WORK ORDERS

The AccuFund Work Orders component gives users centralized control over requested maintenance activities for customer or constituent maintenance and repair requests. Work Orders can be linked to service locations for utility billing, to addresses in the Property Tax module for property billing, and to fixed assets such as a vehicle that requires repairs or maintenance.

Work Orders is available to both nonprofits and government agencies, and their internal departments that need to assign and track the progress of maintenance and repair jobs. Municipalities, housing authorities, economic development agencies, and any organization with a maintenance team or IT services department would find Work Orders valuable for coordinating the numerous types of jobs they may have with differing start times and statuses.

With Work Orders, organizations and departments can manage all the work orders they have in progress, and in one place they can access the information on all the people, locations, resources and fixed assets that are related to each work order. A housing authority can track the repairs needed to buildings and equipment at specific addresses.
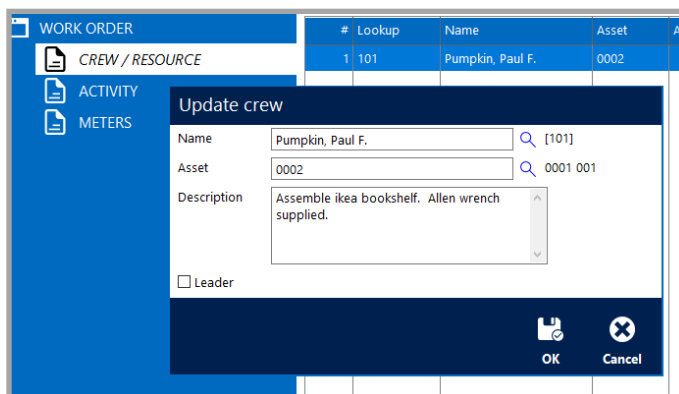
OVERVIEW

With AccuFund Work Orders, you can create various types of work orders, such as building repair, street repair, and vehicle, computer or general equipment maintenance. You define the types available for your organization.

Work orders can be assigned to specific departments, and stored securely so that a department can only see their own work orders.

Resources, or a specific crew (group of employees), can be assigned to a work order, with one person identified as the crew leader. Fixed assets can be assigned to the specific crew member(s) using them or to the entire crew.

Once a work order has been created, users can track the activities connected to the work order, entering detail on each activity as it's conducted. The target job start and completion dates and times can be entered into the work order. The status of the work order can be updated to "Design," "Open," "Assigned," "In progress," "Completed" and "Cancelled."

Reports on work orders created or in progress can be printed at any time or scheduled for printing automatically at a specific time.

Connect all activities, track resources and assign to departments.

FEATURES

AccuFund Work Orders has several features that optimize work order management:

- Work orders are started by just entering a customer/ constituent name or an address that's in the system, which fills the other contact fields in the work order automatically. Contact information can be also manually entered
- Work orders can be associated with a service location (for a utility such as the water department), a specific property listed in the AccuFund Property Tax Billing module, an address in the system or a fixed asset requiring maintenance or repair itself.

- The status of work orders is easily updated and tracked for up-to-the-minute reporting to the customer
- The Work Orders module is designed for use by constituent call centers in state or municipal government departments that need to address reports of broken water mains, downed tree limbs, or leaking water hydrants, as well as internal work order activity.

COMPONENT INTEGRATION

The AccuFund Work Orders component is integrated with:

- Utility Billing for tracking repairs for utility customers such as replacing meter and piping leaks.

- Property Tax Billing for tracking repairs and issues with locations tracked through the Property Tax module

- Fixed Assets for two purposes; first assets such as trucks and backhoes can be assigned to crews to complete projects and second the work orders can be created for repair and maintenance services on fixed assets such as trucks for fleet maintenance and computers for IT activity tracking.

Track each activity required to complete the Work Order including staff and physical resources.

COMPONENT AVAILABILITY & REPORTING

Work Orders is available with both the Standard and Professional editions of the AccuFund Accounting Suite and for cloud use with AccuFund Anywhere - Complete.

AccuFund provides a set of default report templates for Work Orders. Each report template may have multiple reports defined with different data and levels of summary.

These templates provide all the table connections, making it easy to create logical reports. They may be modified and added to through the Reports/Forms Designer. Default report templates include:

- Work Order Activity
- Work Order Activity with Meters
- Work Order Status