Quick Help Guide

Getting Started with Work Order Management

Maintenance is hard.
HelixIntel is here to make it easier.

Dive into the tools that will help you streamline daily operations and boost productivity. Whether you're just getting started or need a quick refresh, this guide will walk you through everything you need to hit the ground running and keep your workflow smooth.

Content

1. Dashboard

Start Your Day Here

The Dashboard is your daily launchpad. Get a snapshot of everything that's happening across your operations. From here, you can:

1 **View Active Work Items:** See what's in progress, what's overdue, and more.

2 **Quickly Access Key Areas:** Jump straight into tasks that need your attention.

2. Assets

Log Your Key Details

Keep your property and equipment information organized in the Assets section. This will help you:

1 **Centralize Information:** Store critical details about each asset in one place.

2 **Enhance Workflows:** Relate assets to relevant work orders for seamless tracking and reporting.

Tip: Regularly update asset information to ensure accurate maintenance records.
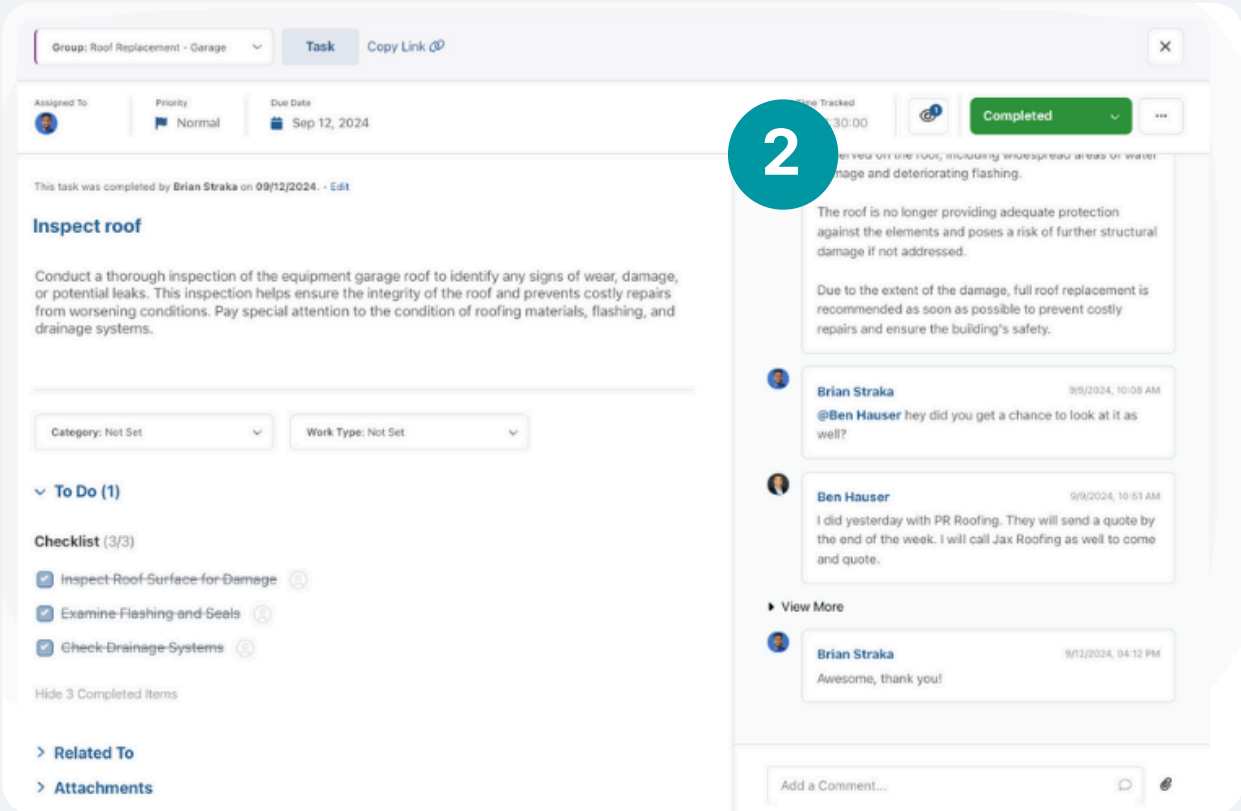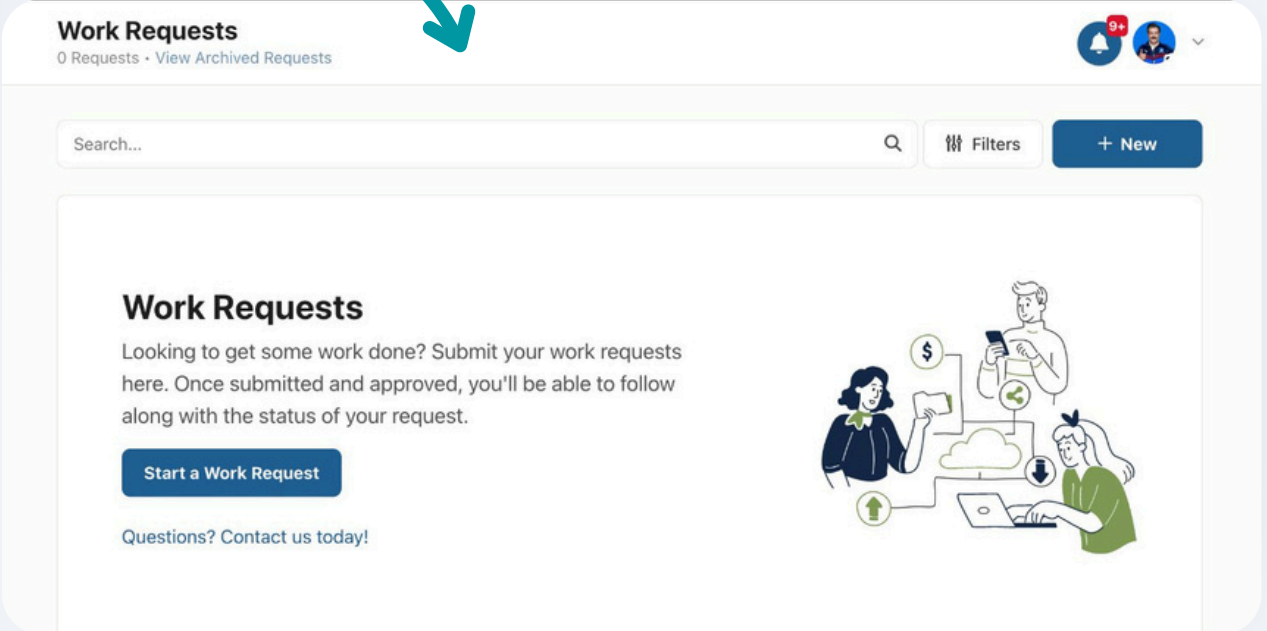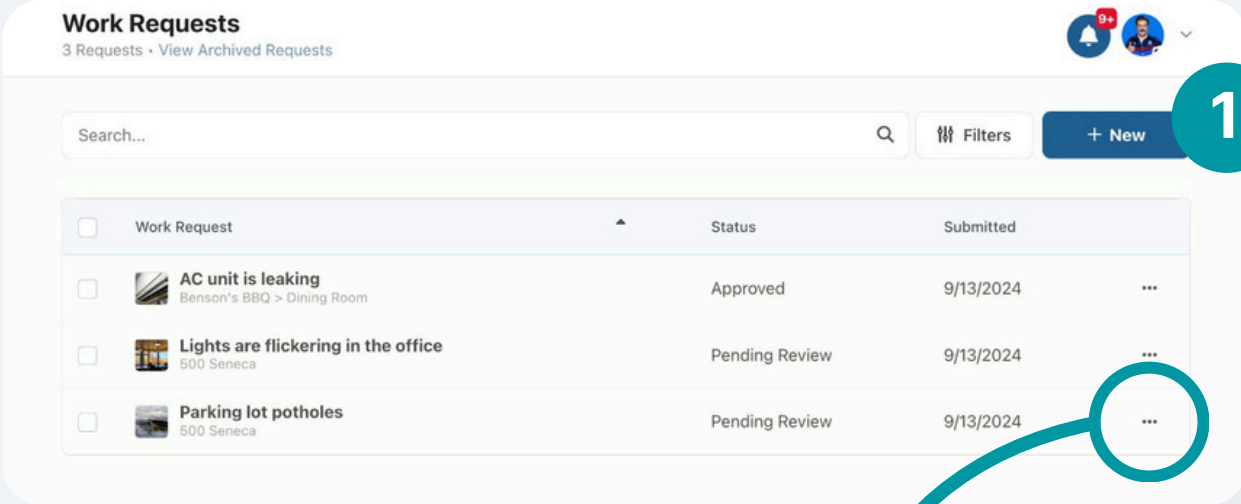
3. Work Requests

Track Your Requests

Work Requests is where you go to access your work requests. You can:

1 **Submit Work Requests:** Submit any work requests (e.g., maintenance needs) and track their progress.

2 **Communicate with Your Team:** Leave comments or ask for additional information if needed.

4. Work Manager

Handle Everything from Here

The Work Manager is your command center for all work items. Use it to:

1 **Track Your Work:** See what's ready to be worked on, in progress, completed, or blocked.

2 **Collaborate with Your Team:** Add comments to keep everyone in the loop and communicate in an efficient, easy way.

5. Notifications

Stay in the Know

Notifications keep you informed about what matters most. You can:

1 **Choose Your Channels:** Select how you want to receive alerts – in-app, email, SMS, or mobile.

2 **Customize Alerts:** Set preferences for the types of notifications you receive.
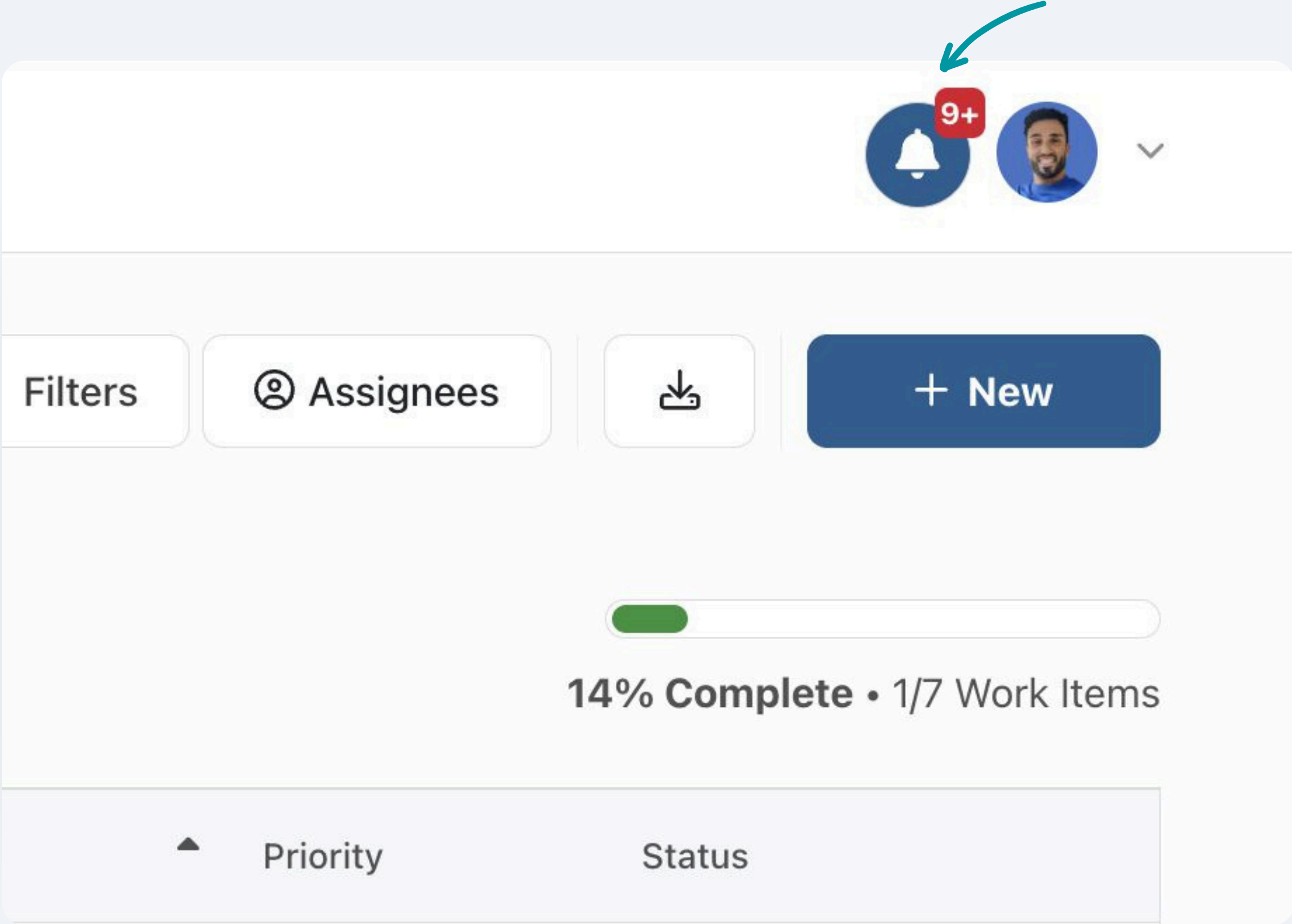
Need Help?

If you have questions or need further assistance, use the in-app chat support or reach out to your Account Manager.

www.helixintel.com