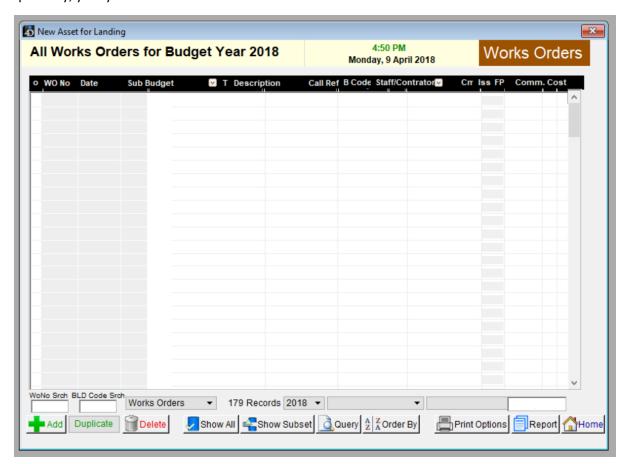# Quadpro Help Desk

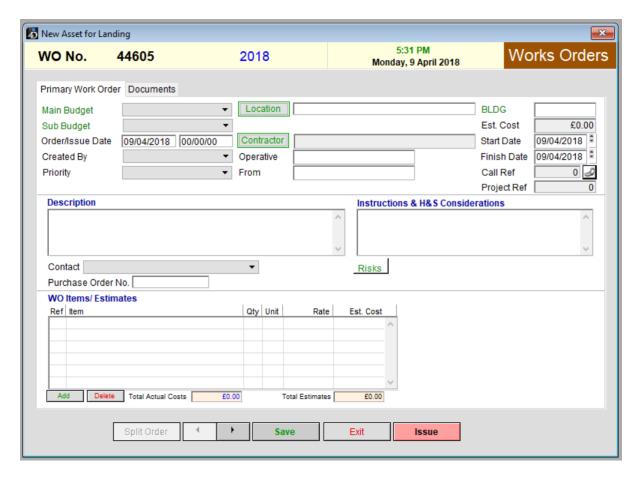**Creating a Works Order**

Creating a Works Order

To create a works order from the **Home Screen**, select **'Work Orders' > 'Add Works Order'.**

Works orders range greatly. This could be the ordering of new parts for a boiler, some supplies to repair a structure, the hiring of a plumber or the planned general maintenance for an asset on site quarterly, yearly or when needed.

To begin adding a new **Works Order** Click **'Add'** from below the list.

Once you select to add a new order, the following screen will appear.

Populate this list with information about the works needed, this will include the price, start date and any health and safety notices needed.

Main Budget:

This covers the funds allocated as a whole to be used each financial year for maintaining buildings, planned maintenance, repairs and so on.

Select the designated main budget which is linked to what type of request has been made.
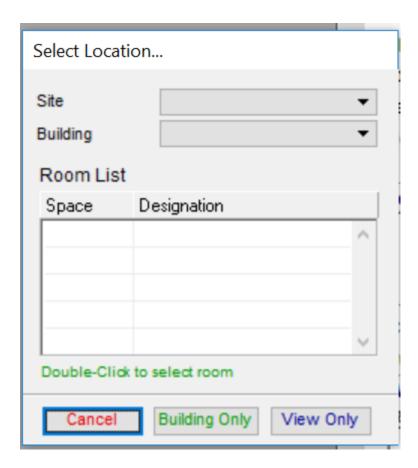
Sub Budget

The Sub Budget is the category in what action needs to be taken for the request. For example, do building supplies or spare parts need to be ordered in? Or does a contractor need to be hired.

Location Button

When you click the green location button a new dialogue box will open where you can choose the site and building from the drop down menu. You can also choose which room/space that the Works Order is related to by double clicking on it from the list.

Select building only if the Job Request relates to that entire building and to view the plans of the building, click View Plan.

Project Reference:

If this particular works order is relating to certain project- for example replacing all the doors on a particular site, then you simply need to use its dedicated project reference so you can link them together.

Description:

In this box you will need to outline the details of the works order and what needs to be done to complete it.

Instructions and H&S considerations:

Include any information that a contractor or site worker needs to know relating to the work order within that space. You can choose from a list which is kept in a separate document.

Contact:

Under here you will need to select who the contractor should contact on site.

Purchase Order Number:

In this field enter the purchase order you wish to associate this works order with

WO Items/ Estimates

Ref	Item	Qty	Unit	Rate	Est. Cost

| Add | Delete | Total Actual Costs | £0.00 | | Total Estimates | £0.00 |

In this list you will need to enter the items or works required to completed.

Reference is what number in the list this row of items is.

Item – in this line you will need to input what items or works that have been requested , for example; tins of paint or floor to be re tiled.

Qty – How much of the item do you need? Leave blank if it is for a contractor to complete works.
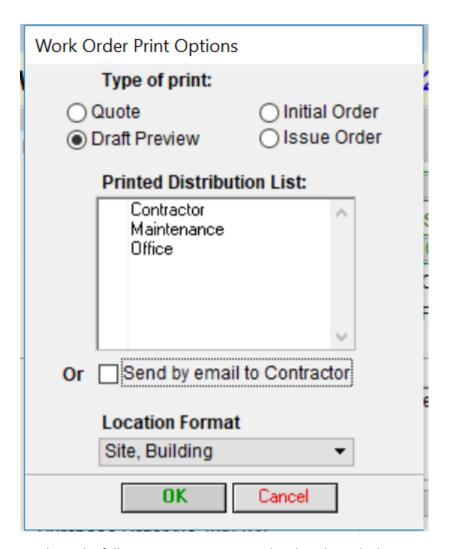
Unit – What amount? Or weight of the item you require. Again leave blank if it is for a contactor

Rate – enter how much the items or work is estimated to cost.

Estimated Cost - this allows you to enter the quoted cost received for the goods or services.

Once you have all the information populated for the Works Order, select 'Issue'

The following box will appear

Work Order Print Options

Type of print:

○ Quote   ○ Initial Order
◉ Draft Preview   ○ Issue Order

Printed Distribution List:

Contractor
Maintenance
Office

Or ☐ Send by email to Contractor

Location Format

Site, Building ▼

OK   Cancel

You have the following options to proceed with. Select which one you need to use then select issue.

You may also choose to print a copy for the contractor, maintenance team and the office. If you want to send an email to the contractor simply tick the box as noted above.