



## Maintenance Module – Work Orders

Property Management Solutions for Over 30 Years

### Overview

The Maintenance module provides the means for recording, tracking and reporting on work orders. When a work order is completed, it can be turned into an invoice using the Invoice function in AP.

A work order form can be printed at the time of entry, later in Work Order History, or in the Print Work Orders function. Copies for the vendor, owner, tenant and file can be printed.

If you are integrated with Inosio for Work Orders please also see [R-778 Integration](#) or [R-931 Inosio Integration Guide](#).

The Maintenance function also includes an asset tracking feature. You can maintain an inventory of major assets and manage their warranty and repair history. Those are addressed in [Help Document #767](#).

The Maintenance functions addressed in this document:

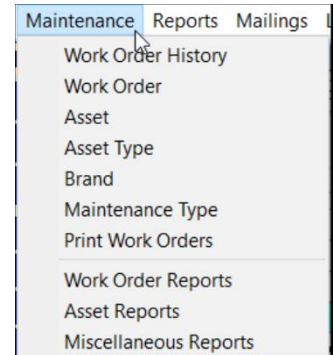
[Work Orders](#) – for entering new work orders and updating their progress

[Work Order History](#) – for viewing and tracking work orders that have been entered

[Print Work Orders](#) – print a single or multiple invoices

[Turn a Work Order into an Invoice](#)

[Work Order Reports](#)



### Enter a Work Order

This function, found under <<Maintenance, Work Order>>, lets you record a work order and track it through the various stages until completion. From the Invoice function in Payables you can select a work order and turn it into an invoice.

A printed work order document can be created for the vendor. The account billing information can be completed. Thus when turned into an invoice only the invoice number may be needed.

A work order can be turned into an invoice by clicking on the Invoice button while editing the work order. As much information as is available will fill into the invoice form.

To delete a work order, select it from the Find List, then click the <Delete> button on the bottom.

There are four folders for entering information: [Problem Report](#), [Vendor Assignment](#), [Account Billing](#), [Asset and Warranty](#).

## ID

The ID must be a unique identifier. The application generates an ID consisting of year, month, day and an algorithm generated four letter suffix. You may change the ID by double clicking in the the field and entering your own identifier.

## Long Description

Use this field to identify the work order. For example, '2118 Oak leaky faucet' or 'Garcia 2118 Oak'. When you select the unit in the Site field, the unit short ID will fill in automatically. You can double click in this field to fill in the unit long description.

## Status

You can modify the status as work progresses so that reports you run will reflect current conditions. Certain statuses require that other fields be entered. The different statuses are: Unassigned, Assigned, Estimate, Out for Bid, Approval Pending, Vendor Notified, In Progress, Completed, Invoiced, Resolved, Hold, No Action Taken, Deferred, Not Approved.

A work order with a status of Completed can be used to create an invoice in the Invoice function. At that point the status will be changed to Invoiced.

## Problem Report Section

### Priority

Enter the priority for getting work started on the job.

### Reported

This date field defaults to the system date. Change it to the date actually reported if appropriate.

### Reported By

This is a freeform optional entry field.

### Phone Number

This is a freeform optional entry field for the phone number of the person in Reported By.

### Problem Description

Use this freeform required field to explain the problem as reported or investigated.

### Insert Time and User Initials

Inserts the day, date, time and user initials into the problem description field at the point where the cursor is placed.

### Site

Select the unit affected from the [Find List](#). If the unit you select has a Cost Limit defined in the Unit Profile, a message will appear asking if you wish that limit copied to the Cost Limit field on the Vendor Assignment folder. Selecting a site will put the unit ID in the work order long description. To change to the unit long description, double click in that field.

### Show Alerts

Displays any maintenance alerts associated with the unit. Examples are Home Warranty, Preferred Vendors, Service Contracts. The text of the alert can be copied to the clipboard or the comment in the alert can be copied to the clipboard. If it is copied to the clipboard it will also be copied into the problem description field of the work order.

### Tenant

Select the tenant involved (if any) from the Find List.

## Ledger

Based on the unit/tenant selected, the owner is displayed in this protected field.

## Notification

### Notification Required

By marking this checkbox you can toggle the entry. If marked ☒, the tenant name, cell, daytime and nighttime phone number are inserted in the name field. If the tenant name plus the phone # fields are too long to fit, the nighttime phone will be left off.

The tenant name fills in from the Contact filed in the tenant profile. If blank, it fills in from the first line of the permanent address field. A maximum of 54 characters will fill in. The priority is up to 20 characters of the contact; up to 20 characters of the cell, between 14-20 characters of the day, between 1-20 characters of the night. Each field has a maximum of 20 characters. When the field is fewer than 20, more of the next in line can fill in.

## Vendor Assignment Tab

### Maintenance

Select the Maintenance Type (optional) from the Find List. The type can be defined by you in the Maintenance Type function. If you have preferred vendors for plumbing, painting, yard work, etc., you can define a maintenance type to choose from which will fill in the Vendor and Bill Code fields.

### Vendor

Select the vendor from the Find List. If the vendor is not on the list, use the folder button to bring up a blank vendor profile so you can add to the list.

### Authorized by

This is a freeform optional entry field. Double clicking in this field will fill in your User initials.

**Phone**

This field is for the Authorized By phone number if applicable.

**Serviced By**

This is a freeform optional entry field.

**Estimate**

The vendor's estimated cost to perform the work. If an amount is entered here it will be withheld from the owner's distribution check. Work orders with a status of Hold, Invoiced, Resolved, Not Approved Deferred and No Action Taken are not included – the estimated amount will not be withheld.

**Cost Limit**

This field fills in from the Unit Profile if one was defined there, or you can enter an amount (optional).

**Total**

The total amount from the line items entered on the Account Billing tab fills in this protected field.

**Tracking**

Tracking dates can be changed as events occur. Dates are maintained for Reported, Vendor Notified, Required By, Work Started, Work Completed.

**Work Description**

A freeform unlimited entry block for describing the work the vendor has performed.

**Special Instructions**

You can enter instructions that will print on the work order.

**Create Statement Note**

Clicking this button will copy the Work Description to the Unit Note, marked Append to Statement. From that Unit Note screen you can also choose to Append to Ledger or Append to Manager.

**Time/Initials**

Clicking this button will insert the Day, Date, Time and User initials into the Work Description field beginning at the cursor position.

**Performance Evaluation****Rating**

One of six rating classes can be chosen from the [Find List](#). In addition, there is a comment area for performance evaluation related notes.

## Work Order History

Reported	Status	Priority	Name	Site	Vendor	Maintenance Type
12/10/2018	In Progress	Normal	212 Main - Tree	212 Main Street	Lawn Doctor	
1/24/2019	Vendor Notified	Normal	WB201	Willow Brooke 201	Victor Garcia	
1/29/2019	Unassigned	Normal	FAIR436 - Flooding	436 Fairway Drive		

Site	MAIN212: 212 Main Street	Estimate	\$0.00
Tenant	GURO: Edward & Marianne Guro	Cost Limit	\$200.00
Ledger	CLAYTON: Frederick Clayton	Total	\$0.00
Vendor	LAWN: Lawn Doctor		
Asset			

Reported	Vendor Notified	Required By	Work Started	Work Completed	
12/10/2018					

Storm on Tuesday knocked down tree in back yard.

☐ Enable Filter  
 Filter  
 Edit  
 New

1. All Work Orders / 2. Not Resolved / 3. On Hold / 4. Resolved / 5. Not Invoiced / 6. Unassigned

Work order history is similar to the other history functions. All work orders are available for review. From this form you can filter, edit and create a new work order.

- Detailed information is available for each line item. The line items are sorted by date.
- Five folders provide a quick filter to various work order subsets.
- While viewing transactions in any of the folders, action buttons are available.

### Filter

Clicking the Filter button will bring up a filter screen where you can enter parameters to help find a work order on the Find List.

### Edit

Clicking the Edit button will bring up the work order as originally entered. From that screen you can modify any field as well as print the work order.

### New

Clicking the New button will bring up a blank work order form from which you can enter a new work order.

Edit Filter

Profile Search  
 Dashboard  
 Internet Publishing  
 Profiles  
 AP  
 AR  
 GL  
 Maintenance  
 Reports  
 Mailings

Sort Order: Date Reported
 

Reported: [ ] to [ ]  
 Vendor Notified: [ ] to [ ]  
 Required By: [ ] to [ ]  
 Work Started: [ ] to [ ]  
 Work Completed: [ ] to [ ]

Site: [ ]  
 Tenant: [ ]  
 Ledger: [ ]  
 Vendor: [ ]  
 WO Number: [ ] Contains: [ ]

☐ Filter Active

Help Save Clear Close

## **Work Order Folders**

### **All Work Orders**

This displays all work orders in the system.

### **Not Resolved**

All work orders that have a status other than Invoiced or Resolved.

### **On Hold**

All work orders that have a status of Hold.

### **Resolved**

All work orders with a status of Resolved and Invoiced. Any reported problem that gets taken care of can be put in the Resolved status.

### **Not Invoiced**

All work orders that are in a Completed status.

### **Unassigned**

Those work orders that do not have a vendor assigned.

## **Work Order Line Items**

### **Site**

This field displays the unit information entered in the work order and includes a folder to jump to the unit profile.

### **Tenant**

This field displays the tenant chosen in the work order and includes a folder to jump to the unit profile.

### **Ledger**

This field displays the owner of the unit as assigned in the unit profile includes a folder to jump to the owner or property profile.

### **Vendor**

This field displays the vendor selected on the Vendor Assignment tab of the work order and includes a folder to jump to the vendor profile.

### **Asset**

If asset information is entered in the work order, the asset will display in this field. It includes a folder to jump to the Asset profile.

The other line item information fields are taken from the work order:

- Estimate
- Cost Limit
- Total
- Reported
- Vendor Notified
- Required By
- Work Started
- Work Completed

### Account Billing Tab

Multiple line items can be associated with a work order. Each line item has its own bill code and dollar amount. To enter additional line items click in the area below the last line item entered. The total amount of all line items entered will be displayed on the Vendor Assignment page in the total field.

The line items are used to fill in an invoice when one is created from a work order.

### Bill Code

Select the [Bill Code](#) from the [Find List](#).

### Amount

Enter the amount for the Bill Code chosen.

### Asset and Warranty Tab

This tab is used to record information about assets (capital items) and in-warranty equipment items. You can view the asset's repair history and the site repair history by clicking the appropriate button.

If you choose an asset, information about the asset will print as part of Problem Description in the work order report.



## Print Work Orders

This function allows you to print multiple work orders at one time.

The screenshot shows the 'Print Work Orders' window. At the top, there are tabs for 'Work Order History', 'Print Work Orders', and 'FAIR436 - Flooding [Work Order]'. Below the tabs is a table with columns: Print, Reported, Name, Site, Vendor, Status, and Priority. The table contains three rows of work orders. The third row, 'FAIR436 - Flooding', is selected. Below the table, there is a detailed view of the selected work order, showing fields for Reported, Vendor Notified, Required By, Work Started, and Work Completed, all with date pickers set to 1/29/2019. A text area below these fields contains the description 'flooding in basement from recent storm'. To the right of the text area are buttons for 'Toggle Print', 'Edit', and 'New'. At the bottom left, there are two tabs: '1. Marked for Printing' and '2. All Work Orders'.

Print	Reported	Name	Site	Vendor	Status	Priority
Print	12/10/2018	212 Main - Tree	212 Main Street	Lawn Doctor	In Progress	Normal
Print	1/29/2019	FAIR436 - Flooding	436 Fairway Drive		Unassigned	Normal

Reported: 1/29/2019 Vendor Notified: 1/29/2019 Required By: 1/29/2019 Work Started: 1/29/2019 Work Completed: 1/29/2019

flooding in basement from recent storm

1. Marked for Printing / 2. All Work Orders

There are two folders:

**Marked for Printing** - This contains a list of those work orders you have selected to print. Work Orders can be selected by choosing them from the Find List on the Work Order screen or the Work Order History screen. Edit the work order and mark the "Mark for Printing" checkbox. Then Save.

**All Work Orders** - This contains a list of all work orders from which to select.

To change the print status you can also highlight a work order and click the <Toggle Print> button.

When you click Compile, the Report Setup screen displays.

### Report Setup

This screen displays when you click the Print button from the Work Orders function or the Print Work Orders function. You can choose to print copies for vendor, tenant or tenant invoice, owner or owner invoice and file by marking the checkboxes.

The screenshot shows the 'Report Setup' dialog box. It has a title bar with a close button. Inside, there are several fields and buttons. The 'Printer' field is set to 'HPB8B1DC (HP OfficeJet 250 Mobile Series)' with a 'Properties' button next to it. The 'Paper Source' field is set to 'Main Tray' with a 'Make Default' button next to it. The 'Report Date' field is set to '1/29/2019' with a 'Today' button next to it. Below these fields, there are checkboxes for 'Include' with options for 'Vendor Copy', 'Tenant Copy', 'Owner Copy', 'File Copy', 'Tenant Invoice', and 'Owner Invoice'. At the bottom, there are buttons for 'Settings', 'Print', 'Publish', 'Mail', 'Export', 'Preview', and 'Cancel'.

Report Setup

Printer: HPB8B1DC (HP OfficeJet 250 Mobile Series) Properties

Paper Source: Main Tray Make Default

Report Date: 1/29/2019 Today

Include ☒ Vendor Copy ☐ Tenant Copy ☐ Owner Copy  
☒ File Copy ☐ Tenant Invoice ☐ Owner Invoice

Settings Print Publish Mail Export Preview Cancel

You can also choose to Print or Publish. Choosing Publish will put the work orders in the Upload folder to be emailed or uploaded to HeroPM through Internet Publishing.

All work orders print the Job Site address, manager contact information, vendor contact information and Problem Description information from the work order. They also contain a Notify Tenant message with the tenant's name and day, cell and night phone numbers.

The key code and work description fields can be added using Setup, Database Settings, Maintenance tab. See [Help Document #747](#).

**Vendor Copy** - The cost not to exceed is included. The problem description and special instructions are included. The Additional Instructions field will include the words "Please provide an invoice when work is completed."

**Tenant Copy** - The tenant copy has the tenant name and address in the address window space. The problem description and work description fields are included. The additional information field will include the words "This is not an invoice. No action required."

**Tenant Invoice** - Like the tenant copy but also has line item billing information from tab 3 of the work order. The work description field and the invoice details field are included.

**Owner Copy** - The owner copy has the owner name and address in the address window space. The problem description and work description fields are included. The additional information field will include the words "This is not an invoice. No action required." as well as the information from the Account Billing tab, and the name/address of the owner.

**Owner Invoice** - Like the owner copy but also has line item billing information from tab 3 of the work order. The work description field and the invoice details field are included.

**File Copy** - The file copy has no address in the address window space. The problem description, work description, and special instructions fields are included. Additional Information field will include the words "This is not an invoice. No action required.", the information from the Account Billing tab, and the name/address of the owner.

To not print the Special Instruction section of the work order, enter /WONSI in Setup, Processing Defaults, Options tab - Customize Programming Options field. See Help Document #377.

## Vendor Copy

PROMAS Demonstration Package  
311D Maple Avenue West  
Vienna, VA 22180

This is the additional letterhead information  
from the management group profile.  
Good for contact information phone numbers, email  
address

up to ten lines

Lawn Doctor  
420 Creek Mill Road  
Oakton, VA 22284

### Work Order 070610UJKY Vendor Copy 212 Main - Tree

Cost Not To Exceed \$200.00

Notify tenant Edward & Marianne Guro at 555-9624

Reported	Required By	Vendor Notified	Work Completed	Authorized By	Manager	Priority
12/3/2022	1/6/2023	12/3/2022		Don aby phone	Fritz 703-555-4519 (D) 703-555-1212 (C) fritz@promas.com	Normal

Job Site	Vendor Address	Vendor Phone Numbers	Unit & Vendor
212 Main Street Fafax, VA 21015	Lawn Doctor 420 Creek Mill Road Oakton, VA 22284 lawndoc@promas.com	Jerry 555-3200 (D) 555-4422 (C) 555-3202 (F)	MAIN212 LAWN

#### Problem Description

Storm on Tuesday knocked down tree in back yard.

#### Special Instructions

These are special instructions for the vendor.

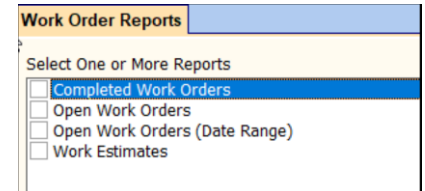
#### Additional Instructions

Please provide an invoice when work is completed. Your invoice must identify labor and material totals.

## Work Order Reports

The work order reports have to do with work orders entered in the Maintenance function.

Each report can be limited to different subsets of vendors, owners, units, tenants as well as date ranges using the selection fields on the Work Order Report selection screen.



Work Order Reports

Select One or More Reports

- ☒ Completed Work Orders
- ☐ Open Work Orders
- ☐ Open Work Orders (Date Range)
- ☐ Work Estimates

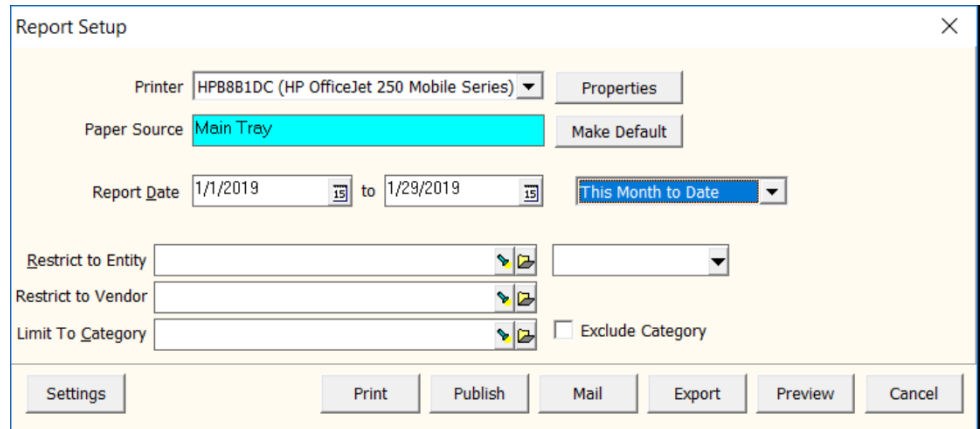
## Work Order Report Fields

### Report Name

Choose the report name from the [Find List](#). The reports are limited to specific work order statuses.

### Report Date

Enter the date range you want for the report. Only work orders falling within the date range will be considered.



Report Setup

Printer: HP88B1DC (HP OfficeJet 250 Mobile Series) [Properties]

Paper Source: Main Tray [Make Default]

Report Date: 1/1/2019 to 1/29/2019 [This Month to Date]

Restrict to Entity: [ ] [ ] [ ]

Restrict to Vendor: [ ] [ ] [ ]

Limit To Category: [ ] [ ] [ ] ☐ Exclude Category

[Settings] [Print] [Publish] [Mail] [Export] [Preview] [Cancel]

### Restrict To Entity

The report can be limited to a specific building, owner, property, unit, management group, property manager or profile list.

### Restrict to Vendor

The report can be limited to a specific vendor.

### Limit to Category

The report can be limited to a category or exclude a particular category.

## Completed Work Orders

This report lists those work orders that have been completed as of the date chosen (all those with a status of Completed, Invoiced, Resolved, Deferred, Not Approved, No Action Taken will be considered).

## Open Work Orders / Open Work Orders (Date Range)

Open work orders report is as of a specific date. The date range report gives a date range (all those with a status of Unassigned, Assigned, Approval Pending, Estimate, Vendor Notified, In Progress, Out for Bid will be considered).

## Work Estimates report

This report will list any work order that has an estimated amount which is held back when doing distribution checks. All work order statuses except Invoiced and Resolved are included.

## Turn a Work Order Into an Invoice

There are two ways to turn a work order into an invoice.

### **Method 1**

- When you are ready to create the invoice, edit the work order.
- You have the option of entering billing information on the Account Billing tab.
- Click on the <Invoice> button on the left. The invoice screen will display with the information from the work order filled in.
- Enter any other information on the invoice screen and click <Post>.
- The invoice will be saved and the status on the work order will change to Invoiced.

### **Method 2**

- If you choose, when the work is completed, edit the work order and change the status to Completed.
- When you are ready to create the invoice, go to AP, Invoice. See [Help Document #227](#).
- In the Work Order field, use the flashlight to bring up a list of work orders.
- If the Show All checkbox is not marked, only the completed work orders will display. Mark the checkbox to show all work orders.
- Once you choose the work order, information from the work order will fill in the appropriate invoice fields.
- Enter any other information and Post.
- The invoice will be saved and the status of the work order will change to Invoiced.