

MMS ~ Work Order Entry

How do I create a Work Order?

- ☐ Start by going to the work order screen.
- ☐ Click the new icon
- ☐ Make sure the Type, Category and Status is correct.
- ☐ Fill in Description and Status,
- ☐ Requestor (building info should populate)
 - ☐ If it doesn't, enter the property number (like BL107) and click on the Zoom for Region and it should populate.
- ☐ Contact information (name, phone & email)
- ☐ Click the green plus sign to add a phase
- ☐ Fill in Phase Description (change if needed)
- ☐ Shop, Priority, and Work Code
- ☐ Funding Source
 - **Shop – Most common (Default)**
 - **Organization – used for HALLS Work Orders**
 - Go to white drop down menu at top of page and click on Account Set up
 - Click green plus sign
 - Zoom on Sub Code
 - Click Green Done Flag to go back to Account setup
 - Click Green done flag to go back to phase
 - **Custom – Used for requests where an account number is provided for you**
 - Go to white drop down menu at top of page and click on Account Set up
 - Click green plus sign
 - Choose SPLIT accounting
 - Fill in or zoom on account and choose account
 - Fill in or Zoom on Sub Code
 - Click Green Done Flag to go back to Account setup
 - Click Green done flag to go back to phase
- **Elevator Tickets**
 - **Go to Equipment and Zoom.**
 - **On Equipment Group enter B-ELEVATORS**
 - **Click the execute search and select the elevator you need.**
 - On the Phase page, click on the green done flag to go back to the Work Order page
 - On the Work Order Page Click on the save icon

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