How do I create a Work Order?

- Start by going to the work order screen.
- Click the new icon
- Make sure the Type, Category and Status is correct.
- Fill in Description and Status.
- Requestor (building info should populate)
  - If it doesn’t, enter the property number (like BL107) and click on the Zoom for Region and it should populate.
- Contact information (name, phone & email)
- Click the green plus sign to add a phase
- Fill in Phase Description (change if needed)
- Shop, Priority, and Work Code
- Funding Source
  - **Shop** – Most common (Default)
  - **Organization** – used for HALLS Work Orders
    - Go to white drop down menu at top of page and click on Account Set up
    - Click green plus sign
    - Zoom on Sub Code
    - Click Green Done Flag to go back to Account setup
    - Click Green done flag to go back to phase
  - **Custom** – Used for requests where an account number is provided for you
    - Go to white drop down menu at top of page and click on Account Set up
    - Click green plus sign
    - Choose SPLIT accounting
    - Fill in or zoom on account and choose account
    - Fill in or Zoom on Sub Code
    - Click Green Done Flag to go back to Account setup
    - Click Green done flag to go back to phase
- **Elevator Tickets**
  - Go to Equipment and Zoom.
  - On Equipment Group enter B-ELEVATORS
  - Click the execute search and select the elevator you need.
    - On the Phase page, click on the green done flag to go back to the Work Order page
    - On the Work Order Page Click on the save icon