

# HOW TO SUBMIT A WORK ORDER



**Elliott Merrill**

COMMUNITY MANAGEMENT



Home



Profile



Accounting



Maintenance



Architectural



WebLinks



Documents



Directory



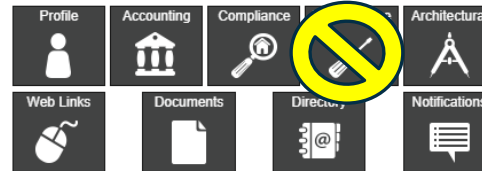
Notifications

Primary Account - Primary

Balance: \$250.00



Select Your Preferred Owner QuickView



Select Your Preferred Owner QuickView



- First Select the **Maintenance** icon at the top of the screen to access the maintenance menu.

\*\*The maintenance icon located in the 'Owner Quick View' area will only show a list of open work orders, but you cannot submit new work orders from this menu and you cannot get details on submitted work orders, therefore to submit a work order or get more details you must go to the maintenance page using the icon in the upper menu



Home



Profile



Accounting



Compliance



Maintenance



Architectural



WebLinks



Documents



Directory



Notifications

## Filter Controls

Current Items

All Items

Submit New Request

Show 10 items per page

Clear sorting

Print

## Maintenance

Date	Work Order #	Status	Location	Issue	Deadline Date	
07/16/2019	2019-CTC-00002	Open	Pool	Gate Equipment	07/30/2019	
07/16/2019	2019-CTC-00003	Open	24th st on the nw side	Pothole	07/30/2019	
09/26/2019	2019-CTC-00005	Open	Park	Pipe Broken or leaking	10/10/2019	
10/01/2019	2019-CTC-00006	Service Request	Pool	Dead Grass	10/01/2019	
01/30/2020	2020-CTC-00004	Open	street	Improper repair	02/13/2020	
01/31/2020	2020-CTC-00005	Open	Park	Adjust Sprinklers	02/14/2020	

- Next make sure to select '**Submit New Request**' on the left hand side of the screen.

All previous work orders are listed under the '**Maintenance**' section to the right. You can click on any of these items to see their current status or you can click the camera icon in the far right to see any pictures that have been attached to the work order.

**Filters and Controls**

Current Items

All Items

**Submit New Request**

Show 10 items per page

**Clear sorting**

**Print**



**Service Request** ✕

Owner: Christopher Madsen      Date: 04/07/2020

**Type:**

**Location:**

**Category:**

**Item:**

**Description/Notes:**

**Issue Location:**

**Submit**      **Close**

Issue	Deadline Date	
Gate Equipment	07/30/2019	
Pothole	07/30/2019	
Pipe Broken or leaking	10/10/2019	
Dead Grass	10/01/2019	
Improper repair	02/13/2020	
Adjust Sprinklers	02/14/2020	

- Use the drop down menus to select the **'Type'** of work order (Ex. a homeowner property issue)
- Then select the **'Location'** (Ex. 123 Test Street which is the homeowners address).
- Next select the **'Category'** (Ex. Irrigation)
- Lastly select the **'Item'** (Ex. Irrigation Timer)
- Next you can add descriptive notes about the issue you are experiencing and any details about the location of the issue.
- When you are finished select the **'Submit'** button at the bottom.



Home



Profile



Accounting



Documents



Directory



Notifications

## Filters and Controls

Current Items

All Items

Submit New Request

Show 10 items per page

Clear sorting

Print

## Maintenance Details

Work Order #: 2020-CTC-00007

Inspector: Christopher Madsen

Inspection Date/Time: 04/07/2020

Vendor Assigned:

Category: Irrigation

Item: Irrigation Timer

Status: Service Request

Description: 123 Test Street

Deadline: 04/07/2020

## Actions

Action Date	Action Taken	Next Action Date
04/07/2020	Created service request by homeowner via web	04/07/2020

## Notes

Date Created	Note
04/07/2020	Something is wrong with my irrigation timer, the sprinklers are not coming on at

Documents Unavailable

Close

Issue	Deadline Date	
Gate Equipment	07/30/2019	
Pothole	07/30/2019	
Pipe Broken or leaking	10/10/2019	
Dead Grass	10/01/2019	
Improper repair	02/13/2020	
Adjust Sprinklers	02/14/2020	
Irrigation Timer	04/07/2020	

- Once you had submitted your Work Order it will be added to your maintenance list.
- If you click on the work order in the list you will see the maintenance details associated with this work order.
- The 'Status' will show what state your work order is in. In this case it is a 'Service Request', once it has been received and sent to the contractor it will have an 'Open' status, and when the issue is resolved it will have a 'Closed' status.
- All work orders regardless of status are stored in Caliber and can be reviewed if historical information is needed at any time in the future.
- The notes section will be updated periodically with new information by Elliott Merrill until the work order has been completed and closed at which time the status will become 'Closed'.

# IN CONCLUSION

The benefits of the Caliber Work Order System are as follows:

- ▶ Provides detailed tracking on all work orders submitted to management.
- ▶ Provides the latest information to owners by allowing notes to be added as new information becomes available.
- ▶ Provides a historical database of all work orders for owners and boards.