WorkTrack Quick Reference

Sign-In to WorkTrack

1. Using Internet Explorer, go to:
   http://provider.worktrack.com
2. Enter: username, password, company name
   (as provided) and press "Sign In"

3. You will see the service request list page

Accept New Work

1. Select the "Waiting on Acceptance" view (a)
2. View request details by clicking on the request number hyperlink (b)
3. Change status to "Accept" by clicking on the
   👆▾ icon.
4. Enter notes and click "Ok"
5. The request will disappear from the "Waiting on Acceptance" view
   and appear in the "Accepted" view (Note: to refuse new work, select
   "Cancel")

Complete Work

1. Select the "Accepted" view
2. Find the request and open it
3. Attach a copy of your regular or original invoice to the work order
4. Select the ☑ status icon and choose "Complete"
5. Enter details in the completion notes field and press "Ok"

Submit an Invoice

1. Find the completed work order in the "Completed" view (c)
2. Click the hyperlink to view details (d)
3. Click "edit" to view the invoice (e)
4. Add your charges -- every invoice must include parts, labor, and tax
   (enter $0 if not applicable)
5. Add an invoice number -- it must only be the original invoice
   number as it appears on your physical invoice. (f)
   • Do not use or include the work order number. The work order
     number will be added to the invoice number automatically by
     the system after payment is processed.
   • Enter only one invoice number per work order (only one
     invoice can be paid per work order)
   • Do not use dashes, slashes, periods, commas or any other
     special characters (#@%&*(){}+-^, etc...)
   • Any letters used in the invoice number must be capitalized (a
     must be A)
   • Limit your invoice numbers to 13 characters

> *Ensure that you are tracking and communicating internally what your
> invoice numbers are and to which work orders they are applied. As
> mentioned above, the work order number will be added to the invoice
> number automatically by the system after payment is processed. This
> means that payments (electronic and physical) will reference your
> company's invoice number with the work order number added to the
> end and will appear as one number. Example: If your invoice number
> is 12345 and the work order number is 600010001, the invoice number
> reference in your payment will be 12345600010001.*

6. When you're finished and ready to send the invoice, click the submit
   button (g)
   (Note: You cannot submit an invoice before the request is

prepared for: