

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.

Job Request 25988

Job Request | Notes | Documents

Job Request
Call Ref: 25988 Date: 29/10/2020
Originator: Steve Requestor
Web Email Enabled: ☒ History
Site: Main Site
Building: Drama Building
Space: DR101 - Drama Clas...
Location: Main Site, Drama Building
☐ Space Contains Risk ☐ Risk Acknowledged
Inspection Reference: 12/17-DR101
Fault Location: Electrical - Internal Lighting - Not Work
Job Type: Electrical
Sub Type: Internal Lighting
Problem: Not Working
Action Required: the main light is constantly flickering

Action
Referred To:
eMail History
☒ Allow Unaccompanied Access
RAMS
Scheduled
Start Date:
End Date:
Solution
Date: 00/00/00
Hrs Spent: 0
Satisfaction: 0 ☐ Action Completed
Action Taken:

Related Data
Related Calls
Call Ref Date Time
Diary
Call Ref Date Time
Associated Works Orders
WO No. Provider

Priority
29/10/2020 Priority: Urgent Priority Date: 31/10/2020 12:08:48 Overdue Days: 0
* Required Fields

Save Cancel

Associated Works Orders

WO No.	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.

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'




Done




Save




First




Previous




Next



Last



Split



Issue

Works Order

2576

2576

General | Estimates / Payments | Notes | Documents

General Information

WO No

2576

Main Budget *

Budget One

Sub Budget *

Sub Budget One

Order Date

29/10/2020

Issue Date

00/00/00

Created By *

Steve Manager

Priority *

Urgent

Printed

☒

This Order has been Issued

Description *

We require a new door for the office can this be installed urgently?

Location

Site

Main Site

Building

10 High Street

Space

NT202 - Board Room


Location

Main Site, 10 High Street

☐ Space Contains Risk

Inspection Reference

Risks



RAMS

Contacts

Type *

Carpenter

Contractor *

ABC Carpentry

Operative

Ben Carpenter

From

Details

PGS-WO

Actual Cost

£162.00

Start Date

29/10/2020

Finish Date

29/10/2020

Call Ref

0

Project Ref

0

Purchase Order No

Instructions & H&S Considerations

* Required Fields

Save

Cancel