NAMFS Generic Method to Define a Work Order

Background and Definitions

Companies that provide field services to the mortgage industry, referred to generically as "**Work Providers**". Work Providers must provide work requests ("**Work Orders**") that may require field questions to be answered at the various properties they service. These properties are typically serviced by their field network which is often referred to as the vendor network or "**Vendors**".

Work Providers may create their work orders and related questionnaires for their internal use or be provided with required questions and statusing from their customer. Work Provider's customers are typically referred to as their "**Client**". Work Providers are typically contracted by their customer to visit, or have their Vendor visit an asset or property and provide answers to related questions to determine the status of the asset. A Client acting as the first Work Provider may hire the 1st tier Vendor, who is in turn a Work Provider that may re-assign their field work to a 2nd tier Vendor to the original Client. Each Work Provider in the supply chain may require their own set of questions from their Vendors.

A collection of questions completed electronically, on paper or both is typically called a "**Questionnaire**", a "**Form**" or a "**Survey**", and collectively be called a "**Survey**" if completed electronically and a "**Form**" if completed on a printed piece of paper. A **Questionnaire** refers to both a question set defined on paper (a Form) and a related question set presented electronically (a Survey).

A Survey is typically provided and completed on a mobile device or via a web browser. A distinction should be made between a "**Mobile Survey**" is done on-site by the field professional as the work is performed and may be verified by a GPS enabled time and date signature, versus a "**Desktop Survey**" which is filled out using a web browser or desktop computer software after the field work has been completed. Desktop Surveys may be completed by the field professional or others acting as his/her agent based on field notes captured by the field professional typically communicated on a paper Form or other methods of note taking.

Surveys allow for conditional questions that may be triggered or enabled based on the answer to a previous question's answer as the Vendor is completing the Survey. This triggering of questions based on previous answers is typically called "**Skip Logic**".

NAMFS Standard Solution

NAMFS proposes a recommended method for the mortgage field service industry to define and share both electronic and paper based Work Orders among member companies and a recommended method on how to share/consume the Work Orders and related data collected on each Work Order.

Method to define a Work Order request

A Work Order must contain at a minimum the following information:
- Assigned Work Order ID (defined by Work Provider)
- Property Address
- Due Date
- Assigned Vendor ID (defined by Work Provider)
- Array of Services to be performed (a minimum of one Service required)

Each Task or "**Service**" in the Service array must contain at a minimum the following information
- Assigned Service ID (ID is a child of the parent Work Order ID)
- Service Name
- Service Description
- Service Questionnaire (if applicable) and related question photo requirements

OR
- Service Photo requirements (if applicable) and appropriate photo labels

Method for Work Provider to share a Work Order with a Vendor

Paper based Work Order must have at a minimum the fields needed to share work requests with a Vendor without violating privacy concerns of their Clients. Committee will define basic requirements recommended by NAMFS.

Electronic sharing of Work Orders can be done via a web portal provided by the Work Provider to allow the Vendor to download and print out the related Work Order, or by using Vendor Order Management tools, import the Work Order and complete the Work Order within the Vendor's preferred Order Management System ("**OMS**") tools available to the Vendor.

Method for Vendor to share Work Order status and related artifacts with the Work Provider

A JSON file is recommended to define the basics of a Work Order with the minimum fields defined above.

Data Element	Required	Updateable	Default	Description
workOrderNumber	Y	N		Work Order/Project Number; this will be displayed in as "{client code}::workOrderNumber".
workOrderInfo	N	Y		Work Order information that is displayed on the work order details screen on Mobile. Useful for lock box codes etc.
address1	Y	N		Address line 1
address2	N	N		Address line 2
city	Y	N		City
state	Y	N		State

zip	Y	N		Zip
county	N	N		County within a State
country	N	N		Country
assignedTo	N	Y*		OMS Subuser to assign to. To assign to all subusers on an account set assignedTo: "~all~".
status	N	Y*	Un-assigned	OMS status. *Internal integrations can directly update, external integrations can indirectly update
dueDate	N	Y*	Today	Field due date, set by Work Provider on creation. See more info in the Date Fields section.
instructions	N	Y*		Instructions for the field - viewable on device. These are displayed as 'webviews'. This field can contain light HTML formatting to include: headers, text styling (bold, etc), line breaks, href links, etc. An example of what won't work is embedded video. *Internal integrations can directly update, external integrations can indirectly update - see OMS Integration Types below.
clientStatus	N	Y		Client order status, controlled by Work Provider
clientDueDate	N	Y		Client due date. Controlled by Work Provider. See more info in the Date Fields section.
clientInstructions	N	Y		Client instructions, controlled by Work Provider.
description	N	N		Description; only viewable in OMS – cannot be updated by the integrations.
reference	N	Y*		Reference; only viewable in OMS.
attribute7-15	N	N		Optional attributes
gpsLatitude / gpsLongitude	N	N		GPS Lat/Long are used to specify the property address. If not provided OMS will geo-locate the address.
options	N	N		A JSON string for Mobile Configuration Options set at the Work Order level. See options section for details.
startDate	N	Y		Setting a startDate will prevent the project from opening on Mobile before the startDate.
source_wo_id	N	N		The work order ID as determined by the source work order provider
source_wo_number	N	N		The work order number as determined by the source work order provider
source_wo_provider	N	N		The (ultimate) source work order provider (the Tier one provider)
services	Y	Y		See related **service** Object. An object containing the work order's services; at least one service/task is required on create. Services are not required for updates. If services are included on an update ALL the services must be included. Missing services will be deleted.