Getting Started
With
WorkTrack
Service Management

User Guide
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Getting Started With WorkTrack

Before You Begin

This guide explains how to set up your WorkTrack Service Management web application. The following assumptions apply to the use of this guide:

- You have a valid URL, user ID, and password for your Corrigo WorkTrack product, acquired either through free-trial or purchase.
- Your computer has Internet access.
- You have a basic understanding of how to operate a supported version of Microsoft Windows, including how to use Internet Explorer as an Internet browser.
- For QuickBooks integration: You utilize QuickBooks as your business accounting software (see System Requirements in this guide for additional information)

The best way to use this guide is to step through each section of WorkTrack configuration in the order in which it is presented in the guide.

Using This Guide

**Appearance:**
Since your company can customize WorkTrack Service Management software by changing the screen appearance, words, and phrases used in the application, some images used in this guide may not exactly match those that appear on your screens.

**Path Reference:**
Path references will be used in this guide to direct you to the appropriate screen within your application. For example, to integrate your WorkTrack Service Management product with QuickBooks, the path is **Settings>Financial>Work Flow Settings**. This means that, within your web application, you select the Settings page, select the Financial tab on that page, then select the Work Flow Settings option from the Financial menu.

**Conventions:**
The WorkTrack Service Management product you use will often be referred to as the web application, or application, within this guide.
System Administrator: This is the person at your company who manages your WorkTrack Service Management web application. The term System Administrator is used in this guide.

WorkTrack Onscreen Conventions

How Do I? Integrated into WorkTrack is an on-demand help system that can guide you through configuration and application use. To access the help system, click the How Do I? link in the upper right corner of each WorkTrack screen.

Activity Center: The WorkTrack Service Management web application is divided into groups of user functions, called Activity Centers. For example, customer functions, such as adding or viewing a customer record, are found in the Customer Activity Center. To access an Activity Center, click the appropriate button on the Activity Center bar:

System Requirements

Supported Operating System: WorkTrack Service Management can be used with the following Microsoft Windows operating system versions:

- Microsoft Windows XP and Vista operating systems, using Internet Explorer version 7 or higher as your Internet browser

To check which version of Windows you are using, go to Start>Control Panel>Help>About Windows (see example, figure 2)
To check which version of Microsoft Internet Explorer you are using, launch Internet Explorer then go to Help>About Internet Explorer (see example, Figure 3):

If you are integrating with QuickBooks: The following versions of QuickBooks are supported (see the Corrigo Integration Client For QuickBooks User Guide for additional information):

- Simple Start, Pro, Premier, and Enterprise versions from 2007 and newer
- A valid QBMS account is required in order to export credit card payments into QuickBooks from WorkTrack
Setup Overview

Your WorkTrack Service Management web application offers many user-adjustable settings. These settings allow you to customize your web application to fit your business needs. The choices you make during setup will determine the appearance of your screens, help you profile your business, and enable you, if you desire, to integrate with mobile devices and QuickBooks.

Step-by-Step Setup of WorkTrack Service Management

Configuring your WorkTrack Service Management web application consists of four basic steps:

1. Log into WorkTrack
2. Adjust System Settings
3. Add People (Users)
4. Add Customers

The following two additional steps are optional. Mobile device configuration and QuickBooks integration are covered in separate guides (see Learning Center for additional information):

- Mobile Device Configuration
- QuickBooks / QBMS Integration

Figure 4: Steps involved in configuring WorkTrack
Logging into your WorkTrack Application

Once you receive your log in information from Corrigo, you are ready to begin configuration of your application.

Note: To obtain log in credentials to your company’s own WorkTrack web application, visit http://worktrack.corrigo.com/service to set up a free trial or purchase a license.

Log In Information

You should receive an email providing you with your user ID, password, and company name as well as a URL (website address) where you can log into your new web application. The contents of the email may be different, but here is a sample of roughly what you can expect.

![Email Sample]

Figure 5: You should receive an email similar to this, which contains your log in information
**Note:** If you have created a free trial online, then you will be logged into the application immediately after your web application company has been created. You can do this by clicking the login link on the confirmation page.

Once you receive your log in information, click on the link inside the email (http://worktrack.corrigo.com/log in.aspx) to launch the Customer Log In screen on your computer (you can also copy or type the link into your browser).

You *must* use Microsoft Internet Explorer (version 6 or higher) in order to log into WorkTrack. If the browser that launches is Internet Explorer, you will be able to read the name “Internet Explorer” in the upper left corner of the browser window. It will appear similar to this:

![WorkTrack - Windows Internet Explorer](image)

If the browser that launches is *not* Internet Explorer:

1. Close the browser.
2. Launch Internet Explorer from your Windows Start menu or desktop.
   **Note:** See System Requirements in the beginning of this guide for information Internet Explorer compatibility information.
3. Copy the link from inside the email, then paste it in the browser address window (or type the link directly into the browser address window).
At the log in screen, enter your user ID, password, and company name, then click **Sign In**. The web application will appear in your browser window.

**Note:** Selecting **Remember Me** on the Customer Log In screen will enable your browser to remember your User Name and Company Name. You will still be required to enter your password each time you log in. Deleting cookies from your browser will remove the log in information.
Setting Up the Application

Overview

This section will walk you through several stages of setup:

- Adjusting settings
- Adding a new web application user
- Adding a customer manually

Navigating WorkTrack

Once you have logged into the web application, you will be greeted by both the Learning Center window and the application window. For your convenience, close the Learning Center window during setup.

Note: In the upper right corner of all WorkTrack screens is a How Do I? link. Click this link to bring up the application help system if you need assistance.
Adjusting System Settings

System settings can be adjusted through the Settings Activity Center. Click the Settings button on the Activity Center button bar to reach the main Settings screen. Settings are organized in groups:

- **Work Orders** (may be called Service Orders, Service Requests, or Service Tickets)
- **Work Zone** (may be called Communities, Properties, or Service Areas)
- **Model Your Business**
- **Company**
- **Mobile Settings**
- **Financial**
- **Customers**
- **Time Card** (available to Time Card module users)

Click on the appropriate tab on the left side of the main Settings page to access a group of settings. On each main settings page is help text that can guide you through the configuration process.

**Work Order Settings**

The Work Orders settings tab contains a list of Work Order-related settings that you can modify. Click on a link in the list to bring up the corresponding settings screen.

**Note:** Your tab may not be labeled Work Orders. If your application has already been configured, the terminology may have been modified. Instead of Work Orders, the first tab may read Service Orders, Service Requests, or Service Tickets. Other tabs may be affected as well. If you would like to change the terminology, go to Settings > Company > Terminology.

**Priorities**

Work Orders can be classified by one of three different priorities. The default Display As terms for these priorities are:

- Non-Urgent
- Urgent
- Emergency

You can set a default priority, change the Display As terms used to describe each priority, and adjust the amount of time in which each work order priority is considered overdue. The default priority can never be set to Emergency. Also, emergency priority alerts are always sent to mobile users who are set up to receive alerts.
To modify priority levels, click on the **Priorities** link under the Work Orders settings tab. Click **Edit** next to the priority you would like to modify. Make changes, then click **Save**.

<table>
<thead>
<tr>
<th>Work Order Priorities</th>
<th>Consider Overdue</th>
<th>Is Default</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Non Urgent</strong></td>
<td>Low</td>
<td>Yes</td>
</tr>
<tr>
<td>Urgent</td>
<td>Medium</td>
<td>Yes</td>
</tr>
<tr>
<td>Emergency</td>
<td>High</td>
<td>n/a</td>
</tr>
</tbody>
</table>

![Figure 8: Setting work order priorities](image)

**Skills**

Enter skills to describe the various types and levels of expertise required of your techs to complete their work. Skills are used in Service Categories to describe the level of expertise needed to complete a particular service (see Service Packages under Model Your Business in this guide for additional information about Service Categories). Click the **Skills** link under the Work Orders tab to modify skills.

**Cancel Reasons**

Cancel Reasons are used to describe why a work order has been cancelled. Edit the Display As description of an existing reason, or add a new reason for cancelling a work order.

![Add a New Cancel Reason](image)

**Basic Reasons for Cancelling a Work Order**

<table>
<thead>
<tr>
<th>Display As</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>All Work Items Removed from Work Order</td>
<td>Edit</td>
</tr>
<tr>
<td>Appointment no show</td>
<td>Edit</td>
</tr>
<tr>
<td>Could not reproduce the problem</td>
<td>Edit</td>
</tr>
<tr>
<td>Customer cancelled request</td>
<td>Save</td>
</tr>
<tr>
<td>Duplicate request</td>
<td>Edit</td>
</tr>
</tbody>
</table>

![Figure 9: Changing a Cancel Reason through the Settings Activity Center](image)

The Cancel Reasons you set here can be seen when you cancel a work order. Once a work order’s status has been changed to Cancel, a window will pop-up with a menu enabling you to pick a Cancel Reason as well as enter notes about why the order was cancelled (see Figure 10).
Figure 10: Cancel Reason window, which appears when a work order status is set to Cancel

Note: Basic cancel reasons cannot be deleted from WorkTrack, although you can edit the descriptions.

**On Hold Reasons**

Work Orders are put On Hold if the tech plans to complete the order, but cannot proceed without additional parts, assistance, etc. Click the **On Hold Reasons** link to modify On Hold Reasons.

Edit the Display As description of an existing reason, or add a new reason for putting a work order On Hold. Work Orders placed On Hold still appear on the web application Dispatch Board.

**Flag Reasons**

Work Orders are typically flagged if the tech plans to continue working, but needs to bring a job issue to the attention of his supervisor or the dispatcher. Click the **Flag Reasons** link to modify Flag Reasons.

Edit the Display As description of an existing reason, or add a new reason for flagging a work order.

**Repair Codes and Repair Categories**

Repair Categories and their corresponding Repair Codes can be used to describe the work that was completed in the Work Done section of a work order. This information can later be used to help create an invoice from the work order. Click the **Repair Codes** link to set up or modify Repair Categories and Codes.

To add new codes, first add Repair Categories, then create Repair Codes that belong in each category.

**Note:** To make these categories and codes accessible within a work order, you must activate the Repair Category and Codes features through **Settings > Work Orders > Work Order Work Flow** (see Work Order Work Flow in this guide).
Work Order Types

The basic work order type is Request, which represents a customer request for service. This type cannot be removed. You can add custom types, such as Preventive Maintenance or Warranty Repair, to describe reasons a work order has been created. Click the Work Order Types link to modify Work Order Types.

Alert Settings

These settings affect how alerts are sent to techs in the field, either through email or their mobile device. Click the Alert Settings link to modify Alert Settings.

Once the general alert settings are adjusted here, each tech must be set up through People > Edit > Alerts Edit in order to receive alerts (see Adding New Users in this guide for additional information).

Print Templates

Click the Print Templates link to modify work order Print Templates. Click Preview to see a sample of the current print template, or click Change to select from three different template options.

Dispatch Board Settings

Click the Dispatch Board Settings link to modify Dispatch Board Settings. Select the daily starting time for the Dispatch Board schedule, the time interval at which the board will update with new information, and the fields that will appear on the Dispatch Board.

To modify field settings, click Edit next to a field. Options available:

- Edit the display width (how wide the field will appear on the dispatch board)
- Enter a Display As name (the label at the top of the column on the dispatch board)
- Select Yes under the Show column (to make the field appear on the Dispatch Board)
- Choose which fields will appear on the Dispatch Board from more than 20 standard and custom fields.
- Move a field’s position on the Dispatch Board to the left or the right by clicking the appropriate icon in the Rank column.

Figure 11: Adjust how each field appears on the Dispatch Board
Work Order Work Flow

Click the Work Order Work Flow link to determine if Repair Categories and Repair Codes will be made available during the disposition of a work order. Also, select whether or not the categories and codes will be required or optional.

Work Order Back Date

Best practices recommend that you do not allow work order back-dating. Change this setting only if you have a compelling reason. Remember to change it to No Backdating once you no longer require backdating. Click the Work Order Back Date link to modify Work Order Back Date settings. This function will only be available to managers.
Work Zones

- Work Zones are typically geographic regions in which your company conducts business. You can use Work Zones, however, to represent other work divisions within your company, such as Maintenance or New Installations work zones.

- Each Work Zone contains at least one Service Team, and is dispatched by one Dispatch Center. The application comes with a default Work Zone, Service Team, and Dispatch Center.

  **Note:** Instead of Work Zones, you may select the label Communities, Properties, or Service Areas to be displayed in your application. If you would like to change the terminology, go to **Settings > Company > Terminology.**

Work Zones

- You may choose to enter multiple Work Zones, or you may conduct business with just one Work Zone.

  Set up your Work Zone by first editing the default Work Zone. Click **Edit** next to the default Work Zone name.

- Change the name of the Work Zone (or keep the default label).

  ![Figure 12: You may choose to change the name of the default Work Zone](image)

  The Dispatch Center is the office of the person who dispatches jobs to this Work Zone. Click **Change** to add a new or existing Dispatch Center to this Work Zone. Next, click **Change** to add a dispatcher to this Dispatch Center. If no dispatch person has been added to the application yet, you can add the new user through this function (see Adding New Users in this guide for additional information).
**Note:** The person you add as a dispatcher to this Dispatch Center is someone who typically would not work in the field. This person will be responsible for maintaining the Dispatch Board in the application.

A Service Team is a group of techs that will handle service calls in a particular Work Zone. Click **Change** to add a new or existing Primary Service Team to this Work Zone. Next, Click **Change** to add service techs to this Service Team. If no service tech has been added to the application yet, you can add a new user through this function (see Adding New Users in this guide for additional information).

Complete Backup Service Team (optional), Time Zone, and Service Hours fields as prompted.

Work order numbering can be customized to fit your business. Click **Change** to add a unique prefix to standard work order numbers, or select **Custom Numbering** to build your own numbering scheme.

![Step 5: Work Order Numbering -> Custom Numbering](image)

Figure 13: Build your own custom work order numbering scheme

As you select different options on the Custom Numbering window, the example in the upper right corner of the window will change to reflect your selections (see Figure 13). Click **Ok** when done.

Click **Ok** when you have completed all Work Zone fields. Add additional Work Zones if desired.

**Service Teams**

Through this setting, you can create a Service Team of techs, then add the team to a Work Zone. You may choose to have one or more service teams for your business.

Your company comes with a default Service Team. Click **Edit** next to the default Service Team in order to modify service team information.
To change the name of the default service team, click Edit next to Team Profile and enter the new name. To add the Service Team to a Work Zone, click Edit next to Areas Serviced and select a Work Zone. New or existing techs can be added to the team by clicking Edit next to Service Team Members (see Figure 14).

Add additional Service Teams if necessary.

**Dispatch Centers**

You may choose to have one or more Dispatch Centers for your business.

Your company comes with a default Dispatch Center. Click Edit next to the default Dispatch Center.

To change the name of the default Dispatch Center, click Edit next to Dispatch Center Profile and enter the new name and phone number. New or existing dispatchers or managers can be added to the Dispatch Center by clicking Edit next to Dispatch Center Members (see Figure 15).

*Note:* To change the Area Serviced by a Dispatch Center, go to Settings>Work Zone>Work Zones then edit the appropriate Work Zone. Click Change under Select Dispatch Center for Work Zone.

Add additional Dispatch Centers if necessary.
Model Your Business

Through this setting tab, you can create Service Packages that your company offers to customers, as well as define an Equipment Model Catalog containing descriptions of equipment that you want to track for customers.

Service Packages

Service Packages describe the services you offer customers. Within each Service Package, you can specify the Service Categories offered. Within each Service Category, you can add services. For each service, set the typical priority, its expected time duration, and the skill level needed to complete the service. Best practice is to use a single service package for all customers.

Add a new Service Package if desired, then click Set Service Categories and Services next to a Service Package to add or edit Service Categories.

![Common Problems Table]

**Note:** The Skills that are available to select for each service can be set up through Settings>Work Orders>Skills.

Equipment Type Catalog

The Equipment Type Catalog will be used by techs to select equipment for tracking at a customer’s site. Add new equipment models if desired, then click Set Services next to a model to configure the services that typically would be performed on that equipment.

On the Services screen, set the typical priority of the service, its expected time duration, and the skill level needed to complete the given service on the selected equipment. Also, select which attributes of the equipment that you would want to track for the customer. Create additional attributes through Settings>Model Your Business>Attributes. When the tech completes his service of the equipment, he will be given the opportunity to enter information on each of these attributes.
Attributes

Create the attributes that will be tracked for equipment entered into the Equipment Model Catalog. An attribute should be designated as Historical if the attribute will change over time (such as equipment condition). Data type refers to the type of information that will be entered for this attribute, such as a date or number.

Once the attribute is created, you have the option to add a pick list for the tech. The list will appear as a drop-down menu from which the tech can select a description of the attribute from pre-defined choices. To create a pick list, click Add or Edit under the Pick List column next to the appropriate attribute. This will bring up the Pick List edit window.

![Pick List for Replacement Type](image)

<table>
<thead>
<tr>
<th>Rank</th>
<th>Choices</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>New Part</td>
<td>Edit</td>
</tr>
<tr>
<td>2</td>
<td>Refurbished Part</td>
<td>Edit</td>
</tr>
</tbody>
</table>

Figure 17: Adding attributes to a pick list through the Pick List edit window
Through this setting tab, you can customize general aspects of your WorkTrack Service Management application.

**Custom Fields**

To fit your business flow, you may need to create custom fields within the application. These would be used to acquire information for your business that is not collected through standard WorkTrack fields.

When entering a new custom field, first choose from the drop-down menu the class of information you want to collect (for example, Customer data). This will determine on which screens the new field will appear.

Next, click **Add a New Custom Field**, then enter the appropriate information. String is the most common data type. Any text information can be entered into a String field. Integers are non-decimal numbers. Floating Point numbers contain decimals. Boolean data requires you to select one of two choices (such as Yes/No).

**Note:** Custom fields that are created under the classification of Space will be seen in a customer’s record under the Site tab (depending upon terminology you have chosen, the Site tab could be labeled Job, Service Location, Suite, or Unit) they can also be displayed on the first step of the work order creation wizard and *with configuration* can be displayed on the mobile device.

Custom fields can be hidden or made visible. They *cannot be deleted* once they have been created. No data will be lost if you hide a custom field.

**Terminology**

In this section, you can change specific terms used throughout the web application. WorkTrack will automatically substitute the terms you select on each screen that they appear.

**Security Policies**

Since your WorkTrack Service Management application is accessible through the Internet, sound security measures have been put in place for your company’s protection. Follow prompts to modify security measures if needed.
**Subscription Details**

Enter your company data in this section. Note the number of mobile licenses you have. This determines how many techs will be allowed to use mobile devices in the field.

**Upload Company Logo**

Through this setting, you can browse your local computer or network for a company logo and upload it for display within the application. It will display at the top of the page, on printed invoices, and in selected reports.

Note: The web application will automatically resize images with .jpg, .jpeg, and .png extensions. If you are uploading an image with a .gif extension, you must resize it yourself to 130x60 pixels.

**Document Types**

Enter descriptions of the basic document types that you will store within a customer record. These descriptions do not affect the actual document in any way.

**Appearance**

Choose from either a Standard silver/blue appearance or a Colorful appearance on your web application screens. Screen examples used in this guide represent the Colorful appearance scheme.

**Landmarks**

Use either the address or geocodes (latitude and longitude) to enter landmarks in your service areas. These landmarks will appear on the Dispatch Board map. They can help the dispatcher in visually determining a tech’s location on the map.

**Integration**

This is where you can optionally choose to set your system to integrate with QuickBooks as well as download a free copy of QuickBooks simple start. If you choose to integrate with QuickBooks this is where you can set up the Authentication code which will be required in Integration Settings.

Please refer Corrigo Integration Client For QuickBooks user guide for information on setting up the Integration Client.
Mobile Settings

These settings affect how the mobile devices used by your techs will operate and display information (if you are using mobile devices). See the Setting Up Mobile Devices for WorkTrack Service Management user guide for information on how to configure these settings.

Financial

Through this setting tab, you can configure basic financial settings. This section also allows you to configure your optional integration with QuickBooks Merchant Services.

Basic Invoice Settings

Choose whether your company offers discounts or charges sales tax. If you select Yes to either, these figures can be overridden when you create an invoice.

Posting Invoices

Choose whether you want to post invoices at the Customer or Site level. If you choose to integrate with QuickBooks, the option you select here will determine whether the invoice transactions will be posted at the customer or job level in QuickBooks.

Sales Tax Items

Here you can add multiple Sales Tax Items with different tax rates. You can associate the Sales Tax Items you create here with Customers and Sites. So the invoices you create for the customer:site will have the sales tax item pre-populated. This will help you a lot if you are servicing an area where sales tax rates differ a lot by cities/counties.
Sales Tax Groups

Sales Tax Group is two or more sales tax items that you apply to an invoice at the same time, using one combined rate. You can set up as many tax groups as you want. You can associate the Sales Tax Groups you create here with Customers and Sites. So the invoices you create for the customer:site will have the sales tax group pre-populated. This will help you a lot if you are servicing an area where sales tax rates differ a lot by cities/counties.

Sales Tax Codes

Sales Tax Codes are used to track the taxable or non-taxable status of your price list items and your customers and sites. You can associate the Sales Tax Codes you create here with Customers, Sites and Price list items. So when you add line items to your invoice the taxable section will be pre-populated based on the associations. This piece of information is handy to technicians who are doing invoices out in the field as they don’t have to call the office to find out which items are taxable and which are not.

Invoice Status

Edit the description of existing invoice statuses, or create your own status based on either the Prepared or Not Prepared status.

Price List

Price List items are non-inventory items and services for which you charge a set price. By creating a Price List catalog, you can make invoicing more efficient and accurate.

Begin by creating price list categories. Once the categories have been created, enter the name, description, and price of each item within the categories. Price List items are available during invoicing.

Price List Groups

Price List groups are grouping of your price list items which aggregates the price of all the items added in that group. If in your business you often have to enter same set of items for a service, you can create price list group for such items. Instead of adding each price list item in an invoice, you can add a price list group which will add all the price list items in that group automatically for you. You have the option to show just the price list group or all the price list items within a group in invoice printouts.

Print Templates

Click Preview to see a sample of the current print template, or click Change to select from two different template options.

Payment Processing

Add or edit the methods by which you receive payment from your customers. Payment can only be taken by techs using mobile devices.
**Note:** If you want to accept credit card payments and receive approval through mobile devices, you must be use QuickBooks Merchant Services.

If you don’t use QuickBooks Merchant Services, however, you can still allow techs to enter manual credit card information on their mobile devices. To do this, create a new Payment Method describing a credit card you accept manually (such as “Visa Manual”), then select Check as the Payment Type. This Payment Method will then appear on the mobile device. Credit card payments accepted this way would need to be processed manually through your office.

**QBMS Integration**

This section allows you to integrate your WorkTrack Service Management application with QuickBooks Merchant Services. This is necessary in order to receive credit card approval from a mobile device. See the Corrigo Integration Client For QuickBooks user guide for information on how to configure this setting.

**Customers**

Through this setting tab, you can configure email notifications for customers.

**Notifications**

Choose whether your customer will be notified on changes in the status of their work order. For example, by selecting Cancelled, customers will be emailed if their work order has been cancelled.

You can also enter text that will appear in the body of each email and select a work order template to email. To view template options, go to **Settings>Work Orders>Print Templates**. The email will include a copy of the work order in the template you select.
**Time Card**

Note: This section applies to users who utilize the Time Card module. To learn more about Time Card, contact Corrigo.

Time Card is an add-on WorkTrack module that enables users to track the number of hours each field service tech works. Through this tab, you can configure basic Time Card settings, such as Time Card model, pay periods, and rules for calculating time.

**Work Flow Settings**

The Time Card module offers two different methods for tracking labor:

- **Punch In / Punch Out**: Tech uses mobile device to register start and end of shift and breaks. This method is typically used for hourly employees.

  - **Auto Shift start and end based on login and logout of the application on mobile device**: If this option is not selected, then the tech must manually punch in and out of Time Card after starting WorkTrack on a mobile device; otherwise, the tech’s shift starts when WorkTrack is launched on the mobile device.

  - Tracking a tech’s break time does not automatically include break time as paid time. Unless you also check **Pay Techs for Breaks**, the breaks will reflect on the tech’s Time Card but will not be included in the total shift hours (see an example of a tech’s Time Card, including breaks, in Figure 18)

  - Turning the GPS off during breaks can avoid a clutter of GPS fixes from appearing on the tech’s location map in the WorkTrack web application.

  - With the Punch In / Punch Out model, work order time is still tracked in the system even though it does not determine Time Card time. You can run reports that compare the time a tech was punched in on the clock against the time actually spent working on work orders.

- **Work Order Feeds Time Card**: Tech’s Time Card hours are based on the time spent working on actual work orders. This method is typically used for techs who work as contractors.
Note: For the Work Order Feeds Time Card model, Time Card time is always tracked when the status of the work order is changed to Started. You can choose to include travel time (En Route status) or time when the work order status is set to Paused. The time that a work order is placed On Hold is never included in Time Card tracking.

Time Card Period

You can select one of two Time Card period settings:

- **Weekly:** Using this time period format, tech’s hours are tracked for a seven-day period. You select the weekly starting day.
- **Semi-Monthly:** Using the semi-monthly format, tech’s hours are tracked for two pay periods each month. You select the starting day for each pay period.

Note: Semi-monthly periods will end on the dates prior to the dates you select. For example, if you select the 7th and 22nd of each month as your period starting dates, the previous semi-monthly periods will end on the 6th and 21st.

Over Time and Double Time Rules

You can choose from one of several scenarios for determining overtime/double time hours:

- **Daily Rules:** Using this rule, Techs will be paid overtime or double time for all time they work beyond a certain limit each day. You can customize the limits for each day of the week.
  
  For Example: If your company pays overtime for any hours that a tech works on Sunday, enter 0 for the Over Time after limit on Sunday. A tech's Sunday hours will then be recorded as overtime, regardless of the general overtime rules.
• **Weekly Rules:** Using this rule, techs will be paid overtime or double time for all time they work beyond a certain limit each week. In this scenario, techs will not be paid overtime/double time for long daily shifts as long as their weekly hours are within the weekly limits.

• **Time Card Period Rules:** This rule works like the Weekly Rules, except it is based on the Time Card Period you have configured in **Settings>Time Card>Time Card Period**.

• **Combination Rules:** This rule allows you to configure several different conditions for overtime/double time. If your company pays overtime/double time based on daily and weekly rules, then you need to use Combination Rules. Combination Rules also allow you to customize overtime/double rules if a tech works more than a certain number of consecutive days. Consecutive Day Rules override Daily or Weekly rules once a tech reaches the consecutive day limit.

**Rounding Rules**

You can configure how Time Sheet hours will be rounded:

• **Round Down:** All tech hours will be rounded down to the Rounding Point you select.  
  **For Example:** If you choose to round down to the closest 30 minutes, then if a tech works 7 hours and 45 minutes, the tech's time will be recorded as 7 hours and 30 minutes.

• **Round to Closest:** All tech hours will be rounded to the nearest time interval increment you select from the Rounding Point menu.  
  **For Example:** If you choose to round to the closest 30 minutes, then if a tech works 7 hours and 25 minutes, the tech's time will be recorded as 7 hours and 30 minutes.

• **Round Up:** All tech hours will be rounded up to the Rounding Point you select (similar to Round Down rules).

**List View Configuration Settings**

You can format how hours will be displayed for each tech on the Time Card List View (the main screen of the Time Card Activity Center). Hours are displayed as two time figures. You decide what is represented in the value of each time figure (see example in Figure 19).
Figure 19: In this example, the Time Card List View Configuration is set to include all hours (regular / overtime / double time) in the first time figure in Time Card List View. The second time figure includes just overtime and double time hours.

**Time Card Reconcile Flag Rules**

You can set the conditions under which a time record is flagged. Flags appear on both the Time Card List View and individual tech’s Time Card Detail View. Flags alert you to conditions on the Time Card that warrant a manager’s review.

<p>| | |</p>
<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Inv Installer</td>
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<tr>
<td>Jack Swage</td>
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<tr>
<td>Joe Tech Sample</td>
<td>1/0</td>
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<tr>
<td>John Exchanger</td>
<td>-</td>
</tr>
<tr>
<td>Jose Tech</td>
<td><strong>Flagged Record</strong></td>
</tr>
</tbody>
</table>

Figure 20: Sample of Time Card List View showing a time record flagged because of a short shift

**Note:** The rules Flag All Incomplete Time Cards and Flag All Overlapping Time Cards Problems cannot be turned off. Problems triggering these flags must be reconciled before the tech’s time sheet can be Approved. Flags for these items will be red 🟥.
Adding People (New Users)

Overview

Your new WorkTrack Service Management application should have at least two users already added to the system:

- You (or the person who entered your company information to acquire WorkTrack)
- Joe Tech Sample (a sample user for you to view)

To add new users, click on the People tab. The first screen that appears will be the People List View. Select All Users from the View menu to list all users currently added to the system.

![Image showing the People List View]

Note: If you added users to the system when you created Service Teams or Dispatchers, additional users may show in the All Users List View.

New Person

To add a new user, click New Person. This will take you to the Add New Person screen. Follow the prompts to enter user information. Help text is included next to fields for which you might require assistance.

Note: Be careful which users you allow to be Mobile Users. Your company’s user licenses are tallied according to the number of Mobile Users you have configured.
When selecting a role for the user, consider the functions that the user will perform. A manager will have complete access to all aspects of the web application. Techs will have very limited access to the application.
Once you’ve added a person, return to the People List View. Click the person’s name to edit their record in People Details. If the user has not been added to a Service Team or Dispatch Center, you can add them through the People Details screen. You can also select the user’s skills from a list of skills created in Settings > Work Orders > Skills.

**Note:** Once users have been assigned work or used a mobile device, their work history and map information will be made available through People Details.

**Alert Settings**

Individual alert policies can be set for each user. Go to the user’s detail page, then click *Edit* next to the Alerts tab. This will bring up the Edit Alerts screen.

![The Edit Alerts screen](image)

**Figure 23: The Edit Alerts screen**
Select if user should receive alerts through email, on a mobile device (Corrigo Mobile), or both.

**Note:** Only mobile users will be given the option to receive alerts through a mobile device.

Choose which types of alerts the user should receive. These settings will work with settings in Settings > Work Orders > Alert Settings to determine how the user will receive alerts.
Adding Customers to the Web Application

Overview

If you are integrating with QuickBooks, most of your customer records will be imported into the web application during the integration process (See the Corrigo Integration Client For QuickBooks user guide for information on importing customers). Customers may also be added when you create a work order or separately.

Add New Customer

If you need to add customers manually, go to the Customer Activities Center. Click on the New Customer button to reach the Add New Customer screen.

![Figure 24: New Customer button on the Customer List View screen](image)

Note: Depending upon the terminology you selected in Settings > Company > Terminology, your Activity Center and add button may read Clients, Guests, Residents, or Tenants.

Help text on the screen will guide you through critical decisions while adding a customer. Factors to consider:

Customer Type

You may not have the option to select between residential or commercial customer types. If this option is not available, your company was not configured to allow multiple types. This setting cannot be changed once it has been set.

If you have the option to select a customer type, choose carefully. Customers can be configured with only one type. Once a type is chosen and the customer’s record has been saved, customer type cannot be changed for that customer. The selection is primarily used to reduce the amount of typing you have to do when you create a customer.
Display As Name

The customer’s Display As name will be used during customer searches and List Views. Choose a common name that WorkTrack users would likely enter when searching for a particular customer.

Once you’ve entered a residential name or commercial customer contact name, Display As name options will be available in the Display As drop-down menu. Select a name option, or choose Other from the drop-down menu and enter a custom Display As name.

Site

The customer’s Site is the physical location where work is performed. Once a customer record is created, additional Site’s may be added by going to the Detail record for that customer. Depending upon the terminology you have selected, Site may be referred to as Job, Service Location, Suite, or Unit.

Note: Custom fields created under the Space classification will appear in a customer’s Site record. See Settings>Company>Custom Fields to add, hide, or make custom fields visible.

Service Package

A Service Package describes the services you will offer a customer. You may not be able to choose from multiple service packages. This occurs if you have set up only one service package in Settings>Model Your Business>Service Packages.

Note: Each customer site may be assigned only one service package.

Work Zone

Typically, Work Zone describes the geographic area where a customer’s site exists. Instead of Work Zone, this field may be called Community, Property, or Service Area. Additional Work Zones may be added through Settings>Work Zone>Work Zones. A customer can only be in one work zone.

Custom Fields

Fields created in Settings>Company>Custom Fields under the Customer classification will appear under the General Information tab. Fields created under the Space classification will appear under the Site tab.
Troubleshooting

Frequently Asked Questions

I just created a trial version of WorkTrack Service Management online, but I didn’t receive my log in information through email. Why?

The log in email will be sent to the address you provided when you created the free trial or contacted Corrigo sales. Check that email account. You may also want to check your junk mail folder if you cannot find the email in your inbox.

I have changed settings on the Settings screen, now I can no longer find the Work Order or Work Zone tabs. Why?

The WorkTrack Service Management application allows you to select the terms used in the application. You have probably changed the default term Work Order (to either Service Orders, Service Requests, or Service Tickets) or the default term Work Zone (to either Communities, Properties, or Service Areas). Go to Settings > Company > Terminology to change them back if you do not want to use the current terminology.

I tried to remove a custom field that I created, but it still appears in the customer’s record. Why?

Once you created any custom field, it cannot be removed. Instead, it can be hidden so that no data can be entered into it. If a custom field contains data for a particular record when you hide it, it will continue to show that data, although the data cannot be altered. To delete this data from the particular record, set the custom field to Show (go to Settings>Company>Custom Fields, then select the type of custom field from the drop-down menu), then bring up the record and delete the data. Once the data is deleted, set the custom field back to Hide.
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