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**

Step 2:

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

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

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

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.

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.

Example:

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.