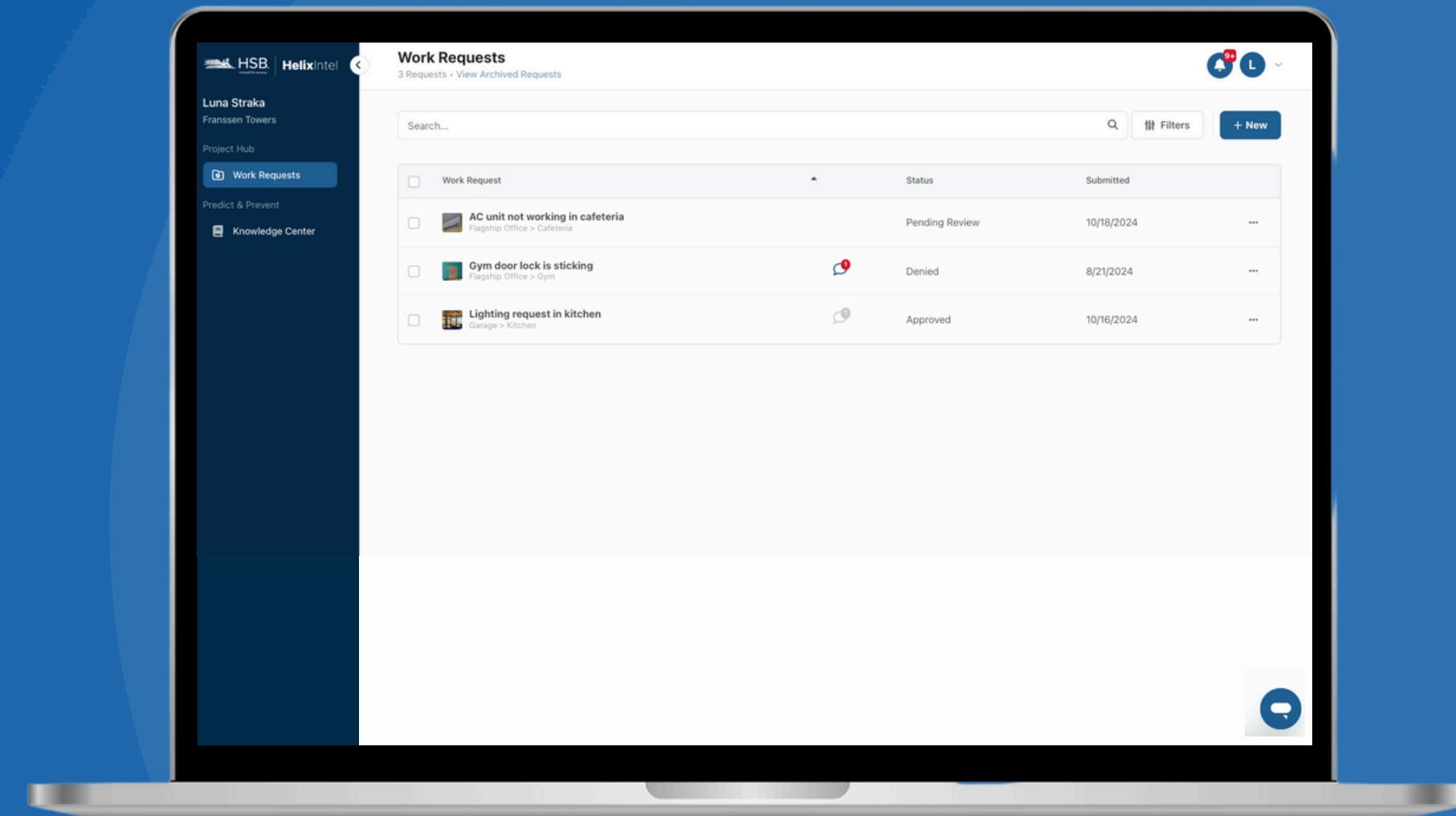


Quick Start Guide Getting Started with Work Order Management



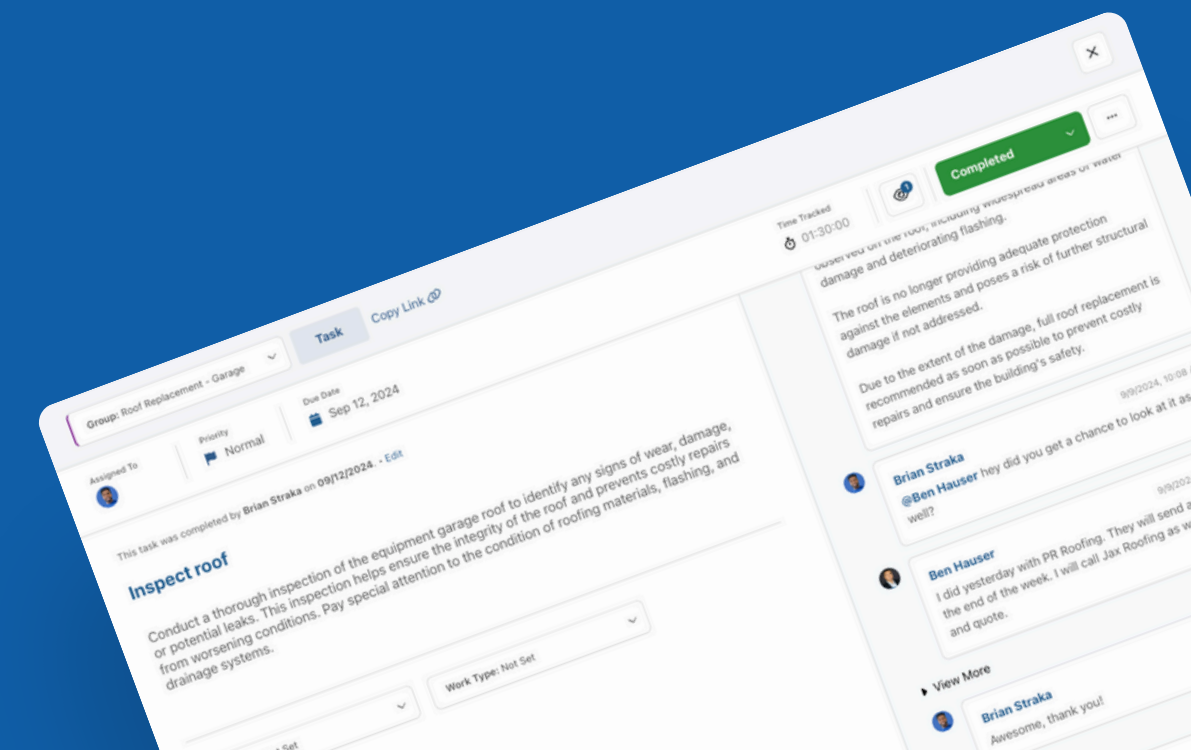
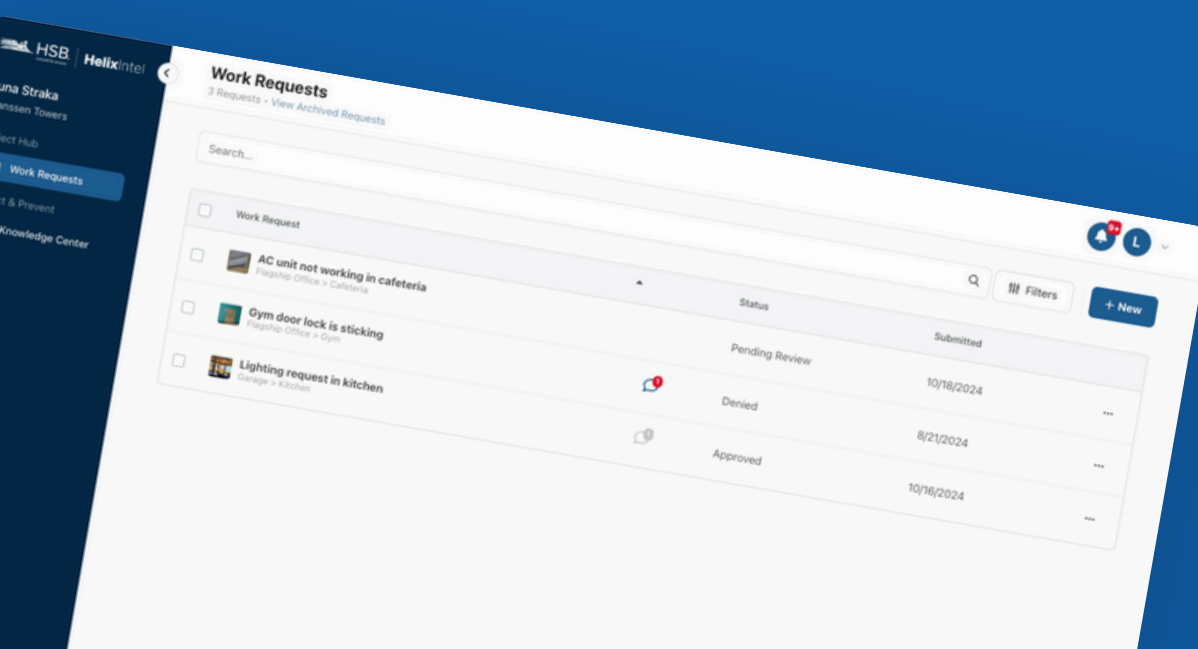
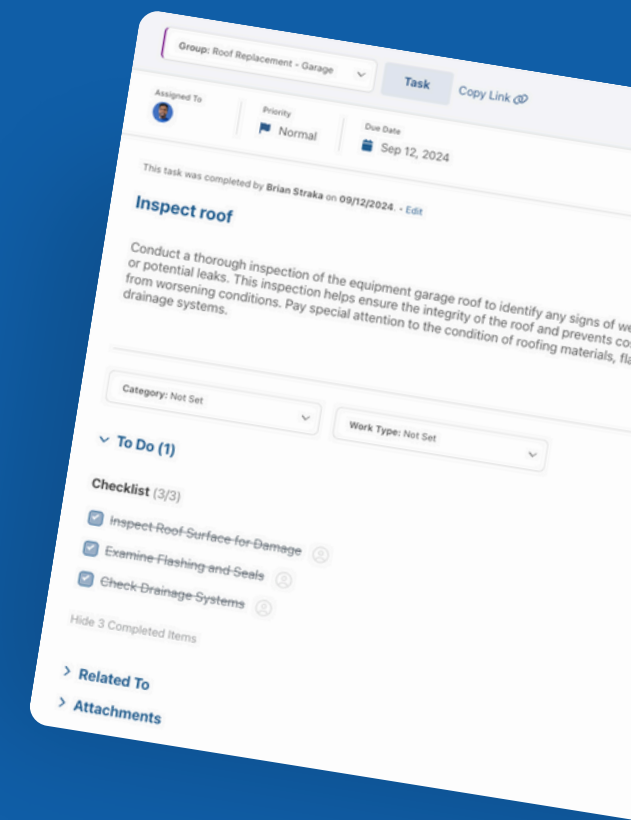
25% Complete • 1/4 Work Items

Due Date	Priority	Status
Aug 12 1 days overdue	Normal	Blocked
Aug 13	Normal	Completed
Aug 19	Normal	In Progress
Sep 1	Normal	Ready



Getting Started with Work Order Management!

This tool was built to make submitting and tracking work requests simple and easy. This guide will walk you through the essentials of using our Work Order Management tool so you can submit and manage work requests with ease.



Content

1	What's a Work Request?	04
2	How to Submit a Work Request	05
3	Your Work Request Dashboard	06
4	Notifications	07

1. What's a Work Request?

A work request is how you can let your team know when something needs attention, like a repair. Simply fill out and submit a quick request form to share it with your team for review.

Group: Not Set | **Work Request** | Copy Link

Assigned To: [User Icon] | Priority: Normal | Due Date: Sep 16, 2024 | Cancel Request

Classroom Heating Issue

The heating in my classroom hasn't been working properly for the past few days. It feels much colder than other rooms, which is making it uncomfortable for students. Can someone please inspect the heating system and ensure it's working correctly?

Work Requested By: **LS Luna Straka** | Reviewer: [User Icon]

Category: HVAC | Work Type: Not Set

> To Do
 < Related To (1)

Location

Name	Address	City	State	Zip
Washington High School > Room 301	111 North Maplemere Road	Buffalo	NY	14221

Add a Comment...

2. How to Submit a Work Request

Need something done?

- 1 Click the +New button to start.
- 2 Fill out the form with all the details – what’s wrong, what needs to be fixed, and any important info or pictures to help explain the request.
- 3 Then, just hit Submit to send it off.

The screenshot displays the 'Work Requests' management interface. At the top, it shows '3 Requests' and a link to 'View Archived Requests'. A search bar, a 'Filters' button, and a '+ New' button are visible. A modal window titled 'Submit New Work Request' is open, containing the following fields:

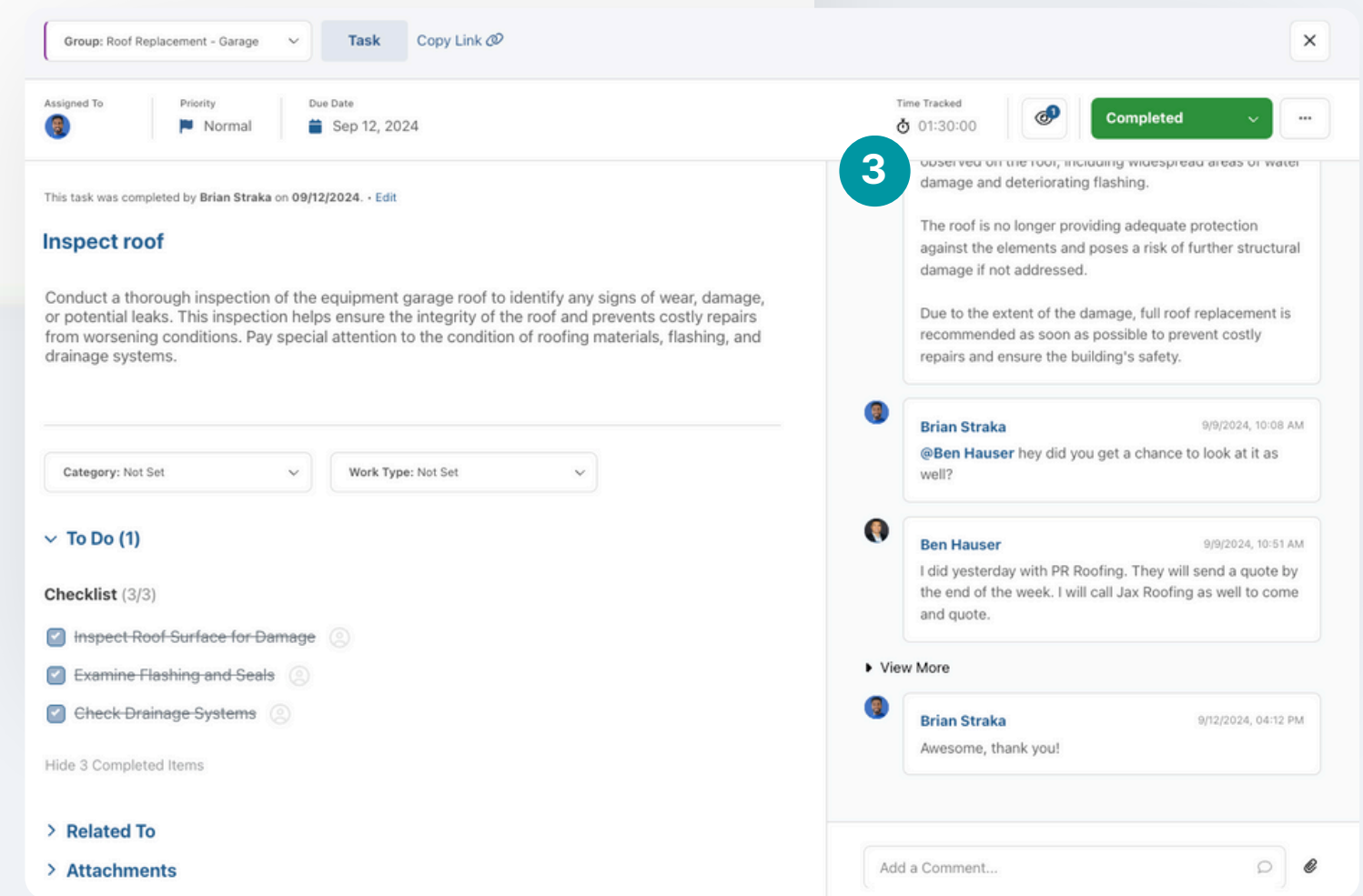
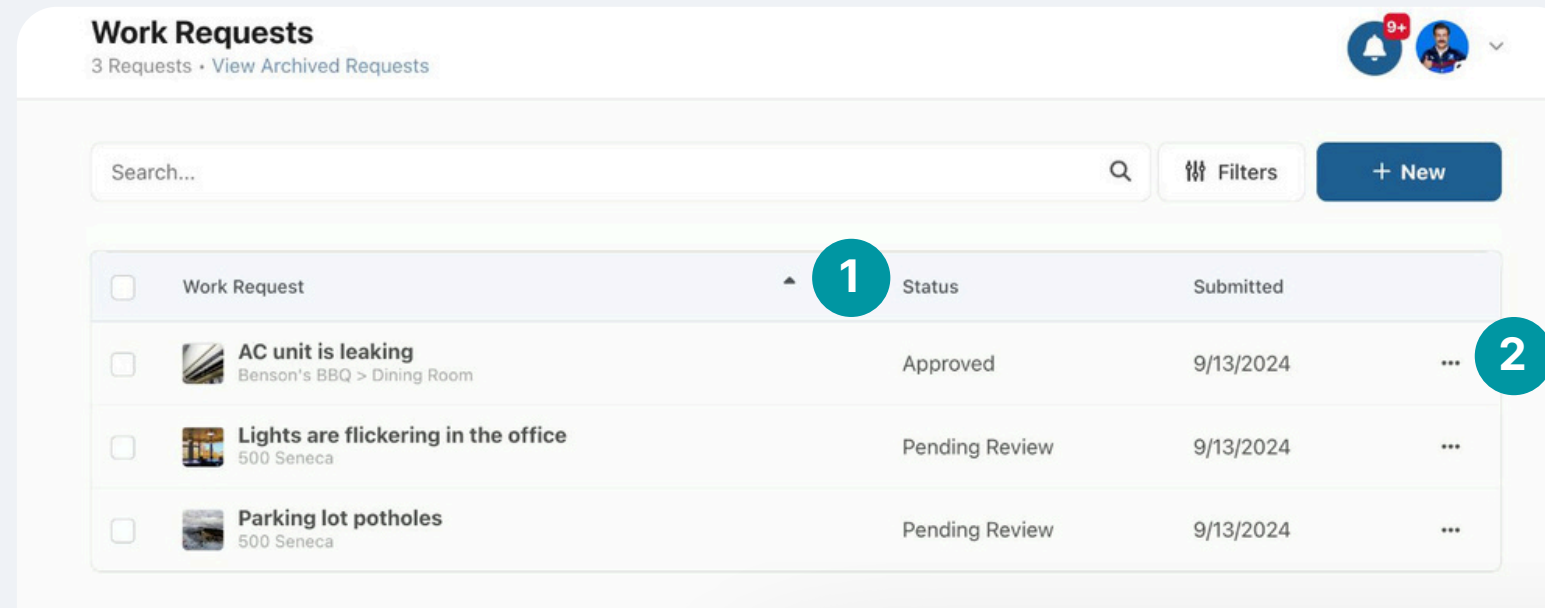
- Work Request Title:** Classroom Heating Issue
- Briefly Explain Your Request:** The heating in my classroom hasn't been working properly for the past few days. It feels much colder than other rooms, which is making it uncomfortable for students. Can someone please inspect the heating system and ensure it's working correctly?
- Optional Details:**
 - Location:** Washington High School > Room 301
 - Requested Completion Date:** 9/16/2024
 - Category:** HVAC
 - Priority:** High
- Attachments:** AC Unit.webp (14.4 KB)

In the background, a table of work requests is visible, with a red arrow pointing to the '+ New' button. The table includes columns for status (Submitted, Review), date (9/13/2024), and actions (three dots).

3. How to Track Work Requests

The Work Requests Dashboard is where you'll see all your submitted requests. From here you can:

- 1 View the status of your request.
- 2 Click on the request for more details.
- 3 Communicate with your team in the comments section.

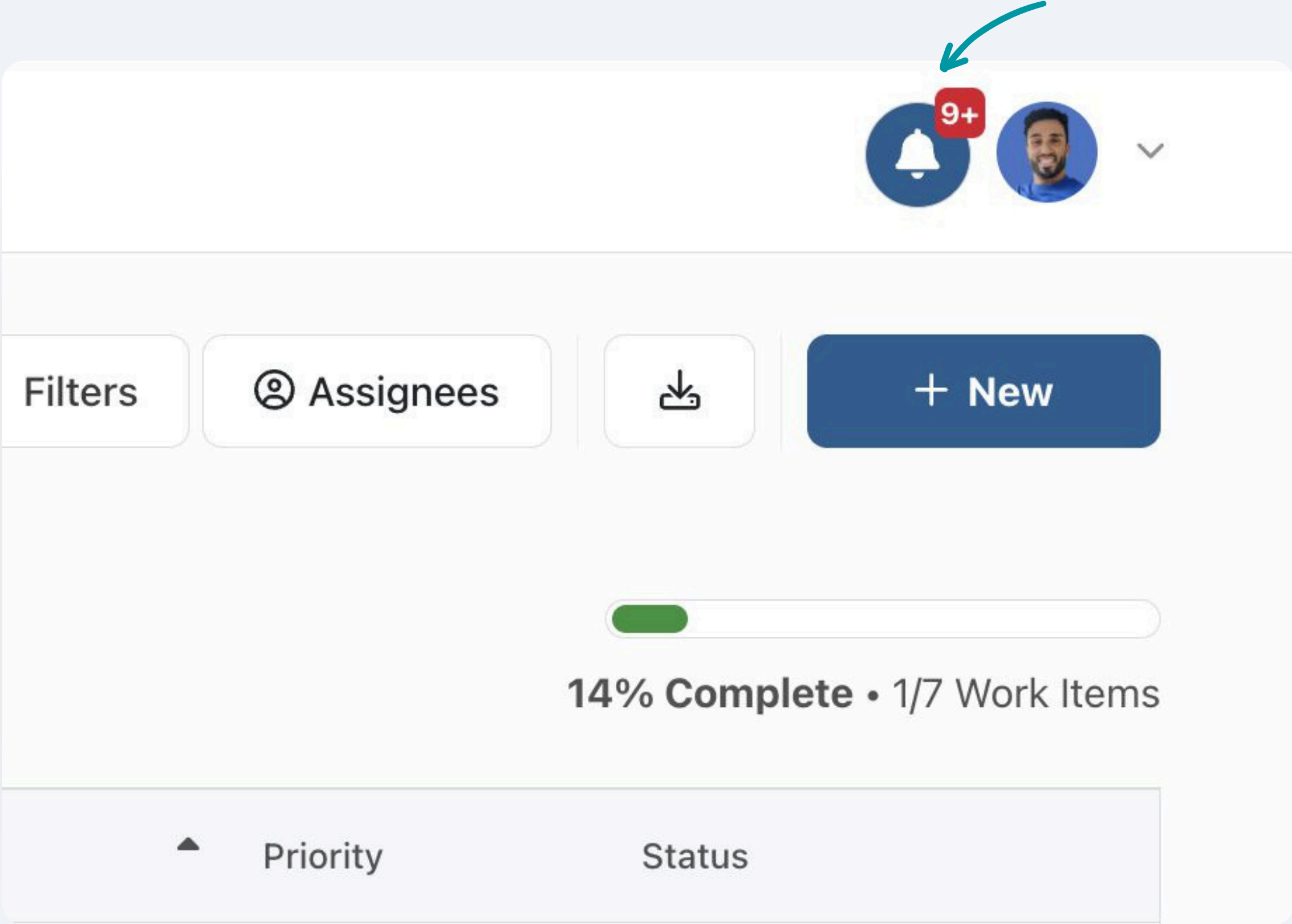


5. Notifications

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.



HelixIntel



www.helixintel.com