

# Work Order Manager

WO Tracking, Management, and Automation for Multi-Site Organizations

## What Is It?

Locations, assets, trades, providers, and on-site staff can add up to thousands or even millions of moving parts that you need to manage, even when you're hundreds of miles away. ServiceChannel Work Order Manager's automated workflows make it easy to manage it all, without sacrificing flexibility or control.

With ServiceChannel Work Order Manager, you can see every detail and gain full control. Get condition-based rules for workflows, clearly defined checkpoints for spend and compliance, and visibility for everyone on your team. Quickly identify hotspots with a map-based view of all issues and submit service requests from anywhere with the mobile app, so you can keep everything running smoothly at all your locations.

## Who Is It For?



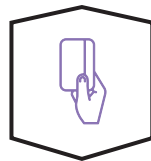
Facility  
Managers



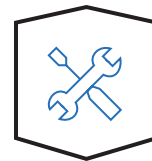
Location  
Staff



Finance/  
Accounting



Procurement/  
Sourcing



Third Party  
Contractors

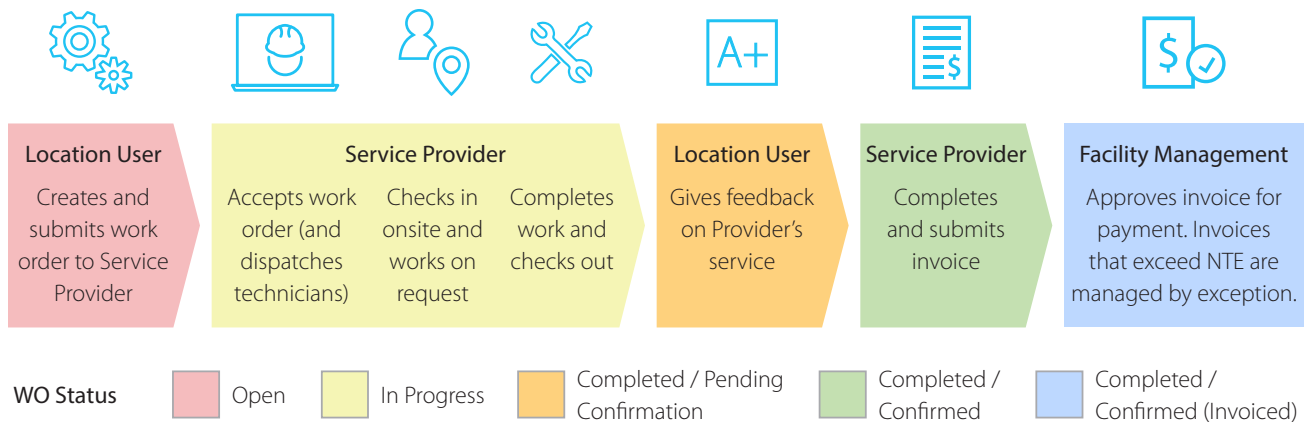
## Benefits

- **Resolve issues faster.** Automate work orders based on your preferences, create bulk work orders easily, and even set up troubleshooting steps to help location staff solve problems without technicians.
- **Get full control.** Configure workflows and assignments based on location, trade, warranty status, and more.
- **Reduce spend, increase accountability.** Never pay more than you should. Checkpoints automatically require proposals based on NTE limits, stop invoices for incomplete work, and validate invoices for accurate rates and hours.
- **Make data-informed decisions.** Get proposal approval or rejection recommendations based on past proposal decisions and provider performance.
- **Keep everyone informed.** Nothing slips through the cracks. Your team sees all work order information, location staff know when to expect providers, and providers get all the issue and asset details to get to job done.
- **Be productive everywhere.** Facilities teams, location staff, and providers can do everything from submitting work orders to confirming completion with the mobile app.
- **Boost efficiency, gain insights.** Get more done faster with bulk issue editing, dynamic search filters, and customizable labels. Use the time saved to explore business insights from the integrated Analytics dashboard.



## The Work Order Life Cycle

Work Order Manager supports facility management teams during every step of the submission, fulfillment, review, and invoicing process:



## Features

### Workflow

- **Automated Processes:** Set up business rules that increase call avoidance, streamline WO submission, and automate dispatch for both repair and planned maintenance.
- **Mobile Access:** Create WOs and view status remotely on your mobile device. Providers can also check-in, view issue details, and track their work with the Provider App.
- **Online and Phone Service Requests:** Place service requests and track work status from anywhere.
- **Contractor-Initiated Work Orders:** Allow service providers to generate work orders while onsite for pre-approved types of work.
- **Proposal Recommendations:** Make informed decisions with machine learning recommendations.

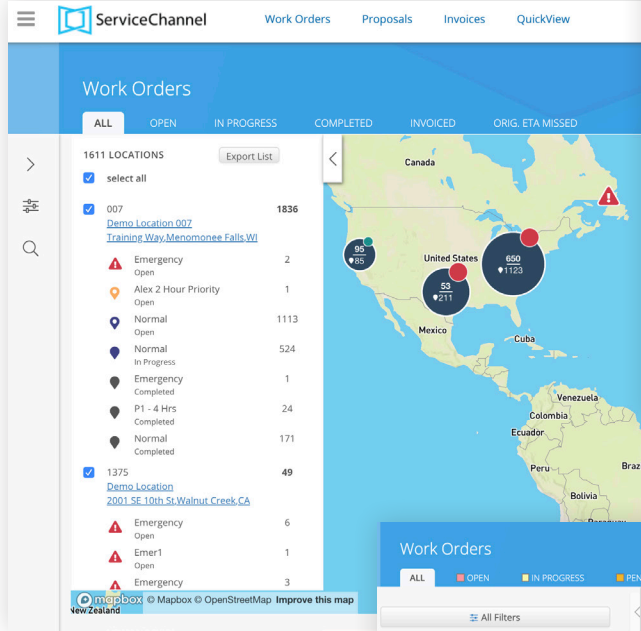
### Controls

- **On-Site Check-in/Check out:** Validate contractor presence and labor invoicing via real-time updates with GPS and IVR.
- **Provider Checklists:** Communicate and gather specific information to provider technicians during check-in/out to validate completion of important steps. You can define separate checklists based on each trade, category, and location.
- **Issue Override:** Reroute work orders based on specific customizable conditions.
- **Alert Notifications:** Receive real-time alerts via email or text.
- **Metric-Based NTE Controls:** Set not-to-exceed cost controls to ensure work order costs stay within budget.
- **Rate & Hours Validation:** Avoid overspending with automatic invoice flagging for mismatches.

### Productivity

- **Customized Dashboard:** Let operating staff easily enter and review service requests.
- **Work Order Labels:** Index and manage related WOs so you can organize work and analyze spending trends for emergency situations, special projects, and other classifications meaningful to your operations.
- **Map View:** Get an intuitive, interactive visualization of your locations and WOs on a map. Find out which locations and regions have high work order volumes, prioritization, and emergency work orders.
- **Weather & Outbreak Tracking:** Overlay weather events/alerts and virus outbreaks in proximity to your locations. Create batch work orders directly from Map View.



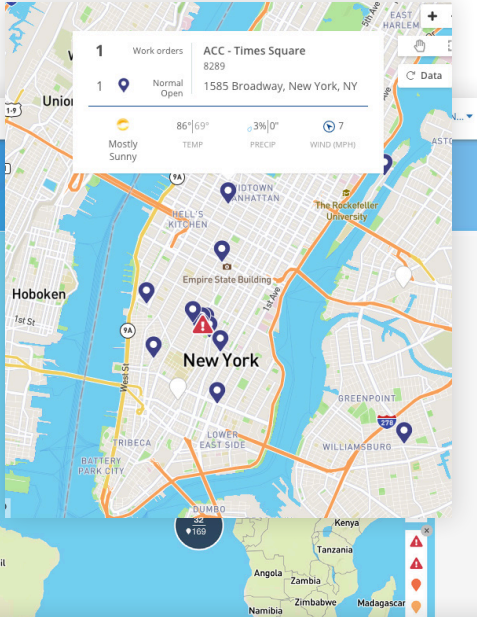


**Work Orders**

ALL OPEN IN PROGRESS COMPLETED INVOICED ORIG. ETA MISSED

1611 LOCATIONS

- select all
- 007 Demo Location 007 Training Way, Menomonee Falls, WI 1836
  - Emergency Open 2
  - Alex 2 Hour Priority Open 1
  - Normal Open 1113
  - Normal In Progress 524
  - Emergency Completed 1
  - P1 - 4 Hrs Completed 24
  - Normal Completed 171
- 1375 Demo Location 2001 SE 10th St Walnut Creek, CA 49
  - Emergency Open 6
  - Emer1 Open 1
  - Emergency 3



1 Work orders ACC - Times Square 8289

1 Normal Open 1585 Broadway, New York, NY

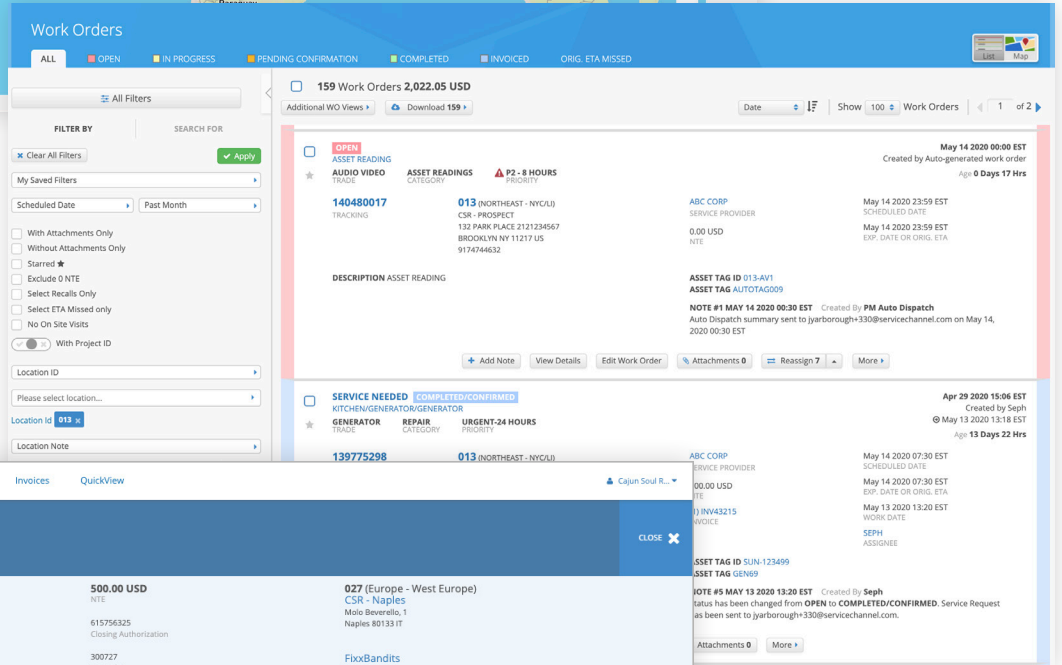
Mostly Sunny 86°|69° 0%|0" 7

TEMP PRECIP WIND (MPH)

Map showing locations in New York City and surrounding areas.

See which regions and locations require your attention with Map View.

Manage all your work orders from one place with List View.



**Work Orders**

ALL OPEN IN PROGRESS PENDING CONFIRMATION COMPLETED INVOICED ORIG. ETA MISSED

159 Work Orders 2,022.05 USD

Filter by: Clear All Filters, My Saved Filters, Scheduled Date: Past Month

140480017 TRACKING

013 (NORTHEAST - NYC/LJ) CSR - PROSPECT

ABC CORP SERVICE PROVIDER

May 14 2020 00:00 EST

Created by Auto-generated work order

Age 0 Days 17 Hrs

NOTE #1 MAY 14 2020 00:30 EST

Created by PM Auto Dispatch

Auto Dispatch summary sent to jyarborough@330@servicechannel.com on May 14, 2020 00:30 EST

139775298 013 (NORTHEAST - NYC/LJ)

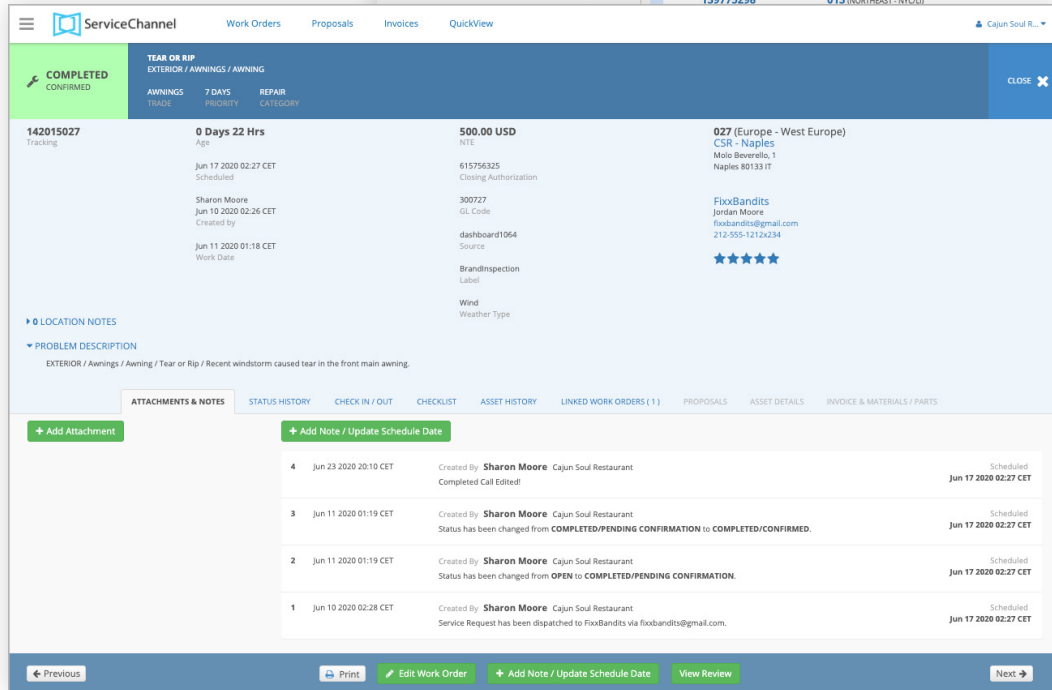
ABC CORP SERVICE PROVIDER

May 14 2020 07:30 EST

Created by Seph

Age 13 Days 22 Hrs

See attachments and notes, check provider activity, review spend, and more with Work Order Details.



**ServiceChannel**

Work Orders Proposals Invoices QuickView

**COMPLETED CONFIRMED**

TEAR OR RIP EXTERIOR / AWNINGS / AWNING

AWNINGS TRADE 7 DAYS PRIORITY REPAIR CATEGORY

142015027 Tracking

0 Days 22 Hrs

500.00 USD

Jun 17 2020 02:27 CET Scheduled

Sharon Moore Jun 10 2020 02:26 CET Created by

Jun 11 2020 01:18 CET Work Date

027 (Europe - West Europe) CSR - Naples

Molo Beverello, 1 Naples 80133 IT

FixxBandits Jordan Moore fixxbandits@gmail.com 212-555-1212x234

★★★★★

EXTERIOR / Awnings / Awning / Tear or Rip / Recent windstorm caused tear in the front main awning.

ATTACHMENTS & NOTES

STATUS HISTORY CHECK IN / OUT CHECKLIST ASSET HISTORY LINKED WORK ORDERS (1) PROPOSALS ASSET DETAILS INVOICE & MATERIALS / PARTS

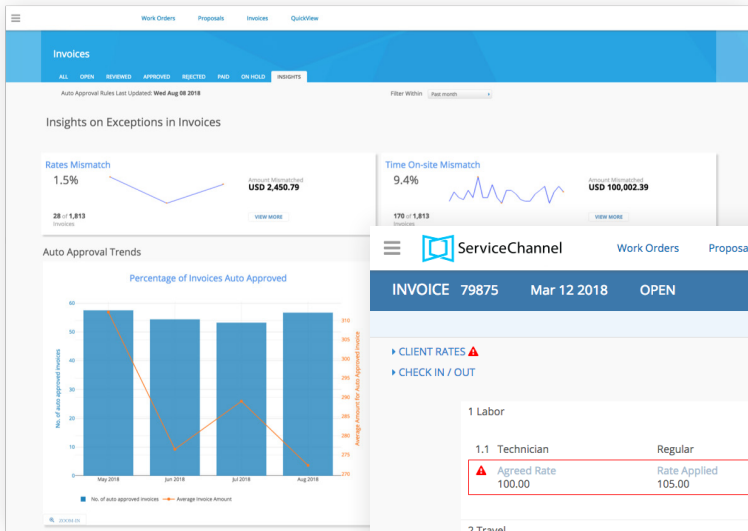
4 Jun 23 2020 20:10 CET Created By Sharon Moore Cajun Soul Restaurant Completed Call Edited! Jun 17 2020 02:27 CET Scheduled

3 Jun 11 2020 01:19 CET Created By Sharon Moore Cajun Soul Restaurant Status has been changed from COMPLETED/PENDING CONFIRMATION to COMPLETED/CONFIRMED. Jun 17 2020 02:27 CET Scheduled

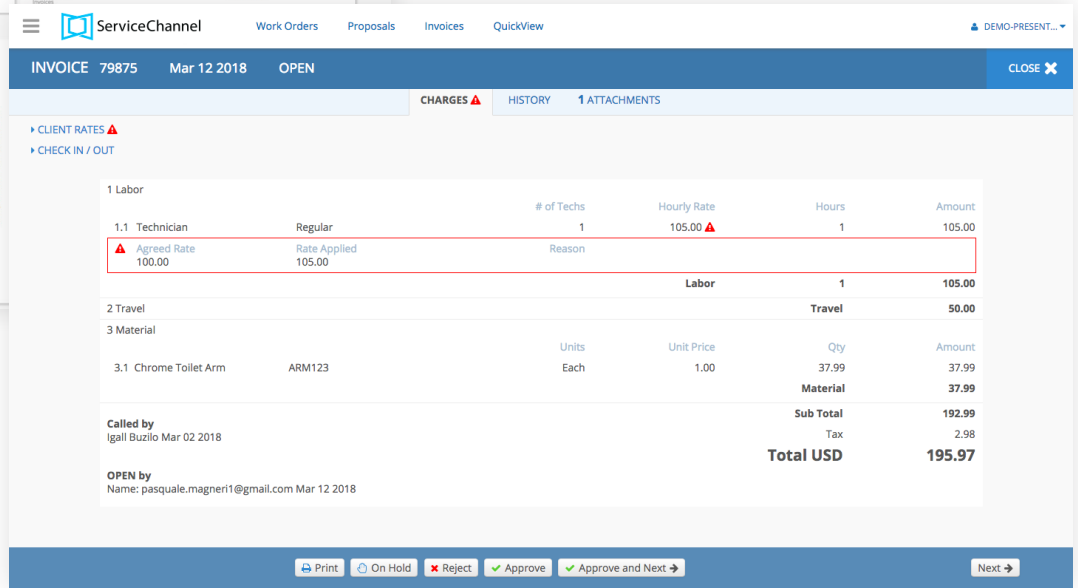
2 Jun 11 2020 01:19 CET Created By Sharon Moore Cajun Soul Restaurant Status has been changed from OPEN to COMPLETED/PENDING CONFIRMATION. Jun 17 2020 02:27 CET Scheduled

1 Jun 10 2020 02:28 CET Created By Sharon Moore Cajun Soul Restaurant Service Request has been dispatched to FixxBandits via fixxbandits@gmail.com. Jun 17 2020 02:27 CET Scheduled





When reviewing invoices, see exceptions where the billed rates or hours don't match your contracted rates and check-in data. You can also set rules to automatically approve invoices without identified errors.



**INVOICE 79875** Mar 12 2018 OPEN

**CHARGES** HISTORY 1 ATTACHMENTS

**CLIENT RATES**  
**CHECK IN / OUT**

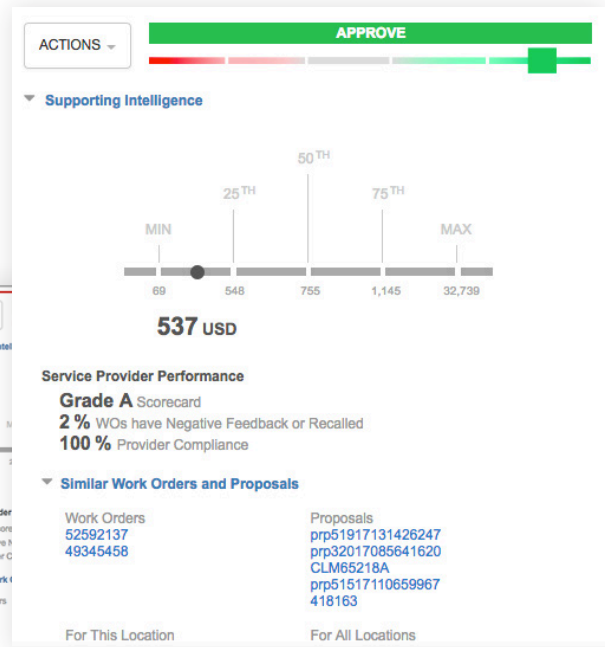
1 Labor	# of Techs	Hourly Rate	Hours	Amount
1.1 Technician Regular	1	105.00	1	105.00
Agreed Rate: 100.00		Rate Applied: 105.00	Reason:	
<b>Labor</b>				<b>1</b>
				<b>105.00</b>
<b>2 Travel</b>				<b>50.00</b>
<b>3 Material</b>				
3.1 Chrome Toilet Arm	ARM123	Units: Each	Unit Price: 1.00	Qty: 37.99
				<b>Material</b>
				<b>37.99</b>
<b>Sub Total</b>				<b>192.99</b>
<b>Tax</b>				<b>2.98</b>
<b>Total USD</b>				<b>195.97</b>

Called by: Igal Buzilo Mar 02 2018

OPEN by: Name: pasquale.magneri1@gmail.com Mar 12 2018

Get automated proposal recommendations to approve or reject backed by data and practices from your industry peers.

Supporting intelligence helps you compare the price to similar proposals with context on provider performance so you can quickly and confidently make the decision.



**ACTIONS** - APPROVE

**Supporting Intelligence**

MIN 69 25TH 548 50TH 755 75TH 1,145 MAX 32,739

**537 USD**

**Service Provider Performance**  
Grade A Scorecard  
2% WOs have Negative Feedback or Recalled  
100% Provider Compliance

**Similar Work Orders and Proposals**

Service Provider: Grade B Scorecard, 1% WOs have Negative Feedback or Recalled, 87% Provider Compliance

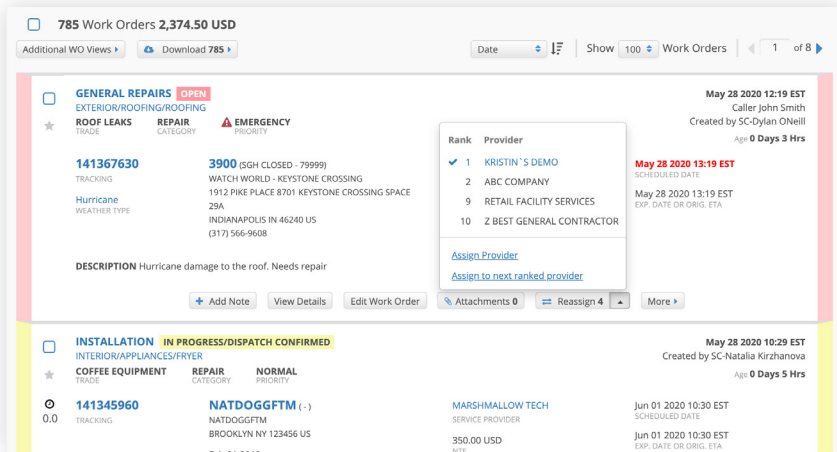
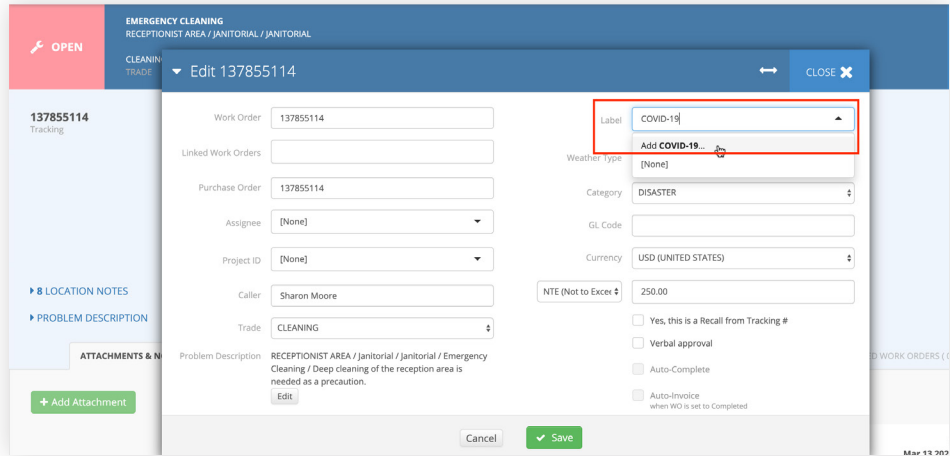
Work Orders: 52592137, 49345458

Proposals: prp51917131426247, prp32017085641620, CLM65218A, prp51517110659967, 418163

002 CSR-Manhattan 18 E. 16th Street New York, NY 10013 REFRIGERATION MacBemis Services	prp4071716574443 1,891.00	Apr 7 2017 16:57 EST Sharon Moore WO: 71987522 PO: 71987522	ON HOLD Apr 7 2017 21:17 EST Regg Ungar	002Manhattan@cajunsoul.com DeepFroster-Specs.pdf FridgMasterFDR4899	<b>ACTIONS</b> - APPROVE
001 CSR-Brooklyn 1 Brooklyn Way Brooklyn, NY 11210 FLOORS/TILES iFax Services	prp40717193534437 1,000.00	Apr 3 2017 19:35 EST WO: 77341548 PO: 77341548	open	001Brooklyn@cajunsoul.com Replace broken tiles and grout in womens' restroom.	<b>ACTIONS</b> - REJECT
002 CSR-Manhattan 18 E. 16th Street New York, NY 10013 BEVERAGE EQUIPMENT SuWex	69967333 369.26	Apr 12 2017 16:43 CST Pamela Mann WO: 71602929 PO: 71602929	open	002-Manhattan@cajunsoul.com Unit leaking water and not starting all the time. Fill hose broken and leaking on electrical components, door gasket bad/bottom, and start switch is intermittent. Parts on order.	<b>ACTIONS</b> - NO RECOMMENDATION

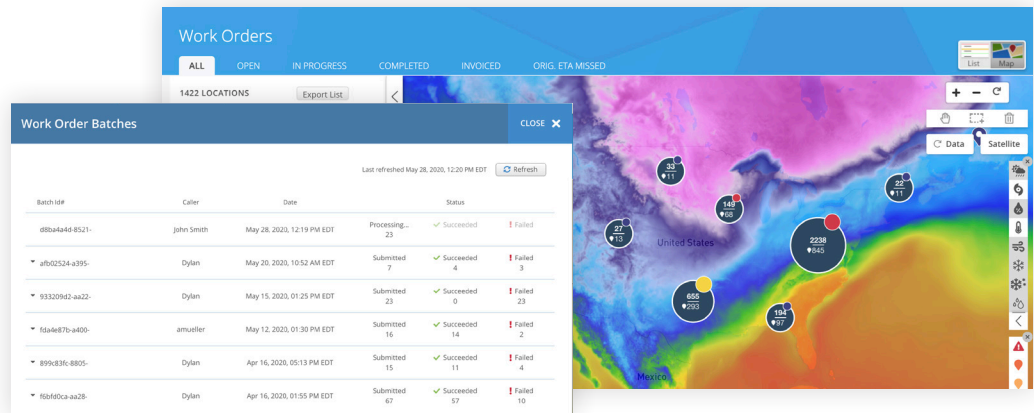


Use Work Order Labels to organize work and analyze spending trends for emergency situations, special projects, and other classifications meaningful to your operations.



Assign, rank, and reroute work orders to providers based on customizable conditions. Define exactly how you want them to proceed automatically based on location, trade, or warranty status.

Proactively protect your locations and assets from weather events with batch WO creation directly from Map View.



## About ServiceChannel

ServiceChannel, the #1 Facilities Management Platform, is used by global multi-location brands to see inside their buildings, assets, and provider networks — and deliver amazing customer experiences at every location. The ServiceChannel platform captures the industry's richest performance data, with billions of data points drawn from 100 million work orders and over 70,000 providers. Industry leaders such as Louis Vuitton, Bloomin' Brands, CVS Health, and Trader Joe's rely on insights from our platform to work with the best providers, optimize spend, and deliver impeccable customer experience. ServiceChannel is a privately held company funded by Accel, based in the San Francisco Bay Area.

