

Go Quick Tips

General Information

- Touch QUEUE to see Work Order/Phases
- Touch a line to expand information
- > will open additional information or the screen to make a change for the line

Work Order/Phases

- Can sort WO/Phases by
 - ID (WO #)
 - Priority
 - Status
- WO line shows
 - Work Order #
 - Phase #
 - Phase Description
 - Building #
 - Location
 - Priority
 - Current Status

Phase Menu Detail

- Make updates from the Phase Menu Detail screen
 - Status
 - PM Checkpoints
 - Start Material Request
 - Start Time Clock
- Click Edit to add an Asset
 - *Click on the Asset arrow*
If there is not an Asset Tag, enter the 4 digit building number in the search field.

Phase Menu Work Order Tab

- Access customer contact information
- List additional Phases
- Access contact information for Phases


Phase Menu Note Tab

- Add a Note
- View all notes on Work Order and other Phases
- View who created note and how old it is



Phase Menu Document Tab

- Add a photo
- View all related documents on Work Order and other Phases



Time Entry

- Swipe the Time line to the Right to start the clock
- Touch > to stop the clock
- Can apply time to other individuals assigned to the Phase
-  Shows all unapproved timecards
- Can create a timecard for a past date

Material Request

- Touch Materials line
- Touch Warehouse Request
- Touch 
- Add Needed By for future time
 - Touch Needed By line to close calendar
- Touch Parts
- Touch 
- Use Class, Commodity and Item to narrow down search
- Search for Part by number or description
- Enter Quantity needed
- Touch Done
- Add more Parts or Touch Done again
- Change status to REQUESTED to submit to the Warehouse

Material Request – Non Stock

- Touch Materials line
- Touch Warehouse Request
- Touch 
- Add Needed By for future time
 - Touch Needed By line to close calendar
- Touch Parts
- Touch 
- In Search box enter #01
- Enter Quantity needed
- Touch Done twice
- Enter Description for part
- Change status to REQUESTED to submit to the Warehouse
- Create new request for each Non Stock item