

WORK ORDER TYPES

AND HOW TO ORGANIZE THEM

POOL CLEAN

- Drain
- Acid Wash
- Chlorine Rinse
- Chemical Startup
- Salt Startup
- Chemical Blast
- Green to Clean
- Vacuum to Waste
- Hot Tub, Spa, Water Feature
- Calcium Remediation

REPAIRS

- Pool Down
- Low Priority
- Medium Priority
- High Priority
- Additional Day
- Callback
- Warranty
- Install Part
- Outsourced

SEASONAL

- Opening
- Opening - 2nd Visit
- Opening - Water Features
- Closing - Full
- Closing - Cover Pool
- Closing - Water Features

ROUTINE MAINTENANCE

- Filter Clean
- Salt Cell Clean
- Sand Change
- Salt & Lateral Change

INSPECTIONS

- Free Pool Evaluation
- Free Diagnostic
- Diagnostic
- Pool Inspection
- New Pool Assessment

ADMIN

- New Customer
- Cancelled Customer
- Customer Records
- PO Box Check
- Office Follow-up
- PTO - Tech Unavailable
- New Hire Training
- Training
- Parts Pickup
- Area Meeting
- Start Route
- End Route

REMODELS

- Consult
- New Build Startup
- Progress Picture
- Final Walkthrough

FLEET

- Clean/Wash Truck
- Oil Change
- Tire Rotation
- End of Week Mileage Check

ADDITIONAL

- Spot Check
- Follow-up Visit
- Tech Notes
- Customer Request
- Assist with...
- First Visit

DIFFERENT WAYS TO ORGANIZE WORK ORDER TYPES

USING ABBREVIATED PREFIXES AND COLORS

- ☰ ■ PC - Pool Drain
- ☰ ■ PC - Acid Wash
- ☰ ■ PC - Chemical Blast
- ☰ ■ PC - Hot Tub, Spa, Water Feature
- ☰ ■ PC - Chemical Startup
- ☰ ■ PC - Chlorine Rinse
- ☰ ■ PC - Calcium Remediation
- ☰ ■ PC - Sand Change

- ☰ ■ Repair - Low Priority
- ☰ ■ Repair - Medium Priority
- ☰ ■ Repair - High Priority
- ☰ ■ Repair - Additional Day
- ☰ ■ Repair - Callback
- ☰ ■ Repair - Install Part/Equipment
- ☰ ■ Repair - Outsourced
- ☰ ■ Repair - Pebble Tech

USING WORK ORDER HEADERS AND COLORS

- ☰ ■ -----POOL CLEANING-----
- ☰ ■ Pool Drain
- ☰ ■ Acid Wash
- ☰ ■ Chemical Blast
- ☰ ■ Chemical Startup
- ☰ ■ Chlorine Rinse
- ☰ ■ Calcium Remediation
- ☰ ■ Sand Change

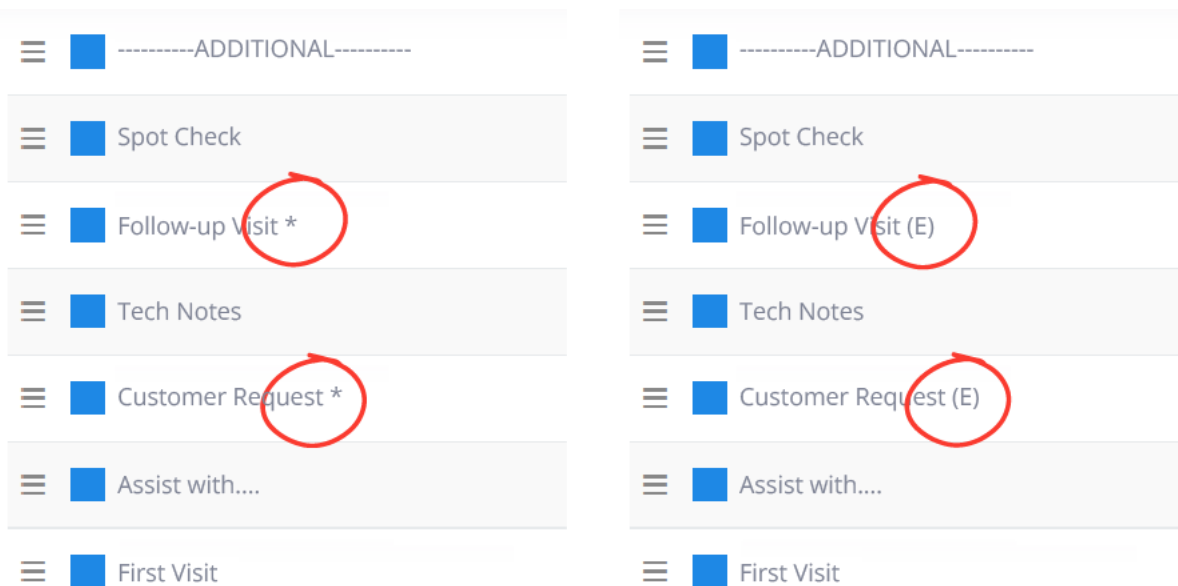
- ☰ ■ >>>>> REPAIRS <<<<<<
- ☰ ■ Part Replacement
- ☰ ■ Outsourced
- ☰ ■ Callback
- ☰ ■ Additional Day
- ☰ ■ High Priority Repair
- ☰ ■ Medium Priority Repair
- ☰ ■ Low Priority Repair

SOME THINGS TO CONSIDER

NOT ALL WORK ORDERS NEED AN EMAIL SENT TO THE CUSTOMER

There are certain work order types for which you may not want the customer to receive an email notification upon completion. Fortunately, this can be customized for each work order during setup. To help you differentiate between emailed and non-emailed work orders, consider using simple indicators.

For example, you could use an asterisk (*) or the letter 'E' to mark specific work orders that will trigger an email notification.



SOME THINGS TO CONSIDER

ALL WORK ORDER TYPES CAN BE CUSTOMIZED

Here are the various things that can be customized on each work order type:

- Color code (the color box next to the work order type)
- If the work order needs to be invoiced
- If a photo is required to complete the work order
- Email sent to customer when work order is completed
- Who can add the work order
- If a work order needs a reoccurring reminder
- What work needs to be performed for the work order
- Add a checklist of specific items to complete during the work order
- What the line item on the invoice should be called and what the price should be
- Email subject and body for each order

KEEP IT SIMPLE

Aim to limit the number of work order types for the services your company provides. It's easy to get carried away and create overly specific work order types, but remember to keep the system as simple as possible. A more complex system can be difficult to implement and challenging to maintain consistently as you grow.