



NEST

Multi-Facility Management

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Adding a New Work Order

Adding a New Work Order

Upon logging into the Facilitate platform, you will be brought to the “**Add Work Order**” page.

Work Orders

Logout

Work Order #

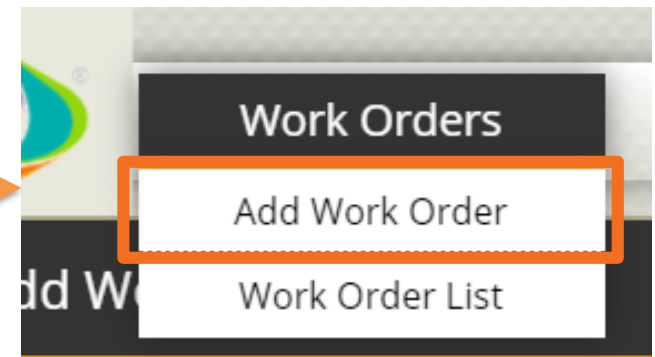
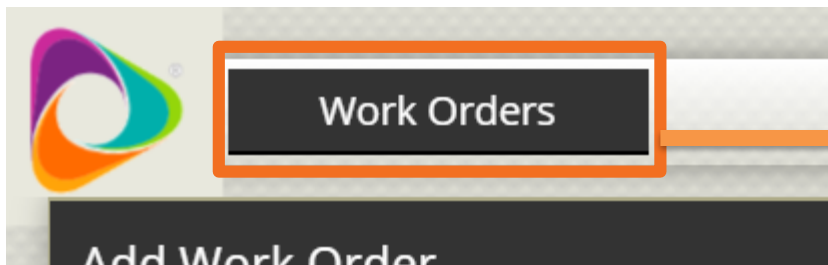
Add Work Order

Locations:

Drag a column header here to group by that column

#	Company	Loc #	Address	City	State	Zip	Phone
+							
+	PRSM Test Client	3	1234 Test Avenue	SHAWNEE MISSION	KS	66250	555-555-5555

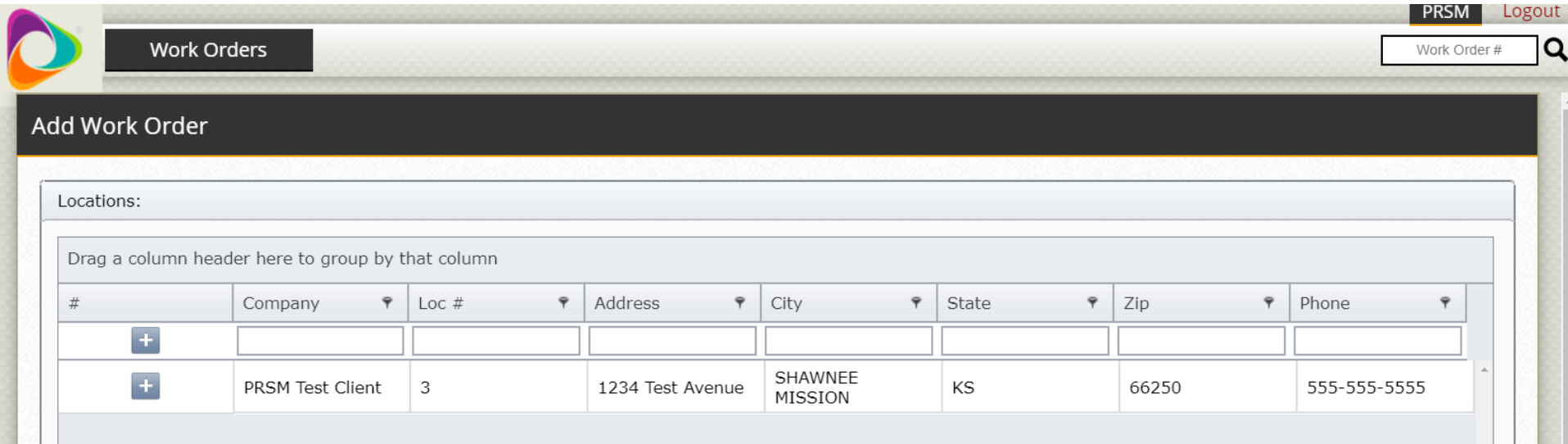
You can also navigate to this page from the Work Orders Menu (upper left).
Click the Work Orders menu and a list will appear. Choose “Add Work Order”.



Adding a New Work Order

On the Add Work Order page, you will see one or many locations, depending on which type of manager you are.

If you are a district/region/territory manager, you will see all locations for which you are responsible.



PRSM Logout

Work Order #

Add Work Order

Locations:

Drag a column header here to group by that column

#	Company	Loc #	Address	City	State	Zip	Phone
+							
+	PRSM Test Client	3	1234 Test Avenue	SHAWNEE MISSION	KS	66250	555-555-5555



NEST

Multi-Facility Management

Adding a New Work Order

To add a new work order, click the  icon next to the left of the location.

Add Work Order

Locations:

Drag a column header here to group by that column

#	Company 	Loc # 	Address 	City 	State 	Zip 	Phone 
							
	PRSM Test Client	3	1234 Test Avenue	SHAWNEE MISSION	KS	66250	555-555-5555



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Multi-Facility Management

Adding a New Work Order

Before adding a new work order, you should always review the Location History first. Location History is at the bottom of the page; scroll down to review it.

This will help you to avoid the entry of a duplicate request, or one that was already completed/cancelled.

Press **F11** to exit full screen

Add Work Order

New Work Order Request:

Company:
PRSM Test Client
Store Number:
3

Address 1:
1234 Test Avenue
Address 2:
Anywhere Shopping Centre
City/State/ZIP:
SHAWNEE MISSION, KS, 66250
Phone:
555-555-5555

Account Number:
PRSM3

DO YOUR VERY BEST TO SELECT THE APPROPRIATE TASK INSTEAD OF "OTHER".

PO Number:

Category:

Task:

Priority:

Service Instructions:

Please enter a description of the problem.

Cancel

Save

Location Work History:						
WO #	Status	Schedule Date	Category	Task	Completion Date	Scope of Work
4274137	Cancelled	12/26/2019 1:00 AM	Plumbing	Clogged Toilet		Test Client Service Record
4277636	Cancelled	12/26/2019 12:00 AM	Appliance Repair	Appliance Repair		Lead Time for parts: 0 days
4272202	Cancelled	12/18/2019 6:00 PM	Appliance Repair	Appliance Repair		Test Client Service Record
4154618	Cancelled	12/18/2019 1:00 AM	Plumbing	Urinal Repairs		Updated Description: - Men's Restroom (located behind the Pharmacy) - 2nd Urinal - Water was flowing out of the metal pipe on the top of the urinal (Flush-O-Meter pipe) - Store Manger inspected the Flush-O-Meter and states the water is coming from the seal between the urinal ceramic and the metal of the Flush-O-Meter - Water has been shut off to the restroom, but there is standing water on the floor (ceramic) - Only the Women's Restroom is available to use; an Out of Order sign has been placed on the Men's Restroom Original Description: Our toilet is shooting out water. A customer got done soaked head to toe. It's still doin it.

Adding a New Work Order

When adding a new work order, almost all fields are mandatory and must be entered, or your work order will not be entered into the system. (see orange chart below for details)

- **PO Number:** OPTIONAL field; you do not need to enter information into this field.
- **Category:** MANDATORY field; select the best Category from the list.
- **Task:** MANDATORY field; select the best Task from the list and try not to use "Other".
- **Priority:** MANDATORY field; select the proper priority based on the urgency of the request.
- **Service Instructions:** MANDATORY field; enter all details surrounding your request.

Company:
PRSM Test Client
Store Number:
3

Address 1:
1234 Test Avenue
Address 2:
Anywhere Shopping Centre
City/State/ZIP:
SHAWNEE MISSION, KS, 66250
Phone:
555-555-5555

Account Number:
PRSM3

DO YOUR VERY BEST TO SELECT THE APPROPRIATE TASK INSTEAD OF "OTHER".

PO Number:

Category:

Task:

Priority:

Service Instructions:

Please enter a description of the problem.

Cancel

Save

Adding a New Work Order

When you are ready to submit the work order, click 'Save' (bottom right).

New Work Order Request:

Company:

PRSM Test Client

Store Number:

3

Address 1:

1234 Test Avenue

Address 2:

Anywhere Shopping Centre

City/State/ZIP:

SHAWNEE MISSION, KS, 66250

Phone:

555-555-5555

Account Number:

PRSM3

DO YOUR VERY BEST TO SELECT THE APPROPRIATE TASK INSTEAD OF "OTHER".

PO Number:

Category:

Task:

Priority:

Service Instructions:

All service details are found here.

Cancel

Save

Adding a New Work Order

After clicking Save, you will be brought to the Work Order Details of your newly entered work order.

From here, you can see the Work Order # and verify the details you entered.

Work Order Details for 4283273

New

Task Sink Leaking

DESCRIPTION OF WORK

" All service details are found here. "

COPY TO CLIPBOARD

Order Detail

Order Notes

Work Order Photos

Upload Documents

IVR

Recurrings

Work Order Information

Work Order #: 4283273

Order Status: New

Created Date: 12/30/2019 12:13:24 PM

Created By:

Schedule Date:

Work Performed:

Category: Plumbing

Task: Sink Leaking

Priority: Urgent

ISP Name:

Completed Date:

Location Information

Company: PRSM Test Client

Region:

District:

Loc #: 3

Address 1: 1234 Test Avenue

Address 2: Anywhere Shopping Centre

City/State/ZIP: SHAWNEE MISSION, KS, 66250

Phone: 555-555-5555

Accounting

PO #:

GL Code:

Project #:

CapEx:

Invoice Status:

Invoice #:

Subtotal:

Tax:

Total:

Save

4283273



Work Order Details

From the Work Order Details screen, **“Order Detail” tab**, you can see general information such as Work Order #, Created Date, Schedule Date, Category, etc.

Work Order Details for 4283273

New

Task Sink Leaking

DESCRIPTION OF WORK

"All service details are found here."

COPY TO CLIPBOARD

Order Detail

Order Notes

Work Order Photos

Upload Documents

IVR

Recurrings

Work Order Information

Work Order #: 4283273

Order Status: New

Created Date: 12/30/2019 12:13:24 PM

Created By:

Schedule Date:

Work Performed:

Category: Plumbing

Task: Sink Leaking

Priority: Urgent

ISP Name:

Completed Date:

Location Information

Company: PRSM Test Client

Region:

District:

Loc #: 3

Address 1: 1234 Test Avenue

Address 2: Anywhere Shopping Centre

City/State/ZIP: SHAWNEE MISSION, KS, 66250

Phone: 555-555-5555

Accounting

PO #:

Invoice Status:

Subtotal:

GL Code:

Invoice #:

Tax:

Project #:

Total:

CapEx:

Save

4283273

Work Order Details: Viewing Notes

From the Work Order Details screen, **“Order Notes” tab**, you can read existing notes and add new notes.

Existing notes are found at the bottom of the page.

Work Order Details for 4283273

New

Task Sink Leaking

DESCRIPTION OF WORK
" All service details are found here. "

COPY TO CLIPBOARD

Order Detail

Order Notes

Work Order Photos

Upload Documents

IVR

Recurrings

Note Type

General

Email Note

Save Note

Drag a column header here to group by that column

Note Type	Notes	Input by	Created Date
General	more notes	prsmstoredemo	12/30/2019 12:21:22 PM
General	test notes	prsmstoredemo	12/30/2019 12:21:15 PM

4283273

Work Order Details: Entering Notes

From the Work Order Details screen, **“Order Notes” tab**, you can enter notes.

There are two ways to enter notes: **You can choose to email your note or just enter a note without an email.**

Work Order Details for 4283273

New

Task Sink Leaking

DESCRIPTION OF WORK
" All service details are found here. "

COPY TO CLIPBOARD

Order Detail

Order Notes

Work Order Photos

Upload Documents

IVR

Recurrings

Note Type

General

☐ Email Note

Save Note

Drag a column header here to group by that column

Note Type	Notes	Input by	Created Date
General	more notes	prsmstoredemo	12/30/2019 12:21:22 PM
General	test notes	prsmstoredemo	12/30/2019 12:21:15 PM

4283273

Work Order Details: Entering Notes

To enter a note **without email**...

1. Select a Note Type from the drop-down list if you do not want to use "General"
2. Type your note into the text box.
3. Click "Save Note"

Work Order Details for 4283273

Task Sink Leaking

DESCRIPTION OF WORK

//

All service details are found here.

COPY TO CLIPBOARD

Order Detail

Order Notes

Work Order Photos

Upload Documents

IVR

Recurrings

Note Type

1

General ▼

☐ Email Note

Notes are entered here.

2

Save Note

3



NEST

Multi-Facility Management

Work Order Details: Emailing Notes

To enter a note **WITH** email...

1. Select a Note Type from the drop-down list if you do not want to use "General"
2. Select **Email Note** checkbox, to the right of Note Type.
3. You can manually add an email address to the **"Email To*" field**, or you can select an email address from the pre-populated list by clicking the drop down menu under **"Pick From A List"**. You do not need to populate both fields, but you must use at least one of them if you choose to email your note.
 - You can choose to use "Action Required", but this is an optional checkbox. Using this checkbox will send the email with urgency.
4. Type your note into the text box.
5. Click "Save Note"

The screenshot shows a web interface for entering notes. At the top is a navigation bar with tabs: 'Order Detail', 'Order Notes', 'Work Order Photos', 'Upload Documents', 'IVR', and 'Recurrings'. Below this is the 'Note Type' section, which includes a dropdown menu (labeled 1) currently set to 'General', and two checkboxes: 'Email Note' (checked, labeled 2) and 'Action Required' (unchecked). Below the checkboxes is a red instruction: 'Please enter the email address(es) below with a semi-colon separating each email.' This is followed by the 'Email To*:' label and a text input field containing 'test@email.com;' (labeled 3). Below this is the 'Pick From A List:' label and a dropdown menu showing 'NEST - TRAINING@enternest.com' (labeled 4). At the bottom is a large text area for the note content, with the placeholder text 'Enter notes here to be emailed to a recipient.' (labeled 4). In the bottom right corner is a 'Save Note' button (labeled 5).

Order Detail Order Notes Work Order Photos Upload Documents IVR Recurrings

Note Type 1
General

2 ☒ Email Note ☐ Action Required

Please enter the email address(es) below with a semi-colon separating each email.

Email To*:
test@email.com; 3

Pick From A List:
NEST - TRAINING@enternest.com 4

Enter notes here to be emailed to a recipient. 4

5 Save Note

Work Order Details: Viewing Photos

From the Work Order Details screen, **“Work Order Photos” tab**, you can see any existing photos associated with this work order.

To view them, click “View” to the left of the photo.
You can add your own photos from the “Upload Documents” tab.

Work Order Details for 4283273

New

Task Sink Leaking

DESCRIPTION OF WORK

" All service details are found here. "

COPY TO CLIPBOARD

Order Detail

Order Notes

Work Order Photos

Upload Documents

IVR

Recurrings

View Image	File Name	Comment	Input Date
View	testJPG		12/30/2019 12:51 PM

4283273



NEST

Multi-Facility Management

Work Order Details: Uploading Photos

From the Work Order Details screen, **“Upload Documents” tab**, you can upload/attach new photos to an existing work order.

To upload a new photo...

1. Select the Document Type of **“WO Photo”**. You must always choose this option, regardless of other selection options or what you are uploading. If you do not choose WO Photo, you will not be able to see the document you just uploaded.
2. Click **“Browse”** and select one of the allowed file types (shown on the Upload Documents page itself for your reference). Locate your file from your device and select it.
3. Click Upload when you are ready to submit.
4. **To see the newly added photo**, you must **Refresh your Browser**, then navigate to **“Work Order Photos”** tab after you refresh.

Work Order Details for 4283273 New

Task Sink Leaking

DESCRIPTION OF WORK

" All service details are found here. "

COPY TO CLIPBOARD

Order Detail Order Notes Work Order Photos Upload Documents IVR Recurrings

First select a document type before uploading:

Document Type: WO Photo

NOTE: Allowed file types are .jpg, jpeg, .pdf, .doc, .docx, .xls and .xlsx

testJPG.jpg X Browse... Remove

Add Upload

From the Work Order Details screen, **“IVR” tab**, you can see clock in/clock out records. When vendors arrive/depart from site, they are to use the Integrated Voice Response (IVR) System to check in and out.

You will see a record for every check in and check out, along with duration and number of technicians that are/were on site.

Work Order Details for 4283273

Assigned

Task Sink Leaking

DESCRIPTION OF WORK
" All service details are found here. "
COPY TO CLIPBOARD

Order Detail

Order Notes

Work Order Photos

Upload Documents

IVR

Recurrings

Drag a column header here to group by that column

Beg Time	End Time	Duration	Techs
Monday, December 30, 2019 12:01 PM	Monday, December 30, 2019 1:27 PM	1 Hour 26 Minutes	2

4283273



From the Work Order Details screen, **“Recurrings” tab**, you can see all programs associated with your location. These Recurring Programs occur at your location on a set frequency.

The frequency and months of service are listed in this tab for your reference.

Work Order Details for 4283273

Assigned

Task Sink Leaking

DESCRIPTION OF WORK

"

All service details are found here.

"

COPY TO CLIPBOARD

Order Detail

Order Notes

Work Order Photos

Upload Documents

IVR

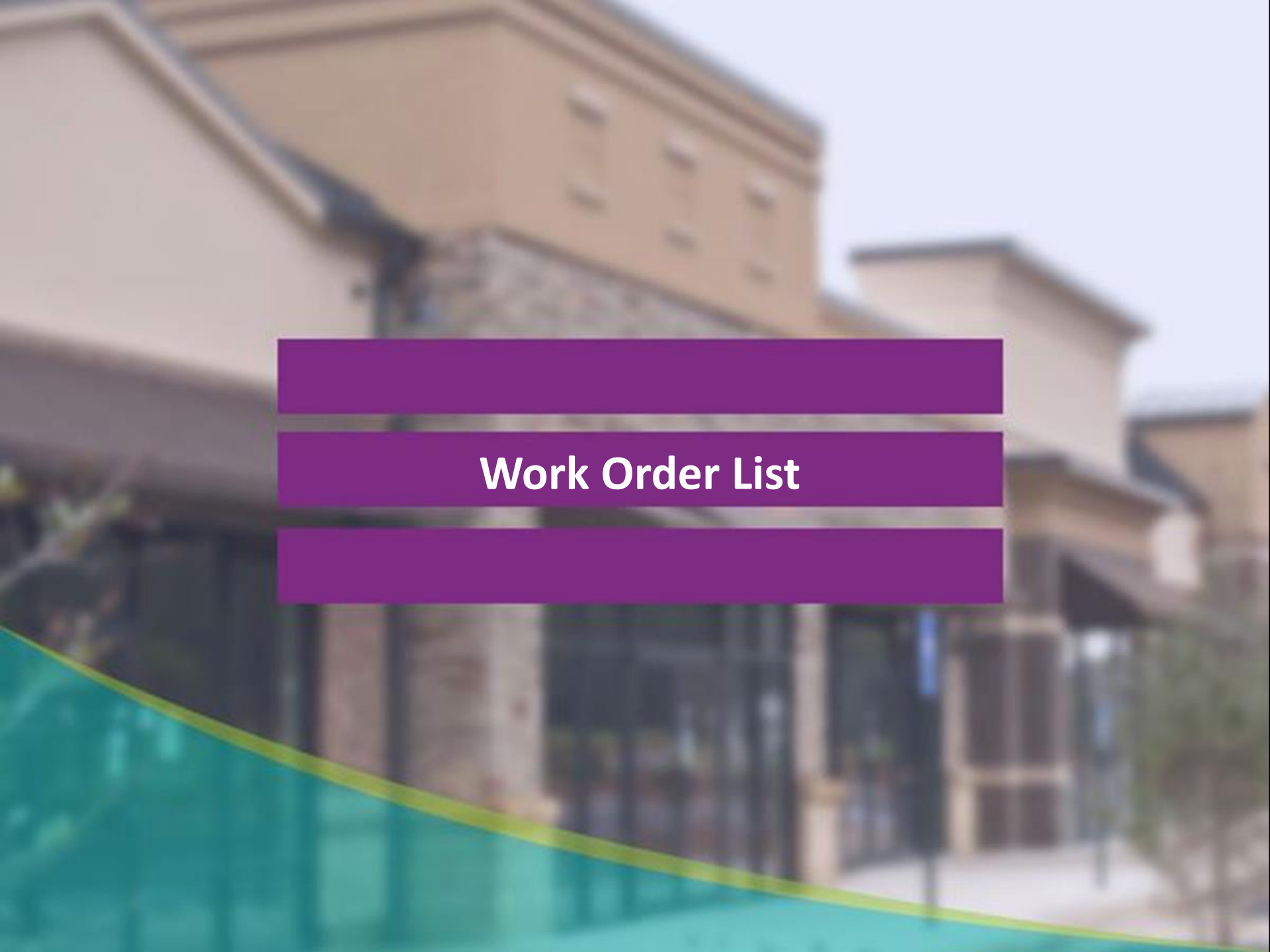
Recurrings

Drag a column header here to group by that column

Recurring # ▼	Category	Task ▼	Freq ▼	Jan ▼	Feb ▼	Mar ▼	Apr ▼	May ▼	Jun ▼	Jul ▼	Aug ▼	Sep ▼	Oct ▼	Nov ▼	Dec ▼
533620	Window Cleaning	Window-Int/Ext	12	1	1	1	1	1	1	1	1	1	1	1	1
534403	Fire Protectio	Fire Extinguis Certificat	2	0	0	0	0	0	0	0	0	0	0	1	1

4283273



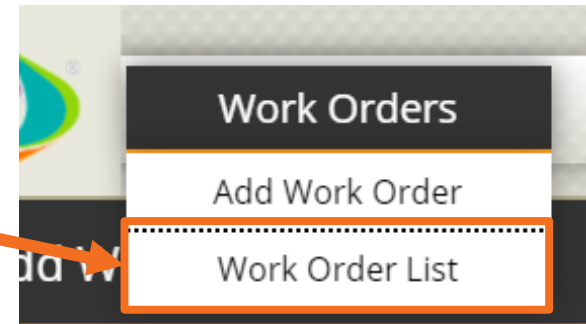
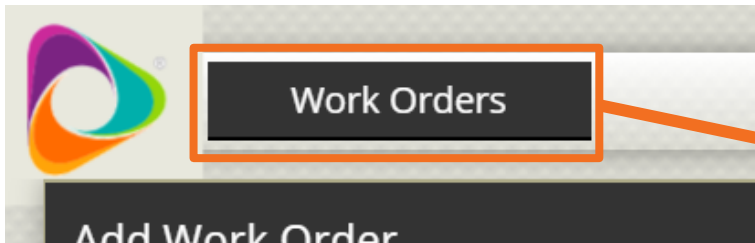


Work Order List

Work Order List

The “**Work Order List**” displays all work orders associated with your location(s).

To access the Work Order List, **click the Work Orders menu (upper left); a list will appear. Choose Work Order List.**



The Work Order List will appear, displaying your applicable work orders.

Work Order List

Show Filters

Download as

PDF

XLSX

Created Date Scheduled Date from 9/30/2019 to 1/30/2020

101 Orders in 2 Pages

Drag a column header here to group by that column

#	WO #	Created Date	Created By	Loc #	Priority	Order Status	Category	Task	WO Description	ISP Name	Scheduled Date	Company	District	Region	City
Details	4283292	12/30/2019	rcoper	3	Low	Cancelled	Appliance Repair	Appliance Repair	Test Client Service Record			PRSM Test Client	Houston	Houston	SHA MIS
Details	4283281	12/30/2019	prsmstoredemo	3	Low	New	Carpet Cleaning	Partial Carpet	TEST WO Only			PRSM Test Client	Houston	Houston	SHA MIS
Details	4283273	12/30/2019	prsmstoredemo	3	Urgent	Assigned	Plumbing	Sink Leaking	All service details are found here.	Portal Training		PRSM Test Client	Houston	Houston	SHA MIS
Details	4283060	12/30/2019	rcoper	3	Low	Cancelled	Appliance	Appliance Repair	test Lead Time for parts: 0 days			PRSM Test	Houston	Houston	SHA

The “**Work Order List**” shows work orders based on the date range displayed.

If you are a store manager, you will only see your location.

If you are a district/region/territory manager, you will see many locations.

Work Order List

Show Filters

Download as PDF XLSX

☒ Created Date ☐ Scheduled Date from 9/30/2019 to 1/30/2020

101 Orders in 2 Pages

Drag a column header here to group by that column

#	WO #	Created Date	Created By	Loc #	Priority	Order Status	Category	Task	WO Description	ISP Name	Schedule
Details	4283292	12/30/2019	rcooper	3	Low	Cancelled	Appliance Repair	Appliance Repair	Test Client Service Record		
Details	4283281	12/30/2019	prsmstoredemo	3	Low	New	Carpet Cleaning	Partial Carpet	TEST WO Only		
Details	4283273	12/30/2019	prsmstoredemo	3	Urgent	Assigned	Plumbing	Sink Leaking	All service details are found here.	Portal Training	
Details	4283060	12/30/2019	rcooper	3	Low	Cancelled	Appliance Repair	Appliance Repair	test Lead Time for parts: 0 days		
Details	4283040	12/30/2019	prsmclient	3	Low	Cancelled	Appliance Repair	Appliance Repair	test wo		
							Appliance		TEST WORK ORDER ONLY DO		

By default, your work orders will display by “**Created Date**”. That means, you will see all work orders, even if they do not have a schedule date.

If you change your search filter to “**Schedule Date**”, you will only see work orders with a schedule date, and are between that date range.



Work Order List

The “**Work Order List**” has additional filters, in addition to the date range.

Click “Show Filters” to see more options. To hide them when you are done, click “Hide Filters”.

Work Order List

Download as PDF XLSX

☒ Created Date ☐ Scheduled Date from to

101 Orders in 2 Pages

Drag a column header here to group by that column

#	WO #	Created Date	Created By	Loc #	Priority	Order Status	Category	Task	WO Description	ISP Name	Schedule
Details	4283292	12/30/2019	rcooper	3	Low	Cancelled	Appliance Repair	Appliance Repair	Test Client Service Record		
Details	4283281	12/30/2019	prsmstoredemo	3	Low	New	Carpet Cleaning	Partial Carpet	TEST WO Only		
Details	4283273	12/30/2019	prsmstoredemo	3	Urgent	Assigned	Plumbing				
Details	4283060	12/30/2019	rcooper	3	Low	Cancelled	Appliance Repair				
Details	4283040	12/30/2019	prsmclient	3	Low	Cancelled	Appliance Repair				

Work Order List

Hide Filters

Date Filter Type

☒ Created Date ☐ Scheduled Date

Start Date

End Date

Work Order Number

Work Order Type

PO Number

Search

Clear

Drag a column header here to group by that column

#	WO #	Created Date	Created By	Loc #	Priority	Order Status	Category	Task	WO Description
Details	4283292	12/30/2019	rcooper	3	Low	Cancelled	Appliance Repair	Appliance Repair	Test Client

Filters Explained:

- **Date Filter Type** allows you to select between Created Date or Schedule Date; this dictates how you want to display your work orders.
- **Start/End Date** allows you to choose the date range you wish to view.
- **Work Order Number** lets you search for a work order by the exact work order number.
- **PO Number** lets you search for a work order by the exact purchase order number (if applicable).
- **Work Order Type** allows you to choose between Recurring/PM, Break-Fix, or All.
 - **Recurring/PM** will display program work orders that happen a routine basis.
 - **Break-Fix** will display unexpected, non-routine work orders (AKA Requests, On-Demand)
 - **All** will display both types of work orders

The “**Work Order List**” may display more work orders than the page allows. If you have too many results, you may have to navigate between multiple pages of work orders.

The page navigation is found at the bottom left.



Work Orders

PRSM Logo

Work Order #

Work Order List

Show Filters

Download as PDF XLSX

☒ Created Date
 ☐ Scheduled Date
 from 9/30/2019 to 1/30/2020
 101 Orders in 2 Pages

Drag a column header here to group by that column

#	WO #	Created Date	Created By	Loc #	Priority	Order Status	Category	Task	WO Description	ISP Name	Scheduled Date	Company	District	Region	City
Details	4283292	12/30/2019	rcooper	3	Low	Cancelled	Appliance Repair	Appliance Repair	Test Client Service Record			PRSM Test Client	Houston	Houston	SHA MIS
Details	4283281	12/30/2019	prsmstoredemo	3	Low	Deferred Maintenance	Carpet Cleaning	Partial Carpet	TEST WO Only			PRSM Test Client	Houston	Houston	SHA MIS
Details	4283273	12/30/2019	prsmstoredemo	3	Urgent	Assigned	Plumbing	Sink Leaking	All service details are found here.	Portal Training		PRSM Test Client	Houston	Houston	SHA MIS
Details	4283060	12/30/2019	rcooper	3	Low	Cancelled	Appliance Repair	Appliance Repair	test Lead Time for parts: 0 days			PRSM Test Client	Houston	Houston	SHA MIS
Details	4283040	12/30/2019	prsmclient	3	Low	Cancelled	Appliance Repair	Appliance Repair	test wo			PRSM Test Client	Houston	Houston	SHA MIS
Details	4281152	12/24/2019	ABonanno	3	Regular	Cancelled	Appliance Repair	Appliance Repair	TEST WORK ORDER ONLY. DO NOT EDIT.			PRSM Test Client	Houston	Houston	SHA MIS
Details	4277684	12/23/2019	rcooper	3	Regular	Cancelled	Appliance Repair	Appliance Repair	Test Client Service Record			PRSM Test Client	Houston	Houston	SHA MIS
Details	4277636	12/23/2019	rcooper	3	Regular	Cancelled	Appliance Repair	Appliance Repair	Lead Time for parts: 0 days			PRSM Test Client	Houston	Houston	SHA MIS
Details	4274180	12/20/2019	rcooper	3	Low	Cancelled	Appliance Repair	Appliance Repair	Test Client Service Record 'test test test			PRSM Test Client	Houston	Houston	SHA MIS
Details	4274176	12/20/2019	rcooper	3	Low	Cancelled	Appliance Repair	Appliance Repair	Test Client Service Record TEST TEST TEST			PRSM Test Client	Houston	Houston	SHA MIS
Details	4274137	12/20/2019	JSpencer	3	Low	Cancelled	Plumbing	Clogged Toilet	Test Client Service Record			PRSM Test Client	Houston	Houston	SHA MIS
Details	4272210	12/18/2019	rcooper	3	Regular	Cancelled	Appliance	Appliance Repair	Test Client Service Record			PRSM Test	Houston	Houston	SHA

101

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The “**Work Order List**” has the option to SORT your data.

To Sort, find the column by which you want to sort. Click once on the column header to sort your list; click twice to reverse sort your list.



Work Orders

PRSM Logo

Work Order #

Work Order List

Show Filters

Download as PDF XLSX

☒ Created Date
 ☐ Scheduled Date
 from 9/30/2019 to 1/30/2020
 101 Orders in 2 Pages

Drag a column header here to group by that column

#	WO #	Created Date	Created By	Loc #	Priority	Order Status	Category	Task	WO Description	ISP Name	Scheduled Date	Company	District	Region	City
Details	4283292	12/30/2019	rcooper	3	Low	Cancelled	Appliance Repair	Appliance Repair	Test Client Service Record			PRSM Test Client	Houston	Houston	SHA MIS
Details	4283281	12/30/2019	prsmstoredemo	3	Low	Deferred Maintenance	Carpet Cleaning	Partial Carpet	TEST WO Only			PRSM Test Client	Houston	Houston	SHA MIS
Details	4283273	12/30/2019	prsmstoredemo	3	Urgent	Assigned	Plumbing	Sink Leaking	All service details are found here.	Portal Training		PRSM Test Client	Houston	Houston	SHA MIS
Details	4283060	12/30/2019	rcooper	3	Low	Cancelled	Appliance Repair	Appliance Repair	test Lead Time for parts: 0 days			PRSM Test Client	Houston	Houston	SHA MIS
Details	4283040	12/30/2019	prsmclient	3	Low	Cancelled	Appliance Repair	Appliance Repair	test wo			PRSM Test Client	Houston	Houston	SHA MIS
Details	4281152	12/24/2019	ABonanno	3	Regular	Cancelled	Appliance Repair	Appliance Repair	TEST WORK ORDER ONLY. DO NOT EDIT.			PRSM Test Client	Houston	Houston	SHA MIS
Details	4277684	12/23/2019	rcooper	3	Regular	Cancelled	Appliance Repair	Appliance Repair	Test Client Service Record			PRSM Test Client	Houston	Houston	SHA MIS
Details	4277636	12/23/2019	rcooper	3	Regular	Cancelled	Appliance Repair	Appliance Repair	Lead Time for parts: 0 days			PRSM Test Client	Houston	Houston	SHA MIS
Details	4274180	12/20/2019	rcooper	3	Low	Cancelled	Appliance Repair	Appliance Repair	Test Client Service Record 'test test test test			PRSM Test Client	Houston	Houston	SHA MIS
Details	4274176	12/20/2019	rcooper	3	Low	Cancelled	Appliance Repair	Appliance Repair	Test Client Service Record TEST TEST TEST TEST			PRSM Test Client	Houston	Houston	SHA MIS
Details	4274137	12/20/2019	JSpencer	3	Low	Cancelled	Plumbing	Clogged Toilet	Test Client Service Record			PRSM Test Client	Houston	Houston	SHA MIS
Details	4272210	12/18/2019	rcooper	3	Regular	Cancelled	Appliance	Appliance Repair	Test Client Service Record			PRSM Test	Houston	Houston	SHA

Count= 101

1
 2



Work Order List: Filtering

The “**Work Order List**” has the option to FILTER your data.

To Filter, find the column by which you want to filter. Each column header has a small filter icon.

Work Order List

Show Filters

☒ Created Date ☐ Scheduled Date

from to

Drag a column header here to group by that column

#	WO # 	Created Date 	Created By 	Loc # 	Priority 	Order Status 	Category 	Task
Details	4283292	12/30/2019	rcooper	3	Low	Cancelled	Appliance Repair	Appli
Details	4283281	12/30/2019	prsmstoredemo	3	Low	Deferred Maintenance	Carpet Cleaning	Partia
Details	4283273	12/30/2019	prsmstoredemo	3	Urgent	Assigned	Plumbing	Sink
Details	4283060	12/30/2019	rcooper	3	Low	Cancelled	Appliance	Appli



NEST

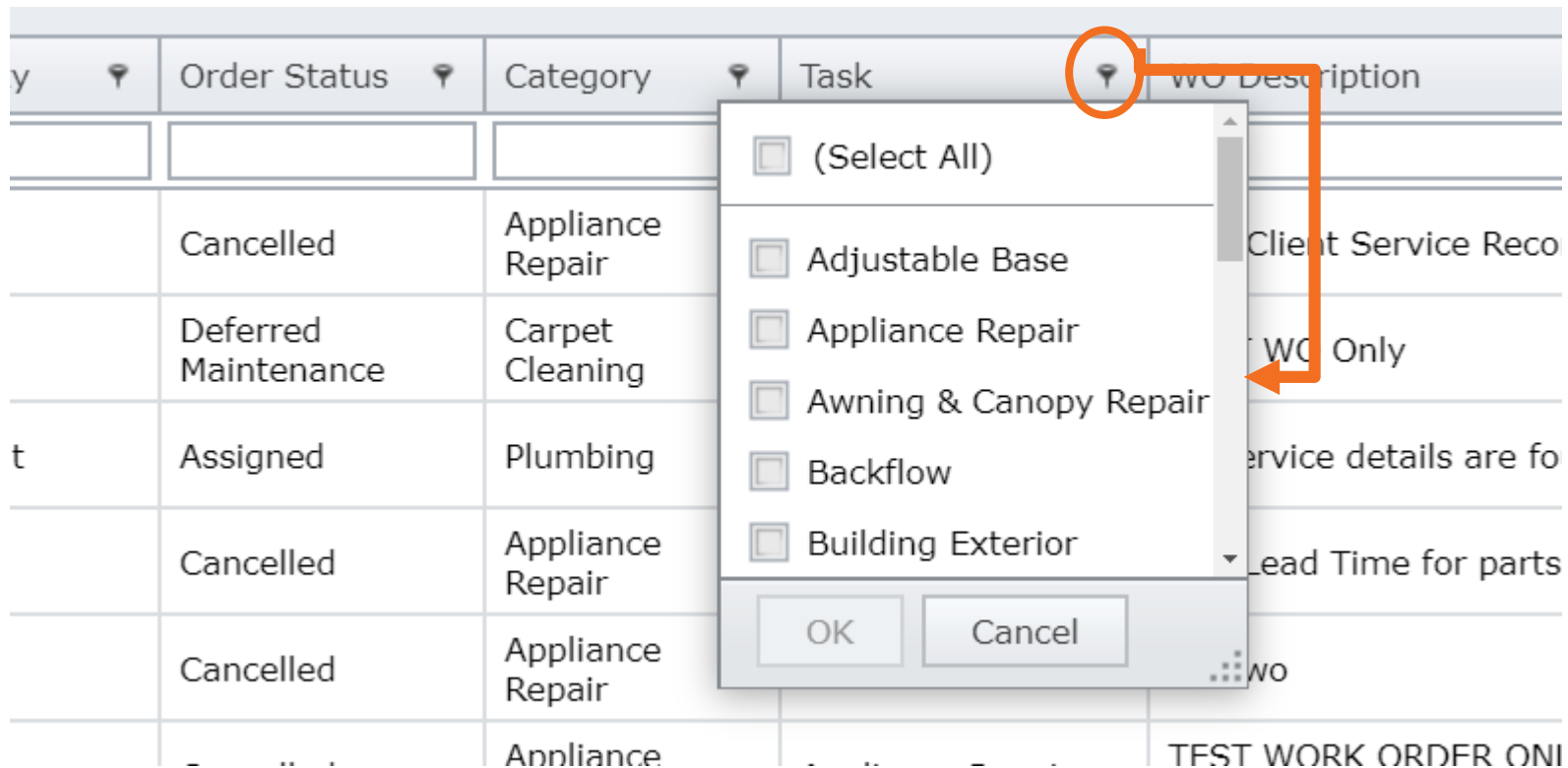
Multi-Facility Management

Work Order List: Filtering

The “**Work Order List**” has the option to FILTER your data.

After clicking the Filter icon, you will see a drop down list where you can select one or many items by which to filter your data. You can filter multiple columns at once.

Click OK when you are ready to filter.



NEST

Multi-Facility Management

Work Order List: Grouping

The “**Work Order List**” has the option to GROUP your data. Grouping is a feature that consolidates a column header into various groups within the grid.

To Group, find the column by which you want to group. Then click and drag the column header into the grey bar above the grid itself.

Work Order List

Show Filters

Download as  PDF

☒ Created Date ☐ Scheduled Date

from to

101 Orders

Drag a column header here to group by that column

#	WO #	Created Date	Created By	Loc #	Priority	Order Status	Category	Task
Details	4283292	12/30/2019	rcooper	3	Low	Cancelled	Appliance Repair	Appliance
Details	4283281	12/30/2019	prsmstoredemo	3	Low	Deferred Maintenance	Carpet Cleaning	Partial
Details	4283273	12/30/2019	prsmstoredemo	3	Urgent	Assigned	Plumbing	Sink Le
Details	4283060	12/30/2019	rcooper	3	Low	Cancelled	Appliance Repair	Appliance
Details	4283040	12/30/2019	prsmstoredemo	3	Low	Cancelled	Appliance	Appliance