The following steps are manual and required until an automated process is finalized and in place.

EMCOR Operations will perform manual steps, which includes opening each WO and saving it, in order for the Goodwill Admin team to perform their steps.

Goodwill Admin Steps:

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- 1) Recommend performing these steps 1x/day. Find a time that works, and be consistent with using that time each day.
- 2) Open Via, click on Work Order Management
- 3) Click Work Orders Find Work Order



4) Find GCNA/GIMV in the Customer Dropdown, and select it



5) Clear out the Requested Date Range (remove the "14")



6) Select Service Provider Not Assigned Status, and no others



a. 🏊 7) Click Search

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- 8) Open each Work Order
- 9) Click Save to clear out the red text notifications.

Save Print	Print Pick Redirect		
- UNSAVED -			
	A new default Activity Code value, 1		
Keep Current Value:	A new default Business Unit value, 6		

10) Click Change Status, select New Work Order (05), click Accept

a.	Change Status	
	Change Status	×
	Select new Work Order Sta	atus below.
	Current Status: (Cancelled (98)
	New Status:	- Select -
	New Status Date:	Closed (02)
	Enter a remark regarding	Closed without Completion (90)
		Completed (99)
		Dispatched (35)
		In Progress (30)
	(New Work Order (05)
b.	Resolution Code: - Se	On Site (37)

11) Click Calculate VLX, Select first option

a.	Calculate VLX							
	Vendor Lookup Matrix							
	Select	Save	Dispatch	Provider ID	Туре	Call Order	Name	
	Select	Save	Dispatch	1175156	VC - Customer Vendor	1	Mood Media (Goodwill M	
h	Select	Save	Dispatch	1164164	CE - Customer Employee	2, 99	Goodwill Fa Admin	

12) Click Save



a. Lick Change Status, select Dispatched (35), click Accept

C	Change Status			
Se	Select new Work Order Status below.			
	Current Status: New Work Order (05)			
	New Status:	- Select -		
	New Status Date:	- Select -		
Er	nter a remark regarding	Acknowledged (32)		
		Approved (31)		
		Assigned (34)		
		Cancelled (98)		
		Closed (02)		
	IT/Telecom and Office B	Closed without Completion (90)		
Re	equest Code Notes	Completed (99)		
M	lusic Systems (517)	Dispatched (35)		
Se	N/A ervice Class Notes	In Progress (30)		

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