

Creating a Works Order from a Job Request

Creating a Works Order from a Job Request:

If you need to create a works order from a Job Request, you can do so by clicking _____ under the Works Order section.

Quadpro v03.12.41	16/04/2018 1:30 PM			Job Reque
037344	10/04/2010 1.30 FW	Tuesday, 24 Ap	ril 2018	JOD Reque
Request Origina	tor: Nick Davis 👻 🗄 of 🛛	uadpro Trust	Entered By:	
Web Email Notif	ication Enabled 🗹 🖄 Email History			
Comment/Fault			Related Cal	ls
Building/Space	Scotts Academy, Barts Sports Ha F07 Inspection Reference	Changing Room Risk Present	Call Ref [Date Time
Fault/Location:	Toilets blocked in changing room			×
Job Type:	Plumbing			S. 10
Sub Type:		▼		•
Action Required Date Received:	All toilet cubicles in the changing room an - 16/04/2018 + Priority: 4hrs E.	· · ·	Diary Date 0:28 OD:8	Notes
Solution Referred To:	Search Operative	Send Eman	Works Orders WO No. Serv	ice Provider
Action Taken: Action Complete	Date: 00/00/00 HRS Spent 0	Satisfaction: 0 Issued		 ■ ■
Call Log	Documents			
	↓ Sa	ve Exit Prin	nt	

Works Or	ders	
WO No.	Service Provider	
		~
		~
		🛨 🙀

This will bring you to the Works Orders section.

Information from the Job Request will already be populated within the Works Order form, such as the location and description of the issue.

Select the **Main Budget** and **Sub Budget** that will apply to this work order.

If a contractor is required, simply select them using the **'Contractor'** button to find the relevant option.

If there are any Risks that people should be aware off, click the Risks button and select as necessary. Should you need to create a new Risk, please contact your administrator.

NO No.	44618	2018		12:45 Tuesday, 24	5 PM 4 April 2018	Wo	orks Orde
Primary Work Ord	er Documents						
Main Budget		▼ Location	Scotts A	cademy, Barts Sports	Hall	BLDG	
Sub Budget		 Space 	F07	Changing Room		Est. Cost	£0.00
Order/Issue Date	24/04/2018 00/00/00	Contractor				Start Date	24/04/2018 🗘
Created By		 Operative 				Finish Date	24/04/2018 🗘
Priority	4hrs Emergency	✓ From	Nick Dav	vis		Call Ref	37944
						Project Ref	0
Tollets blocked	in changing room			All toilet cubic with paper	les in the char	nging room are	ріоскеа
Contact		•		with paper Risks			~
Contact Purchase Order	No.	Ŧ		with paper			k Present
Contact	No.	▼ Qty Unit	Rate	Risks			~
Contact Purchase Order WO Items/ Estir	No.		Rate	Risks			~
Contact Purchase Order WO Items/ Estir	No.		Rate	Risks			~
Contact Purchase Order WO Items/ Estir	No.		Rate	Risks			~
Contact Purchase Order WO Items/ Estir	No.	Qty Unit	Rate	Risks Inspection Reference Est. Cost			~
Contact Purchase Order WO Items/ Estir Ref Item	No.	Qty Unit	otal Estimates				~

Under **WO Items/ Estimates** you can enter the information about items or works needed that will have a cost applied to them.

Reference:

The reference number will be in order, so 1, 2, 3 and so on.

Item:

In this box enter the details about the item or works needed. For instance if you need spare parts for the Job Request you could put 'White Toilet Seat'. If it is requiring labour , put 'Plumber'.

QTY:

How much of the item do you need? If it is a labour charge, leave blank.

<u>Unit:</u>

Enter the weight/ number of boxes required.

Rate:

Enter how much the items or work is estimated to cost.

<u>Estimated Cost -</u> this allows you to enter the quoted cost received for the goods or services. The cost is then deducted from the budget you have allocated the order to.

Once you have filled out all information needed for this Works Order, select 'Save'.

Issuing a Work Order

To then issue this work order to your team or contractors, select 'Issue'.

This will give you a few options to choose from.

You have the following options to proceed with.

The Health & Safety risks will appear on all document options.

Quote:

Select this option if you are sending this off to a contractor for an estimation on the works required. No costs will appear on the document

Draft Preview:

To preview the Works Order select this option. This can be used if you would like to review the order internally before issuing it.

Initial Order:

Use this option to send you order out, the costs will appear on it.

Issue Order:

Selecting this option will send out a final order to the recipient, this will include costs and safety details for the contractor or operative to review

To send your completed order out, select this option. If you have selected the recipients of the Works Order, this will print separate copies with specified information for them individually.

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.

Select which one you need to use then select 'OK'.

Once you have issued the order it will appear like this:

'This Order has been issued'

WO No.	44617	2018			11:47 AM ay, 24 Apri	il 2018	Wo	rks Orde
Primary Work Orde	er Documents							
Main Budget	2018 - 19 Budget	Location	Scotts Aca	ademy, Barts	Sports Ha	II	BLDG	
Sub Budget	Day To Day Maintenance	Space	45660	Landing Area	1		Est. Cost	£1,050.00
Order/Issue Date	23/04/2018 24/04/2018	Contractor	Ash Buildi	ing Services			Start Date	23/04/2018
Created By	Nick Davis	Operative	Not Specif	fied			Finish Date	23/04/2018
Priority	14day Routine	From					Call Ref	0
This Order h	nas been issued						Project Ref	0
Description	nas been Issued		• • • • • • • • • • • • • • • • • • •	Instructio	ens & H& S	i Considera		(
Description Replacement of Contact Nick D	Main Door to landing area		v	Risks		Considera	ntions	^ ~
Description Replacement of Contact Nick D. Purchase Order	Main Door to landing area avis No. 1801			Risks	Reference	i Considera	ntions	^
Description Replacement of Contact Nick D Purchase Order WO Items/ Estin	Main Door to landing area avis No. 1801		Completed	Risks	Reference Paymen	Considera	ntions Ri	sk Present
Description Replacement of Contact Nick D. Purchase Order WO Items/ Estin Ref Item	Main Door to landing area avis No. [1801 nates	Qty Unit	Completed	Risks Inspection	Reference	i Considera	ntions	^ ~
Description Replacement of Contact Nick D Purchase Order WO Items/ Estin	Main Door to landing area avis No. [1801 nates ors	City Unit 1 Item 1 Each	Completed	Risks	Reference Paymen	Considera	ntions Ri	sk Present
Description Replacement of Contact Nick D. Purchase Order WO Items/ Estim Ref Item 1 New Glass Do	Main Door to landing area avis No. [1801 nates ors dow	1 Item	Completed Rate £800.00	Risks Inspection Est. Cost £800.00	Reference Paymen	Considera	ntions Ri	sk Present
Description Replacement of Contact Nick D. Purchase Order WO Items/ Estin Ref Item 1 New Glass Do 2 New Door Win	Main Door to landing area avis No. [1801 nates ors dow	1 Item 1 Each	Completed Rate £800.00 £150.00	Risks Inspection Est. Cost £800.00 £150.00	Reference Paymen	Considera	ntions Ri	sk Present