

## ServTraq Work Orders

ServTraq® now includes a Work Order solution. Generate, track, and manage Work Orders through a single dashboard. With our Work Order Management solution:

- Link a Work Order to a Job
- Assign a funding Source to the Work Order
- Assign a Vendor or Subcontractor
- Add Measures to your Work Order
- Track the Progress of your Work Order

### Step 1:

Work Orders can be created by going to: *ServTraq>Weatherization>Scheduling>Work Orders*

Click **New Work Order**

**SERVTRAQ** Local Solutions for Everyone

Logged in as E

Work Orders

Current View: Open Work Orders + New Work Order Edit Work Order Refresh List Export List

Priority	Work Order Number	Job ID	Entry Date	Due Date	Status	Subject
Priority: HIGH	2	28195	5/19/2019 4:55 PM	6/12/2019	APPROVED	MY WORK ORDER
	4	36560	5/23/2019 2:08 PM	6/30/2019	IN PROGRESS	GHFI ASSESSMENT AND INSTALL
Count=2						
Priority: LOW	3	36556	5/20/2019 10:34 AM	5/24/2019	INITIAL REQUEST	TEST
Count=1						

### Step 2:

If a job has not been created, you'll need to create one first. Enter the fields in the table below.

Save Save and Close Exit

**Add Work Order**

**Customer: STEVE DOMINGO; Address: 200 HOLLY DR WATSONVILLE CA 95076**

Work Order Details

JobID\*: 36564 View Job

Subject\*: HVAC Work Order

Current Status: -

Priority\*: HIGH

Vendor: AAA FURNACE & AIR CONDITIONING CO.

Start Date: 6/3/2019

Due Date\*: 6/14/2019

Completed Date: -

Closed Date: -

Description: HVAC - Forced Air System

Field	Description
<b>Job ID</b>	Select the Job ID from the drop down list. If a job has not been created, you'll need to create one first.
<b>Subject</b>	Enter the Subject of the work order.
<b>Current Status</b>	The initial status will default to <b>Initial Request</b> . You can update the status of the work order after saving the work order.
<b>Priority</b>	Assign the work order a priority of: <b>Emergency, High, Low, Normal</b>
<b>Vendor</b>	Associate a Vendor or Subcontractor to the Work Order. You may need to add the Vendor first if they are not in the drop down list.
<b>Start Date</b>	Enter the start date
<b>Due Date</b>	Enter the anticipated due date
<b>Completed Date</b>	If the work was completed, enter a completed date to remove the work order from your open work order list.
<b>Closed Date</b>	If <b>no work</b> was completed, enter a closed date to remove the work order from your open work order list.
<b>Description</b>	Enter a description of the work order.

### Step 3:

Click **save**. The *estimated hours, labor, materials, subcontractor costs, and total* will be calculated after each measure entry.

Work Order Saved Successfully

Work Order Details

JobID\*: 36564 View Job

Subject\*: HVAC WORK ORDER

Current Status: INITIAL REQUEST

Priority\*: HIGH

Vendor: AAA FURNACE & AIR CONDITIONING CO.

Start Date: 6/3/2019

Due Date\*: 6/14/2019

Completed Date:

Closed Date:

Description: HVAC - FORCED AIR SYSTEM

Estimated Hours: 0.00

Estimated Labor: \$0.00

Estimated Materials: \$0.00

Estimated Sub Costs: \$0.00

Estimated Overhead: \$0.00

Estimated Total: \$0.00

Click **Add Measure** assign measures to the work order.

Work Order Items			
<a href="#">+ Add Measure</a> <a href="#">Edit Measure</a> <a href="#">X Delete Measure</a> <a href="#">Refresh List</a> <a href="#">Export List</a>			
Measure	Projected Subprogram	Status	Percent Complete

#### Step 4:

In the “Work Order Item” page, enter the fields below and click **save & close**. Repeat the step until all measures have been added to your Work Order.

The screenshot shows a web application window titled "Add Work Order Item" with a sub-header "HEATING SOURCE REPLACEMENT, FORCED AIR UNIT (SPLIT SYSTEM)". The "Measure Data" section contains the following fields and values:

- Measure\*: HEATING SOURCE REPLACEMENT, FORCED AIR UNIT (SPLIT SYSTEM)
- Projected Subprogram: ECHS 2019
- Current Status\*: NOT STARTED
- Estimated Hours\*: 2
- Measure Count\*: 1
- Estimated Labor\*: \$0.00
- Estimated Materials\*: \$0.00 (with an "Add/Edit Materials" button next to it)
- Estimated Subcontractor Costs\*: \$0.00
- Overhead\*: \$0.00
- Estimated Total\*: \$0.00
- Percent Complete\*: 0
- Note: (empty text area)

Field	Description
Measure	Select the measure from the drop down table
Projected Subprogram	Assign the projected funding source. (not required)
Current Status	Assign the measure a status: Not Started, Approved, Cancelled, Completed, In Progress, On Hold, Ordered
Estimated Hours	Enter the estimated number of hours
Estimated Labor	Enter the estimated labor hours
Estimated Material	Enter the estimated material amount
Estimated Subcontractor Costs	Enter the estimated subcontractor cost
Overhead	Enter the estimated overhead cost
Estimated Total	ServTraq calculated field
Percent Completed	Enter the completion percentage to track progress
Note	Enter additional notes if necessary.

#### Step 5:

Click **Print Work Order** to generate a printable version.

The screenshot shows a web application window titled "Edit Work Order". The customer information is displayed as "Customer: STEVE DOMINGO; Address: 200 HOLLY DR WATSONVILLE CA 95076". Below this, the "Work Order Details" section shows "JobID\*: 36564" with a "View Job" link.

Example:

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### Work Order

TEST AGENCY R1

Customer: STEVE DOMINGO  
Address: 200 HOLLY DR WATSONVILLE CA 95076  
Status: CANCELED  
Priority: HIGH  
Subject: HVAC WORK ORDER  
Comment: HVAC - FORCED AIR SYSTEM

Work Order Number: 5  
Date Opened: 6/3/2019  
Due Date: 6/14/2019  
Last Activity: 6/3/2019  
Job ID: 36564

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Projected Subprogram: ECHS 2019

Work Order Items						
Measure	Hours	Labor	Materials	Subcontractor	Meas Ct	Total
HEATING SOURCE REPLACEMENT FORCED AIR UNIT (SPLIT SYSTEM)	2.00	\$0.00	\$0.00	\$0.00	1	\$0.00
Projected Subprogram Totals for ECHS 2019	2.00	\$0.00	\$0.00	\$0.00		\$0.00
Work Order Totals:	2.00	\$0.00	\$0.00	\$0.00		\$0.00

#### Step 6:

To update the status of the work order, scroll to the bottom of the page and click the **addition** icon to log a new status. The available statuses are:

*Approved, Cancelled, Completed, In Progress, Initial Request, On Hold, Out to Bid, Waiting for Approval.*

### Status History

Status Date	Status	Note	Entry Date	Entered By	Last Updated Date	Last Updated By
Status Date: 6/3/2019	Status: OUT TO BID	Note:				
6/3/2019	INITIAL REQUEST	INITIAL WORK ORDER SAVE	6/3/2019	JULIE GARCIA	6/3/2019	JULIE GARCIA

Notes