

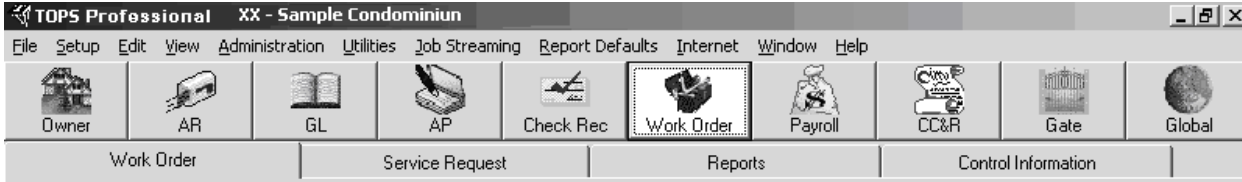
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Work Order Overview

Work Orders are a common facet of community management. The Work Order module of TOPS PROFESSIONAL™ allows you to manage all facets of the work order, from entering a service request from a resident to converting that service request to a work order to assigning a vendor to the work order to scheduling service times to managing costs to reporting on the work order status.

The Work Order module contains the following sections:



- **Work Order** – Use this area to maintain your work orders, including job locations, vendor assignment, and costs.
- **Service Request** – This section allows you to enter a request for service that, once it has been investigated, may be converted to a work order.
- **Control Information** – Primary setup of work order options is available in this easy control interface.
- **Reports** – Print reports on service requests, work orders, parts and labor info, and more.

Your work order database may be uploaded to a Palm Pilot or Windows CE system if you have purchased the Hand-Held Organizer Interface for TOPS PROFESSIONAL™.

Work order status will automatically be uploaded to owner accounts if this community has a Community Web Site.

Work Order is an Optional Module



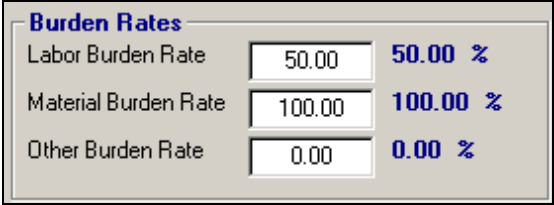

Unlike other modules referenced in this Quick Start Guide, the Work Order module is not a part of the basic system. If you did not purchase the Work Order module, and have no plans to do so, please disregard this section.

Work Order Control Information

The Work Order Control screen allows you to setup the Work Order module based on your preferences. The Work Order Control Screen controls burden rates, tax rates, starting numbers, various preferences, and setup options. Although it is not required to define control information prior to using the Work Order module, it is highly recommended.

Setting Up Burden Rates

Burden Rates can be used to markup the costs for labor, material and other. The idea behind burden rates is that a company may want to markup their actual costs to a higher level so they earn income when they bill out the work order.



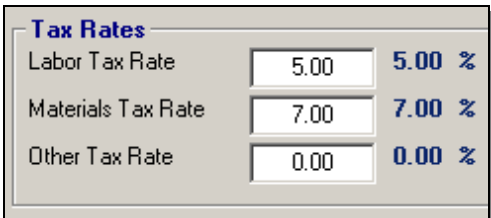

Instructions	Images
1. Click the Work Order button from the main TOPS PROFESSIONAL™ window.	
2. Click the Control Information tab.	
3. Enter the percentages that you wish to markup each category.	
4. Click Save and Exit .	

Whenever you accumulate costs in a work order, the Burden Rates will automatically be calculated and added to the actual costs for billing purposes.

Work Order Control Information

Setting Up Sales Tax Rates



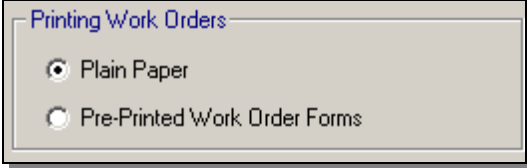
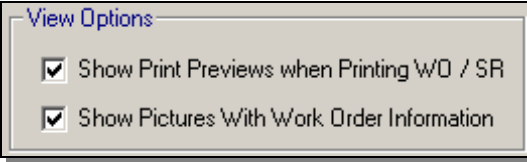
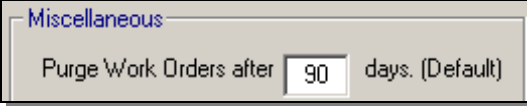
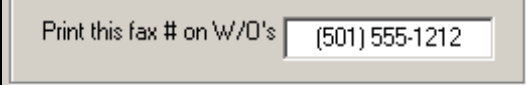

In some states, Sales Tax must be charged on the work order charges to owners, most often on materials. TOPS PROFESSIONAL™ allows tax rates to be defined for Labor, Materials, and Other in the Control Info. Please check the laws in your area to determine sales tax requirements and rates.

Instructions	Images
1. Click the Work Order button from the main TOPS PROFESSIONAL™ window.	
2. Click the Control Information tab.	
3. Enter the percentages of the tax rates in each category.	
4. Click Save and Exit .	

Whenever you accumulate taxable costs in a work order, the Sales Tax will automatically be calculated and broken out along with the costs.



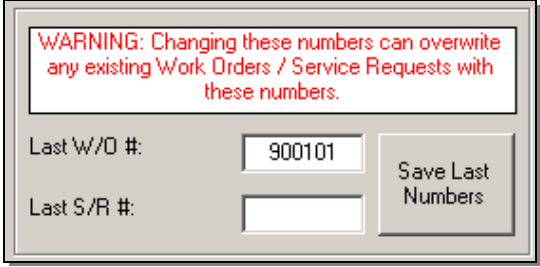

Work Order Control Information

Defining Work Order Preferences

Instructions	Images
1. Click the Work Order button from the main TOPS PROFESSIONAL™ window.	
2. Click the Control Information tab.	
3. Select the desired option for printing work orders. <ul style="list-style-type: none"> ▪ Plain Paper – Prints entire work order form, including boxes and other formatting. ▪ Pre-Printed – Prints work order data without any extra formatting. Pre-printed forms are available from several vendors. See the appendix for a listing of TOPS form vendors. 	
4. Select the desired view options. <ul style="list-style-type: none"> ▪ Print Preview – the print preview screen will display reports on the screen prior to printing them out. ▪ Show Pictures – any digital pictures attached to the work orders or service requests will be displayed on the screen. 	
5. If desired, define a default number of days after which old work orders will be purged (deleted) from the system. <i>This option is useful for companies issuing a large number of work orders.</i>	
6. If desired, enter your fax number to be printed on work order forms.	
5. Click Save and Exit .	







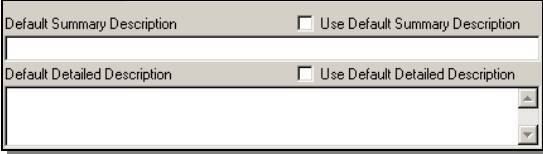



Work Order Control Information

Setting Initial Numbers

Instructions	Images
1. Click the Work Order button from the main TOPS PROFESSIONAL™ window.	
2. Click the Control Information tab.	
3. Enter the number of the last work order or service request. TOPS PROFESSIONAL™ will begin numbering subsequent work orders with the next number in sequence. 4. Click Save Last Numbers . <i>Be careful if you are defining the last work order number for a community in which work orders have already been created, as the old work order numbers may be overwritten.</i>	
5. Click Save and Exit .	










Work Order Control Information

Defining Work Order Types

Instructions	Images
1. Click the Work Order button from the main TOPS PROFESSIONAL™ window.	
2. Click the Control Information tab.	
3. Click W/O Types . <i>Work Order types are the categories that designate the type of work order or service request entered.</i>	
4. Click Add New .	
5. Enter a three-digit code for the work order type. Press <TAB>. <i>This code must be unique.</i>	
6. Enter a description for this work order type.	
7. If desired, you may define default descriptions for work orders that are created under this category. Simply check the appropriate box and enter the descriptions.	
8. Click Save to save this description.	
9. Continue to follow steps 4 through 8 until you have entered all the work order types you need. To complete editing types, click Close . <i>Don't worry if you don't think of all possible types. You may return to this screen later, or add a type 'on the fly' in the work order maintenance window.</i>	
9. Click Exit .	







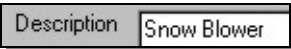

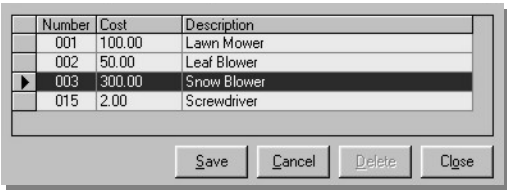
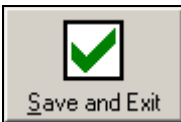
Work Order Control Information

Defining Authorized Users

Instructions	Images
1. Click the Work Order button from the main TOPS PROFESSIONAL™ window.	
2. Click the Control Information tab.	
3. Click Authorized Users .	
4. Click Add New .	
5. Enter the initials of the first authorized user. Press <TAB>. <i>This code is used to identify the authorized user, so it must be unique.</i>	
6. Enter the name of the authorized user.	
7. Click Save .	
8. Continue to follow steps 4 through 7 until you have entered all of the authorized users you need. To finish entering users, click Close . <i>Don't worry if you don't think of all possible users. You may return to this screen later, or add a user 'on the fly' in the work order maintenance window.</i>	
9. Click Save and Exit.	









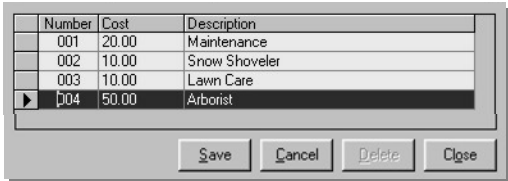

Work Order Control Information

Defining Parts Information

Instructions	Images
1. Click the Work Order button from the main TOPS PROFESSIONAL™ window.	
2. Click the Control Information tab.	
3. Click Define Parts . <i>Parts costs are calculated in the costs screen of each work order.</i>	
4. Click Add New .	
5. Enter a part number for this item. Press <TAB>. <i>This code is used to identify the part, so it must be unique</i>	
6. Enter the cost of the part. Press <TAB>. <i>For purchased parts, enter the cost of the item. For rental equipment, enter the cost of one unit of time. (\$20 per hour, or \$300 per day.)</i>	
7. Enter a description for the part.	
8. Click Save .	
9. Continue to follow steps 4 through 8 until you have entered all of the parts you need. To finish entering parts, click Close . <i>Don't worry if you don't think of all possible parts. You may return to this screen later, or add a part 'on the fly' in the costs window.</i>	
9. Click Save and Exit .	



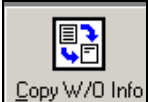
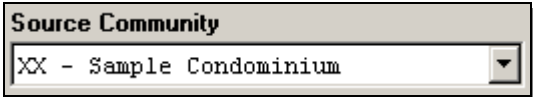
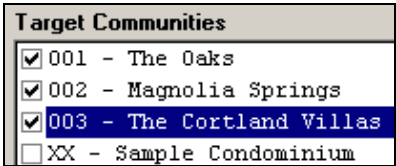
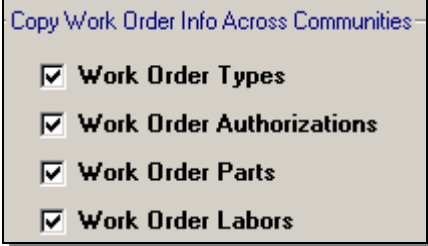
Work Order Control Information

Defining Labor Information

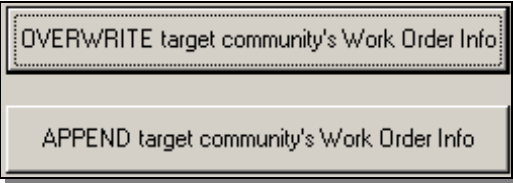

Instructions	Images
1. Click the Work Order button from the main TOPS PROFESSIONAL™ window.	
2. Click the Control Information tab.	
3. Click Define Labor . <i>This is information on the laborers that you employ to complete the work order. May include individuals employed by your company, or vendors.</i>	
4. Click Add New .	
5. Enter a labor number for this person. Press <TAB>. <i>This codemust be unique.</i>	
6. Enter the cost of the laborer. Press <TAB>. <i>Enter the cost of one unit of time. (\$20 per hour, or \$300 per day.)</i>	
7. Enter a description for the laborer. <i>This can be the person's name, if you wish.</i>	
8. Click Save .	
9. Continue to follow steps 4 through 8 until you have entered all of the laborers you use. To finish entering labor, click Close . <i>Don't worry if you don't think of all possible laborers. You may return to this screen later, or add a laborer 'on the fly' in the costs window.</i>	
10. Click Save and Exit .	

Work Order Control Information

Copy Settings to Multiple Communities


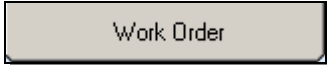
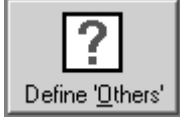



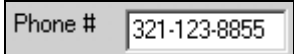
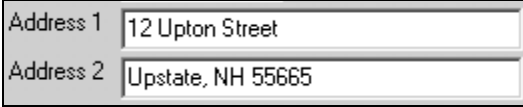


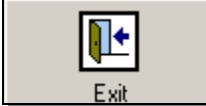
Instructions	Images
1. Click the Work Order button from the main TOPS PROFESSIONAL™ window.	
2. Click the Control Information tab. <i>Ensure that all of the control information is correctly entered as desired in the source community.</i>	
3. Click the Copy W/O Info button.	
4. Click the down arrow and select the source community from which you will be copying your work order information.	
5. Check the community or communities to which you wish to copy your work order information.	
6. Check the boxes to select the information you wish to copy. <ul style="list-style-type: none"> ▪ Types -the codes that identify work order categories. ▪ Authorizations - the list of authorized users who can approve work orders. ▪ Parts - the codes and costs of all parts. ▪ Labor - the codes and costs of all laborers. 	

Work Order Control Information

<p>7. Click the appropriate button to copy your work order information from the source community to the selected communities.</p> <ul style="list-style-type: none">▪ Overwrite - use this option to replace any existing control information in the selected communities with the selected settings.▪ Append - use this option to copy the selected settings into the selected communities in addition to any existing control information.	 <p>The screenshot shows two buttons stacked vertically. The top button is labeled "OVERWRITE target community's Work Order Info" and the bottom button is labeled "APPEND target community's Work Order Info". Both buttons have a light gray background and a thin black border.</p>
<p>8. Click exit to close the utility</p>	 <p>The screenshot shows a small square button with a light gray background and a thin black border. Inside the button is a small icon of a document with a blue arrow pointing to the left. Below the icon, the word "Exit" is written in a small, black, sans-serif font.</p>


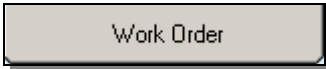





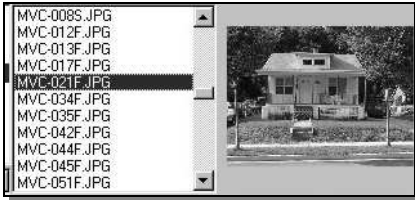
Work Order Control Information

Defining Other Laborers




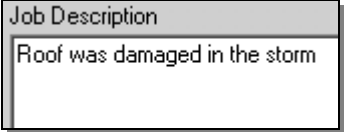
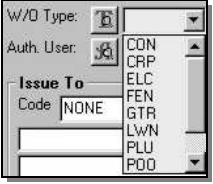




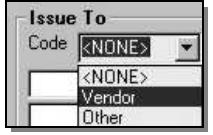
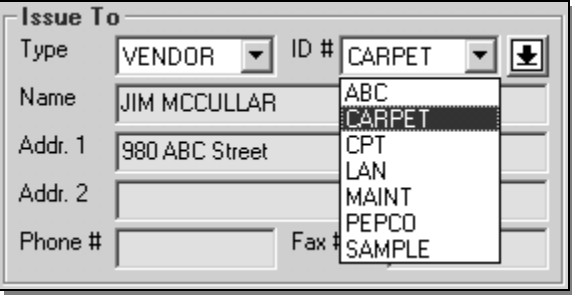

Instructions	Images
1. Click the Work Order button from the main TOPS PROFESSIONAL™ window.	
2. Click the Work Order tab.	
3. Click Define 'Others' .	
4. Click Add New to add a new record to the Other table.	
5. Enter an ID Number to identify the 'Other'. Press <TAB>. <i>The ID number may be up to 10 characters.</i>	
6. Enter the name of the 'Other'. Press <TAB>.	
7. Enter the Phone Number of the 'Other'. Press <TAB>.	
8. Enter the Address of the 'Other'. Press <TAB>.	
9. Click the Save button to save this 'Other'.	
10. If you wish to add additional 'Others' click the Add New button, and follow steps 5 through 9.	
11. Once you have completed 'Other' entry click the Exit button to close the 'Other' window.	

Work Order Maintenance

Creating a Work Order

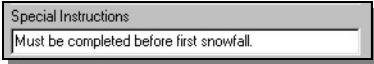

Instructions	Images
1. Click the Work Order button from the main TOPS PROFESSIONAL™ window.	
2. Click the Work Order tab.	
3. Click Add New to add a new work order. <i>A number is automatically assigned to the new work order.</i>	
4. Enter the Status of the Work Order. Press <TAB>. <i>By default, the status of a new Work Order is Open.</i>	
5. Enter the creation date of the work order. Press <TAB>. <i>This field defaults to today's date, but may be changed, if necessary.</i>	
6. Click the down arrow to select a target date for this work order to be completed by.	
7. Enter a summary for this work order. Press <TAB>. <i>This is a required field, and must be completed</i>	
8. If you wish to insert a digital image of the work order, click Insert Picture. Navigate to the image you wish to insert, and then click OK to insert the image.	

Work Order Maintenance

<p>9. If this work is being done on a home in the community, click the Browse button to select the property where this work is being done. </p> <p><i>Alternately, you can freeform enter a common area or general location.</i></p>	 <p>Job Location Address 1  100 Easy Street Address 2 City/State/Zip [] [] 20888 Contact Ray and Nancy Simon SIMON Phone 1 202-222-3322 Lot/U # 100 Phone 2 301-555-1212 Acct # 100</p>
<p>10. Enter a job description.</p> <p><i>Describe the work that needs to be done. These will be your instructions to the person doing the job.</i></p>	 <p>Job Description Roof was damaged in the storm</p>
<p>11. Click the down arrow to assign a work order type.</p> <p><i>This feature only works if work order types have been defined. See Defining Work Order Types above.</i></p>	 <p>W/O Type:  Auth. User:  Issue To Code NONE [] [] [] [] [] []</p>
<p>12. Click the down arrow to assign an authorization code.</p> <p><i>This feature only works if Authorized Users have been defined. See Defining Authorized Users above.</i></p>	 <p>Auth. User:  Issue To Code NONE [] [] [] []</p>
<p>13. Click the down arrow to select the Work Order issued to code.</p> <ul style="list-style-type: none"> ▪ Vendor: Select an existing vendor from the A/P vendor database. ▪ Other*: Enter an assignee for this work order, like an employee. 	 <p>Issue To Code <NONE> [] [] []</p>
<p>14. Click the down arrow next to ID# to select a vendor from the A/P vendor database, or an individual from the Other Table. Click the vendor you wish to assign to this work order.</p> <p><i>If the Vendor/Other is not listed under the ID pull down, you can click the browse button to search vendors/others on the fly.</i></p>	 <p>Issue To Type VENDOR ID # CARPET  Name JIM MCCULLAR Addr. 1 980 ABC Street Addr. 2 Phone # [] Fax # []</p> <p>Dropdown menu options: ABC CARPET CPT LAN MAINT PEPCO SAMPLE</p>

* The work order module contains a separate, searchable database for tracking other parties to assign work orders. An example might be an in-house employee who is assigned to perform the work.

Work Order Maintenance





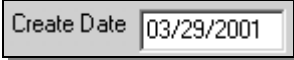

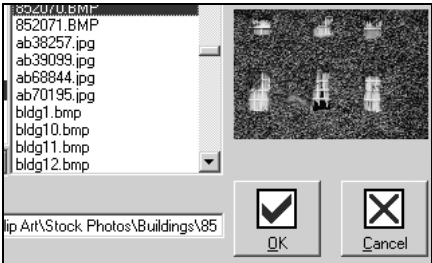
15. Enter any <u>special instructions</u> for the vendor.	
16. Click the Save button to save the work order.	

Service Requests

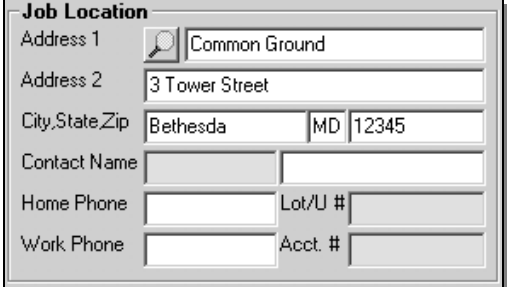

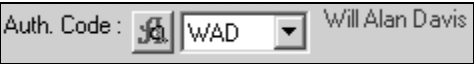
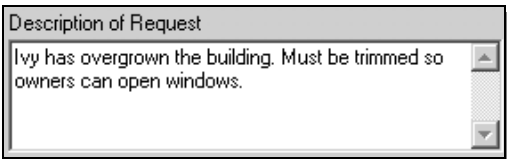
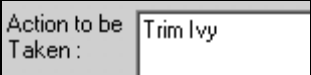

Creating a Service Request

A service request is created for requests from residents that may or may not lead to a work order being issued. It is a way to track a request until it has been resolved. Sometimes, before a work order is issued, the property manager may need to go out to inspect the problem to determine whether a work order is required. Other times, a service request can be used to track a request, such as a copy of the community's legal documents where no work order would ever be issued. It would just be a request for some action on the part of the staff by a resident, which can be tracked as a reminder until it is resolved, by some action on the part of the staff.

A service request can automatically be converted into a work order. That is why the fields on the screen for a service request are very similar to a work order.





Instructions	Images
1. Click the Work Order button from the main TOPS PROFESSIONAL™ window.	
2. Click the Service Request tab.	
3. Click Add New to add a new Service Request. <i>A number is automatically assigned to the new service request.</i>	
4. Enter a summary for this service request. Press <TAB>. <i>This is a required field, and must be completed</i>	
5. Enter the creation date of the request. Press <TAB>. <i>This field defaults to today's date, but may be changed, if necessary.</i>	
6. If you wish to insert a digital image of the request, click Insert Picture. Navigate to the image you wish to insert, and then click OK to insert the image.	 

Service Requests

<p>7. If this request is for a home in the community, click the Browse button to select the property where this work is being done. Press <TAB>.</p> <p><i>Alternately, you can freeform enter a common area or general location.</i></p>	 <p>Job Location</p> <p>Address 1 <input type="text" value="Common Ground"/></p> <p>Address 2 <input type="text" value="3 Tower Street"/></p> <p>City,State,Zip <input type="text" value="Bethesda"/> <input type="text" value="MD"/> <input type="text" value="12345"/></p> <p>Contact Name <input type="text"/></p> <p>Home Phone <input type="text"/> Lot/U # <input type="text"/></p> <p>Work Phone <input type="text"/> Acct. # <input type="text"/></p>
<p>8. Click the down arrow to assign a service request type. Press <TAB>.</p> <p><i>This feature only works if work order types have been defined. See Defining Work Order Types above.</i></p>	 <p>S/R Type : <input type="button" value="🔍"/> <input type="text" value="LND"/> <input type="button" value="▼"/> Landscaping</p>
<p>9. Click the down arrow to assign an authorization code. Press <TAB>.</p> <p><i>This feature only works if Authorized Users have been defined. See Defining Authorized Users above.</i></p>	 <p>Auth. Code : <input type="button" value="🔍"/> <input type="text" value="WAD"/> <input type="button" value="▼"/> Will Alan Davis</p>
<p>10. Enter a <u>description of the request</u>. Press <TAB>.</p> <p><i>Describe the work that needs to be done. These will be your instructions to the person doing the job.</i></p>	 <p>Description of Request</p> <p>Ivy has overgrown the building. Must be trimmed so owners can open windows.</p>
<p>11. Enter an <u>action to be taken</u> for this request. Press <TAB>.</p>	 <p>Action to be Taken : <input type="text" value="Trim Ivy"/></p>
<p>12. Click the Save button to save the work order.</p>	 <p><input type="button" value="Save"/></p>

Service Requests


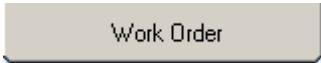



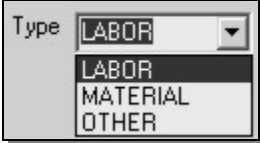

Converting a Service Request to a Work Order

Instructions	Images
1. Click the Work Order button from the main TOPS PROFESSIONAL™ window.	 A rectangular button with a dark background and a white icon of a wrench and screwdriver. Below the icon, the text "Work Order" is written in white.
2. Click the Service Request tab.	 A rectangular tab with a light gray background and a dark border. The text "Service Request" is centered in a dark font.
3. Click the down arrow next to the Service Request Number field to select a Service Request . Alternatively, you can click the browse buttons to navigate to the desired Service Request.	 A screenshot of a software interface showing a text input field with a small downward-pointing arrow on the right side. Below the field are four navigation buttons: a left arrow, a double left arrow, a double right arrow, and a right arrow.
4. Click the Create W/O button. <i>The service request will automatically be closed as the open work order is created. Proceed to complete the work order screen and make changes, if needed to the information filled in from the service request. The service request will still be retained in the history files after this action and it will show the work order # as a reference.</i>	 A rectangular button with a light gray background and a dark border. It features a white icon of a pencil writing on a document. Below the icon, the text "Create W/O" is written in a dark font.


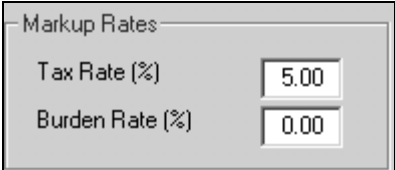


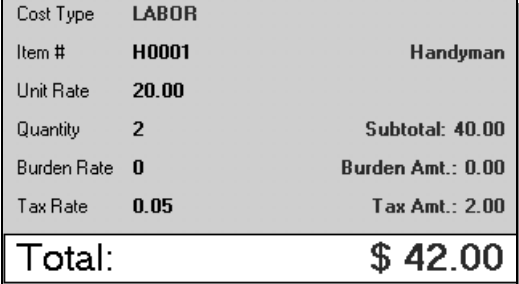



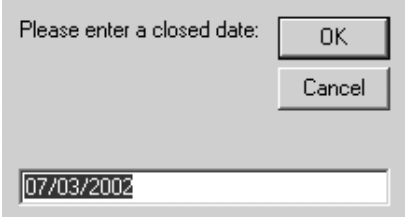
Work Order Costs

Accumulating Work Order Costs

This is typically done if the work order costs are going to be charged to someone, like the homeowner where the work was done. You can accumulate labor, material (parts) and other costs in a work order. Also, sales tax can be charged where applicable on labor, material or other costs. The costs are kept in the work order history even after a work order has been closed so they can be referred to at any time.

Instructions	Images															
1. Click the Work Order button from the main TOPS PROFESSIONAL™ window.																
2. Click the Work Order tab.																
3. Click the down arrow to view a list of work orders. To select a work order, double click the gray bar on the left side of the work order listing.																
4. Click the Costs button.																
5. Click Add Cost .																
6. Click the Type arrow to select a charge category <ul style="list-style-type: none"> ▪ Labor – Employee costs, such as maintenance. ▪ Material – Parts or a physical product, such as repair kits. ▪ Other – Miscellaneous costs such as travel exp. 																
7. Click the browse button (magnifier) to select an Employee or Item number . <i>Double click the gray box next to the item you wish to select. To add a new employee or part on the fly, click Add New.</i>	<table border="1" data-bbox="922 1482 1317 1631"> <thead> <tr> <th>Number</th> <th>Cost</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>ANDY</td> <td>20.00</td> <td>Andy Griffith</td> </tr> <tr> <td>H0001</td> <td>20.00</td> <td>Handyman</td> </tr> <tr> <td>P0001</td> <td>45.00</td> <td>Plumber</td> </tr> <tr> <td>R0001</td> <td>35.00</td> <td>Roofer</td> </tr> </tbody> </table>	Number	Cost	Description	ANDY	20.00	Andy Griffith	H0001	20.00	Handyman	P0001	45.00	Plumber	R0001	35.00	Roofer
Number	Cost	Description														
ANDY	20.00	Andy Griffith														
H0001	20.00	Handyman														
P0001	45.00	Plumber														
R0001	35.00	Roofer														
8. Enter a quantity (put in number of parts used, the hours spent, such as .5 hours = 1/2 hour)																

Work Order Costs

<p>9. Click Next.</p>																						
<p>10. If desired, enter new tax and burden rates for this cost.</p>																						
<p>11. Click Apply Default Burden/Tax Rates.</p>																						
<p>12. Click Next.</p>																						
<p>13. Confirm the amounts for the cost.</p> <p><i>If the values in the summary are correct, click the back button to make alterations.</i></p>	 <table border="1" data-bbox="964 821 1479 1102"> <tr> <td>Cost Type</td> <td colspan="2">LABOR</td> </tr> <tr> <td>Item #</td> <td>H0001</td> <td>Handyman</td> </tr> <tr> <td>Unit Rate</td> <td>20.00</td> <td></td> </tr> <tr> <td>Quantity</td> <td>2</td> <td>Subtotal: 40.00</td> </tr> <tr> <td>Burden Rate</td> <td>0</td> <td>Burden Amt.: 0.00</td> </tr> <tr> <td>Tax Rate</td> <td>0.05</td> <td>Tax Amt.: 2.00</td> </tr> <tr> <td>Total:</td> <td colspan="2">\$ 42.00</td> </tr> </table>	Cost Type	LABOR		Item #	H0001	Handyman	Unit Rate	20.00		Quantity	2	Subtotal: 40.00	Burden Rate	0	Burden Amt.: 0.00	Tax Rate	0.05	Tax Amt.: 2.00	Total:	\$ 42.00	
Cost Type	LABOR																					
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Unit Rate	20.00																					
Quantity	2	Subtotal: 40.00																				
Burden Rate	0	Burden Amt.: 0.00																				
Tax Rate	0.05	Tax Amt.: 2.00																				
Total:	\$ 42.00																					
<p>14. Click Save Cost.</p>																						
<p>15. If you wish to add additional costs to this work order, click Add Cost.</p>																						
<p>16. Once all work order costs have been entered, and the work complete, click Close and Charge. Clicking this option will close the work order, and apply the charges to the owner's account.</p>																						
<p>17. The system will request that a close date be entered for the work order. Today's date will be entered by default. If desired, you may alter this value.</p> <p>Click OK.</p>																						

Work Order Reports

Available Work Order Reports

Print these reports with many sort options.



The Work Order History is a detailed history of work orders. Includes a number of sort and range options, and may be defined by record type or open/closed status. Includes option for detailed or summary report.



The Service Request History is a detailed history of service requests. Includes a number of sort and range options, and may be defined by type or status. Includes option for detailed or summary report.



The Authorized Types report generates a quick report that will print a complete listing of authorization codes and descriptions.



The Work Order Types report generates a quick report that will print a complete listing of Work Order type codes and descriptions.






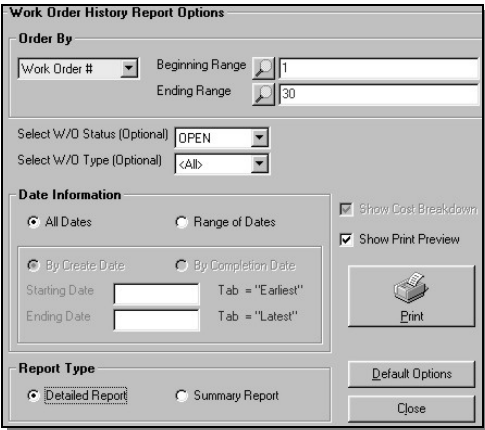

The Parts Info report generates a quick report that will print a complete listing of parts codes and descriptions.



The Labor Info report generates a quick report that will print a complete listing of Labor codes and descriptions.

Work Order Reports

Printing Work Order Reports

Instruction	Illustration
1. Click the Work Order button on the main TOPS PROFESSIONAL™ window.	
2. Click the Reports tab.	
3. Click the appropriate report button.	
4. Select the desired options for sorting, date ranges, record types, etc.	
5. Click Print to print the report.	

Work Order Types

Recommended Work Order Types

1.	ROF	Roof Repairs
2.	WOD	Wood Repairs
3.	PLU	Plumbing
4.	LWN	Lawn Care
5.	TRE	Tree Problems
6.	IRR	Irrigation Problems
7.	ELE	Electrical Problems
8.	PNT	Painting Requests
9.	CAR/GAR	Carport/Garage Issues
10.	PST	Pests (Interior or Exterior Bugs)
11.	ANI	Animals in Crawl Spaces/Roof (could be more specific) If problem with squirrels (SQU), Rabbits (RAB), etc
12.	GAR	Garbage (if by dumpsters or assn pays for pickups)
13.	REP	Misc. Repairs around the community