

Invoice extension:

Warranty: _____

Expiration date:

Bill manufacturer for this material?

Taxable on manufacturer invoice?

Manufacturer: NONE

Billing rate:

Warranty extension:

Work order 61482 Panorama Castle Rock

Task code	Description	Quantity	Price	Extension	Bill #	Equipment
-----------	-------------	----------	-------	-----------	--------	-----------

New Task

Task: 100 100% Complete billing
 Pricing type: Flat rate

Task
 Equipment:
 Contract:
 Quantity: 1
 Sell price/unit: 4,858.92
 Extension: 4,858.92

Budget financials

Labor cost	0.00	
Material cost	0.00	
Other costs	0.00	
Subtask costs	0.00	
Total cost budget (estimate)		0.00
Overhead	0.00	
Profit	0.00	
Subtotal (including overhead and profit)		0.00
Flat price		4,858.92
Sell price/unit		4,858.92

9. Go to **Billing Setup** and uncheck the **Taxable?** checkbox to ensure tax is not paid on this fee.

Work order 61482 Panorama Castle Rock

Classification
 Lead source: EXISTING Existing Customer
 Salesperson: ZM Zack Maestas
 Taken by: ZAM
 Print status: UNPRINTED

Billing rates
 Material level: 1
 Labor level: 1
 Material markup: DS Denver Service

Terms and conditions
 Terms code: 3 Net 30
 Sales tax code: CASTLEROCK Castle Rock Douglas
 Taxable?
 G/L department: WI SERVICE WORK ORDER W/INVENTORY
 Cost Center: 120 Front Range Service

Alternate bill-to address
 Print alternate address on work order form and invoice?
 Bill-to code

10. Review the numbers in the **Financials** tab to check for accuracy and anything that needs further investigation such as profitability. If the target of 40% profitability is not being hit, then there should be a conversation with account managers to find out what is going on. For example, if a change order is necessary?

Switch Bill Now 1-Main 2-Labor 3-Material 4-Other 5-PO 6-Notes 8-Tasks 9-UDF Work Order Financial Summary ✓								
Work order	61482	Panorama Castle Rock						
Quote	4,908.00							
Billings and cost								
	Labor/Equip	Material	Other	Flat rate	Total	Tax	Invoice total	
Unselected	0.00	0.00	0.00		0.00			
Current billing	0.00	49.08	0.00	4,858.92	4,908.00	0.00	4,908.00	
Total unbilled	0.00	49.08	0.00	4,858.92	4,908.00			
Billed-to-date	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Total sale	0.00	49.08	0.00	4,858.92	4,908.00	0.00	4,908.00	
Standard Cost								
Estimated cost		3,124.10			3,124.10			
Unposted cost	0.00	0.00	0.00		0.00			
Actual cost	616.50	0.00	0.00		616.50		Net profit: 4,291.50 (87.4 %)	
Total cost	616.50	3,124.10	0.00		3,740.60		Net profit: 1,167.40 (23.8 %)	

11. Select **Bill Now** and select the upcoming Friday for the invoice date. Put all invoices for that week into a batch for the service manager to review. Put the billed work order in **W WO Recvd** status to indicate they have been invoiced. Anyone changing the dispatch status out of **W WO Recvd** must notify the project accountant. This is critical for understanding which work orders have been billed.

Switch Bill Now 1-Main 2-Labor 3-Material 4-Other 5-PO 6-Notes 8-Tasks 9-UDF								
Work order	61482	Panorama Castle Rock						

Create A/R Invoice

Work order # 61482

Accounts receivable invoice

A/R invoice # 61482

Customer 2920 Flintco LLC

Invoice date 05/27/22

G/L date 05/27/22

Invoice batch code KMF052722

Terms code 3 Net 30

Sales tax code CASTLEROCK Castle Rock Douglas

Bill through date 05/31/22

Preview customer invoice now?

Invoice totals

Manufacturer subtotal

Customer subtotal 4,908.00

Sales tax

Invoice total 4,908.00

Work order

Set work order to complete?

New dispatch status W

New priority U4 WO Recvd (Finished)

Continue

REMIT TO: 7125 W Jefferson Ave Lakewood, CO 80235

Invoice 61279

Bill to: Colorado Plasticard Inc 10368 W Centennial Rd Littleton, CO 80127	Job: CPI Centennial 10368 W. Centennial Rd. Littleton CO 80127
--	---

Invoice #: 61279	Date: 05/13/22	Customer P.O. #: 2045120
Payment Terms: Net 30	Salesperson: Zack Maestas	
Customer Code: 1848		

Remarks: CPI Centennial WO# 61279

Questions or credit card payment for this invoice: Lakewood - (720)279-5701

Quantity	Description	U/M	Unit Price	Extension
	Quote			4,702.00
			Subtotal:	4,702.00
			Total:	4,702.00

Add Exit Sign/EM Circuit and Receptacle/Receptacle for TV in Scodex Room

- Install (1) customer furnished exit sign. Circuit to nearest un-switched local lighting circuit in room.
- Install (1) duplex receptacle for TV monitor. Circuit to nearest 120 volt circuit in room.
- Install new 20 amp, 120 volt breaker in EM Generator panel in main electrical room. Energized work will be required.
- Install conduit, wire and (1) new 20 amp, 120 volt EM circuit from panel into Scodex Room.
- Install (1) duplex receptacle above ceiling in room to feed new IT equipment/Black Box on new EM Circuit.

Quantity	Description	U/M	Unit Price	Extension
7.000	SERVICE TECHNICIAN	HRS	165.00	1,155.00
1.000	MISC HARDWARE/SUPPLY FEE		5.00	5.00

13. Progress billing is determined by reviewing profitability report. Typically, on larger work orders.

Revenue and Cost										
Work Order	Status	Dispatch	Customer Name	Work Summary	Total					
					Finished Date	Quote	Invoice	Cost	Profit Profit %	
Work Order Status as of Period-End Date: Unfinished										
56767	H	C	Univ Of Colorado Hospital-UCH	IR Scan on ATS's only per proposal		2,970.00	0.00	0.00	0.00	0.00%
56769	H	C	Univ Of Colorado Hospital-UCH	IR scan of ATS switches only		6,220.00	0.00	0.00	0.00	0.00%
57121	S	A	Univ Of Colorado Hospital-UCH	Add auto openers/security rough in and Containment for this work to OR's in AIP, AIP and RMLEI****Do not schedule, waiting on Shawn to schedule a kick off meeting		99,015.00	69,310.50	42,485.12	26,825.38	38.70%
57122	H	C	MA Mortenson	CUSTOMER MOVED START DATE TO NOV - SJD NICU and L&D Triage Expansion / KP Suite Renovations Project Manager- Jason Becker Project start date July 19th.		47,971.00	34,171.00	24,347.99	9,823.01	28.75%
57405	O	T	Adolfson & Peterson	NORTHGLENN HIGH SCHOOL - Disconnect Reconnect Mechanical Equipment		24,734.00	7,068.95	3,419.95	3,649.00	51.62%
57649	H	C	Centura Health AP/Payroll	Annual MV Transformer oil testing, quote from H&H attached, this is the 3rd year we've done this testing.		2,265.00	0.00	125.37	-125.37	0.00%
57964	O	T	Becknell Industrial	LED lighting retrofit of Mondelez Building - Ryan Janness will handle this one. PARTS ORDERED 6/9 - Added exhaust fan and reconnect whips		72,579.97	54,359.64	43,243.12	11,116.52	20.45%
58407	S	A	Gilmore Construction Corp.	Mobile MRI Project		71,271.00	63,898.00	73,418.49	-9,520.49	-14.90%
58509	S	A	TKM Group	Leprino Lab Cooling, more info to follow. This work order will be increased once we get our contract from TKM		35,737.00	29,847.00	32,964.78	-3,117.78	-10.45%
58531	O	T	Hunter Douglas WFD	NEEDS PERMIT - HD recently purchased anew building at 2880 Midway, we need to bore across the parking lot to get fiber to it. See attached proposal-need to release Interface and Advanced Underground, quotes attached.		39,890.00	0.00	428.12	-428.12	0.00%
58541	O	T	Univ Of Colorado Hospital-UCH	DO NOT DISPATCH, WAITING ON SCHEDULE from UCH - Install/extend power for I-Star security panel in IDF room of ED, and install (2) conduit sleeves		1,480.00	0.00	0.00	0.00	0.00%

- Review overtime and double-time pay approval for emergency calls. **Priority** should indicate if the double-time and overtime pay is required. Account managers confirm approval for billing with OT and double time pay with clients.

CLOSE WORK ORDER

CLOSE WORK ORDER

- At month end, run the **Work Order Close Report** under work orders>special reports on the site map. Export the report as an excel file and select the **export data only** check box. Select the appropriate cost center and the **W WO Received** dispatch status. **W WO Received** indicates the work order is being billed.

The screenshot shows a software interface with a navigation menu on the left. The 'Work Order' menu item is selected, which has opened a sub-menu containing 'Special Reports'. The 'Special Reports' sub-menu is also selected, opening a list of reports. 'Work Order Close Report' is highlighted in green. Below the menu, a dialog box titled 'Select Report Output' is displayed, with three buttons: 'Preview', 'Export', and 'Cancel'. The 'Export' button is highlighted with a green border.

Export Report

Export format

Acrobat (PDF)

Crystal report (RPT)

Rich text format (RTF)

Separated values (CSV)

Microsoft Excel (XLS)

Options

Export file name: .xls

Export data only?

OK Cancel

Set Report Parameters

Enter Cost Center:
String

000 ▲
110 ■
120 ▼
130 ▼

Enter Dispatch Status:
String

T ▲
U ■
W ▼
Z ▼

- Sort the report by the **OpenAR** column to determine if Encore has been paid for the work order. Zero balance indicates payment has been received. Work orders cannot be closed unless payment has been received.

Q	R	S	T	U	V	W	X	Y
VarianceQuote-Invoiced	Open POs	Unposted	ActualCostNetProfit	Total-Actual	Total Paid	OpenAR	Cost_Center	
0.00		0.00	884.08	295.92	1,160.00	0.00	120	
0.00		1,759.22	692.23	177.77	870.00	0.00	120	
-591.00		0.00	248.50	342.50	591.00	0.00	120	
0.00		0.00	-467.61	467.61	0.00	0.00	120	
-440.00		0.00	237.24	202.76	440.00	0.00	120	
0.00	1	0.00	469.51	1,530.49	2,000.00	0.00	120	
-198.00		0.00	82.92	115.08	198.00	0.00	120	
-1,029.86	1	0.00	505.77	524.09	1,029.86	0.00	120	
0.00	1	0.00	2,617.76	9,998.24	12,616.00	0.00	120	
0.00	1	0.00	3,062.54	1,087.06	4,149.60	0.00	120	
-660.00		0.00	303.80	356.20	660.00	0.00	120	
-440.00		0.00	237.24	202.76	440.00	0.00	120	
0.00	1	0.00	4,764.58	1,610.42	6,375.00	0.00	120	
-110.00		0.00	59.31	50.69	110.00	0.00	120	
-495.00		0.00	266.89	228.11	495.00	0.00	120	
-385.00		0.00	207.58	177.42	385.00	0.00	120	
-330.00		0.00	177.93	152.07	330.00	0.00	120	
-660.00		0.00	351.75	308.25	660.00	0.00	120	
-110.00		0.00	59.31	50.69	110.00	0.00	120	
-770.00		0.00	415.17	354.83	770.00	0.00	120	
-110.00		0.00	59.31	50.69	110.00	0.00	120	
-935.00		0.00	504.13	430.87	935.00	0.00	120	
-275.00		0.00	148.27	126.73	275.00	0.00	120	
-660.00		0.00	355.86	304.14	660.00	0.00	120	

- Sort by the **Last Cost** column to determine work orders that have not had cost in the last 60 days. The 60-day period allows time for all invoices to be received and processed as well as credit card charges that take 30 days to process. Do not close work orders that have had cost in the last 60 days.

	A	B	C	D	E	F	G	H	I
1	WO Close Report	5/27/22							
2	WO	Price	Site	Ordered Date	Days Since	Last Inv Date	Days Since Date	Last Cost	Days Since Date
3	55905	F	2640	12/9/20 12:00 AM	534.00	12/9/20 12:00 AM	534.00	2/26/21 12:00 AM	455.00
4	59563	F	2357	10/12/21 12:00 AM	227.00	11/12/21 12:00 AM	196.00	11/12/21 12:00 AM	196.00
5	60249	T	3497	12/9/21 12:00 AM	169.00	12/24/21 12:00 AM	154.00	12/24/21 12:00 AM	154.00
6	60369	T	3650	12/16/21 12:00 AM	162.00	4/30/22 12:00 AM	27.00	12/29/21 12:00 AM	149.00
7	60500	T	6308	12/29/21 12:00 AM	149.00	1/12/22 12:00 AM	135.00	1/6/22 12:00 AM	141.00
8	60419	F	3497	12/20/21 12:00 AM	158.00	1/28/22 12:00 AM	119.00	1/28/22 12:00 AM	119.00
9	60545	T	3497	12/31/21 12:00 AM	147.00	1/28/22 12:00 AM	119.00	1/28/22 12:00 AM	119.00
10	59380	T	5849	9/27/21 12:00 AM	242.00	1/31/22 12:00 AM	116.00	1/31/22 12:00 AM	116.00
11	59529	F	6488	9/30/21 12:00 AM	239.00	1/31/22 12:00 AM	116.00	1/31/22 12:00 AM	116.00
12	60474	F	3497	12/23/21 12:00 AM	155.00	1/31/22 12:00 AM	116.00	1/31/22 12:00 AM	116.00
13	61012	T	6214	2/7/22 12:00 AM	109.00	3/25/22 12:00 AM	63.00	2/7/22 12:00 AM	109.00
14	61017	T	6731	2/7/22 12:00 AM	109.00	3/18/22 12:00 AM	70.00	2/7/22 12:00 AM	109.00
15	60603	F	535	1/7/22 12:00 AM	140.00	1/31/22 12:00 AM	116.00	2/8/22 12:00 AM	108.00
16	61003	T	6337	2/7/22 12:00 AM	109.00	3/18/22 12:00 AM	70.00	2/8/22 12:00 AM	108.00
17	61011	T	6337	2/7/22 12:00 AM	109.00	3/18/22 12:00 AM	70.00	2/8/22 12:00 AM	108.00

- Use this sorted report to determine works order that meets the criteria for ready to close.
- Go through each tab and make sure there are no outstanding labor and material cost.
- Go to the **Labor** tab on the work order. Time that was entered into a workbook can be added to labor by clicking on the blue **Labor** button in the upper right side of the **Labor** tab.

Save	Cancel	Form	2-Labor	3-Material	4-Other	5-PO	6-Notes	7-Financials	8-Tasks	9-UDF
Work order	60987	Site	4278							

New										Switch	1-Main	3-Material	4-Other	5-PO	6-Notes	7-Financials	8-Tasks	9-UDF	Work Order Labor		
Work order										60987		I dex Band IT-Service									
Edit										Edit All		Re-price		Delete		Status: All					
Work date	Bill #	Source	Technician	Pay type	Hours worked	Hrs billed to customer	Invoice extension	Warranty extension	Labor cost status	Equipment											
02/28/22	0001	Entry	966 (Jason L Wicker)	R	2.00	2.00	.00	.00	Updated												
02/22/22	0001	Entry	2023 (James P McNow)	R	3.00	3.00	.00	.00	Updated												
02/14/22	0001	Entry	966 (Jason L Wicker)	R	5.00	5.00	.00	.00	Updated												

- Go to the **Material** tab look for the blue **Material** button in the upper right corner indicating that there is outstanding material cost available to bill. Click the material button>select all>continue to pull in the outstanding material cost.

Work Order Materials		
Transactions available to bill		Material
Status: All		
Invoice extension	Unit cost	Cost total
21.87	.00	

Bill Available Material Transactions							
<input type="button" value="Select All"/> <input type="button" value="Select"/> <input type="button" value="Deselect All"/> <input type="button" value="Deselect"/>							
Selected?	Current location	Vendor	P.O.	P.O. status	Invoice #	Type	Item
Yes	Material cost history	2060 (Graybar Electric Co...	60987.0002	Open	9325599753	I	INC (material
Yes	Material cost history	2060 (Graybar Electric Co...	60987.0001	Open	9325579812	I	INC (material
<input type="button" value="Continue"/> <input type="button" value="Cancel"/>							

- Go to the **PO** tab and confirm there is nothing outstanding. Outstanding balances require further information from service supervisors and service managers to confirm the work order can be closed.

New	Switch	1-Main	2-Labor	3-Material	4-Other	6-Notes	7-Financials	8-Tasks	9-UDF
Work order	60987	I dex Band IT-Service							
Search	<input type="text"/>	<input type="button" value="New Search"/>							
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>								
Purchase order	Vendor	Order date	\$ ordered	\$ received	\$ outstanding	Lump sum?	Last received date		
60987.0001	2060 (Graybar Electric Company, Inc.)	02/15/22	220.86	220.86	.00	Yes	02/21/22		
60987.0002	2060 (Graybar Electric Company, Inc.)	02/16/22	48.86	48.86	.00	Yes	02/22/22		

- Select each purchase order with a zero outstanding balance and change the status from **Open** to **Closed**. Confirm that the cost center for each PO is **000**.

Purchase order 60987.0001

Vendor Graybar Electric Company, Inc.

Cost Center Assets & Liabilities

For 60987 I dex Band IT-Service

Line	Type	Quantity	Item code	Item description
001	D	1.00	INC	material

Purchase Order Entry

Financials

Purchase amount	220.86
Sales tax	
Purchase order total	220.86

Purchase order status

Current revision 000

(before tax)	G/L account	Job
220.86	5310	

10. Review all notes to ensure there is no reason to keep the work order open.

Save Cancel 1-Main 2-Labor

Work order 60987

- AR FOLLOW UP
- DAILY SUMMARY
- INVOICE NOTES
- PARTS LIST
- WORK COMPLETED
- WORK ORDER NOTES
- WORK ORDERED
- WORK SCHEDULED

11. Go to the **Task** tab to confirm there is no outstanding tasks.

12. Go to the **Financials** tab and review all information closely to ensure it is ready to close. Look for things like missing cost, net profit values that are very high or low, and anything out of the ordinary that requires investigation. If nothing is outstanding, then click **Bill Now**, check the **Set work order to complete** box and click continue.

Switch Bill Now 1-Main 2-Labor 3-Material 4-Other

Work order 60987 Idex Band IT-Service

Quote 2,187.23

Billings and cost _____

Create A/R Invoice

Work order # 60987

Accounts receivable invoice

A/R invoice # 60987A

Customer 4140 Idex Band It

Invoice date 05/31/22

G/L date 05/31/22

Invoice batch code KMF

Terms code 3 Net 30

Sales tax code DENVER Denver and State

Bill through date 05/31/22

Preview customer invoice now?

Invoice totals

Manufacturer subtotal

Customer subtotal

Sales tax

Invoice total

Work order

Set work order to complete?

New dispatch status

New priority

It is possible to reopen work orders that are in the same fiscal years. This should be avoided if possible because it affects when the revenue is recognized for the work order. Closing work order on time gives a more accurate picture of revenue.

Work orders are typically closed at the end of the month.

Meet with Service Manager to determine if the Work Order can be closed

Ensure all costs have come in (corporate credit cards have about 30-day delay)

Ensure you do not prematurely close the work order - i.e. all expected cost is in and captured

Work Order 100% billed

PO's are reconciled (where applicable)

Work Order paid in full

Set to Closed in Spectrum

FLAGGING INCOMPLETE WORK ORDERS

OFFICE PERSONNEL

Work orders that are missing information should be marked by office personnel in Spectrum using the **C&A WO Checklist** UDF's to indicate what type of information is missing. This will populate a dashboard in Spectrum that is visible to all roles. Account managers and service supervisors should check this dashboard daily to resolve incomplete work orders. The work will not be scheduled until the missing information is added and the UDF is put in complete status.

The person flagging the work order will reach out to the account manager or other appropriate person to gather the missing information. They should document what is missing in the **Internal Feedback** notes field. Communicating with the right people to get the information will allow the work to proceed. Otherwise, the work order will remain in the Unscheduleable Spectrum dashboard until the account manager inputs the missing information.

UDF FLAGGING PROCESS

1. Select the type of missing information in the **C&A WO Checklist** user defined field (UDF)
2. Enter notes in work order internal feedback
3. Notify account managers via email

FIELD PERSONNEL

If a work order makes it to the technician and is missing information, the tech should contact the account manager or supervisor to find the missing information and then document what was missing in the note field **Internal Feedback**. Documenting missing information is a critical step so the team knows where we need to improve.

FIELD CONNECT FLAGGING PROCESS

1. Contact account manager or service supervisor to find missing information to proceed with work. The account manager contact information is notes section under the site tab by selecting the account manager drop down.
2. Document what information was missing in **Internal Feedback** notes in field connect.