

# Welcome Guide:



## Trades & Field Services

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# Introduction



# Welcome to WrkOrd

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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.

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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)

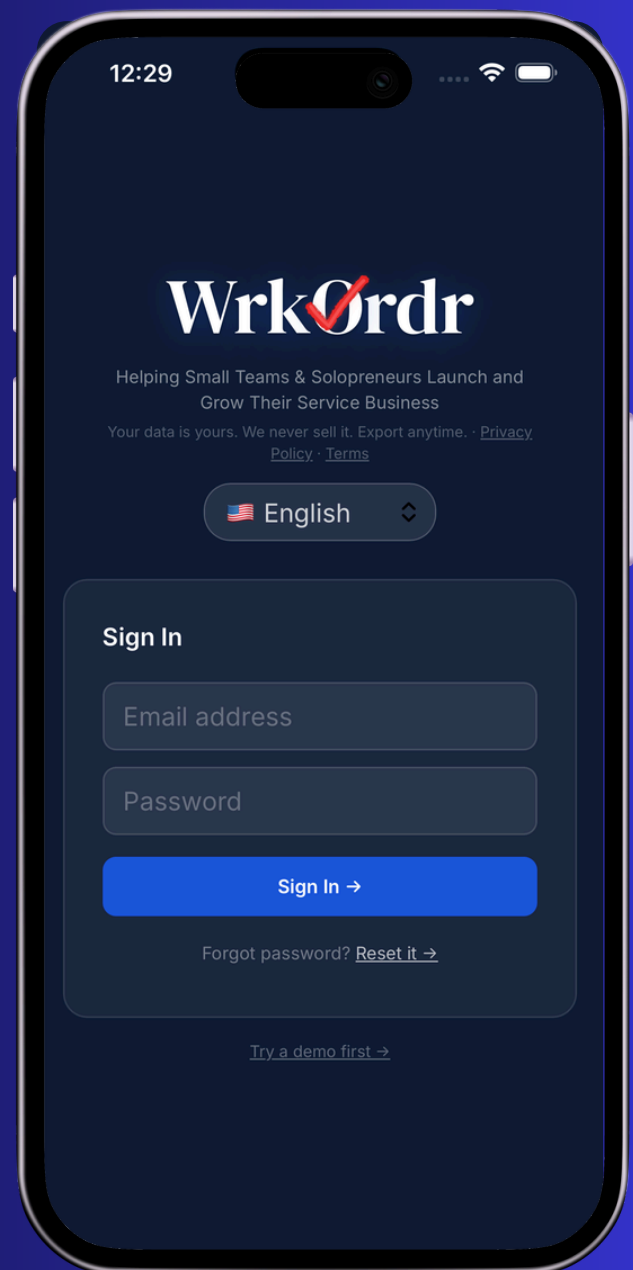
➤ If you have not already go to [getwrkordr.com/signup](https://getwrkordr.com/signup) and follow the steps

➤ Once completed go to [getwrkordr.com/signin](https://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



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### The WrkLog:

- This is where your business lives. From here you can schedule work, record tasks as they are completed, and even attach photos and expenses as they occur.
- Employees log their time and activities so you don't spend Friday afternoon chasing timecards.

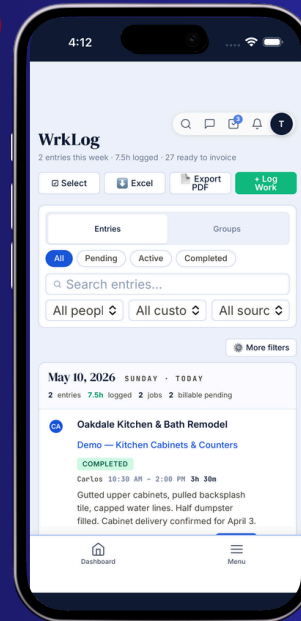
2

### Invoices:

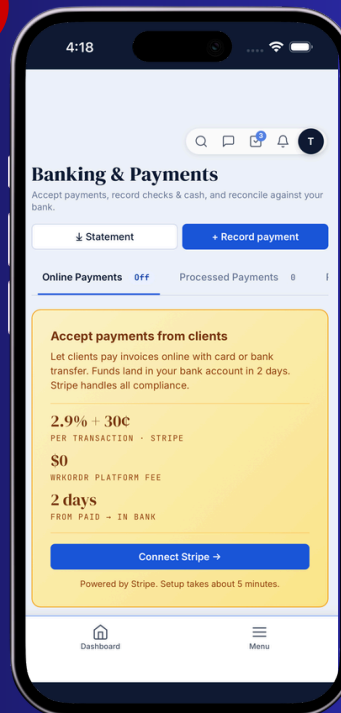
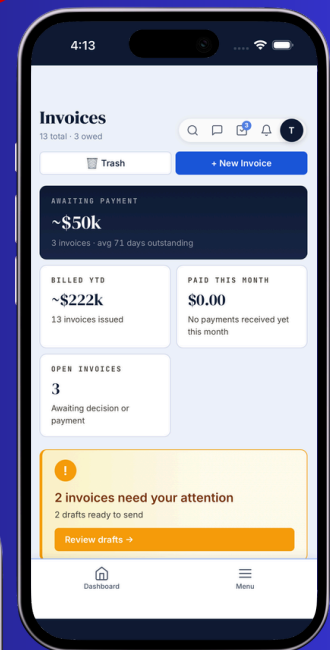
- After a WrkLog Entry is completed, you can generate an invoice in seconds.
- Pass through expenses and photo documentation are automatically added to the invoice.
- Get reminders for past due invoices and download a CPA friendly summary anytime.

### Payments & Billing:

- Accept payments online and connect your bank account account for automatic bank reconcilliation.
- WrkOrdr enables faster payouts and cleaner books because nothing falls through the cracks.



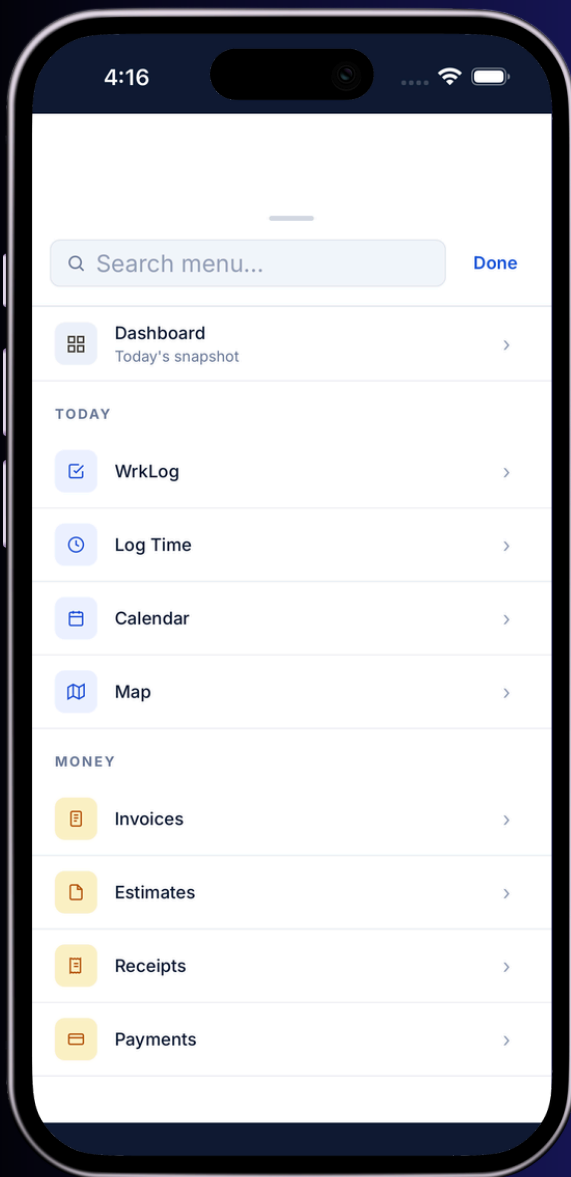
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# Key Features & Next Steps



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/@WrkOrder>



For any and all questions or concerns, contact information is available on the next page.

# Contact Us



# WrkOrd

TOOLS TO **START**, **RUN** & **GROW** YOUR BUSINESS

**Email**

For help with the app,  
desktop platform or tech  
issues -  
[support@getwrkordr.com](mailto:support@getwrkordr.com)

For assistance with sign up,  
cancelling and all inquiries -  
[contact@getwrkordr.com](mailto: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