



## Vendor Training Manual

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## Invoice Instructions

Confirm the service request is in the PVINV status.

Each status has designated color coordination:

<a href="#">Received</a>	<a href="#">Pending Acceptance</a>	<a href="#">Rejected</a>	<a href="#">Pending Quote</a>
<a href="#">In Progress</a>	<a href="#">Pending Vendor Invoice</a>	<a href="#">Waiting Approval</a>	<a href="#">Waiting Materials</a>

You can also filter by work order status:

Search / Sort

AND

AND

WO Status  ☐ Web ☐ ETA ☐ On Site

Work orders filled in yellow are in Pending Vendor Invoice Status (PVINV).

From the “Action” dropdown, select “Invoice” to enter the online vendor invoice screen.

<a href="#">WEB-278265</a>	FCS-057 - FAMILY CHRISTIAN STORE - 57(STERLING HEIGHTS, MI)	DNE: \$500.00
-- Action --	PVINV - P4 - Trade:ELECTRICAL Problem:ELECTRICAL REPAIRS - EMERGENCY WoType:WO	Quote: \$0.00
-- Action --	Vendor: ECO32746FL Created: 11/29/2012 4:28 PM ET ETA:11/30/2012 8:30 AM ET	Invoice: \$0.00
Print	FCS-026 - FAMILY CHRISTIAN STORE - 026(LOMBARD, IL)	DNE: \$250.00
Invoice	PVINV - P4 - Trade:LOCKSMITH Problem:INSTA KEY REPLACEMENT WoType:WO	Quote: \$0.00
View	Vendor: SEC60695IL Created: 11/29/2012 12:24 PM CT ETA:11/30/2012 4:38 PM CT	Invoice: \$0.00

On in the Online Vendor Invoice screen, Click "Add Labor"

<b>Online Vendor Invoice</b>	<b>ECO CONSTRUCTION &amp; MAINTENANCE</b> 39 Skyline Rd suite 1017 Lake Mary, FL 32746 407-478-3258	<b>INVOICE</b> Vendor Inv #: <input type="text"/> Invoice Date: 11/30/2012 Service Date: 11/30/2012 Received Date: 11/29/2012 Date Approved:
------------------------------	--	---

**Billing Address:**  
FAMILY CHRISTIAN STORES  
5300 PATTERSON AVE, SE  
GRAND RAPIDS, MI 49530  
616-554-8700

**Location Address:**  
FAMILY CHRISTIAN STORE - 57  
44943 SCHOENHERR RD  
STERLING HEIGHTS, MI 48313  
586-254-5557  
FCS-057

<b>Work details</b> <u>W/O# (FWO#)</u> WEB-278265	Status: PVINV <u>Provider</u> ECO32746FL	Batch ID: <u>Equipment</u>
---	--	-------------------------------

**Requested by:** WUSTMAN, JEFF

**Service Details:** had installed Cmas reg 5 and moved regs 1 and 5 at the cash wrap, we can't connect to the registers. There's no internet connection to them. I can connect to regs 2, 3 and 4. We checked the cable  
**Description of Work Done:** ECO Construction & Maintenance - ECO CONSTRUCTION & MAINTENANCE - 11/30/2012 9:17:10 AM MOD ENDS OF THE CAT 5 CABLES WERE NOT TERMINATED CORRECTLY SO OUR TECH TERMINATED THEM CORRECTLY AND NOW ALL CASH REGISTERS ARE WORKING CORRECTLY.

\*\*\*\*\* ECO Construction & Maintenance - ECO CONSTRUCTION & MAINTENANCE - 11/29/2012 5:41:33 PM I have confirmed with Elizabeth, that service for tomorrow at 8:30 Am is perfect.

\*\*\*\*\* **Email sent by:**  
**GARY WOODS on 11/29/2012 4:35:40 PM** Subject: Work Order: WEB-278265 - FCS-057 - FAMILY CHRISTIAN STORE - 57 - MI To: info@ecogc.com; ashleyp@ecogc.com

\*\*\*\*\* **GARY WOODS - 11/29/2012 4:35:13 PM** Eco - Please instruct the Tech to call our Help Desk while on site to verify the connections. FCS Help Desk 800-477-1475 ext. 8746

\*\*\*\*\* What is the nature of the problem? Ask the caller if this is an emergency or can the service wait until the next day? If it can not wait then proceed with the work order. Yes If the service can wait until the next day please make sure you put this work order under the request code of Yes

Item #	Description								Line Cost
	<u>Name</u>	<u>Date</u>	<u>Start</u>	<u>Finish</u>	<u>Hours</u>	<u>Rate</u>	<u>OT</u>	<u>Line Cost</u>	
	ECO CONSTRUCTION & MAINTENANCE	11/30/2012	8:51	9:16	0.40	\$0.00	N	\$0.00	
1	<a href="#">Add Labor</a>					Labor costs:		\$0.00	
2	<a href="#">Add Materials / Other Costs</a>					Material / Other Costs:		\$0.00	
<b>Invoice Sub-Total:</b>								<b>\$0.00</b>	
Sales Tax:								<input type="text" value="0.00"/>	
<b>Total Tax:</b>								<input type="text" value="0.00"/>	

Confirm the labor code has populated in the “Labor Code” field.  
Enter the “Labor Rate”, which is the hourly rate for the client.



Use the calendar icons to enter the start and finish times for the work order in the designated fields and click outside the calendar box to save your entry.


We are not going to use the OT box. If there is an OT rate, please calculate it within the labor rate.

In the “Hours” field, enter the actual number of hours worked.

Click the “Add” button to record your entry and to bring up another entry line. Repeat the above steps to record all service provided and associated labor rate/hours.

**Add labor and materials**  
Work Order: **WEB-278265** Status: **PVINV** Description: **had installed Cmas reg 5 and moved regs 1 and 5 at the cash wrap, we can't connect to the registers. There's no internet connection to them. I can connect to regs 2, 3 and 4. We checked the cable**

<u>Labor Code</u>	<u>Labor Rate</u>	<u>Start Time</u>	<u>Finish Time</u>	<u>OT?</u>	<u>Hours</u>	<u>Cost</u>
ECO32746FL	0	11/30/2012	11/30/2012	<input type="checkbox"/>	0.40	\$0.00
<input type="text"/>	<input type="text"/>	11/30/2012 12:20:19 	11/30/2012 12:20:19 	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

 **Add**

### Invoice - Materials/Other Costs

Enter a description of the cost incurred in the “Material/Other Cost” field.

Enter the quantity of the item in the “Qty” field.

Enter the “Unit Cost” of each item. The actual cost will be calculated automatically by fmPilot.

Click the “Add” button to record your entry and to bring up another entry line. Repeat the above steps to record all materials and other costs (trip charge, fuel charge, freight).

<u>Material / Other Cost</u>	<u>Qty</u>	<u>Unit Cost</u>	<u>Actual Cost</u>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



 **Add**

## Generate Quote Instruction

If you anticipate the total costs for a work order (including Tax) will be greater than Do Not Exceed (DNE) amount, or you would like to suggest additional work done, you should submit a quote.

### Generate Quote From the inside of the work order

Click on the WEB/PM number (blue hyperlink)

		SKH-644 - SHOPKO HOMETOWN STORE #644(Clare , MI)	DNE: \$250.00
<a href="#">WEB-278225</a>		PQTE - P48 - Trade:LIGHTING Problem:BUILDING INTERIOR LIGHTING REPAIRS WoType:WO	Quote: \$0.00
-- Action --		Vendor: ALW48624MI Created: 11/28/2012 4:24 PM CT ETA:11/30/2012 5:00 PM CT	Invoice: \$0.00

To generate a quote for a selected work order that is either “In Progress” or Pending Quote”, choose Generate Quote for a specific work order simply by clicking the ‘Generate quote’ button at the bottom of the “Update Work Order” screen.

<a href="#">Labor</a> <a href="#">Add labor</a>					
<u>Laborcode</u>	<u>Date</u>	<u>Start Time</u>	<u>Finish Time</u>	<u>Hours</u>	<u>Cost</u>
<b>Total Labor Cost:</b>					<b>\$0.00</b>
<a href="#">Materials / Other Costs</a> <a href="#">Add materials / other costs</a>					
<u>Date</u>	<u>Part Num</u>	<u>Quantity</u>	<u>Unit Cost</u>	<u>Actual Cost</u>	
<b>Total Materials:</b>					<b>\$0.00</b>
<hr/>					
<div><a href="#">Update</a>   <a href="#">Generate Quote</a>   <a href="#">Zero Invoice</a>   <a href="#">Print</a></div>					

The quote form displays the details of the work order as well as any actual (or incurred to date) labor and materials costs that were entered for the job. It is essential that you enter your incurred cost to date, if applicable, before entering the costs and scope of work description for the proposed work

Click “View Quotation Details” to enter proposed labor and materials costs. FM Pilot will subtotal the costs automatically.

<b>Incurred Costs to Date</b>				
<u>Labor</u>				
<u>Date</u>	<u>Laborcode</u>	<u>Hours</u>	<u>Rate</u>	<u>Cost</u>
<u>Materials / Other Costs</u>				
<u>Date</u>	<u>Part</u>	<u>Qty</u>	<u>Price</u>	<u>Cost</u>
			<b>Labor costs to date:</b>	<b>\$0.00</b>
			<b>Materials / Other costs to date:</b>	<b>\$0.00</b>
			<b>Total costs to date:</b>	<b>\$0.00</b>

View Quotation details

Description of work to be performed:

<b>Estimated labor costs:</b>	<b>\$0.00</b>
<b>Estimated material / other costs:</b>	<b>\$0.00</b>
<b>Total Additional Costs:</b>	<b>0.00</b>
<b>Sub-Total:</b>	<b>0.00</b>
<b>Sales Tax:</b>	<input type="text" value="0.00"/>
<b>Vendor Total Tax:</b>	<input type="text" value="0.00"/>
<b>Total Quoted Cost:</b>	<b>0.00</b>

[Generate Quote](#)   [Print](#)   [Back](#)

Fill in the Labor Rate, Hours, Material/Other Cost, Qty, and Unit Cost.

After entering each line item, click add to lock the line item in place.

When ready, click “Close” to return to the “Quote” screen.

**Important:** After entering all labor and materials, you must click on the 'CLOSE' button below to calculate the correct quote total.

**Add labor and materials for quote**  
 Work Order: **WEB-276511**   Status: **PQTE**   Description: **\*\*\*\*\* DO NOT DISPATCH!!\*\*\*\*\* TEST FOR TRAINING WEBINAR 10/3/2012 @ 2PM EST**

Labor Code	Labor Rate	OT?	Hours	Cost
<input type="text" value="SASOPS"/>	<input type="text" value="40.00"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
				➔ <a href="#">Add</a>

Material / Other Cost	Qty	Unit Cost	Actual Cost
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
			➔ <a href="#">Add</a>

**Important:** After entering all labor and materials, you must click on the 'CLOSE' button below to calculate the correct quote total.

[Close](#)   [Print](#)

Enter the total amount of sales tax owed, based on the incurred and proposed costs.

Click "Generate Quote", to submit the quote to the client. You will be prompted to confirm the submission. Once the quote has been submitted, it cannot be modified.

### Generate Quote


**Work Order #:** **WEB-276511** ( [back](#) ) [Attach Document](#)

Date Opened:	10/3/2012 12:27:53 PM	Provider Address:	123 Main St.
Date Submitted:		City, State, Zip:	PHOENIX AZ 85484
Provider Contact:	SOFTWRENCH SOLUTIONS	Phone / Fax:	800-555-1234 / 602-555-4321
Status:	PQTE	Email:	
Orig. DNE:	<input type="text" value="\$300.00"/>	Escalate Date:	
		Escalate Email:	

### View Quotation details

Description of work to be performed:

Estimated labor costs:	\$80.00
Estimated material / other costs:	\$475.00
Total Additional Costs:	555.00
Sub-Total:	555.00
Sales Tax:	<input type="text" value="0.00"/>
Vendor Total Tax:	<input type="text" value="0.00"/>
Total Quoted Cost:	<input type="text" value="555.00"/>

 [Generate Quote](#) [Print](#) [Back](#)


Following submission, the quote is ready for review by client and the work order status will change to "Waiting on Approval."

## Corrective Entry Steps

### Correcting Labor Entries on Invoices and Quotes

When you enter a correcting entry in labor, enter the regular labor rate and then enter the number of hours as a negative (hyphen key over the letter P on the key board). You will see negative cost in the corresponding box. Click "Add" to enter the corrective entry.

**Add labor and materials for quote**  
Work Order: **WEB-276511** Status: **PQTE** Description: **\*\*\*\*\* DO NOT DISPATCH!!\*\*\*\*\* TEST FOR TRAINING WEBINAR 10/3/2012 @ 2PM EST**

<u>Labor Code</u>	<u>Labor Rate</u>	<u>OT?</u>	<u>Hours</u>	<u>Cost</u>
SASOPS	\$40.00	<input type="checkbox"/>	2	\$80.00
<input type="text" value="SASOPS"/>	<input type="text" value="40.00"/>	<input type="checkbox"/>	<input type="text" value="-2"/>	<input type="text" value="-80.00"/>
				 <a href="#">Add</a>


### Corrective Entries in Materials


When you enter a corrective entry in materials, enter a negative quantity (hyphen key over the letter P on the key board) and regular unit cost. You will see the negative actual cost in the corresponding box. Click "Add" to enter the corrective entry.

As a result, your positive entry and your negative entry cancel each other out and become a net zero.

**Important: After entering all labor and materials, you must click on the 'CLOSE' button below to calculate the correct quote total.**

**Add labor and materials for quote**  
Work Order: **WEB-276511** Status: **PQTE** Description: **\*\*\*\*\* DO NOT DISPATCH!!\*\*\*\*\* TEST FOR TRAINING WEBINAR 10/3/2012 @ 2PM EST**

<u>Labor Code</u>	<u>Labor Rate</u>	<u>OT?</u>	<u>Hours</u>	<u>Cost</u>
SASOPS	\$40.00	<input type="checkbox"/>	2	\$80.00
<input type="text" value="SASOPS"/>	<input type="text" value="40.00"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
				 <a href="#">Add</a>

<u>Material / Other Cost</u>	<u>Qty</u>	<u>Unit Cost</u>	<u>Actual Cost</u>	
Door	1	\$100.00	\$100.00	
Corrective Entry for Knobs	4	\$75.00	\$-300.00	
Knobs	5	\$75.00	\$375.00	
<input type="text" value="Corrective Entry for Door"/>	<input type="text" value="-1"/>	<input type="text" value="100"/>	<input type="text" value="-100.00"/>	
				 <a href="#">Add</a>

**Important: After entering all labor and materials, you must click on the 'CLOSE' button below to calculate the correct quote total.**

[Close](#) [Print](#)



## Status Change Steps

The status of the work order can be changed two different ways

1. From the select work order screen

You can change the status of the work order by using the “Action” dropdown box.

The screenshot shows a web interface for selecting a work order. At the top, a green header bar contains the work order ID 'WEB-276511' and details: 'FCS-231 - FAMILY CHRISTIAN STORE - 231(LAKE ORION, MI)', 'INPRG - P24 - Trade:ELECTRICAL Problem:ELECTRICAL - LIGHTING WoType:WO', 'Vendor: SASOPS Created: 10/3/2012 12:27 PM ET ETA:', 'DNE: \$300.00', 'Quote: \$0.00', and 'Invoice: \$0.00'. Below the header, there is an 'Action' dropdown menu with a red circle around it. The dropdown menu is open, showing options: 'View Quote', 'Waiting materials', 'Follow Up', 'Complete', 'Print', and 'View'. To the right of the dropdown, the text 'Page: 1 of 1' and 'Total: 1' is displayed.

2. From the update work order screen

Scroll to the bottom of the page and find the “Status” dropdown box. Select the status that the work order needs to be moved into and click “Update” to make the status change.

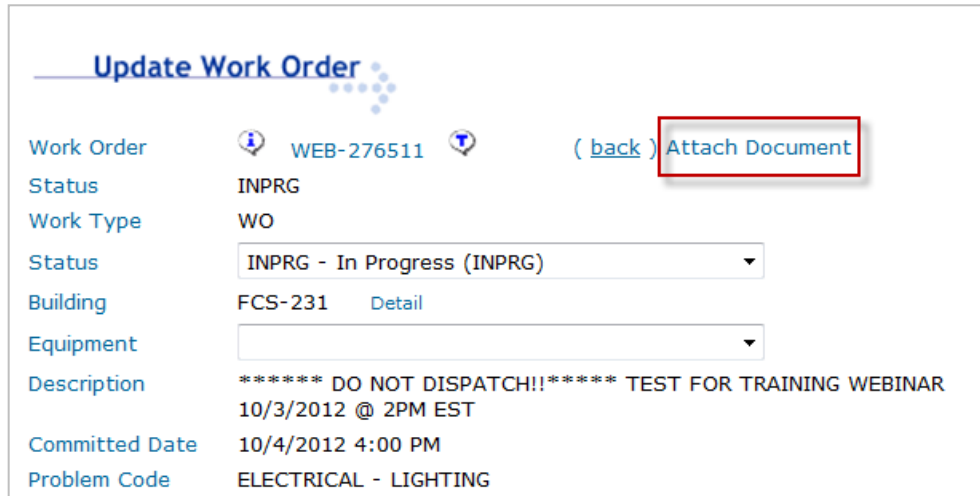
The screenshot shows the 'Update Work Order' screen. At the top, there is a header with the work order ID 'WEB-276511' and a '( back ) Attach Document' link. Below the header, there is a form with various fields. The 'Status' field is highlighted with a red box, and the dropdown menu is open, showing options: 'INPRG - In Progress (INPRG)', 'INPRG - In Progress (INPRG)', and 'PQTE - Pending Quote (PQTE)'. The 'Description' field contains the text: '\*\*\*\*\* DO NOT DISPATCH!!\*\*\*\*\* TEST FOR TRAINING WEBINAR 10/3/2012 @ 2PM EST'. The 'Committed Date' is '10/4/2012 4:00 PM'. The 'Problem Code' is 'ELECTRICAL - LIGHTING'. The 'Cause' and 'Remedy' fields are empty. The 'Sched Start', 'Sched Finish', 'Act Start', and 'Act Finish' fields are empty. The 'Do Not Exceed' field is '\$300.00'. The 'Comments' field contains the text: '<b>Patricia ODell - 10/3/2012 1:30:59 PM</b> DEMO SITE ISSUE HAS BEEN CORRECTED. SOLVING THIS WORK ORDER'. Below the form, there is a section for 'Labor' and 'Materials / Other Costs'. The 'Labor' section has a table with columns: 'Laborcode', 'Date', 'Start Time', 'Finish Time', 'Hours', and 'Cost'. The 'Total Labor Cost' is '\$0.00'. The 'Materials / Other Costs' section has a table with columns: 'Date', 'Part Num', 'Quantity', 'Unit Cost', and 'Actual Cost'. The 'Total Materials' is '\$0.00'. At the bottom of the page, there is a red arrow pointing to the 'Update' button, which is part of a row of buttons: 'Update', 'Generate Quote', 'Zero Invoice', and 'Print'.

## Attachment Steps

Confirm file size does not exceed over 768kbs

Supporting files are .pdf .jpg .doc and .gif

Click the “Attach document” hyperlink.



**Update Work Order**

Work Order: [WEB-276511](#) ( [back](#) ) [Attach Document](#)

Status: INPRG

Work Type: WO

Status: INPRG - In Progress (INPRG)

Building: FCS-231 [Detail](#)

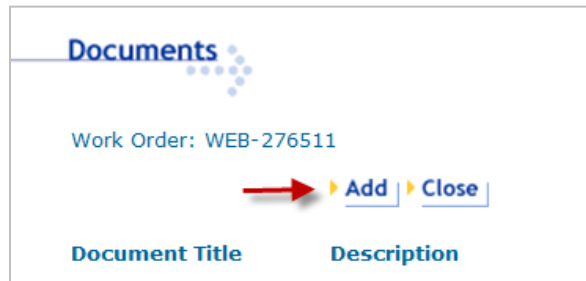
Equipment:

Description: \*\*\*\*\* DO NOT DISPATCH!! \*\*\*\*\* TEST FOR TRAINING WEBINAR  
10/3/2012 @ 2PM EST

Committed Date: 10/4/2012 4:00 PM

Problem Code: ELECTRICAL - LIGHTING

Click “Add” on the Documents screen.



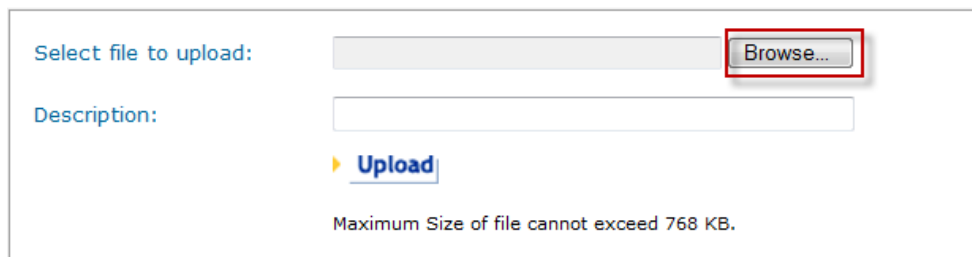
**Documents**

Work Order: WEB-276511

[Add](#) [Close](#)

Document Title      Description

Then click “Browse” to find the attachment you would like to upload.



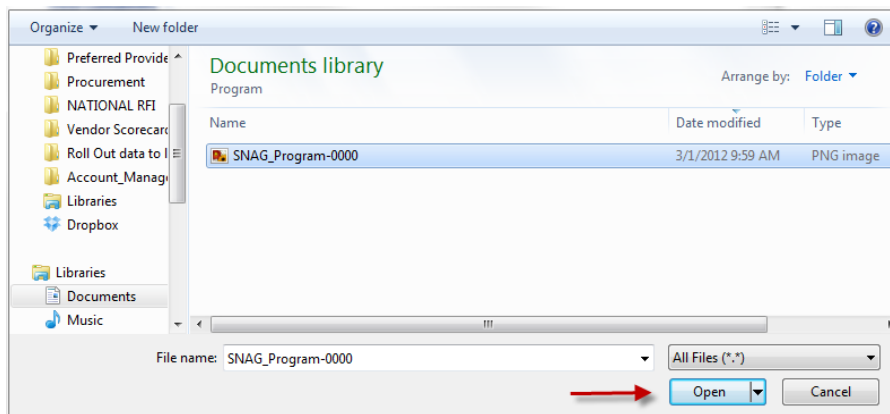
Select file to upload:  [Browse...](#)

Description:

[Upload](#)

Maximum Size of file cannot exceed 768 KB.


Once you find the document that you wish to attach, highlight the document by clicking on the name. Click on “Open” in the bottom right hand corner of the documents.



Add a description of the document you selected and click the “Upload” button to attach the document.

Select file to upload: C:\Users\sjanitzki\Documents\SnagIt Browse...

Description: Attachment

 Upload

Maximum Size of file cannot exceed 768 KB.

The attachment will then appear on the “Documents” page.

**Documents**

Work Order: WEB-278185

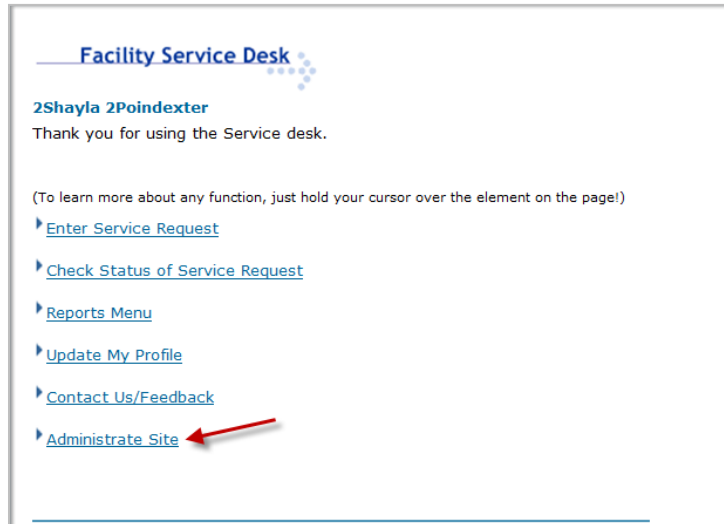
[Add](#) [Close](#)

Document Title	Description
<a href="#">WEB-278185_FMP.pdf</a>	photos
<a href="#">WEB-278185_FMP1.pdf</a>	site map

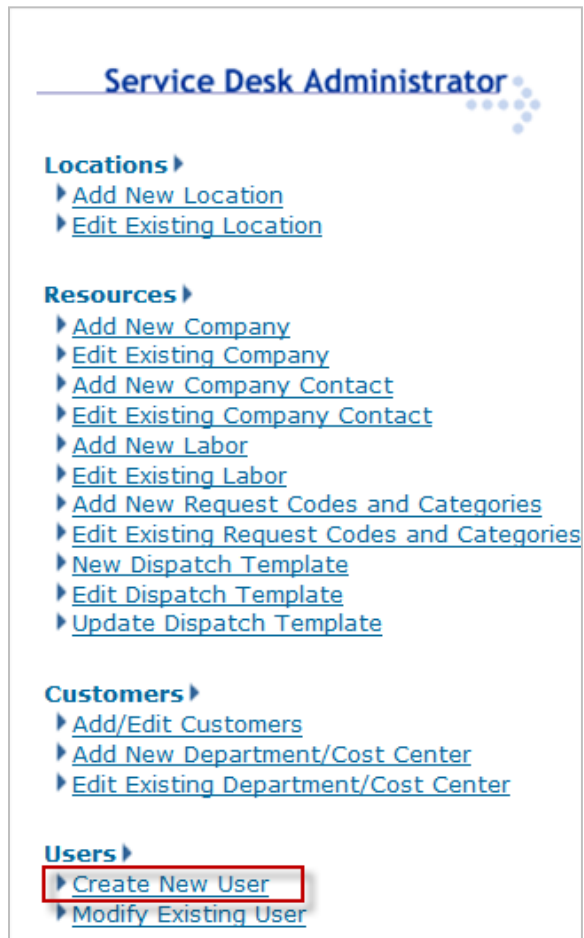
## Setup user logins

Login as a Administrator

Select the “Administrate Site” from the Facility Service Desk.



Click on the “Create New User” option from the Service Desk Administrator page.



Select the "Provider Code" that the new user is to be associated with.

Enter the new user's contact information.

Also enter the "Alt Contact" and "Alt Phone" if there is an alternate available.

Select Dept/CC – use the default cost center.

For the location field, click "Change" and find the correct state.

Enter 01 for the "Floor Field"

Enter 1 for "Room" field.

Enter the "User Name" in lower case letters (typically the first initial and last name of the user).

Click "Submit" to create the login.

### Service Desk Registration

Please enter information in both sections, then click 'Submit'.  
(\*) - required field.

User Type	Provider	
Provider Code	(A1P45417OH) A-1 PLUMBING	
Customer:		
First Name*	Seth	
Last Name*	Janitzki	
Telephone*	614.318.1899	
Email*	sjanitzki@facilitysource.com	
Voice Jack		
Data Jack		
Mail Code		
Alt Contact	Seth Janitzki	
Alt Contact Phone	614.318.1899	
Dept/CC*	101010 - Default Cost Center	
	ex: 1234567890	
Location*	FCS-041	<a href="#">Change</a>
Location Details	FCS-041 FAMILY CHRISTIAN STORE - 041	
Floor*	01	
Room*	1	

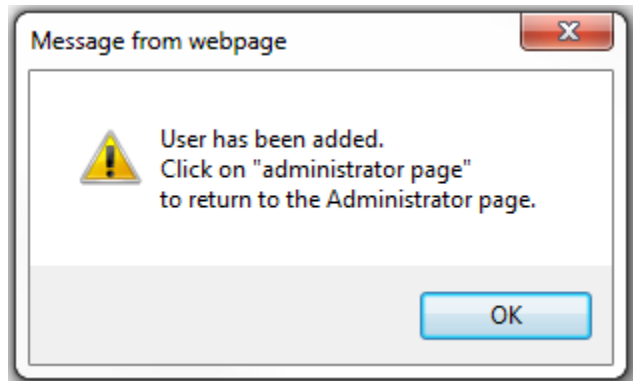
Please enter a unique User Name.

User Name*	sjanitzki
------------	-----------

[Submit](#)

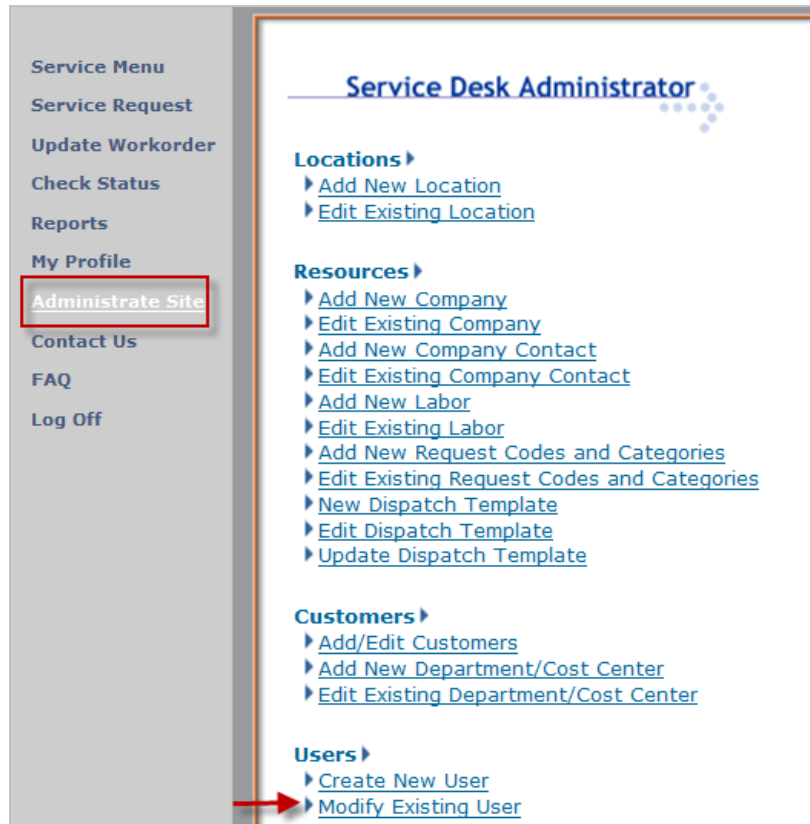
Then you will receive an error stating that logins were dispatched to the above email address .

**Once the login is dispatched, email the training template to new user along with training tutorials and vendor guide.**



## Delete Logins

Click on the Administrate Site option to bring up the Service Desk Administrator page.  
Select the “Modify Existing User” option.



Insert the last name of the user you wish to delete.

Click “Find” to search for the desired user.

**User Search**

[Administrate Site](#)

**User Search**

Enter Search Criteria

Last Name:

Department:

Status:

[Find](#)

Select the user by clicking on the user’s name in blue (Last, First).

(Click on a user name to view their profile)			
▶ <b>User Name</b>	<b>Phone</b>	<b>User ID</b>	<b>Building Email</b>
▶ <a href="#">Janitzki, Seth</a>	614.318.1899	sjanitzki	FCS-041 sjanitzki@facilitysource.com

In the Status dropdown box, select the “Inactive” option

Scroll to bottom of the page and click the “Submit” button.

The screenshot shows a web form titled "Update User Profile" for user "sjanitzki". The form contains various fields for user information. The "Status" dropdown menu is open, showing "Active", "Active", and "Inactive" options, with "Inactive" selected. A red rectangle highlights this dropdown. At the bottom of the form, a red arrow points to the "Submit" button.

User ID	sjanitzki
User Type	Provider
Status	Active Active Inactive
Labor Code	(A1P45417OH) A-1 PLUMBING
Customer	
First Name*	Seth
Last Name*	Janitzki
Telephone*	614.318.1899
Email*	sjanitzki@facilitysource.com
Voice Jack	
Data Jack	
Mail Code	
Alt. Contact*	Seth Janitzki
Alt. Contact Phone*	614.318.1899
Dept/CC*	101010 - Default Cost Center
Location*	FCS-041
Location Details	FCS-041 FAMILY CHRISTIAN STORE - 041
Location Access	
<a href="#">Submit</a> <a href="#">Change Password</a>	

The login will now be inactive.

The screenshot shows the "Update User Profile" form with the "Status" dropdown menu set to "Inactive". The form also includes a message to return to the previous page and a note about required fields.

**Update User Profile**

Please return to [previous page](#).

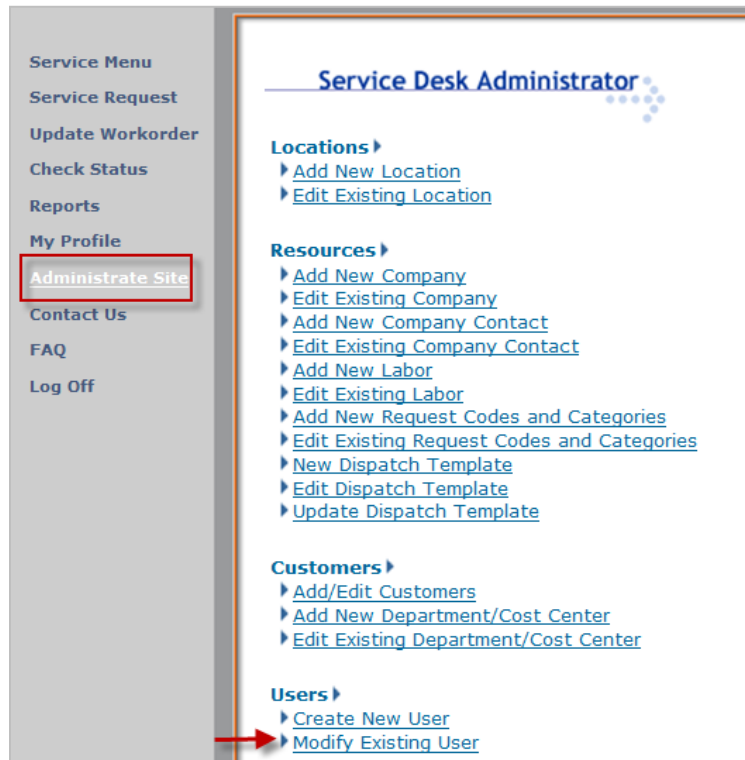
(\*) - required field.

User ID	
User Type	Provider
Status	Inactive
Enter only for providers (*) - inactive laborcode	



## Reset Password

Click on the Administrate Site option to bring up the Service Desk Administrator page.  
Select the “Modify Existing User” option.



Insert the last name of the user you are resetting the password for.

Click “Find” to search for the desired user.

**User Search**

[Administrate Site](#)

**User Search**

Enter Search Criteria

Last Name: Janitzki

Department:

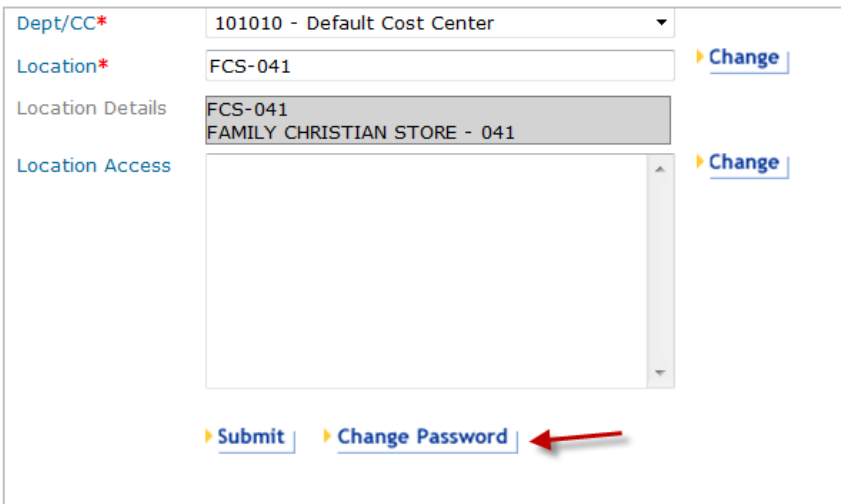
Status: All

**Find**

Select the user by clicking on blue hyper link

(Click on a user name to view their profile)			
▶ <u>User Name</u>	Phone	User ID	Building Email
▶ <b>Janitzki, Seth</b>	614.318.1899	sjanitzki	FCS-041 sjanitzki@facilitysource.com

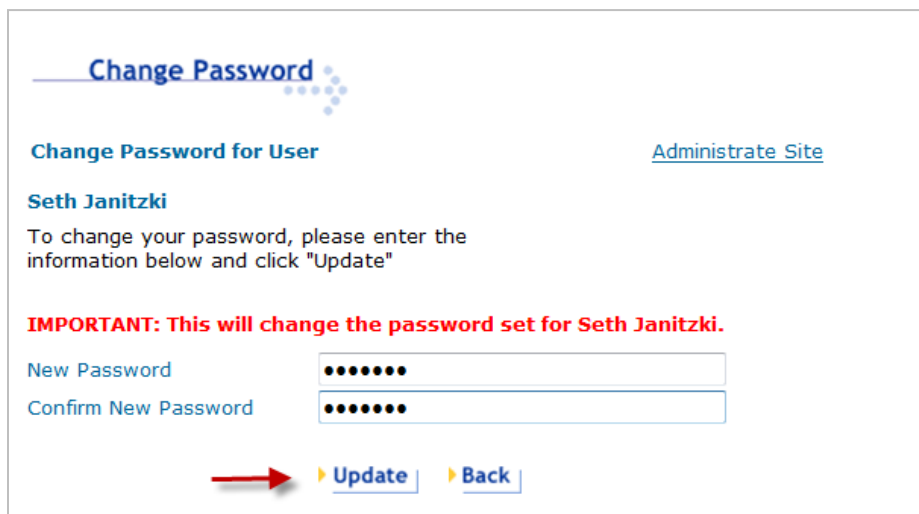
Scroll to bottom and click the “Change Password” button.



The screenshot shows a user profile configuration page. It includes fields for 'Dept/CC\*' (101010 - Default Cost Center), 'Location\*' (FCS-041), 'Location Details' (FCS-041, FAMILY CHRISTIAN STORE - 041), and 'Location Access'. There are 'Change' buttons next to the 'Location\*' and 'Location Access' fields. At the bottom, there are 'Submit' and 'Change Password' buttons. A red arrow points to the 'Change Password' button.

Insert the new password and confirm the new password.

Click the “Update” button to submit the new password.



The screenshot shows the 'Change Password' form for user Seth Janitzki. It includes a title 'Change Password' with a logo, a link 'Administrate Site', and instructions: 'To change your password, please enter the information below and click "Update"'. A red warning message states: 'IMPORTANT: This will change the password set for Seth Janitzki.' Below this are two password input fields: 'New Password' and 'Confirm New Password', both masked with dots. At the bottom, there are 'Update' and 'Back' buttons. A red arrow points to the 'Update' button.

Confirm that the user will be able to access their account with their new password by logging in and logging out using the newly created password.

## Reports

Click the “Reports” option to bring up the Administration Reports page.

Use the dropdown box to select “My Work Order Report” or “Advanced Reports”.

Click the “Show Report” button to bring up the selected report screen.

Service Menu  
Service Request  
Update Workorder  
Check Status  
**Reports**  
My Profile  
Administrate Site  
Contact Us  
FAQ  
Log Off

### Administration Reports

**Report Options**  
Select report  
My Work Orders Report  
My Work Orders Report  
Advanced Reports

**Show Report**

**Emergencies must be called in to the Facility Service Desk at 614-318-1748.**  
Web site and service desk portal system for use only by client staff and approved vendors. ©  
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Select the desired filter from the r # 1 dropdown box.

Click “Load” to bring up the list of appropriate reports in the # 2 dropdown box.

#1 - Select a filter set and click 'Load'  
<Choose from work order filters>  
<Choose from general reports>  
<Choose from building filters>  
<Choose from detail export>

**Load** **Search**

#2 - Choose your report and click 'View'  
- or -  
#2 - (optional) Save query for later use

**Welcome to the Reporting Module, 2Shayla 2Poindexter**

Select additional fields that apply to the report you are pulling by clicking on the “Edit” button next to the field you wish to filter.

Select the “Date Range” you wish to have the report on.

Once the report and filters are selected, click “View” to execute the report.

The screenshot shows a web-based report generation interface. At the top, there are two main sections: #1 - Select a filter set and click 'Load', and #2 - Choose your report and click 'View'. Section #1 contains a grid of filter fields, each with an 'Edit' button. The filters include Work Order, Location, Trade, Company, Floor, Status, Priority Code, Equipment, State/City, Mall, Design Type, Building Type, Cost Center, Trade Class, Request Code, and Operator. The 'Trade' filter is highlighted with a red box. The 'Status' filter is also highlighted with a red box, and its dropdown menu is open, showing options: All, APPR ... Approved (APPR), CAN ... Cancelled (CAN), and CLOSE ... Closed (CLOSE). The 'Initial Sort' dropdown is set to 'Work Order' and is circled in red. The 'Web Orders Only' checkbox is checked. The 'Date Ranges' section at the bottom right is also highlighted with a red box, showing 'From: Nov 30 2012' and 'To: Nov 30 2012'. The 'Field' dropdown is set to 'Date Reported'. A red arrow points to the 'View' button in the top right corner.

#1 - Select a filter set and click 'Load' [Load](#) [Search](#)

[Close Window](#)

#2 - Choose your report and click 'View' [View](#) [Update](#)

[Edit](#) Work Order [Edit](#) Location [Edit](#) Trade [Edit](#) Company [Edit](#) Floor [Edit](#) Status [Edit](#) Cost Center [Edit](#) Trade Class [Edit](#) Priority Code [Edit](#) Equipment [Edit](#) Customer [Edit](#) Zone [Edit](#) State/City [Edit](#) Mall [Edit](#) Design Type [Edit](#) Building Type [Clear](#) [Close Window](#)

Group By: Status

Initial Sort: Work Order

☒ Web Orders Only

Date Ranges

From: Nov 30 2012

To: Nov 30 2012

Field: Date Reported