

Welcome Guide:



Professional Services

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Introduction



Welcome to WrkOrd^r



Thank you for trusting us with your business. Whether starting a new business or managing an established one. As a new customer we look forward to supporting your efforts and want to make sure you are up and running on the platform.

We created this guide to get you started and make sure you can access support if and when you need it.

Getting Started



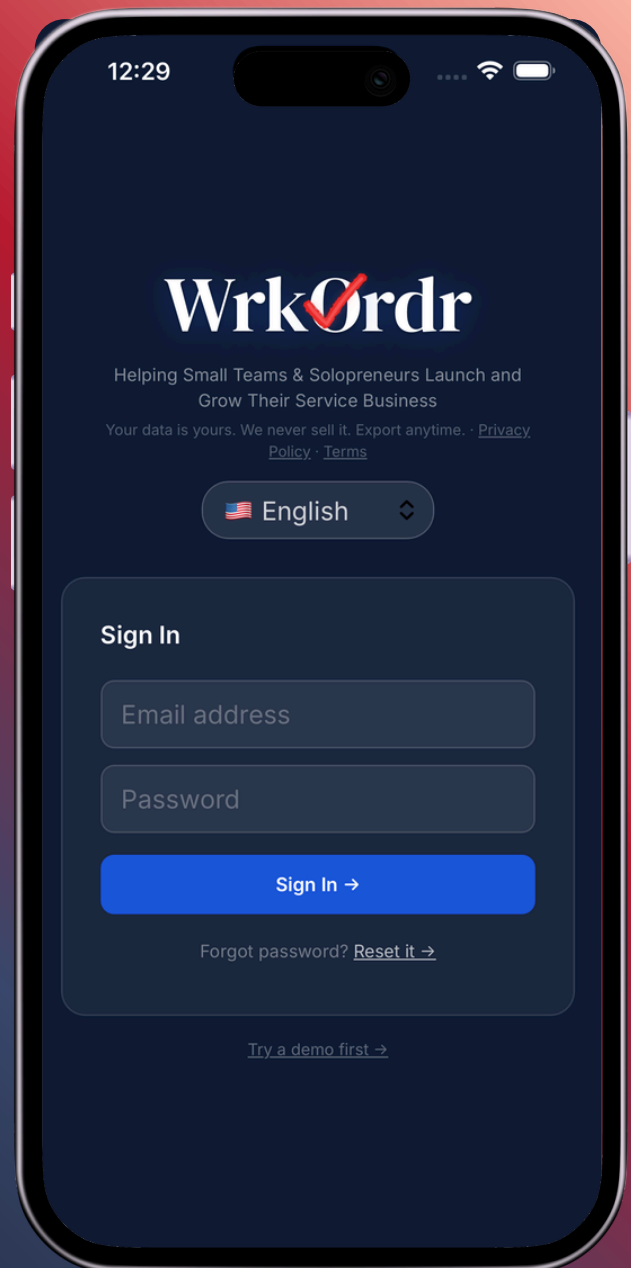
Setting Up Your Account (~5 Minutes)

- If you have not already go to getwrkordr.com/signup and follow the steps
- Once completed go to getwrkordr.com/signin

You will start with a 14-day trial, no credit card required. After the 14 days your account will switch to view only mode.

You can still export and view your information, but thats it.

- But for now, follow the set up wizard. Select the layout that best fits your needs, enter some information and you are ready to get started.



The WrkFlow

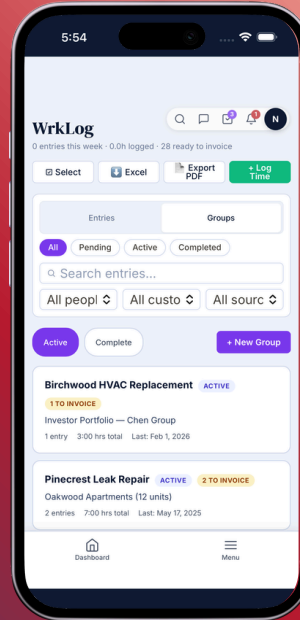
Simple Process Big Results



1

The WrkLog:

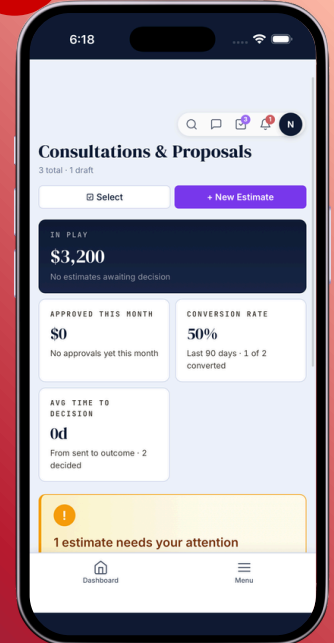
- This is where your business lives. Track every matter, case, or property in one place.
- Log billable time as it happens with built-in timers — or enter manually.
- Attach documents, communications, and expenses to the right matter. Bill rates apply automatically.



2

Consultations & Invoices:

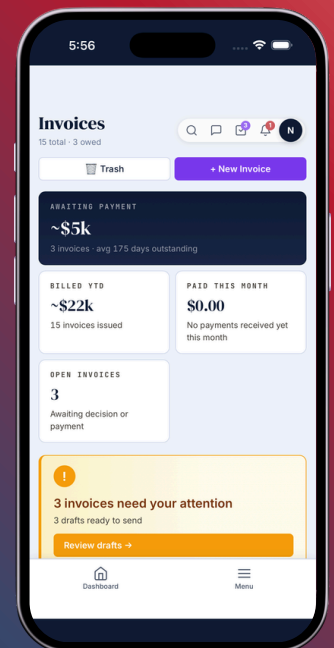
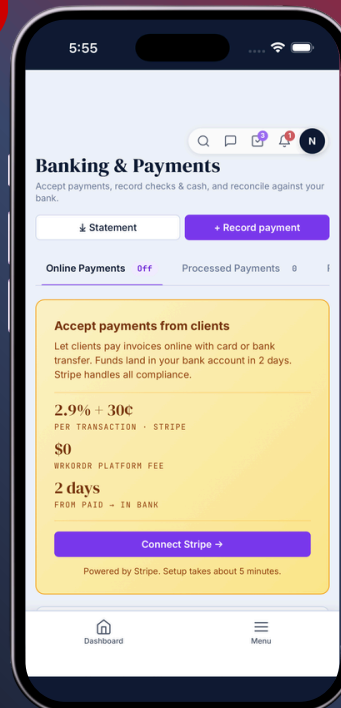
- Send consultations (estimates) for new clients and convert approved ones into matters.
- Generate detailed invoices from time logs in seconds.
- Apply retainers, send statements, and get reminders for past-due balances.



3

Payments & Billing:

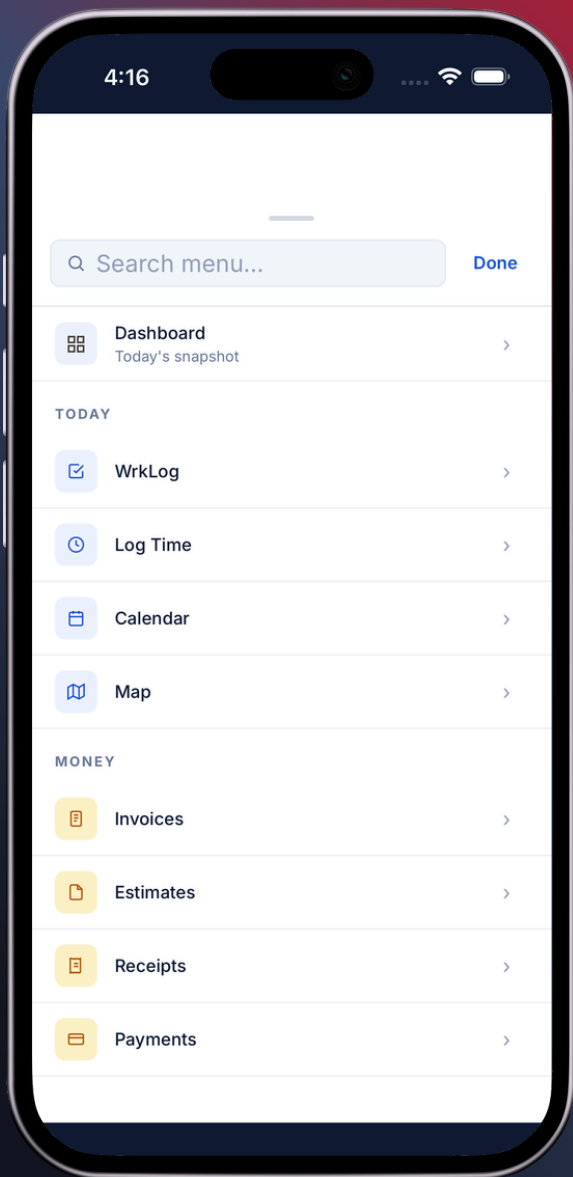
- Accept payments online.
- Connect your bank account for automatic reconciliation.
- Download CPA-ready summaries anytime — built for professional services billing standards.



Key Features & Next Steps



All the tools you need to
Start Run & Grow Your Business



- ✓ Go to the menu to check out the other tools like equipment and inventory management, customer management, payroll & more
- ✓ If you have any problems using the platform please contact us or check out our enablement videos at <https://www.youtube.com/@WrkOrdr>
- ✓ For any and all questions or concerns, contact information is available on the next page.

Contact Us



WrkOrdR

TOOLS TO START, RUN & GROW YOUR BUSINESS

Email

For help with the app,
desktop platform or tech
issues -
support@getwrkordr.com

For assistance with sign up,
cancelling and all inquiries -
contact@getwrkordr.com

Phone

Call us at
(201) 419-5386
Monday-Friday
8:00AM-6:00PM EST.

If no one is available to
take your call please
leave a message and
we will follow up with
you shortly.

App

Submit Feedback from
the Help/Settings
section of the App for
bugs and feature
suggestions