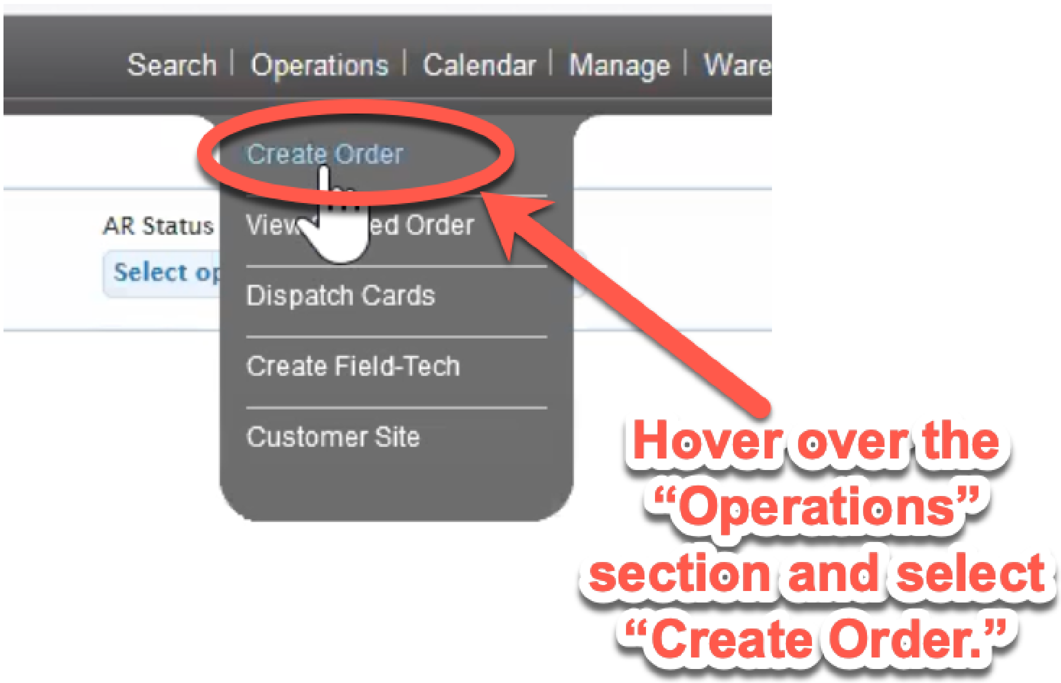
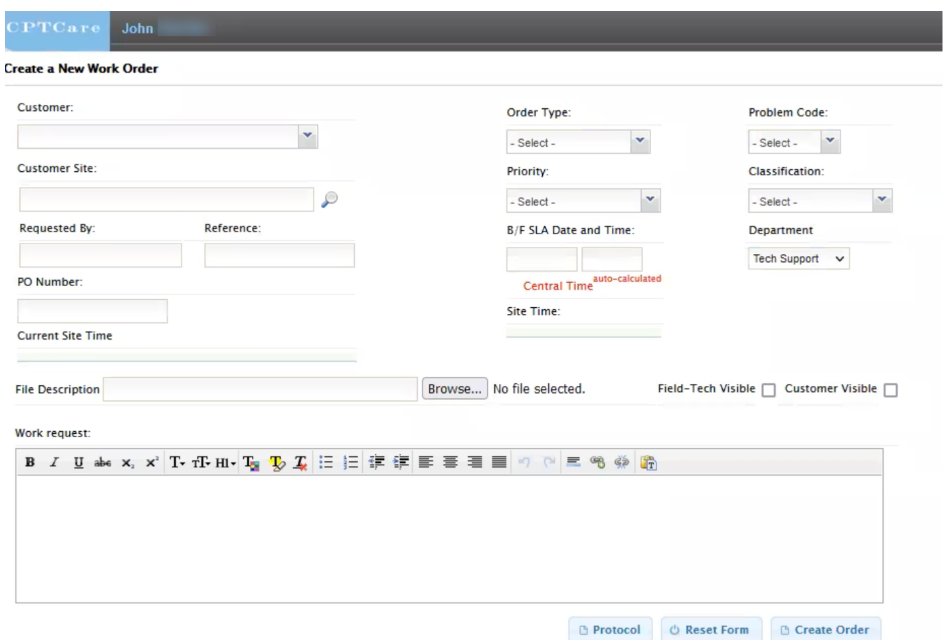
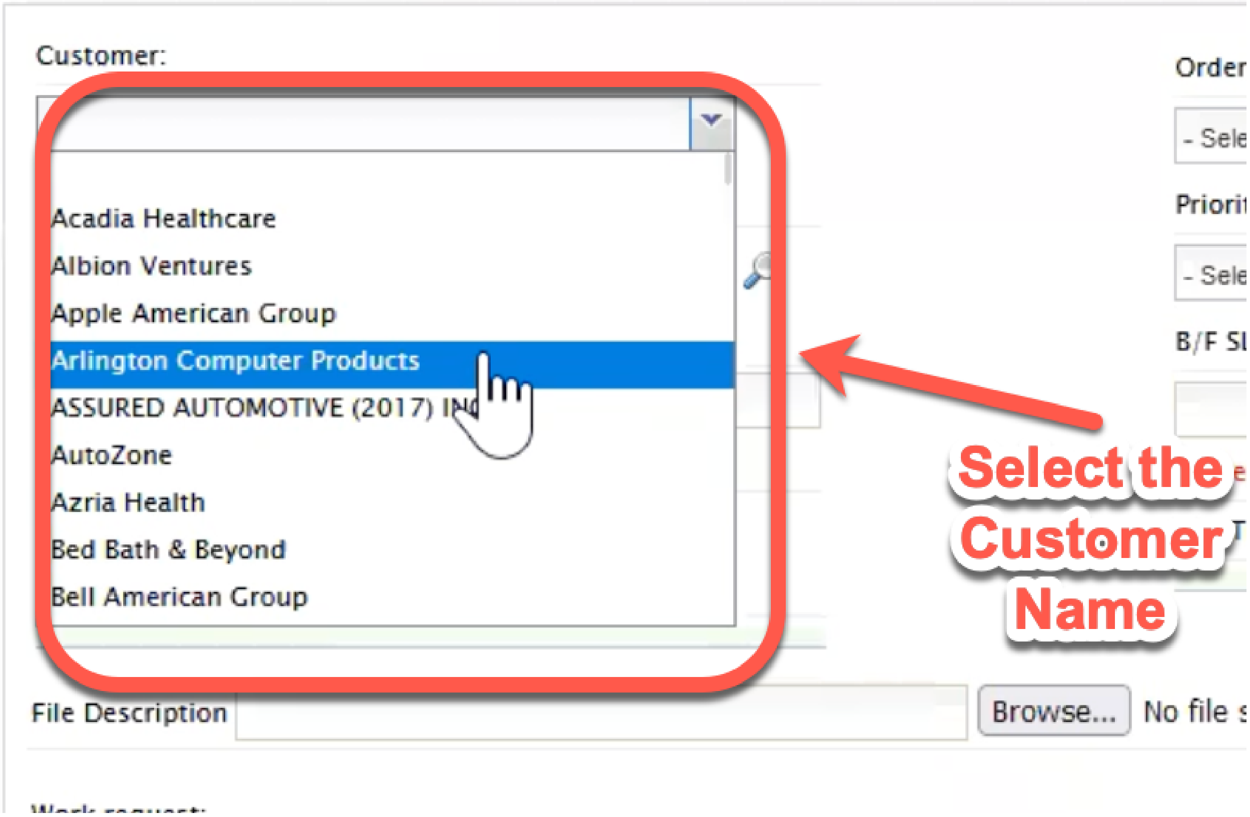
To create a **new** work order, hover over the **"Operations"** section on the toolbar. When the drop-down menu appears, select **"Create Order."**



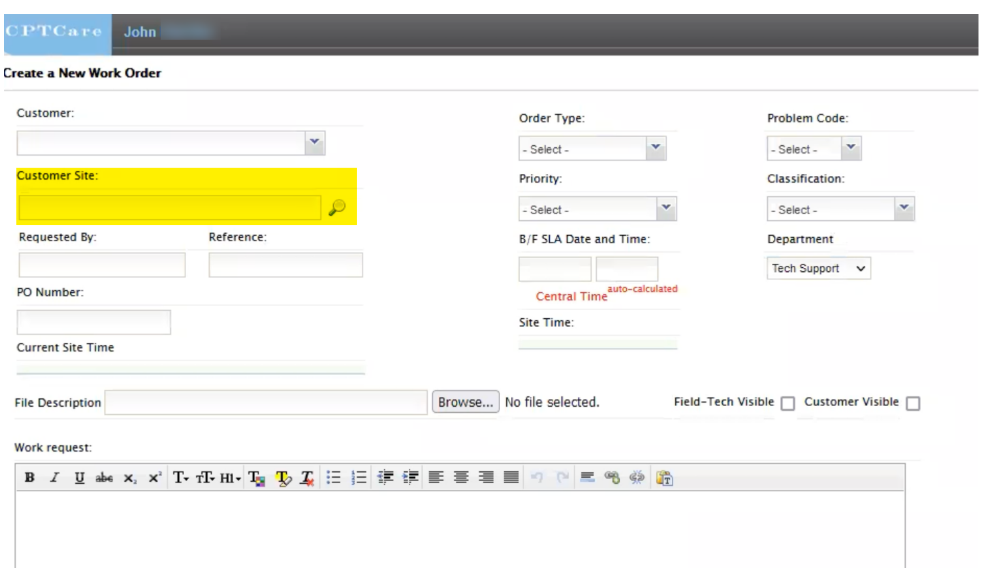
After you select "Create Order" the following screen with populate. 👇



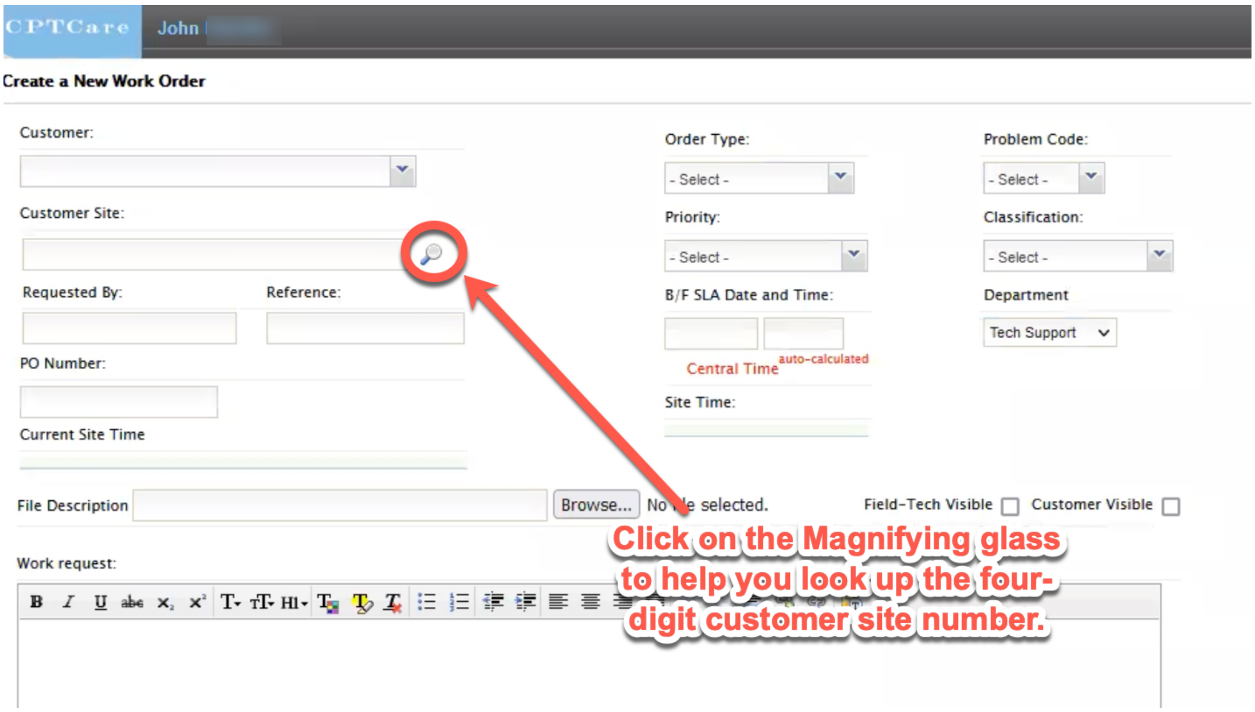
On this screen, you will need to select the **customer name** by using the "Customer" drop-down box.



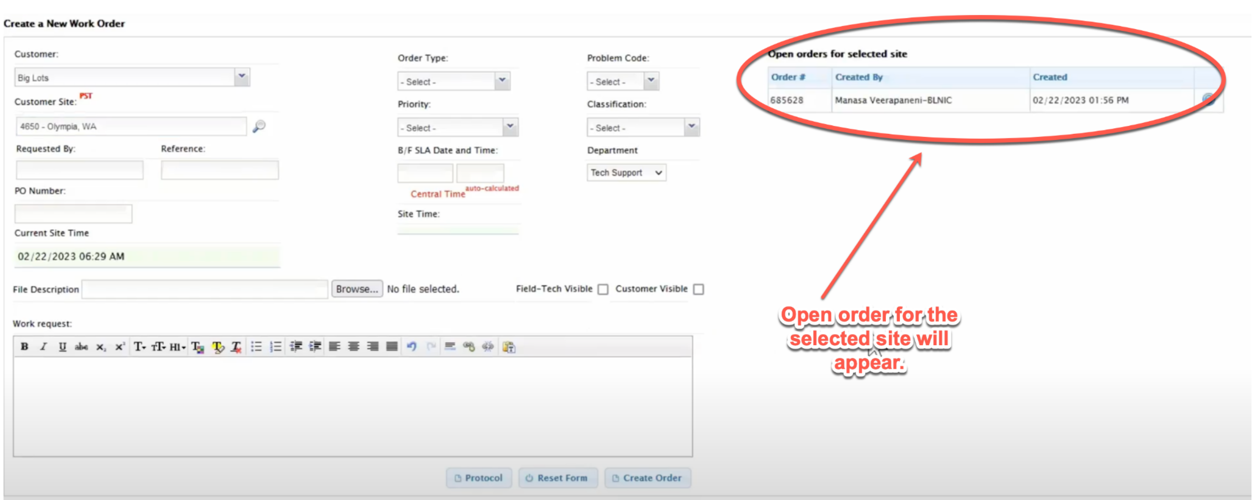
Then you will need to type in the **four-digit site number** in the customer site box.



__**Pro Tip:**__ If you do not know the customer's **four-digit site** number, you can search for it by clicking the **magnifying glass** next to the "Customer Site" field.



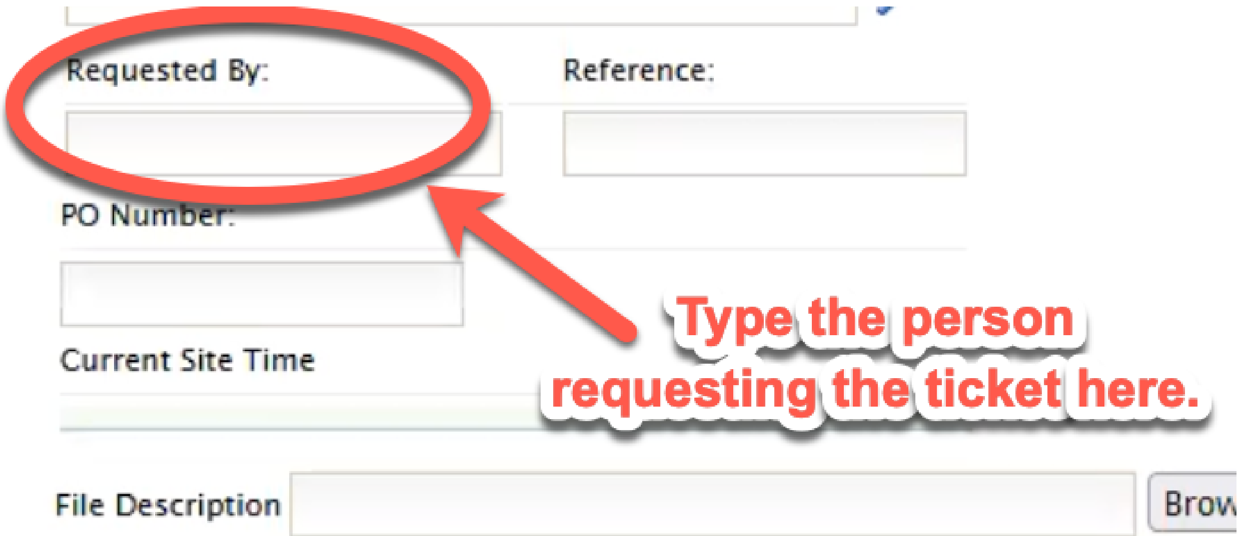
When you enter the site number, if there is **another ticket** associated with that location, it will pop up on the **top left**-hand side.



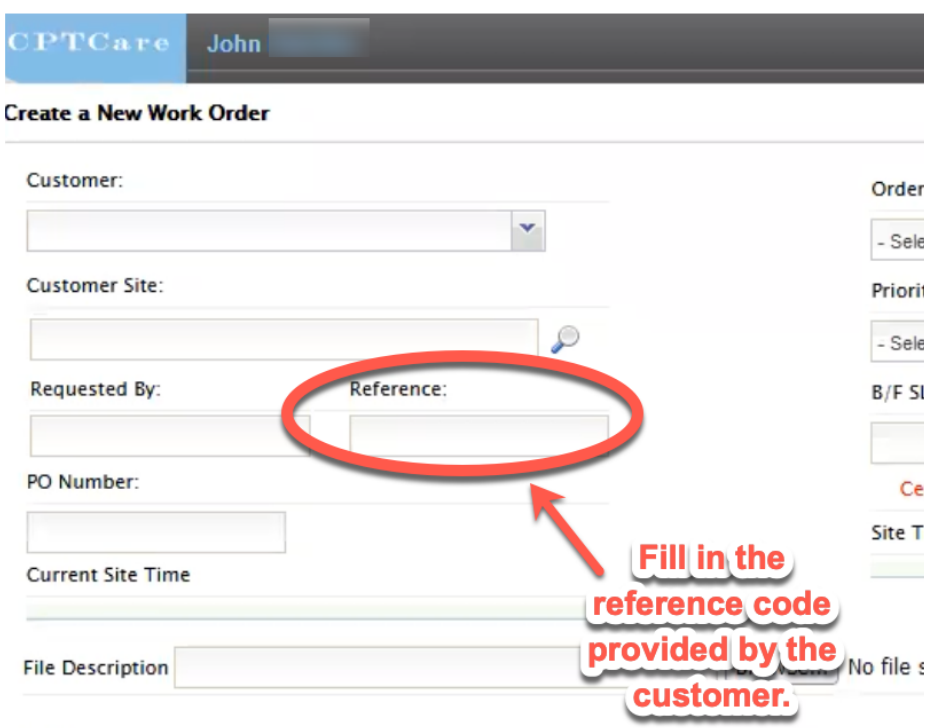
[Click this Video to View this Process!]

IMPORTANT NOTE: If this happens, the ticket needs to be **reviewed** to ensure **duplicate tickets** are **NOT** created.

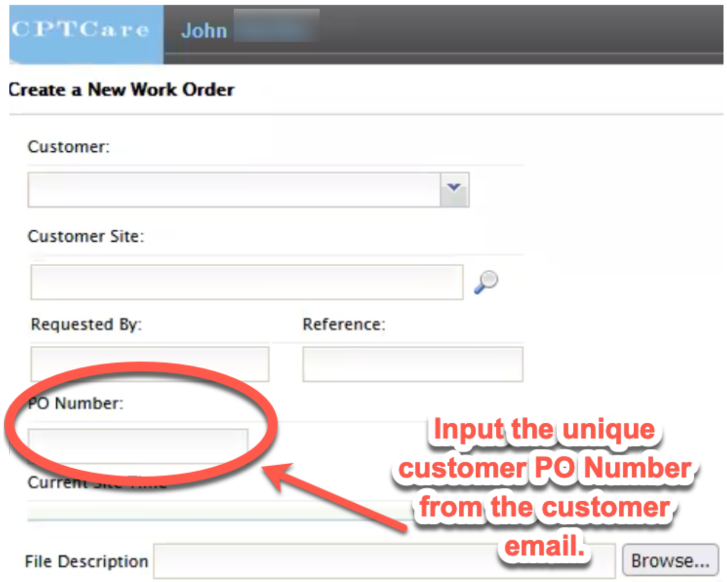
Next, filling the "Requested By" section for the individual requesting the work order. 👇



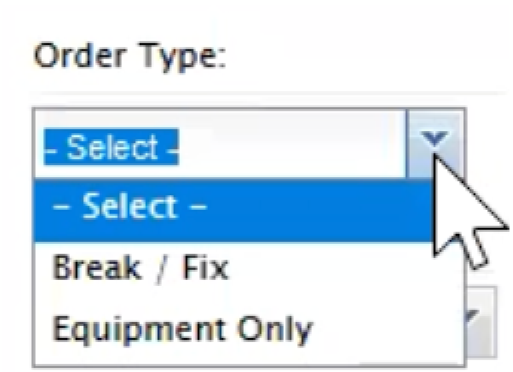
Then fill in the “Reference” section, **if the customer has provided one**. This code will allow the customer to get updates, in real time on their work order, through their “Service Now” program.



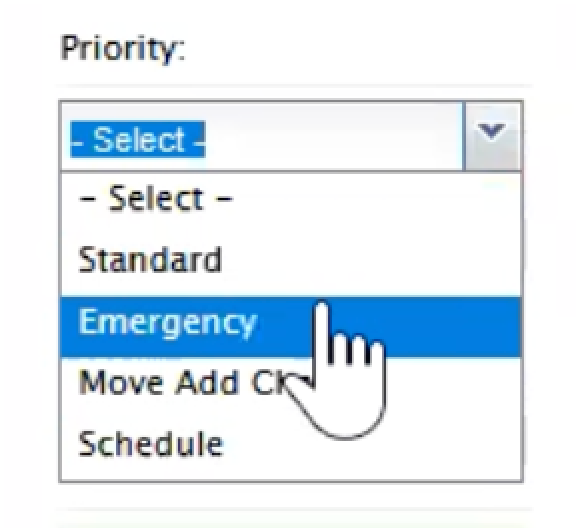
Now, fill in the “PO Number” section. Some customers will send a unique **PO number provided** in their emails and **later require this information for their invoices.**



Next select the **“Order Type”** from the drop down menu.

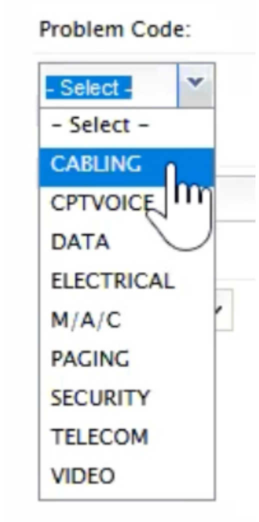


Then, select the **Priorty** of the work order from the drop down menu.

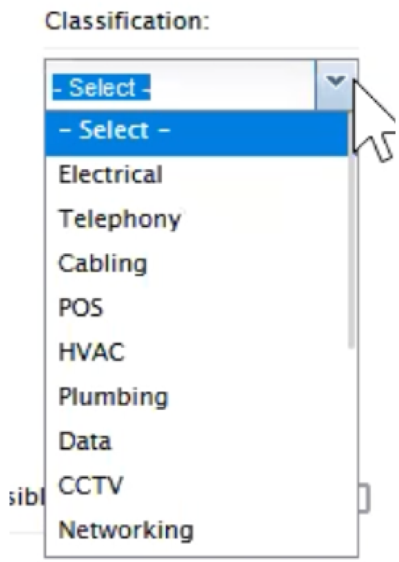


Important Note: When you have completed the last two steps, the **"B/F SLA Date and Time"** and the **"Site Time"** with auto populate.

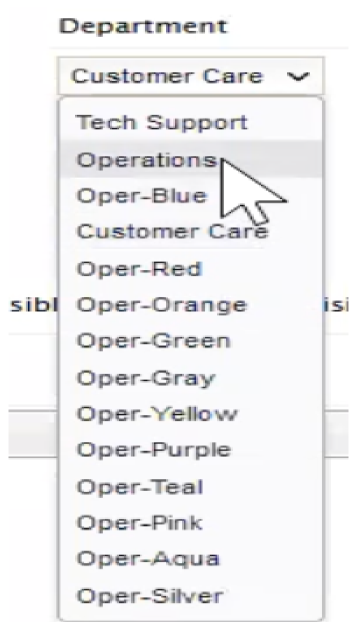
Next, select the **"Problem Code"** from the drop down box. This is the work order **issue type**.



Now, select the **"Classification"** Code from the drop down menu. This is to select the **type of technician** needed for this specific job.

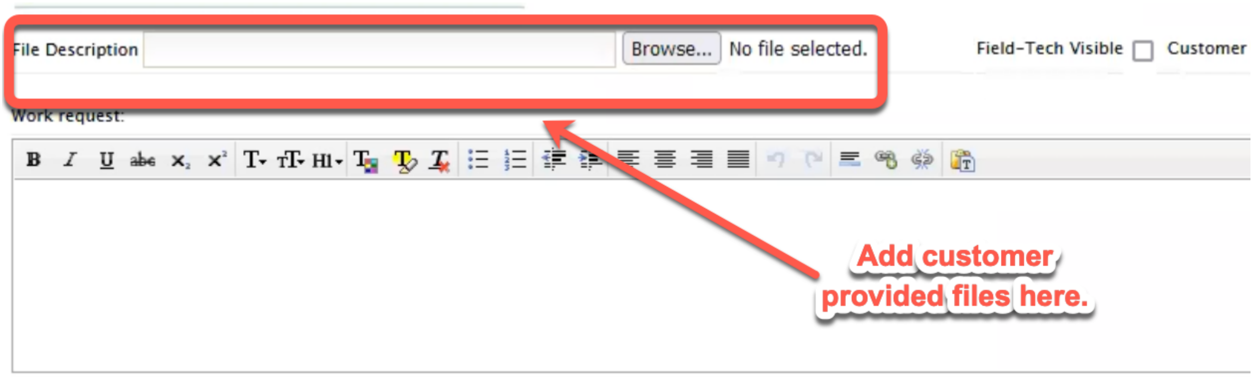


Select the **"Department"** from the drop down menu. This will push the work order to whatever department it **needs to go to**.

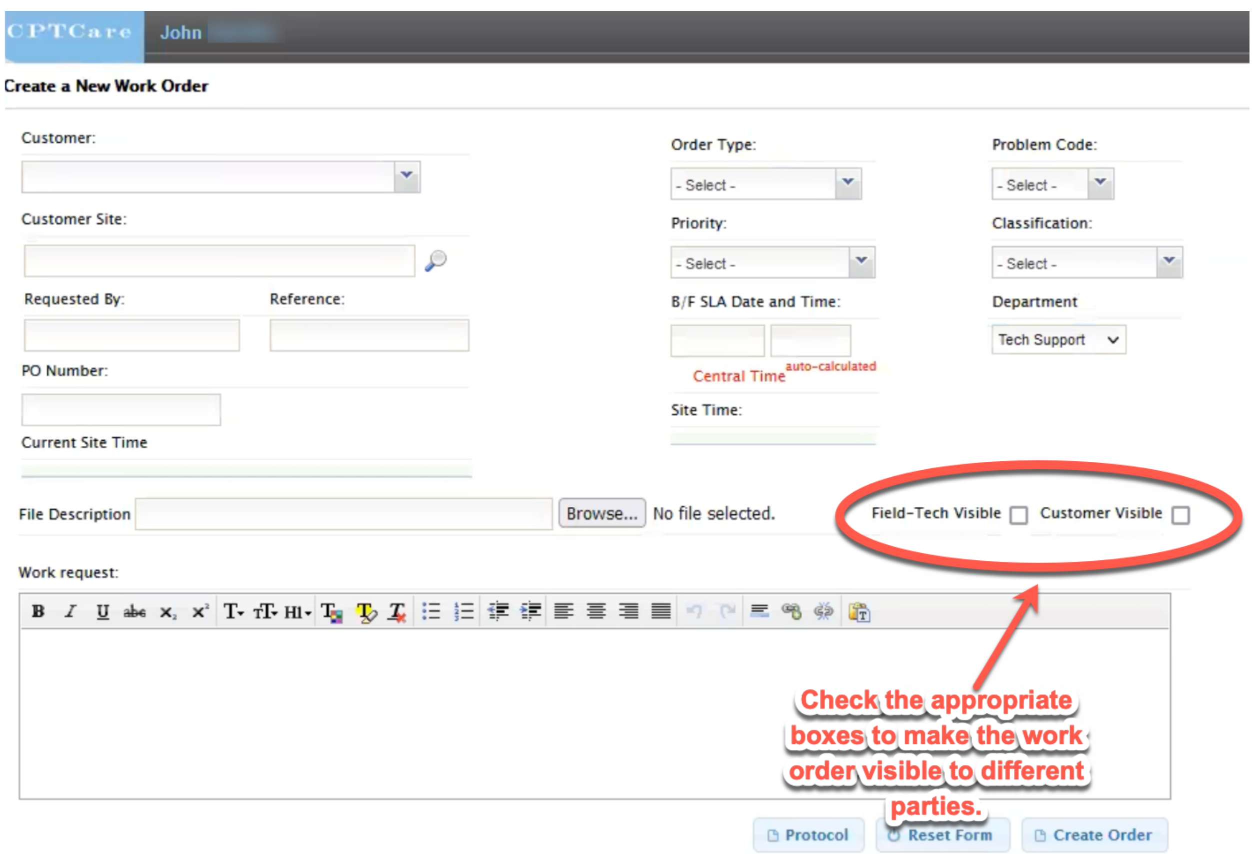


Upload and attatch a file to **“File Description”** if the **customer has provided** us with one.

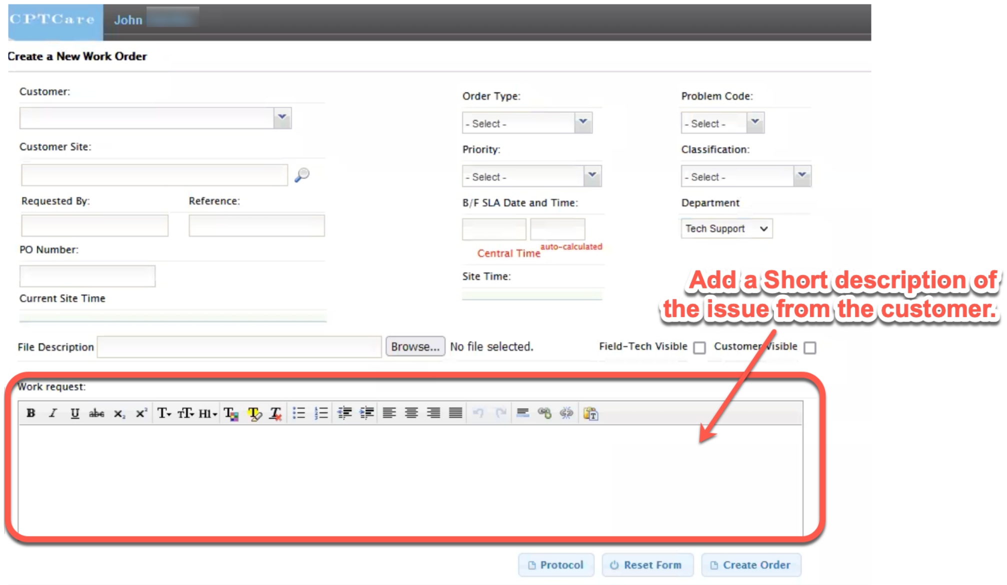
<u>Please note</u> that only one file can be added here and other files will have to be added after the work order has been created.



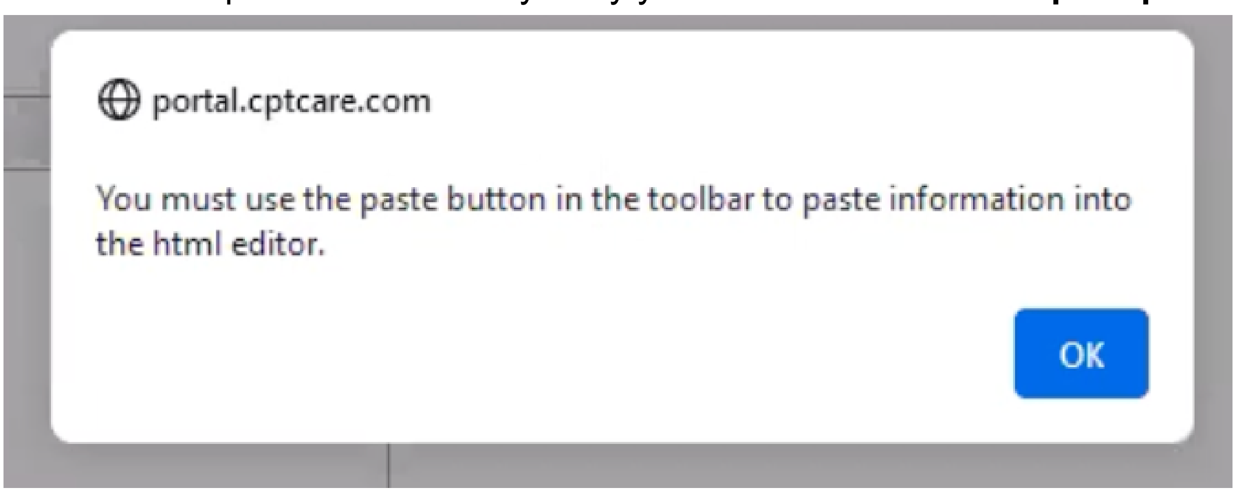
Decide whether the work order needs to be **visible** to the **field-tech**, the **customer** or **both**. **Check** the corresponding **boxes** for the specific needs of the work order.



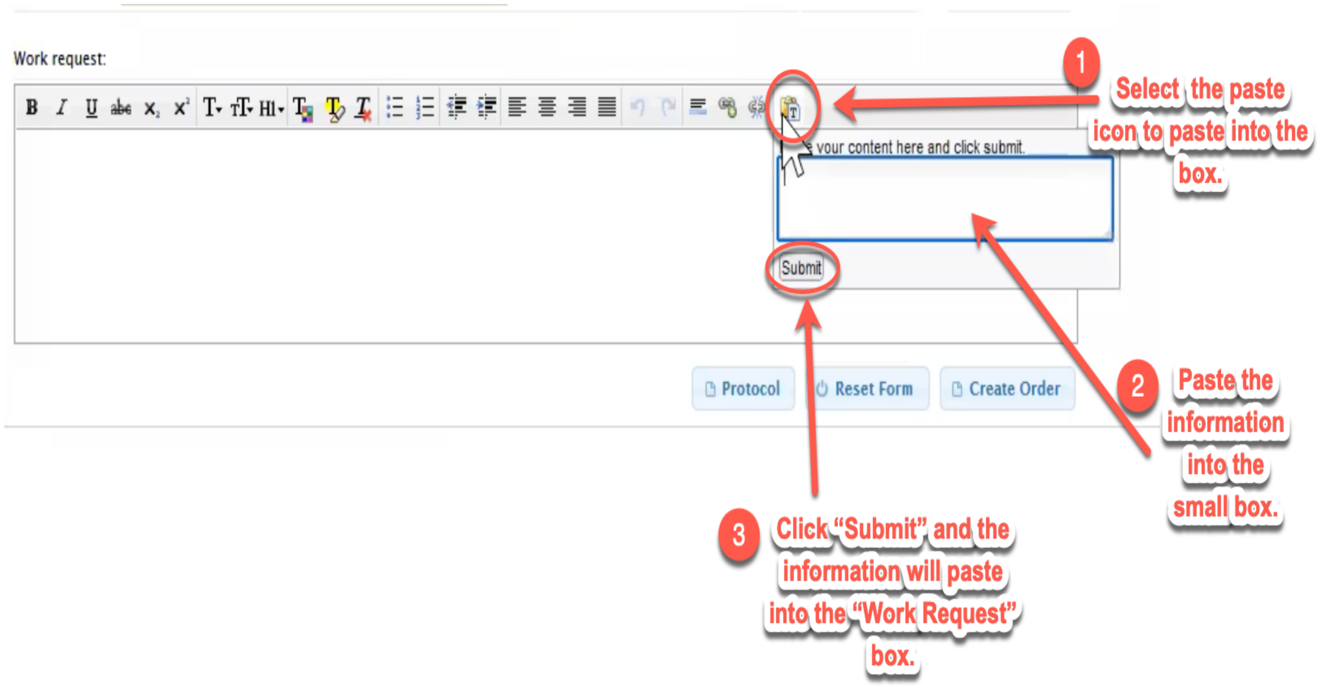
Next, in the “Work Request” box add a short description of the issue from the customer. This should be **copy and pasted** **(See Important Note Below)** from the customer email or as close to work for word as possible.



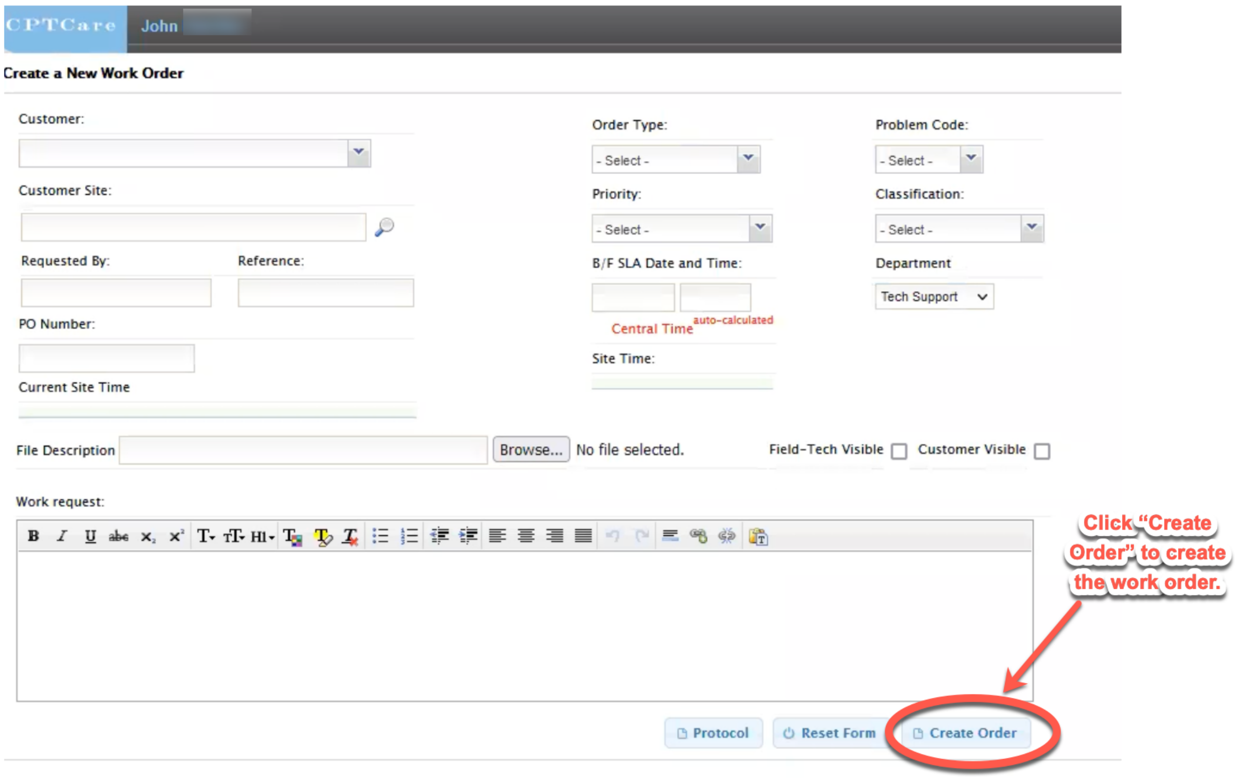
Important Note: The system will not allow you to paste directly into the “Work Request” Box. When you try you will receive this **error prompt**.



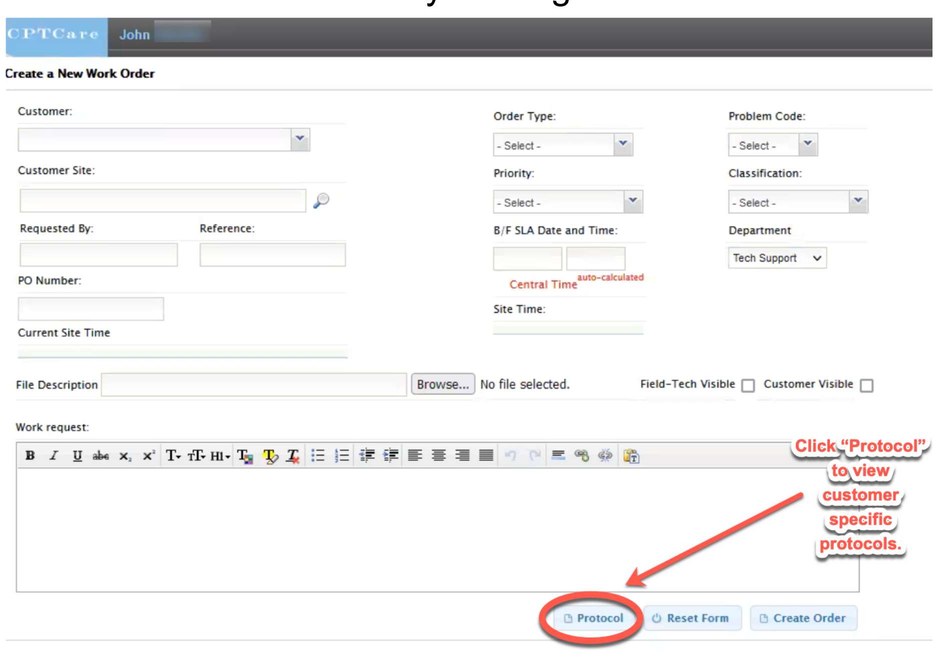
To paste into the “Work Request” box, first select the paste icon (shown below), paste in the small box that appears, then click “Submit”



After the appropriate information is entered, the work order is ready to be created and you can click “Create Order”



Special Note: Some customers have specific protocol to be followed when completing jobs. This is important information to place in the work order and can be found by clicking “Protocol”.



A protocol box will appear with more customer specific information.