Create New Work Order

From the Transactions dropdown menu, choose Records under Work Order
Click Add
Associate a Location with the Work Order by selecting appropriate level from the Location dropdown

*Note, a WO can be associated with a Building or Equipment, which is shown later in these instructions*
To aid with finding Location, click on the Filter icon of the respective column header and enter desired filter criteria.
Select the desired Location
If WO is for a specific piece of equipment, choose Equipment from the dropdown list.
To aid with finding Equipment, click on the Filter icon of the respective column header and enter desired filter criteria.
Select WO Type (default is Corrective)

Choose applicable Priority (default is “Normal”)

Enter necessary text detailing request or issue

Choose most applicable Task Code or Description

*Note – Tasks can be filtered using Smart Filtering by typing Code or Description

Click Save at the top when finished