

Work Orders

In SRS' cemetery program, InStone, we developed a key tool called Work Orders. This feature makes it a cinch to assign jobs to your staff. Some tasks might include cut the grass, or install or replace vase. Now, you have a manager for these tasks and making sure they're completed on time.

Start by clicking Work Orders on the top toolbar, then the Work Order Tasks List tab. Here's where you're going to build your task list. We can give you a few examples, but this is completely customizable for your business and creating tasks unique to your cemetery. Click New to create a new task. Give it a name! You can give a description if you'd like, but that's optional. Another option is to assign a staff member who normally performs this job, and click save.

Task Name	Name	Description	Default Staff
Clean Grave	Cut/Trim Grass Around Marker		Simons, Scott
Clean Office			
Complete Interment Authorization			
Cut/Trim Grass around Marker			
Flag Grave			
Install Bronze/Lettering			
Install Veterans Bronze			
Install/Replace Vase			
Monument/Marker			
Obtain Lot Card			

You can enter as many tasks as you'd like until you have a dynamic list for any person in the program.

The Templates tab is where you can create to do lists with multiple tasks included. If you have a general task, such as Clean Grave, you can include tasks such as cut grass, replace vase, replace granite, etc. That way, when this "list" is assigned to a staff member, you can ensure everything will be completed associated with that grave. Use these arrow buttons to move tasks in and out of the template list of included tasks.

Template Name	Included Tasks	Task Pool
Clean Grave	Install/Replace Vase	Clean Grave
	Refill/Seed Grave	Clean Office
	Replace Granite	Complete Interment Authorization
	Cut/Trim Grass	Flag Grave
		Install Bronze/Lettering
		Install Veterans Bronze
		Monument/Marker
		Obtain Lot Card

Now, move into the Work Orders tab. Here's where you'll assign your individual tasks or templates to employees. Click New to assign a new task. In the Requestor box, select your name since you're assigning the task. Select a foreman from the drop down. Add a description, which will be used as a "title" for this task. Give it a due date. In the Workers Assigned box, select as many staff members as you'd like in charge of completing this task, then click Add to put them on the list.

Description	Date Issued	Date Due
Marker Install	2/26/2015 3:18 PM	2/26/2015
Opening and Closing	3/31/2015 4:07 PM	3/18/2015
Open and Closing	4/1/2015 9:33 AM	4/1/2015
Clean Grave	2/3/2015 2:46 PM	4/1/2015

Requester	Foreman	Description	Date Due	Grave	Workers Assigned
Lawrence, John	Lawrence, John	Marker Install	2/26/2015	Section H, 10, 1	Simons, Kimberly Simons, Scott

Now assign your tasks or templates that need to be completed. You can select templates from the drop down and click Add to place it on the list. If you want to assign individual tasks instead of a list, click Show Task Pool. This will bring the list of every task you entered. Use the arrows to move tasks in and out. Any notes can be added in this section if you'd like to add them. Click Save at the top when you're finished creating this task.

Needs done ASAP 9/25/2015 9:05 AM 9/25/2015

Requester: Bouvy, Alyssa

Workers Assigned:

Add

Foreman: Best, Adam

Name

Remove

Description: Needs done ASAP

Best, Adam

Date Due: 9/25/2015

Simons, Kimberly

Grave: Section G, 17, 2

Associate Current

Clear

Select and View

Included Tasks: Template:

Add

Show Task Pool

Task		Date Due	Staff	Date Completed
Cut/Trim Grass	<input type="checkbox"/>	9/25/2015		
Install/Replace Vase	<input type="checkbox"/>	9/25/2015		
Refill/Seed Grave	<input type="checkbox"/>	9/25/2015		

When an employee completes a task, they'll check the box. It'll also be date and time stamped to show you when it was finished! Completed work orders can also be seen in the space information section.

Task lists can be printed simply by clicking the printer icon at the bottom.