

Updated 8/14/2020

Transfer from Maintenance or Custodial to Grounds

- Click on Work Order number
- Write down the WO #
- Click on Notes Log
- Copy any Notes from the shop.
- Click Done
- Click Copy
- Check Boxes
 - Extra Description
 - Related Documents
 - UDF
 - Copy First Phase Only
 - Extra Description (At Phase Level)
- Click Next
- Write down the new WO #
- Add to the beginning of description "Ref WO #"
- Click on Extra Description
- Add Shop Notes to the Extra Description
- Click Done
- Change Type to Grounds
- Click on Reference Data
- Change Shop to Grounds
- Remove Shop Person
- Click Done
- Click on the Phase number
- Set the Work Code
- Set the Shop to Grounds
- Set Funding Method to Shop
- Click Done
- Click Save
- Go back to original Work Order
- Click Edit
- Add New WO # to the description
- Set Status to original WO to TRANSFERRED TO GRNDS
- Click Save

Transfer from Maintenance or Custodial to Structural Pest

- Click on Work Order number
- Check Account number. Is it E&G or Customer Funded?
- Write down the WO #
- Click on Notes Log
- Copy any Notes from the shop.
- Click Done
- Click Copy
- Check Boxes
 - Check Extra Description
 - Check Account Setup
 - Related Documents
 - UDF
 - Copy First Phase Only
 - Extra Description (At Phase Level)
- Click Next
- Write down the new WO #
- Add to the beginning of description "Ref WO #"
- Click Extra Description
- Add Shop Notes to the Extra Description
- Click Done
- Change Type to Grounds
- Click on Reference Data
- Change Shop to Structural Pest
- Remove Shop Person
- Click Done
- Click Account Setup if E&G
 - Click Add on Charge Account
 - Choose Percentage Split
 - Click Next
 - Account -- 02-240737-00000 Subcode -- 5530
 - Percentage -- 100
 - Click Done twice
- Click on the Phase number
- Set the Work Code
- Set the Shop to Structural Pest
- Set Funding Method to Work Order if E&G
 - Set Funding Method to Shop if not E&G
- Click Done
- Click Save
- Go back to original Work Order
- Click Edit
- Add New WO # to the description
- Set Status to original WO to TRANSFERRED TO GRNDS
- Click Save

Transfer from Grounds to Maintenance

- Click on Work Order number
- Check Account number. Should it be Maintenance or Customer Funded?
- Write down the WO #
- Click on Notes Log
- Copy any Notes from the shop.
- Click Done
- Click Copy
- Check Boxes
 - Check Extra Description
 - *If Customer Funded* – Check Account Setup
 - Related Documents
 - UDF
 - Copy First Phase Only
 - Extra Description (At Phase Level)
- Click Next
- Write down new WO #
- Add to the beginning of description “Ref WO #”
- Click on Extra Description
- Add Shop Notes to the Extra Description
- Click Done
- Change Type to M
- Click on Reference Data
- Change Shop to correct shop
- Remove shop person
- Click Done
- Click Account Setup if Maintenance Funded
 - Click Add on Charge Account
 - Choose Fixed Amount
 - Click Next
 - Account – 26543 Subcode – 5530
 - Precedence – 1
 - **Amount 5,594.07**
- Click Done twice
- Click on the Phase number
- Set the Work Code
- Set Funding Method to Work Order
- Set the Shop to correct shop
- Click Done
- Click Save
- Go to original Work Order
- Click Edit
- Add New WO # to the description
- Set Status to original WO to TRANSFERRED TO MAIN
- Click Save

Transfer from Grounds to Custodial

- Click on Work Order number
- Write down WO #
- Click on Notes Log
- Copy any Notes from the shop
- Click Done
- Click Copy
- Check Boxes
 - Check Extra Description
 - Related Documents
 - UDF
 - Copy First Phase Only
 - Extra Description (At Phase Level)
- Click Next
- Write down new WO #
- Add to the beginning of description “Ref WO #”
- Click on the Extra Description
- Add Shop Notes to the Extra Description
- Click Done
- Change Type to M
- Click on Reference Data
- Change Shop to Custodial
- Remove Shop Person
- Click Done
- Click on the Phase number
- Set the Work Code
- Set Funding Method to Shop
- Set the Shop to Custodial
- Click Done
- Click Save
- Go back to original Work Order
- Click Edit
- Add New WO # to the description
- Set Status to original WO to TRANSFERRED TO CUS
- Click Save