Using Yardi’s Mobile Work Order App

Yardi’s Mobile Maintenance iPhone app allows you to access, add and update work orders created by both KRC employees and tenants. Some of the tasks available on the app include:

- Sorting, reviewing and editing work orders
- Adding new work orders
- “Picking up” new work orders
- Logging hours you worked on a work order
- Adding notes, photos, voice messages and signatures to work orders

For information on setting up the Yardi Mobile Maintenance app, please review the crib sheet entitled “How to Set Up Yardi’s Mobile Maintenance App,” which can be found on the Knowledge Base.

Upon logging into the app, you will be taken to the Main Menu.
1. **My Work Orders** – Opens the “My WOs” screen and shows you a list of work orders assigned to you. From there you can select which work orders you want to process.

2. **Unassigned** - Opens the “Unassigned” screen, where you can review work orders that have not yet been assigned to an employee.

3. **Completed** - Opens the “Completed” screen, where you can review the work orders that you have recently completed that are still on your device.

4. **New Work Order** – Opens the “New WO” screen, where you can create a new work order.

5. **Logout** – Logs you out of the app and returns you to the “Sign In” screen.

6. **Sync button** - Uploads completed work orders and downloads work orders assigned to you up to the limit set on the “Sync Record Count” screen.
My Work Orders

1. Tapping “My Work Orders” will display any work orders that have been assigned to you, or that you have picked up.
1. **Menu**: Returns you to the Main Menu.

2. **Sort By**: You can sort your assigned work orders by date, number, property, priority, category or status.

3. **Priority**: color indicates priority of that work order (Red = High; Yellow = Medium; Blue = Low). No color means no priority was assigned.

4. **Search**: use to search for specific text in a work order.

   “Route” – N/A (*plans a route for your assigned jobs*)

2. Tap any work order to open, review and edit it.
Editing/Adding Info to a Work Order

Tap to edit info

Tap to call phone number

Tap to see more details about the request
To log hours on a WO, or add photos, voice memos, or signatures to it, when in the WO, tap “Details” under the “Labor,” “Photos,” “Voice Memos,” or “Signatures” tabs. Tap the plus sign (+) to enter details. Upon completion tap “Save.”

- **Create a new work order for the same property or unit**
- **Add days and hours worked, notes and mark the WO complete**
- **Add quantity and type of materials used** *(not currently configured for KRC)*
- **Add photos taken on your phone to the WO**
- **Record and add a voice message to the WO**
- **Record an approval signature from the WO requestor**
Adding Labor and Notes

1. **Date In:** Automatically defaults to the current date. Tap on the date to edit.
2. **Time In:** Automatically defaults to the time when you access this screen. Tap on the time to edit.
3. **Date Out:** Enter date the WO was completed or status was changed (i.e., if work will continue the next day or WO is pending parts)
4. **Time Out:** Enter the time the WO was completed or status was changed (i.e., if work will continue the next day or WO is pending parts)
5. **Notes:** Select from a list of standard notes related to the status of the WO.
6. **Tech Notes:** Enter any pertinent notes relating to the WO
7. **Complete:** Tap if WO is now complete. Status will change on the app to “Completed” upon syncing. (You may change this later.)
Adding Photos

To add a photo:

Tap the (+) sign from the Photo details screen. Tap “Choose Existing” to select a photo already on your device or “Take Photo” to snap a new photo to add to the thumbnail gallery. You can email the photo or save it to your device.
Adding Voice Memos

You may add several voice memos to one work order.

**To add a voice memo:**

Tap the (+) sign from the Voice Memos screen. Tap the red “Record” button to start recording.
A red banner will appear across the top of the screen telling you the device is recording. Tap the blue pause button to pause your recording, or the stop button when you are finished recording.
Adding Signatures

To add a signature:

Tap the Signature portion of the screen on the work order. A box will appear asking you for the signer’s name. Type the name and tap OK. A blank screen will now display for the signer to sign with their finger or a stylus.

NOTE: Unlike Labor, Photos, or Voice Memos, you may only attach one signature to a work order.
Unassigned Work Orders

Tapping the “Unassigned” menu will open a list of work orders that have yet to be assigned to a technician.

Tap on any work order in the list to open it. Tap the button and then “Pickup” to assign the work order to yourself.

The work order will now appear in the “My Work Orders” menu where you can edit, add attachments, and complete the work order.
To “unassign” yourself from a work order, when in the work order, tap the “Edit” button, change the status to “Unassign,” then tap “Save.” The work order now returns to the Unassigned menu after syncing.
Completed Work Orders

Tap on the “Completed” menu to see work orders you have completed in the last 7 days. You can tap “Sort By” to sort the work orders, or type in the “Search” box to find specific work orders.

NOTES:

- Completed work orders cannot be edited from the iPhone app, only from Voyager.
- The app will only display work orders you have completed. You may log onto Voyager to see additional work orders.
New Work Order

To add a new work order, tap “New Work Order” on the Main Menu (also available on the bottom menu).
Complete the desired fields to create the new work order, and tap “Save” when finished. The work order will appear under the “Unassigned” menu.

You may also create a new WO from within an existing WO for that specific property or unit by tapping the button: