

# Work Orders

## Work Orders

The Work Orders section is where you will find all the jobs your administrator has assigned to you. By default the list shows your open (incomplete) work orders, but you can switch views at any time.

## The Work Order List

Each work order in the list shows you:

- The work order number in brackets
- The name of the property or job site, which is a clickable link to the full detail page
- A color-coded due date badge so you can see at a glance what needs attention:
  - **Blue** means the due date is coming up and you have time
  - **Yellow** means the job is due today
  - **Red** means the job is past its due date
  - **Green** means the job has been completed
- The property address, with a map pin icon you can tap to open directions in your maps app (Apple Maps on iPhone and iPad, Google Maps everywhere else)
- The management company name and their contact information
- Any work instructions provided by your administrator
- A list of checklists linked to that work order, also color-coded by due date

## Switching between open and completed work orders:

Click the **Show Completed WOs** button in the upper right corner to see work orders you have already finished. Click **Show Incompleted WOs** to switch back to your active list.

## Rejected work orders:

If a work order has been rejected, it will appear with a yellow background and a warning icon. Click into it to see the details and take action.

## The Work Order Detail Page

Clicking a work order opens its detail page. What you see here depends on the type and current state of the job.

**If the work order is already completed**, the page shows a completed label and a link back to your list. No further action is needed.

**If the work order is active**, you will see one or more of the following sections:

### **Simple Completion**

This section is for straightforward jobs where you just need to confirm the work is done.

- Read through the job details, property address, and instructions.
- Click the address to open it in your maps app if you need directions.
- Enter any notes about the work in the notes field.
- Optionally update the account or invoice number and your actual fee for the job.
- Click the red **All Complete** button to submit your completion.

### **Detailed Completion**

If the work order includes specific fixtures or equipment items, you will see the Detailed Completion section also. This is where you document the condition of each individual piece of equipment. If some equipment isn't repaired, this is where you will note what you found on site and recommend next steps.

A map at the top of the section shows the locations of fixtures at the property. Click **Hide Map** if you want more screen space. Each fixture is listed below the map as a collapsible card. Tap or click the fixture name to expand it and see its parts.

**For each part, select one of three status buttons:**

- **OK** means the part is in good condition and no action is needed.
- **Needs Service** means the part requires repair or follow-up. When you select this option, an extra area appears where you can enter a note describing the issue and upload photos of the problem.
- **Repair Complete** means the part had an issue and you have already fixed it. The same note and photo area appears so you can document what you did.

**Uploading photos:** Click **Add Images** to open the photo uploader. You can choose an image from your device or take a new photo with your camera. Uploaded photos appear as thumbnails. Click the X badge on any thumbnail to remove a photo you added by mistake. Photos that were already on file before you arrived are shown for reference but cannot be deleted from this page.

Once you have gone through all fixtures and parts, fill in the account or invoice number and your actual fee if needed, then click **Submit**.

### **Reject This Work Order**

If for any reason you cannot accept the work order, use this section to send it back to your administrator. Enter a reason for the rejection in the text field and click **Reject**. Rejected work orders appear highlighted in yellow on your work order list.

## Notes

The Notes section is available on every active work order. It is a running log of comments visible to both you and your administrator.

To add a note, click in the text field, type your message, and press **Enter**. The note is saved immediately with your name and a timestamp. You do not need to click a separate save button.

To delete one of your notes, click the X icon next to it. You will be asked to confirm before it is removed permanently.

## Workorder #12502

Welcome, Elemental Air

### Ollie's Toccoa Quarterly HVAC Service Units 1,2,7,8

**Property:** Toccoa Georgia Ollies 996

📍 1524 Big A Rd, Toccoa, GA 30577, USA

**Management:** Big Ole Company (615) 555-1212

123 Main Street Nashville TN 37206

Please conduct the quarterly service on HVAC Units 1,2,7, and 8. Clean the coils, Change the filters, Inspect the heat exchangers, and adjust the belts. Estimate the cost before starting repairs. Call me with any questions, Jeff 615-319-8277.

Confirm completion of Workorder #12502 at Toccoa Georgia Ollies 996.

Enter notes here, then click all complete below.

All Complete

Revision #6

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**Add A Note to Workorder #12502**

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