

# WORK ORDERS QUICK REFERENCE GUIDE

## Drop Down Options

The screenshot shows a web application interface for maintaining drop-down options. At the top, there is a navigation bar with links: Homeowners, Vendors, Banking, Accounting, CCR, Management, Portfolio, and Reports. Below this is a sub-header 'Maintain Drop Down Options' with buttons for New, Save, Delete, Refresh, and Cancel. On the right, there are links for Help and Dashboard. The main area features a 'Drop Down List' section with a dropdown menu currently set to 'Association Address Type'. Below this is a table with two columns: 'Description' and 'Send WO Emails'. The table contains three rows: '1099 Address', 'Clubhouse', and 'Developer'. Each row has a checkbox in the 'Description' column and a toggle switch in the 'Send WO Emails' column.

Select System/Drop Down Options

- o Association Address Type
- o Work Order Status
- o Work Order Type

## Email Templates

The screenshot shows a web application interface for editing email templates. At the top, there is a navigation bar with links: Homeowners, Vendors, Banking, Accounting, CCR, Management, Portfolio, and Reports. Below this is a sub-header 'Edit Email Template' with buttons for Save, Refresh, and Cancel. On the right, there are links for Help and Dashboard. The main area is divided into three sections: 'Email Template:', 'Attachments:', and 'Body Text:'. The 'Email Template:' section has a dropdown menu currently set to 'eStatement'. The 'Attachments:' section lists several templates: 'New Action Item Note - Mgmt. Co.', 'Past Due Action Item List', 'Weekly Manager Update', 'Vendor Templates', 'Insurance Expired - Past Expiration Notice', 'Insurance Expiring Notice', 'License Expired - Past Expiration Notice', and 'License Expiring Notice'. The 'Body Text:' section contains a list of templates, with 'Work Order Templates' highlighted in blue. A red box highlights the 'Work Order Templates' section, which includes the following templates: 'Work Order Created - For Homeowner', 'Work Order Created - For Manager', 'Work Order Dispatched - Homeowner', 'Work Order Dispatched - Vendor', 'Work Order Note Notification', 'Work Order Re-Opened', 'Work Order Status Change', and 'Work Order Vendor Reassignment'.

Select Tools/Email Templates



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## Common Areas

The screenshot shows the 'Additional Addresses' screen for the 'Test Training Association'. At the top, there are tabs for 'New', 'Save', 'Delete', 'Excel', 'Refresh', and 'Cancel'. Below the tabs is a table of existing addresses. The 'Common Area' toggle is highlighted with a red box.

Name	Address	Email	Phone
Clubhouse	222 Sunny Field Lane		
Pool	Test Association Pool	test@testemail.com	
Remittance Address	*Test Training Association	C/O Training Management Company	
Tennis Pro Shop	Tennis Pro Shop	222 Sunny Field Lane	

Below the table is a form to add a new address. The 'Common Area' toggle is highlighted with a red box.

Address Type: Clubhouse  
Name: Clubhouse  
Address: 222 Sunny Field Lane  
City / State / Zip: Buahuth GA 30096  
Home Phone:   
Work Phone:   
Village:   
Lot:   
Mobile Phone:   
Email:   
Phone:   
Block:   
Common Area: ☒

- Select Setup/Association Setup, Select association, click on Addr tab
- o Add each common area to the association's Additional Addresses screen
  - o Toggle on the Common Area button

## Work Order List Screen

The screenshot shows the 'Work Order List' screen. At the top, there are tabs for 'Homeowners', 'Vendors', 'Banking', 'Accounting', 'CCR', 'Management', 'Portfolio', and 'Reports'. Below the tabs is a table of work orders. The 'Common Area' toggle is highlighted with a red box.

WO #	Created	Printed / Emailed	Due	Type / Description	Vendor	Work Location	Status
1	12/02/2021	P/E: 12/02/2021	12/03/2021	Plumbing / Pool is leaking	Polly's Pool Service	Community Pool 2838 Elm Way	Closed

Select Vendors/Work Orders

- o View existing work orders in a single or All Association view
- o Check the box next to the WO# to complete or reopen the work order
- o Click on the WO# to view a work order or click New to enter a new work order



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## Creating a New Word Order

**Work Order**

Association: \*Test Training Association

Work Order #:

Type:  Status:

Description: \*TEST - Pipe Leaking

Estimate Total:  Due Date:  Follow Up Date:

**Work Location**

Name:  Select Homeowner  or Common Area

Address:

City, State, Zip:

**Contacts**

Contact (Address Type)	Email	Phone
Test Association Pool (Pool)	<input type="text" value="test@testemail.com"/>	<input type="text"/>

**Work Assigned To**

Vendor:

Check Name:

Vendor Contact	Phone	Cell	Fax	Email
Polly Brown	(404) 556-7788			ppool@test.com

**Attachments**  Files over 50 MB will not be uploaded.

Date	File Name	Size
<input type="checkbox"/> 10/13/2023 6:22:40 PM	pipe (1).jpg	67 KB

Drop files to attach or click [Browse](#)

**Work Order Notes**

Date	Public	Email	Note
10/13/2023	<input checked="" type="checkbox"/>	<input type="checkbox"/> Work Location <input type="checkbox"/> Vendor	<input type="text" value="Pipe near entrance is leaking."/>

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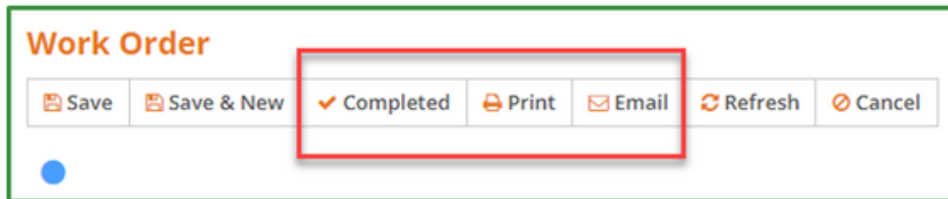
- Work Order # will automatically populate after clicking Save
- Description will automatically populate in the Subject line when Emailing the work order
- Work Location can be linked to a Homeowner or Common Area
- The system will trigger the Unlinked Vendor flag if the Vendor has no contact information listed
- Work Order Notes with the Public box checked will appear on the Work Order List report



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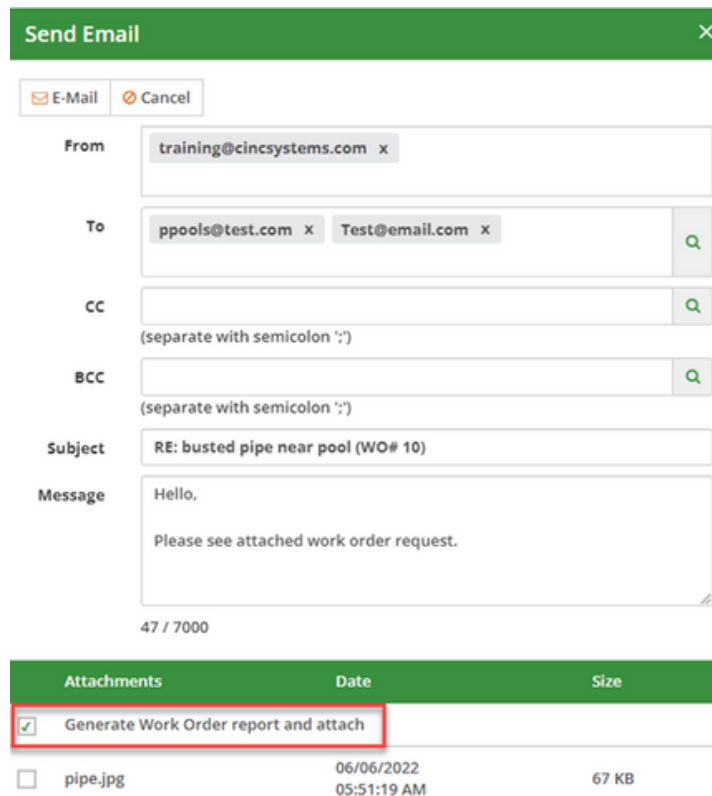
### Completed/Print/Email



Work Order

Save Save & New **Completed** Print Email Refresh Cancel

- These are made available after clicking Save
- Clicking Print will create a pdf of the work order under Recent Reports titled Work Order
- Click Email to email the Work Order Report and/or attachments
  - o The User's email address will populate in the From field – replies will go to your inbox
  - o The Work Location and Vendor email addresses will populate in the To field
  - o You must include a message and check the Generate Work Order report and attach box



Send Email

E-Mail Cancel

From: training@cincsystems.com x

To: ppools@test.com x Test@email.com x

CC: (separate with semicolon ';')

BCC: (separate with semicolon ';')

Subject: RE: busted pipe near pool (WO# 10)

Message: Hello, Please see attached work order request.

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Attachments	Date	Size
<input checked="" type="checkbox"/> Generate Work Order report and attach		
<input type="checkbox"/> pipe.jpg	06/06/2022 05:51:19 AM	67 KB



# WORK ORDERS

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Complete Work Order

Status: Closed

Email ☒ Work Location ☒ Vendor ☒

Public ☒

Note: Work completed.

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NOTE: This Note may be visible to either the Homeowner or Vendor. Please use appropriate language.

Vendor Rating (Optional)

Global Average Rating: ★★★★★ (7 rating)

Your Average Rating: ★★★★★ (0 rating)

Your Last Rating: ★★★★★

New Rating: ★★★★★

Rating Note (Optional):

Save Cancel

- Click Completed to close the work order
- o The Email Work Location, Vendor and Public boxes default as checked – uncheck if needed



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## Link Work Order to Invoice

**Assign Invoice**

Save Refresh Cancel Help Dashboard

\*Test Training Association

Batch: 01/18/2022 Batch # 6 (4) - Test User Unassign

Recurring: WO #:

Invoice #: Date: 10/05/2023

Status: Pending Approval Due:

Pay To: Account #:

Address: Total: \$0.00

City: State: Zip:

Memo:

Account: TestBank - OP - 1234 Pay By: Check

·Assign Invoice screen – Select Vendors/Assign Invoices

**Invoice**

Save Save & New Refresh Cancel Dashboard

\*Test Training Association

Invoice# Invoice Date 10/05/2023

Vendor Account # Due Date

Status: Pending Approval WO #:

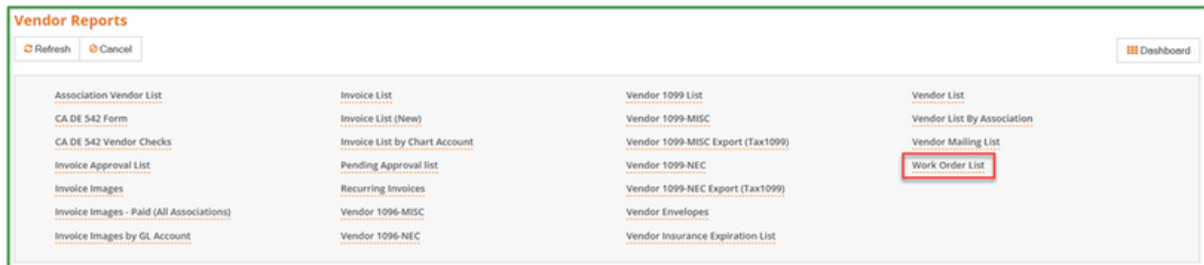
Pay To:

·Invoice screen – Select Vendors/Invoices then click New



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## Work Order Report



Select Reports/Vendor Reports click Work Order List

- o Create Date – Day Work Order entered in CINC
- o Due Date – Work Order with Due Date set
- o Nex Reminder Date – Work Order with Follow up Date set
- o Issued Date – Day Work Order was Printed / Emailed
- o Completed Date – Day Work Order was closed/completed

