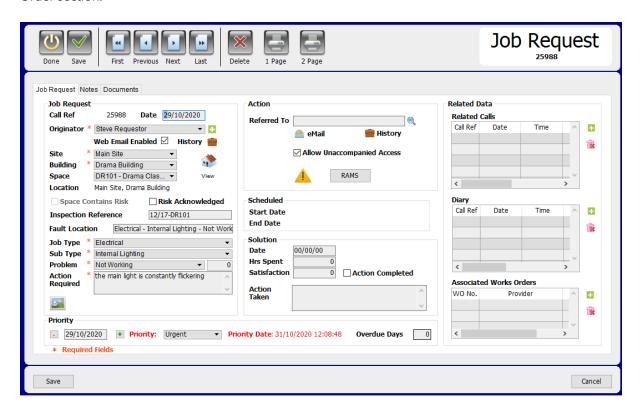
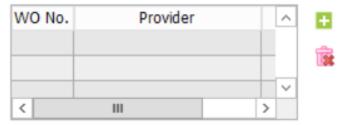
Creating a Works Order from a Job Request:

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



Associated Works Orders



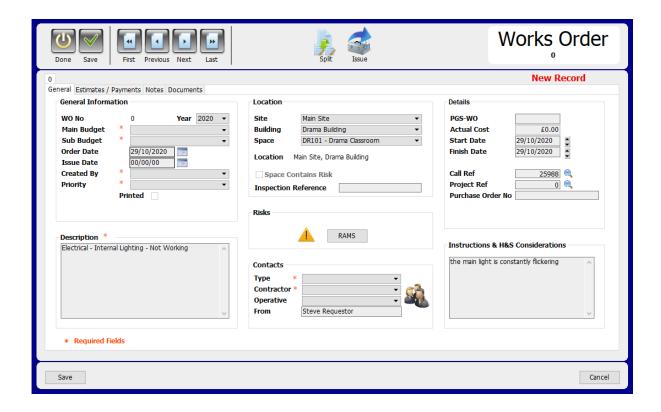
This will bring you to the Works Orders section.

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.



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.

Unit:

Enter the weight/ number of boxes required.

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. 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'

