

# Writing Up Work Orders

**Step 1:** Type the location of where you want to write up the work order inside the **Property, Associations, Homeowner, or Tenant** section

NOTE: Location can be a specific unit or an entire property. [\(Click here for Units/Common area descriptions to use when writing up work orders\)](#)

New Service Request

Property, Association, Homeowner, or Tenant \*

Start typing to search

Unit

Work Order Type

When the property is selected the unit is automatically generated

Property, Association, Homeowner, or Tenant \*

Apt Acct F-01

Unit

F-01 (4 BR 2 LVL GRD Floor - Style 1) - Apt

Auto generates from information in Property, Association....

**Step 2:** Scroll down to Priority

NOTE: Do not do anything with Work Order Type, Permission to Enter, or Additional Information Regarding Entry

Work Order Type

Internal

Auto Generates - No Action Required

Permission To Enter

☐ Yes

☐ No

☐ Not applicable

Additional Information Regarding Entry

Leave Blank

**Step 3:** Determine the style of work order needed for the request:

- **Low:** (To-Do List)
  - Building Inspections
  - Unit Inspections

NOTE: If something is found during the inspection that is a safety issue it will be classified as Normal, so it is addressed immediately

- **Normal:**
  - Word Orders called in/texted by Residents
  - Night Calls
  - Preventative Maintenance (PM'S) that will be done in-house (By our Staff)

NOTE: If the Preventative Maintenance (PM'S) will be done by a contractor then change the status to **Urgent**. Auto generates as **Normal**

- **Urgent:**
  - Projects that will be done in-house
  - Projects that will be done by contractors
  - Preventative Maintenance (PM's) that will be done by Contractors

#### Step 4: Click the dropdown button under Priority

NOTE: AppFolio defaults to Normal. If that is the classification you need for the work order, then skip to **Step 6**

Priority

Normal

#### Step 5: Click the style of the work order

Urgent

✓ Normal

Low

Description \*

#### Step 6: Fill in the Description based off the information below:

Description \*

The Service Request description will detail the reported issue, and is for internal use only.

- **Tenant Phone Call:** Phone Call (NAME)
- **Text Message:** Text Message (NAME)
- **In Person:** In Person (NAME)
- **Building Inspection:** To-Do List
- **Unit Inspections:** (Spring Inspection) or (Winter Inspection)
- **Night Call:** (On-Call)

#### Step 7: Scroll down to Job Description

NOTE: Do not do anything with the boxes after description or before Job Description

☒ Use service request description as work order job description

Automatically checked - do not do anything

Work Order Information

☐ Owner approved

Do not do anything

#### Step 8: Fill in the job description based off what needs to happen

NOTE: The first line in the description auto generates from the Description

Location (Item) What the issue is and special instructions if needed

- Example: Kitchen (Light) Replace the broken light fixture
- Example: Bathroom (Toilet) Toilet is leaking at the base. NOTE: Has an aggressive dog so need to contact tenant prior to entering

Job Description

(On-Call)

Bathroom (Toilet) Toilet is leaking at the base. NOTE: Has an aggressive dog so need to contact tenant prior to entering

The Work Order Job Description is specific to a single work order and will be visible on the printed work order.

#### Step 9: Scroll down to the Save button

NOTE: Do not do anything with Vendor Instructions, Vendor Trade, Vendor, or the check boxes

Vendor Instructions

← Skip - Do not fill out

Vendor Trade

No Trade Assigned ← Skip - Do not fill out

Vendor Suggestions

Assign a vendor trade to generate suggestions.

Vendor

Search ← Skip - Do not fill out

☐ Email vendor a secure link to view this work order ← Skip

☐ Request vendor to confirm receipt of work order ← Skip

Assign To

← Skip - Do not fill out

Save Cancel

## Step 10: Save the work order

Assign To

Save Cancel

## Step 10: Print the work order

NOTE: Work orders are printed on different color paper based on what they are

Work order #22592-1 has been printed.

Work Order #22592-1 **WAITING** Actions ... ✓ Tracking ✎ E

Job Description

FULL BATH ( TUB) Faucet drips

Print Text

Owner approved: No

- **Low** – Printed on **Blue** Paper
- **Normal** – Printed on White paper
- **Urgent** – Printed on **Orange** Paper

## Step 10: File the work order accordingly

NOTE: All emergencies are radioed out and will be addressed immediately