

## Work Orders

*AccuFund Onsite*

### **Keep Track of Multiple Maintenance, Repair and other tasks—All in One Place**

Gain centralized control over maintenance, repair and other work requests with AccuFund's Work Orders module, which you can link conveniently to service locations, existing tax and billing records, and fixed assets such as vehicles or machinery.

Nonprofit and government organizations with busy maintenance teams and/or IT service departments—especially those that schedule and track multiple jobs at multiple locations—can benefit from AccuFund Work Orders.

### **Work Orders Online Version**

Looking for the cloud online version of this module?

[Show Me the Online Version](#)

The screenshot shows the 'WORK ORDER' form in the AccuFund software. The title bar reads 'CUS:[3]Boggs Hardware ADR:Phineas Bogg'. On the left is a blue sidebar with icons and labels for 'CREW / RESOURCE (1)', 'ACTIVITY (1)', 'METERS', 'IMAGES', and 'INVOICES'. The main form area contains the following fields:

- Crew leader:** <none assigned>
- Source:** Address (selected with a radio button)
- Work order:** 2
- Customer:** Boggs Hardware (with a search icon and '[3]' next to it)
- Name:** Phineas Bogg
- Street 1:** 13 Maple Road
- Street 2:** (empty)
- City:** Needham
- State:** MA
- Zip Code:** 02494
- Country:** (empty)
- Description:** Fix Meter display
- Start date:** 12/17/2018 (with a calendar icon)
- Time:** (empty)
- Complete date:** (empty)
- Time:** (empty)
- Options:** ☐ Hold ☐ Printed
- Date:** 12/17/2018 (with a calendar icon)
- Type:** <none> (dropdown)
- Status:** Open (dropdown)
- Reference:** (empty)
- Department:** <none> (dropdown)
- Est hours:** 0.00

At the bottom right are three buttons: 'Previous' (with a left arrow), 'OK' (with a floppy disk icon), and 'Cancel' (with an 'X' icon).

## Save Time and Increase Productivity

AccuFund's Work Orders module offers valuable functions that increase efficiency:

- Open a work order simply by entering a name or address. If it's already in your system, the other contact fields will be filled in automatically.
- Associate your work orders with service locations, fixed assets, or properties listed in your AccuFund Property Tax Billing module.
- Work Orders is ideal for state and municipal call centers that field reports of various incidents, such as broken water mains, downed tree limbs, and leaky fire hydrants.

## Improve Your Work Order Workflow

The Work Orders module makes it possible to manage different types of repair and maintenance requests related to buildings, infrastructure, vehicles, computers, and general equipment.

Specific personnel can be assigned to each work order, and if a group of employees is necessary one person is designated as the crew leader.

All documentation is stored securely for access by authorized users. Once a work order has been created, users can enter details and update its status to "Design," "Open," "Assigned," "In Progress," "Completed," and "Cancelled."

Real-time reports can be printed at any time or scheduled for automatic printing. While custom reports are easy to make, the default templates—Work Order Activity, Work Order Activity with Meters, and Work Order Status—cover most reporting needs.

Browse work orders [<all>]

Locate

Order	Hold	Reference	Source	Source Item	Status	Type	Department	Date	Lookup	Customer	Description	Start Date	Start Time	Complete Date
A	1		Service Location	1 MAIN	Assigned	Outside	<none>	3/31/2009	12	1st National Bank	Replace worn meter	6/27/2009	9:00 AM	
D	2		Service Location	2 MAIN	Design	Outside	<none>	2/10/2009	2	AccuFund, Inc.	Pot hole in the parking lot			
	3		Property Billing	001-0001	In-Progress	Inside	<none>	2/01/2009	3	Boggs Hardware	HVAC Repair	2/15/2009	8:00 AM	
	4		Address	1398 Willow Brook	Cancelled	<none>	<none>	3/05/2009	4	Colorado Custom Deck				
	5		Property Billing	001-0001	Completed	<none>	<none>	2/15/2009	3	Boggs Hardware		2/17/2009	12:00 PM	2/19/2009
	6		Fixed Asset	0003	Completed	<none>	<none>	3/01/2009		MainStHouse	Clean and polish	3/05/2009	8:00 AM	3/05/2009
	7		Fixed Asset	0007	Requested	Outside	<none>	1/15/2009	001	Administration	Truck needs an oil change			
A	8		Service Location	2 THIRD	Assigned	Outside	Administration	3/05/2009	102	Munson, John T	Meter reread			

## Enjoy Greater Convenience with Built-in Integrations

To streamline your processes even more, AccuFund's Work Orders module ties into other key applications:

- Document Management—add photos, contracts, and other documents to a work order
- Mobile Apps—Employees with Android and iOS devices can easily edit work orders in the field
- Utility Billing—Tasks for meter replacements and pipe repairs can be added to constituent utility bills
- Permits and Inspections - Setup and schedule tasks related to your permitting and inspections process.
- Fixed Assets—Assets such as trucks and backhoes can be assigned to crews to complete projects and work orders can be created to repair and maintain vehicles, computers, and other fixed assets

## Let's Get Started

AccuFund supports your mission with a full suite of financial management applications for nonprofit and government organizations. To learn more and arrange a demo, contact AccuFund at 877-872-2228 or [sales@accufund.com](mailto:sales@accufund.com) or visit [www.accufund.com](http://www.accufund.com).

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