

Work Order Enhancements

Worker Maintenance

1. Go to *Billing/Collections > Work Order > Worker Maintenance*. Users now have the ability to set a worker's availability, save a worker's state license number and set the type of work that individual is permitted to perform.

The screenshot shows a software window titled "Worker Maintenance". At the top, there is a menu bar with buttons for "Add", "Edit", "Close", "Delete", "Previous", "Next", and "Help". Below the menu bar, the form contains several input fields: "Worker Id:" with a search icon, "Name:" with a search icon, "Phone:" with a format "() - " and "Ext:" field, "Email:" with a search icon, "State License #:" and "Exp Date:" with a calendar icon. To the right, there is a "Worker Type:" dropdown menu currently set to "Account Id". Below these fields is a section titled "Availability" which contains a grid of checkboxes for each day of the week (Mon through Sun) and corresponding "Start:" and "End:" time dropdown menus for each day.

Worker Schedule

2. The schedule can be found by going to *Billing/Collections > Work Order > Worker Schedule*. Users can schedule out worker's appointments in an easy to view schedule in MCSJ. You can view the schedule in a monthly or daily view. Work Orders can be viewed and edited from this schedule, appointment times can be changed and the worker can be reassigned.

Worker Schedule						
July 2018						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1 SU - 6 Appt(s)	2 SU - 11 Appt(s)	3 SU - 12 Appt(s)	4	5 SU - 45 Appt(s)	6 SU - 8 Appt(s)	7
8	9 SU - 7 Appt(s)	10 SU - 5 Appt(s)	11 SU - 7 Appt(s)	12 SU - 4 Appt(s)	13 SU - 7 Appt(s)	14
15 SU - 1 Appt(s)	16 SU - 11 Appt(s)	17 SU - 7 Appt(s)	18 SU - 9 Appt(s)	19 SU - 2 Appt(s)	20 SU - 8 Appt(s)	21
22	23 SU - 11 Appt(s)	24 SU - 6 Appt(s)	25 SU - 7 Appt(s)	26 SU - 7 Appt(s)	27 SU - 13 Appt(s)	28
29	30 SU - 41 Appt(s)	31 SU - 5 Appt(s)	1	2	3	4

Notifications

- Workers can receive notifications using the mobile app when work orders are assigned to them and reminders when and reminders when appointments are coming up. They can also edit work orders, add reads, enter notes and mark the work order as completed.

Work Orders

- Location work orders can be assigned to a property or service location that is not attached to a utility account. The location type work orders also give you the option of marking a latitude and longitude to identify a specific location in an area.
- Fleet Id work orders can be assigned to have work done on vehicles and equipment in you fleet. These can be set to recurring work orders in the event you need to have work performed based upon miles or hours used.
- Customer Id work orders can be assigned to a Miscellaneous Account Receivable Customer to assign work.
- Internal Location allow work orders to be assigned to a location within a municipality for work to be performed on a municipal building and has the ability to indicate the location, floor and room of that building.

Work Order Reporting

8. Work Order Reporting
 - a. Work Order Custom Report
 - i. Enhances work order reporting to be able to run reports based upon the criteria you select. Users also have the ability to save the form to run the same report from a saved file in the future.
 - b. Work Order Inquiry
 - i. Search work orders for specific items such as completed date, status, worker assigned and service location.
 - c. Work Order Change Transaction Inquiry
 - i. Internal audit to track changes made when work orders are edited.