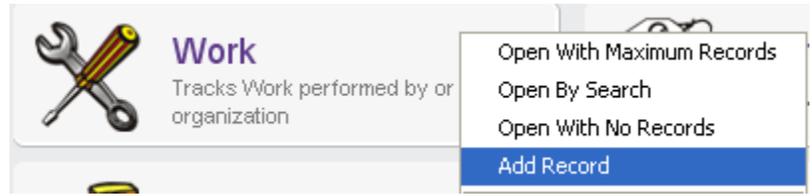
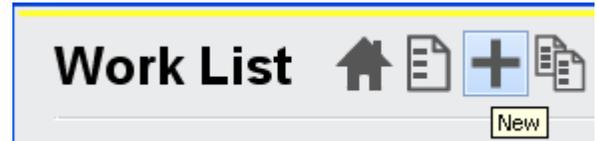


1. Right-click on **Work** and select **Add Record**, or **Open By Search** and click **New** from the list/form.



2. Enter information into the following fields:



The top of the Work window records WHO and WHERE:

Number:	0061	006AR
Tenant:	ONEWAY	The One Way Company
Work Contact:	REVER.P	Paul Rever
Phone:	617-767-3427	
Property:	6 ARLNGTN	6 Arlington Street
Unit:	6 ARLNGTN-300	Suite 300
Floor:		
Room:		

Client or Tenant	To bring up the list of Clients/Tenants, enter the first few characters of the name and press Tab. Select from the list by double-clicking or highlight and press Tab. Note: In most cases the following fields will default once you Tab out of the Client/Tenant field: Contact, Phone, Property, Unit, Floor and Room.
Work Contact	If the wrong contact defaulted, update the field accordingly. To bring up the list of Contacts, enter the first few characters of their last name and press Tab. Select from the list by double-clicking the record or highlighting the record and pressing Tab. If the person is not in the Contact list - change the field title from <u>Work Contact</u> to Work Person by clicking on the <u>down arrow</u> . Then type the person's name in the field. <div style="text-align: center;"> <input type="text" value="Work Person"/> <input type="text" value="Type the person's name"/> </div>
Phone	This should default; if it is incorrect or blank adjust it accordingly. Enter the number of the person reporting the work or the number where work is to take place.

Unit	This should default based upon the client/tenant; if it is incorrect or blank adjust it accordingly. Note: If the Unit is not in the list, select the record for the floor and use the Room field to record the Unit.
Floor	The Floor field will default based upon the Unit.
Room	The Room field can be used to further describe the location (kitchen, conf room, etc). All these values should reflect where the work will be performed.

Reminders:
 Use the Tab key to move from one field to the next - Use Shift / Tab to move backwards through the fields.
 Selecting Enter will save the record (or you can click the green checkmark).
 Fields outlined in red are mandatory.

3. Enter information into the following fields:

The second part of the Work window records **WHAT, WHO (the work will be assigned to), and WHEN.**

Work Type	Select the code for the type of work needed to resolve the issue. Note: If you are not sure of the code, type the first few characters and press Tab.
Assigned To: Worker	Most of your work orders will be assigned to Workers (staff). If the work is assigned to a vendor change the field title to Vendor and choose the appropriate vendor from the list.
Priority	This will default based upon the Work Type, you can adjust if necessary.
Description	Enter the specific information regarding the work. Note: this information will typically be shown to the clients on the Portal Pages.
Notes	Typically this field is left blank; as it is used at completion to record details related to the work that was performed.
Work Category	This will default based upon the Work Type, you can adjust if necessary.
Work Status	This will default based upon the Work Type, you can adjust if necessary.

Number:	0061	006AR	<input type="checkbox"/> Posted
Tenant:	ONEWAY	The One Way Company	Work Category: CLN Cleaning
Work Contact:	REVER.P	Paul Rever	Work Status: CLOSED Work is done, inspect
Phone:	617-767-3427		Entered: January 9, 2008 15:38
Property:	6 ARLNGTN	6 Arlington Street	Received: January 9, 2008 15:38
Unit:	6 ARLNGTN-300	Suite 300	Scheduled: January 10, 2008 15:38
Floor:			Required: January 11, 2008 15:35
Room:			Started: January 11, 2008 10:20
Department:	CLN		Completed: December 3, 2011 12:05
Work Type:	CLEAN	Cleaning	Closed: December 6, 2011 16:00
Priority:	3-LOW	Low	Posted: 00:00
Worker:	ENG1	Eng 1	<input type="checkbox"/> Billable
Description:	need the carpets to be steam cleaned		Notes:

Save the changes by clicking on the **Save** icon when you are done.
To **Save and Print** click the **Save and Print** icon.

