



List Types – How to Add

List/Request Types are the organizational tool used to hold the Items/Work orders and typically reflect the timeframe of when the work is submitted.

To add a List Type go to the top blue toolbar Setup > System Setup > Settings> List Types and select New Entry .

List Types:

Description	Abbrev.	Order	Status	Show in Job Portal	Submit in Job Portal	Show in Project Status Report
Pie-close Walk Through		1	Active	Yes	No	Yes
90 Day		2	Active	Yes	No	Yes
Warranty		3	Active	Yes	No	Yes
11 Month		4	Active	Yes	No	No
Past Warranty		5	Active	Yes	No	Yes
Emergency Request		6	Active	Yes	No	Yes
Portal Request		7	Active	Yes	Yes	Yes



Type the label of the List in the Description field

If you want the List Types shown in a specific order you can designate that order here.

If you want the List to be viewable by the homeowner in the Portal this will need to be check marked.

If you want the homeowner to be able to select this List Type to submit in the Portal this will need to be checked.

Typically, all List Types should Show in the Project Status Report (this is an internal report).

Select the disk icon to Save the List Type

Description:
 Abbreviation:
 Order:
 Status: Active ▼

Show in Job Portal
 Submit in Job Portal
 Show in Project Status Report





NOTE: This is an Administrative function only.