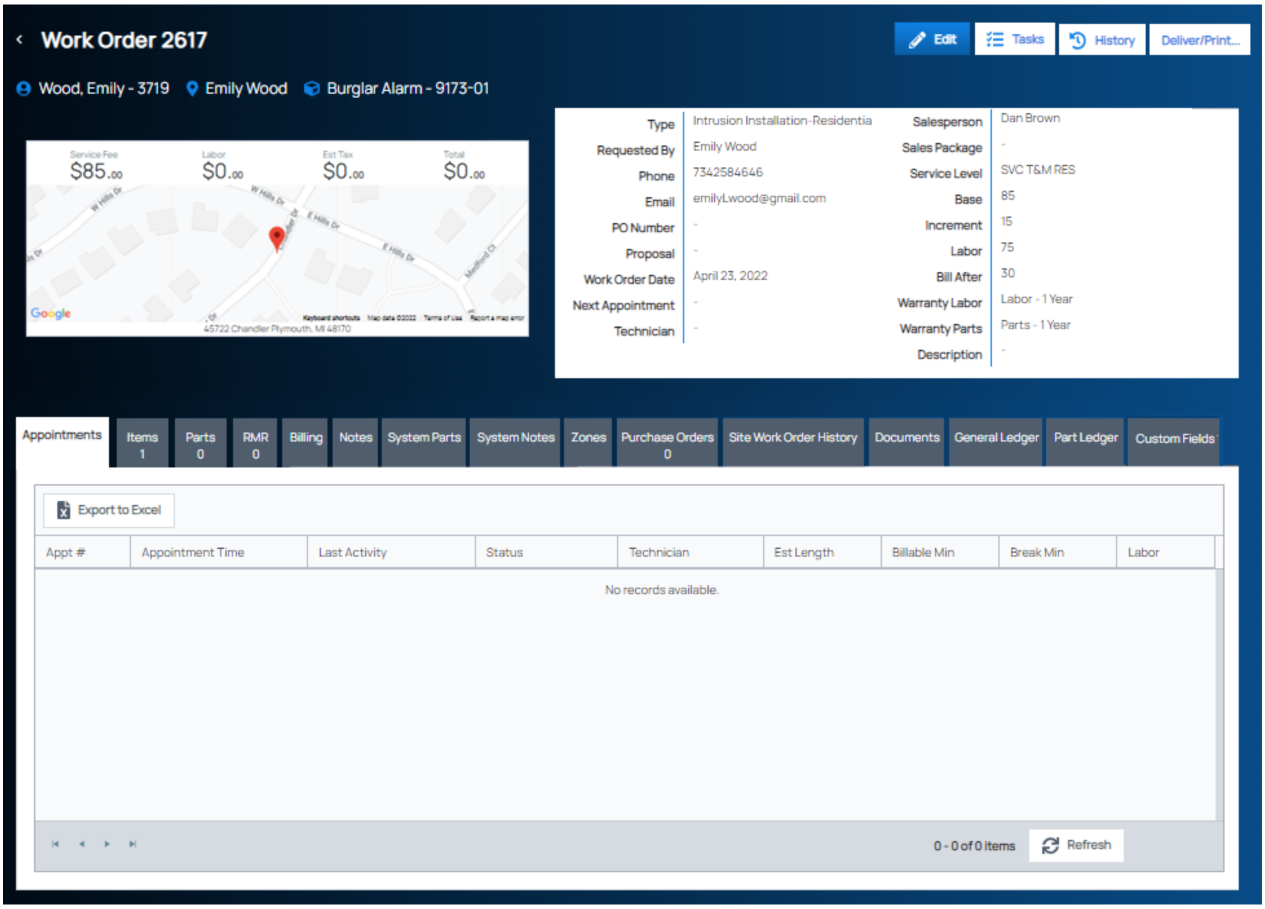
Work Order Record Definitions

Last Modified on 05/06/2022 9:29 am EDT

Once a new Work Order is saved, several tabs are displayed in the lower panel of the page. When clicking on the Edit button at the upper right of the work order page, additional buttons will be exposed on the various tabs to add data. Each of these tabs will be explained below.

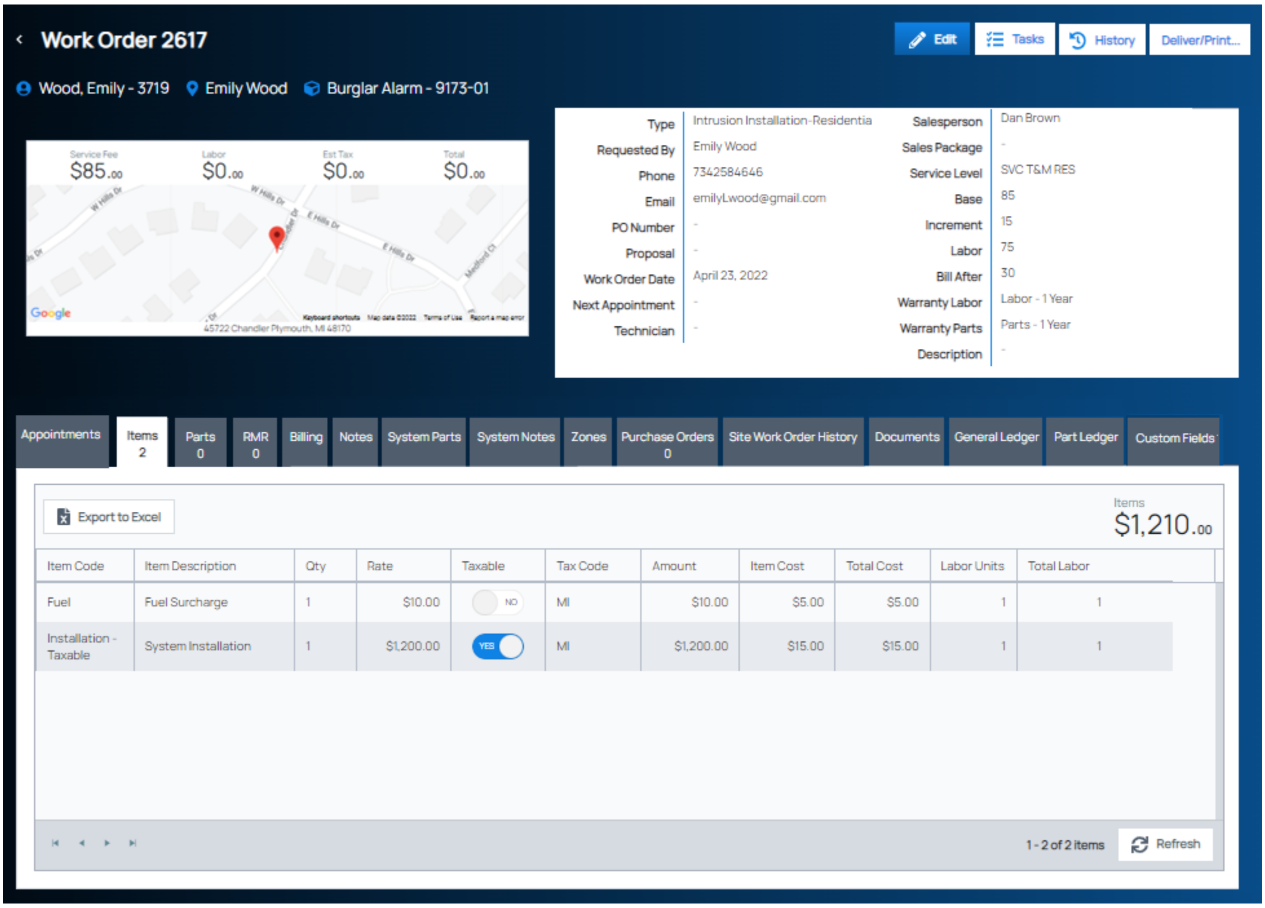
Appointments

This tab will display all scheduled technician appointments for the work order. If the work order is in edit mode, new appointments may be added.



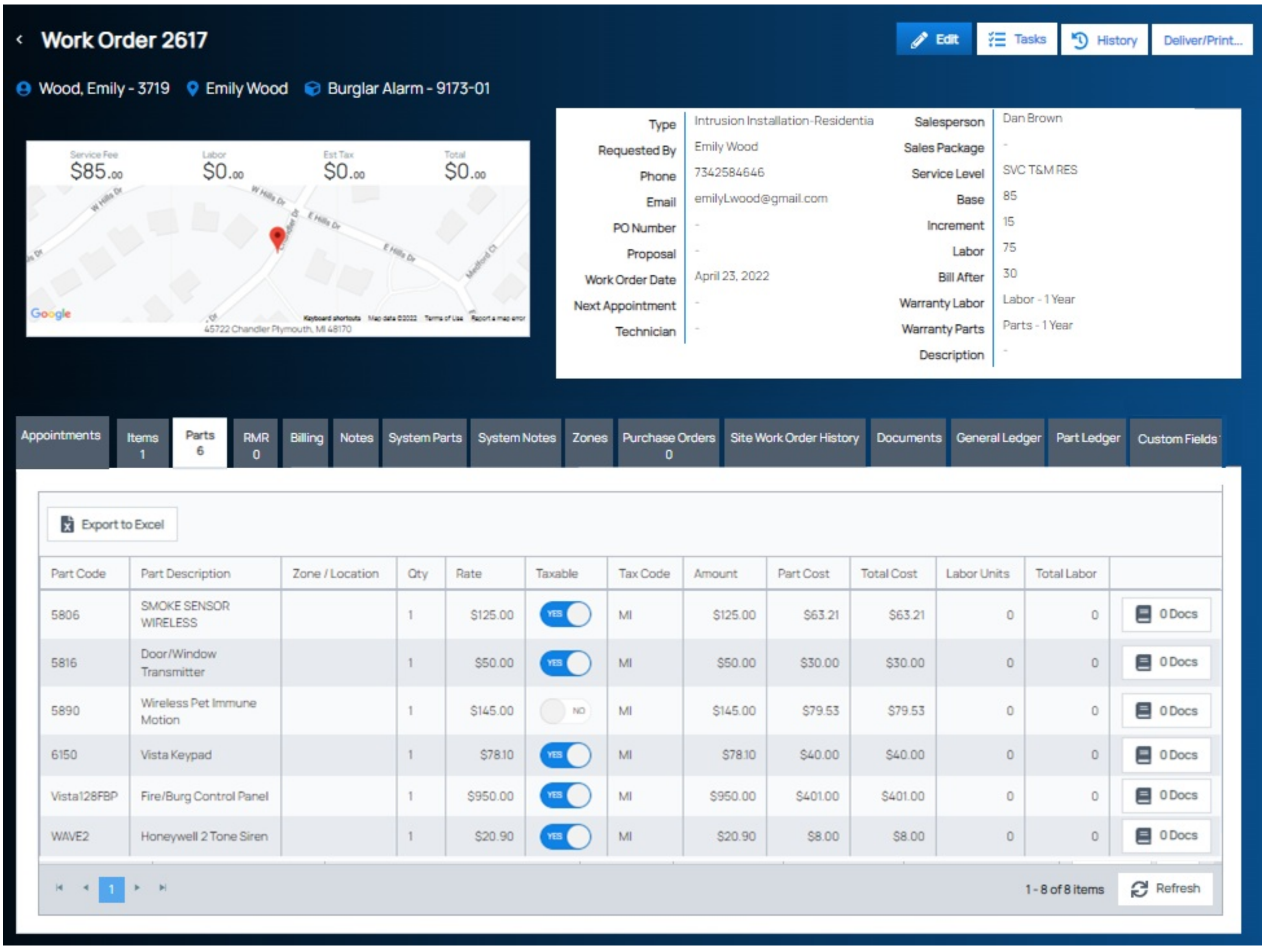
Items

The Items tab will display all invoice items which have been added to the work order. If the work order is in edit mode, new items may be added, edited, or deleted.



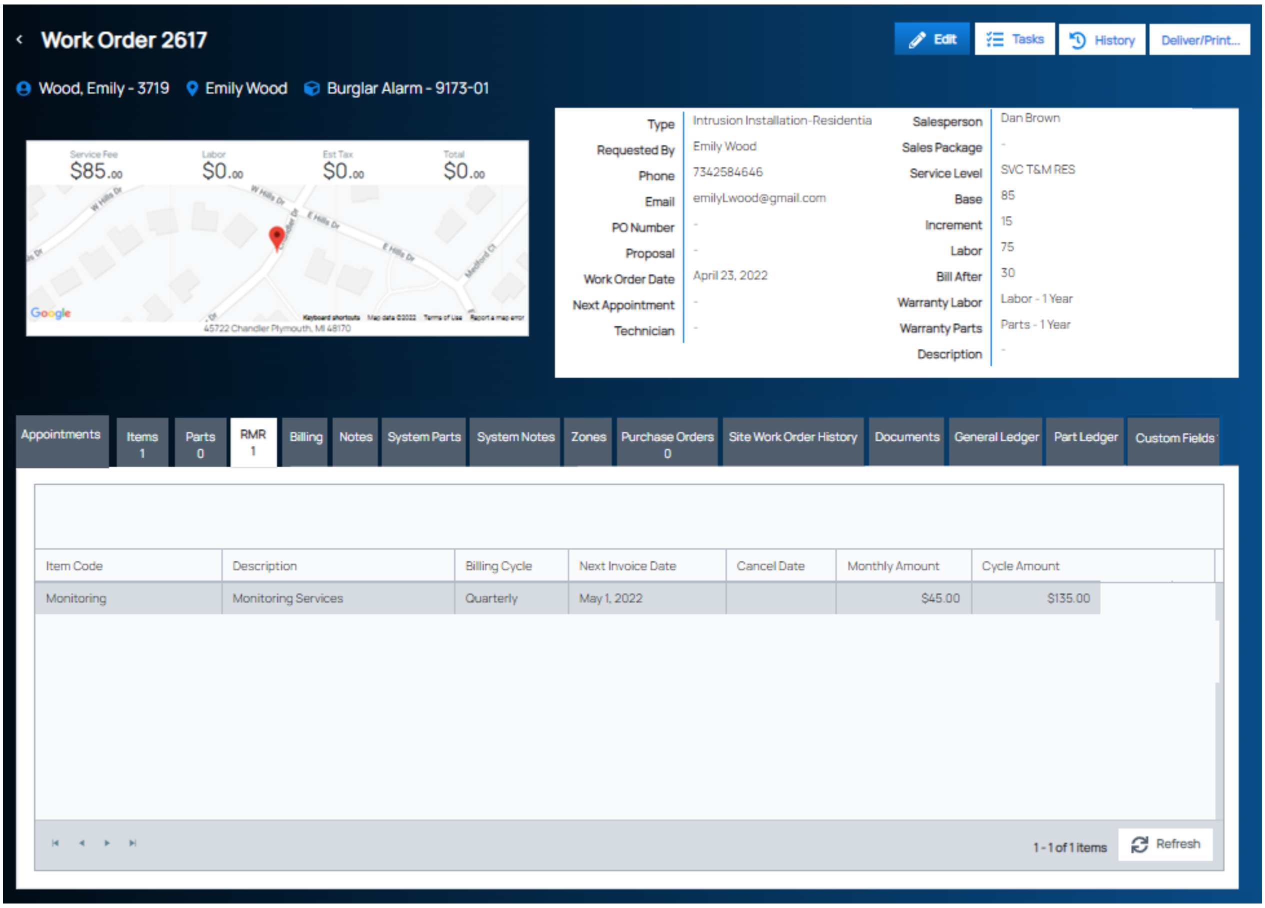
Parts

The Parts tab will display all inventory parts which have been added to the work order. If the work order is in edit mode, new parts may be added, edited, or deleted.



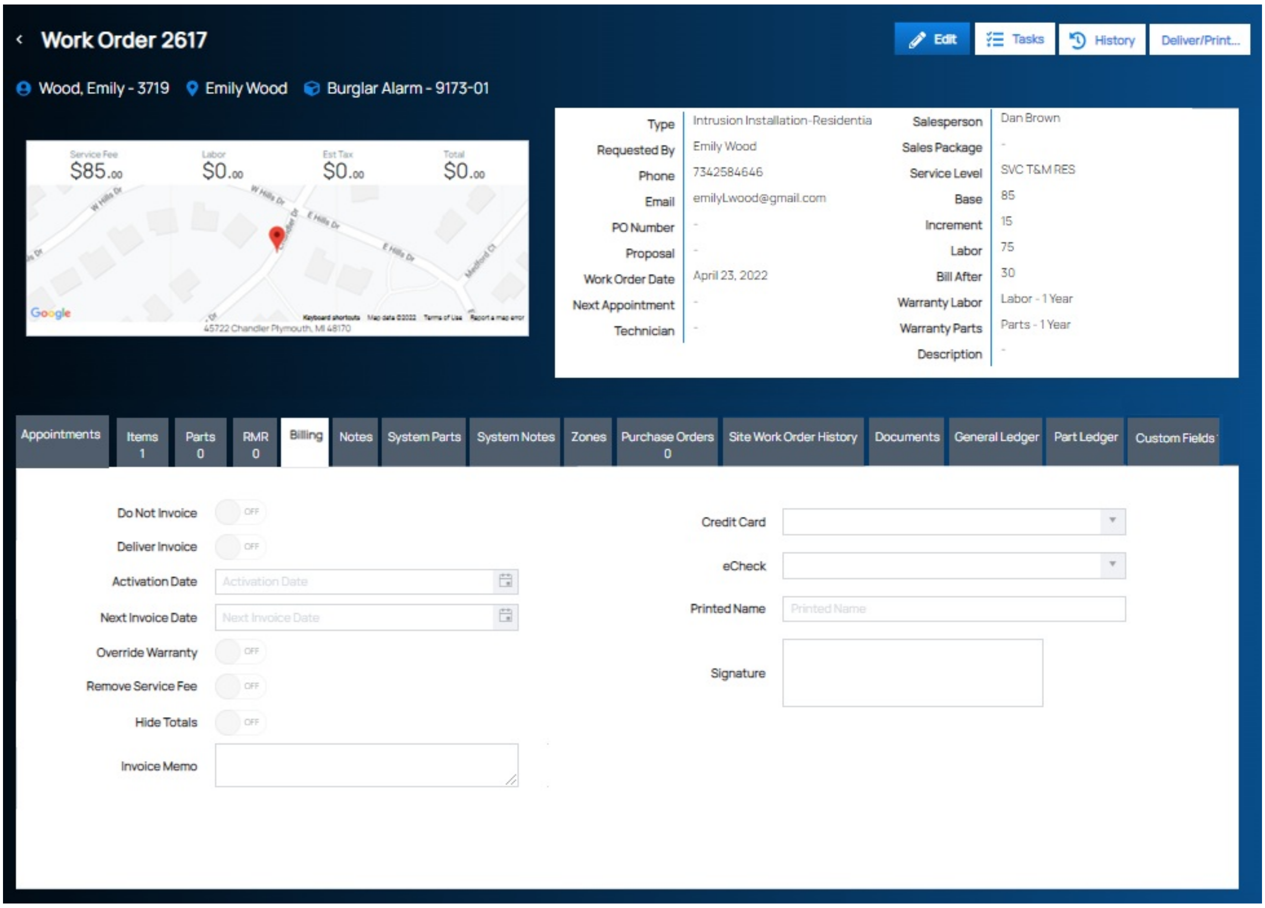
RMR

If recurring services were sold on the work order, this tab is used to add those recurring type invoice items.



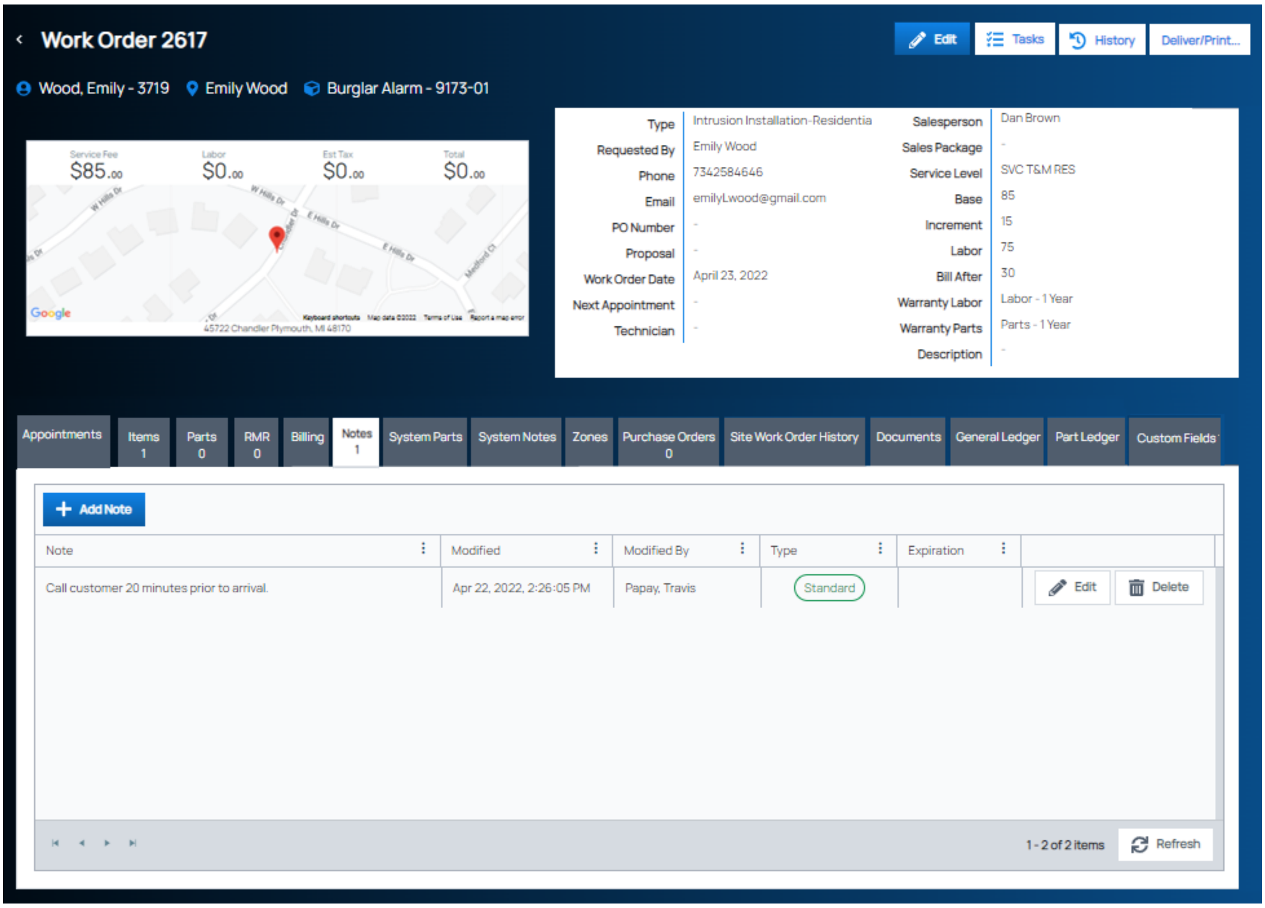
Billing

The Billing tab contains options, which control if and how the customer will be invoiced for charges on the work order.



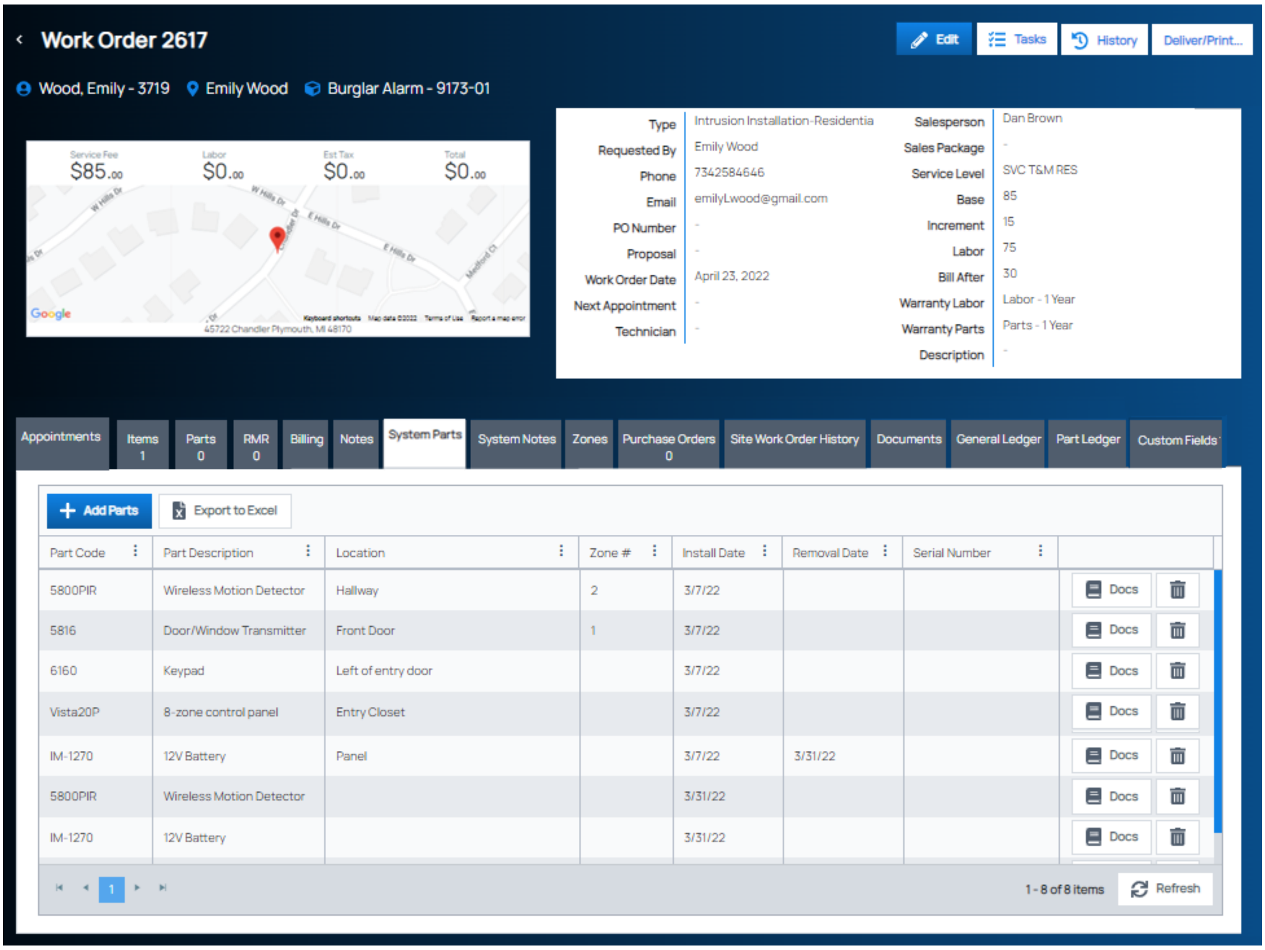
Notes

Any notes associated with the work order are entered, edited, or deleted from this tab.



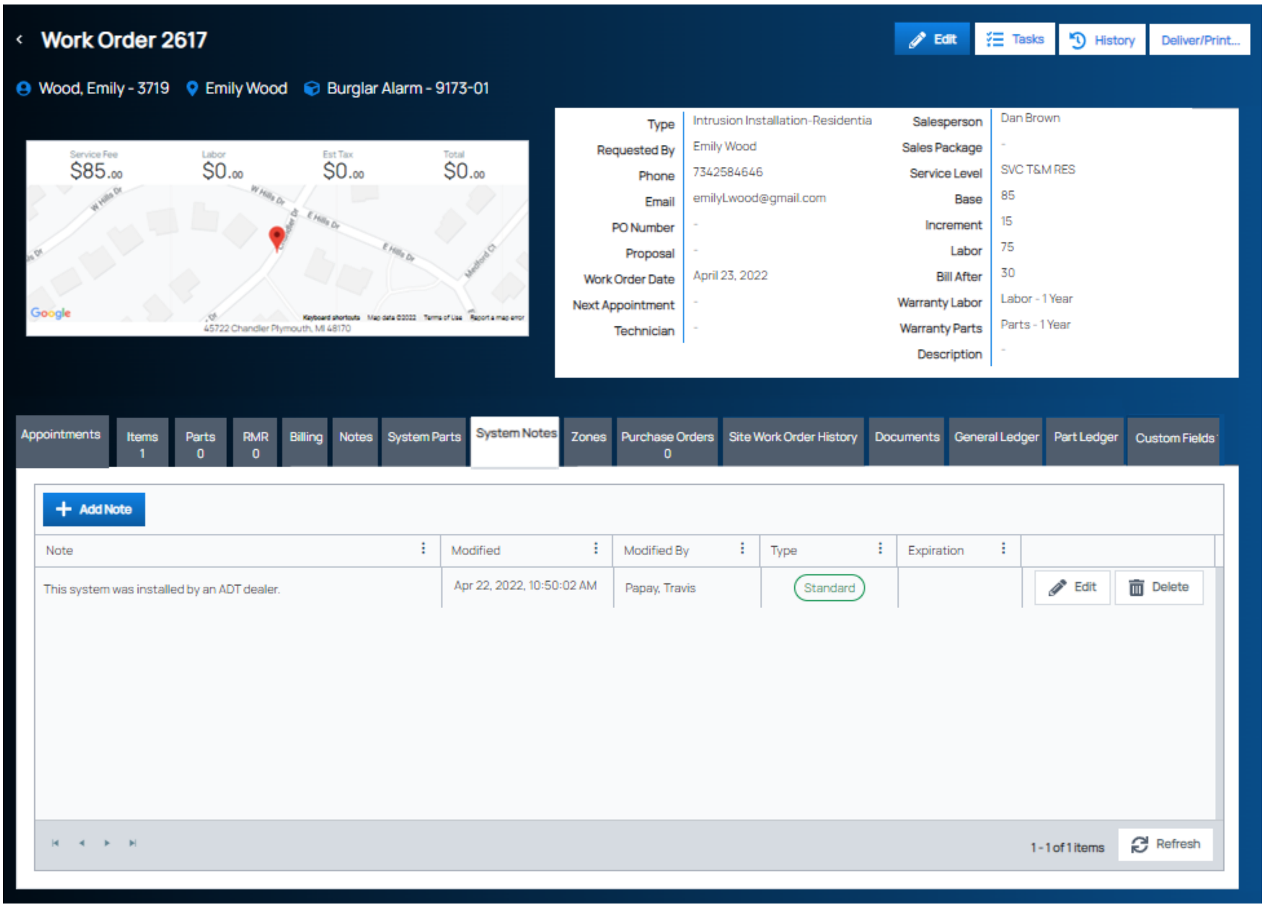
System Parts

If a list of installed parts is setup on the Site or System they will be displayed in the grid area. Users are able to add, edit or delete parts from this list.



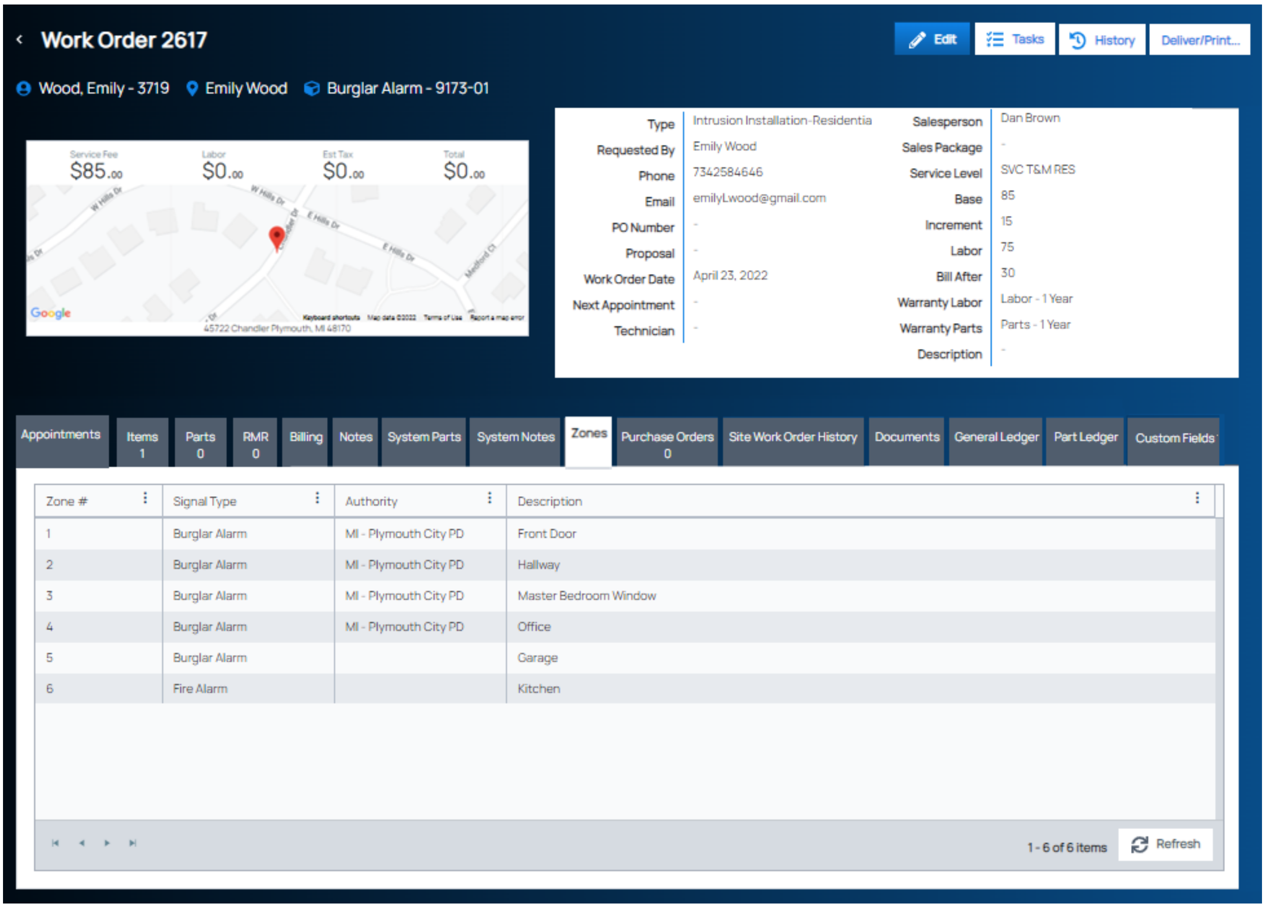
System Notes

If the work order is linked to a System record, all notes entered on the system record will be displayed. Additional notes may be added, and existing notes may be edited or deleted.



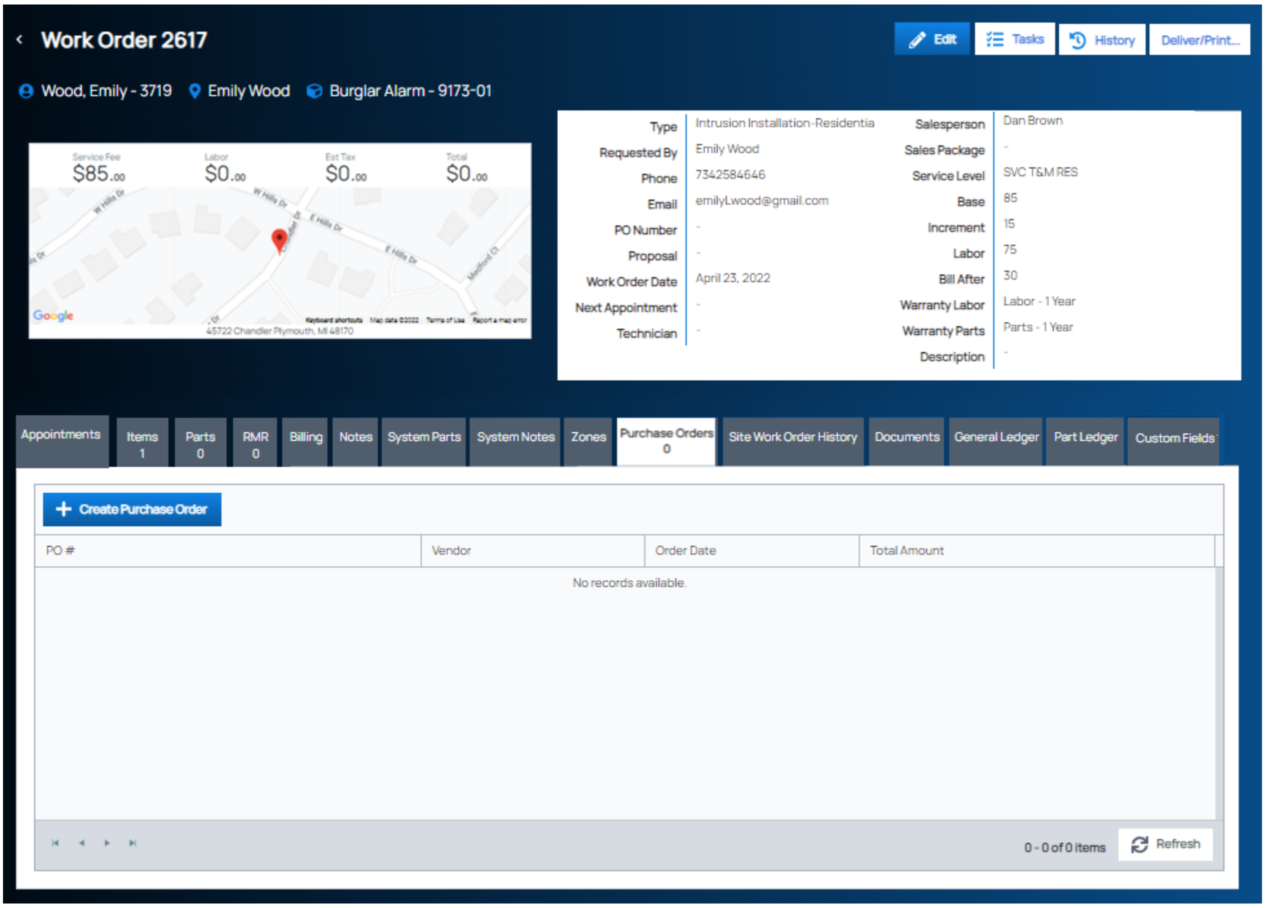
Zones

If a zone list was entered for the Site or System associated with the work order, the zones will be displayed. If the work order is in edit mode, new zones may be added, and existing zones may be edited or deleted.



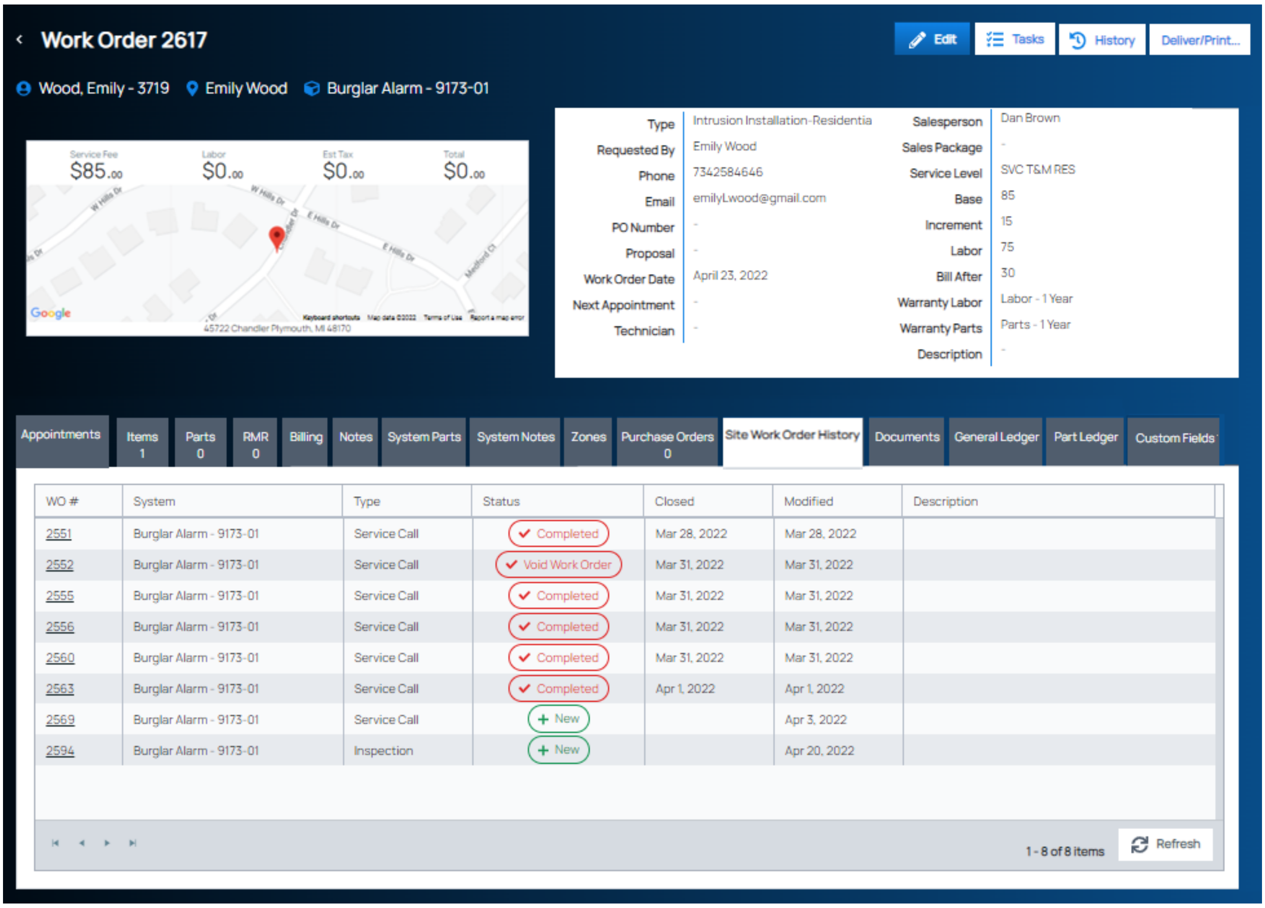
Purchase Orders

Any purchase orders created which are linked to the work order will be displayed. Users are able to create new purchase orders and edit or delete existing purchase orders.



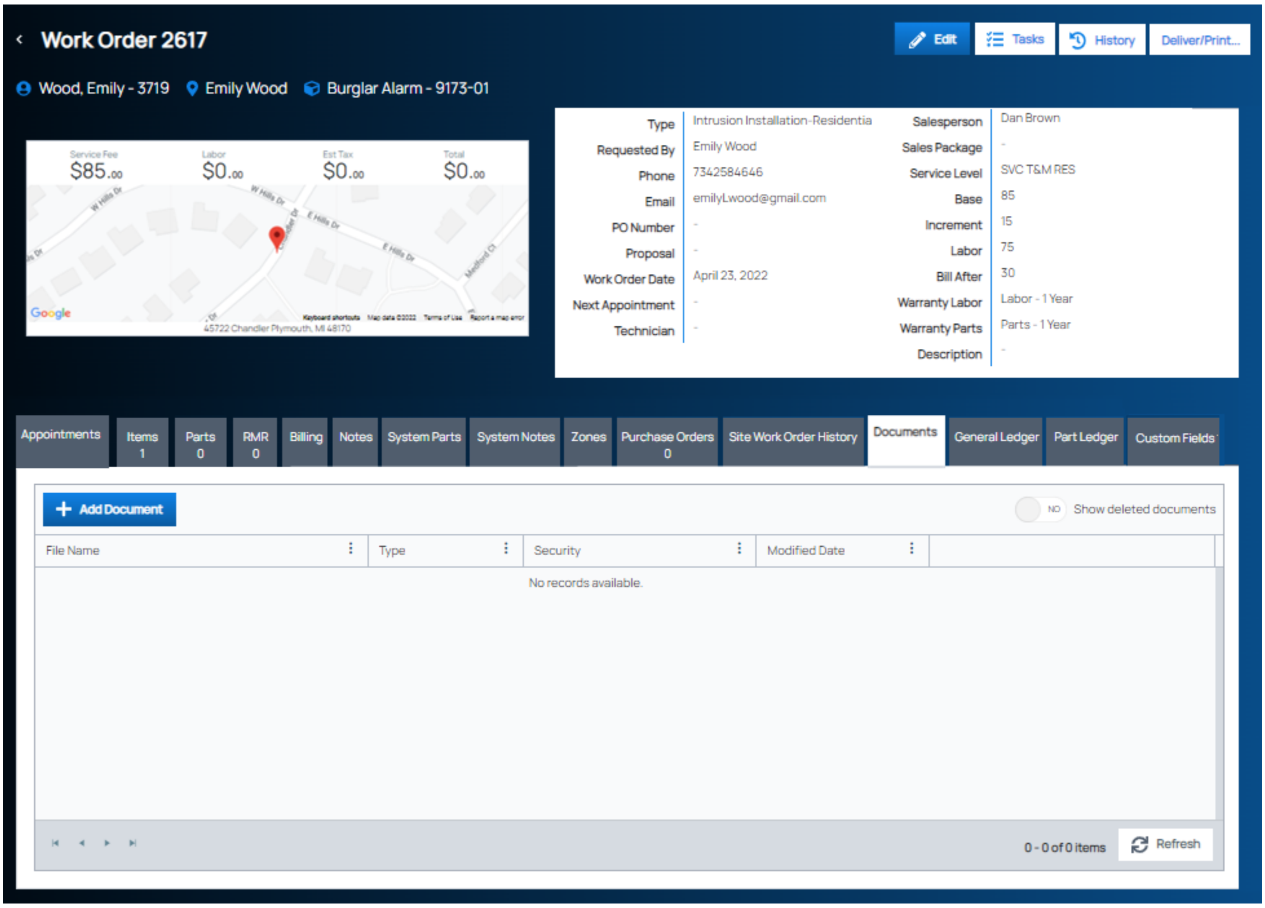
Site Work Order History

All open and closed work orders associated with the Site or System will be displayed. Users may click on the hyperlink of a work order within the grid to open and view the work orders.



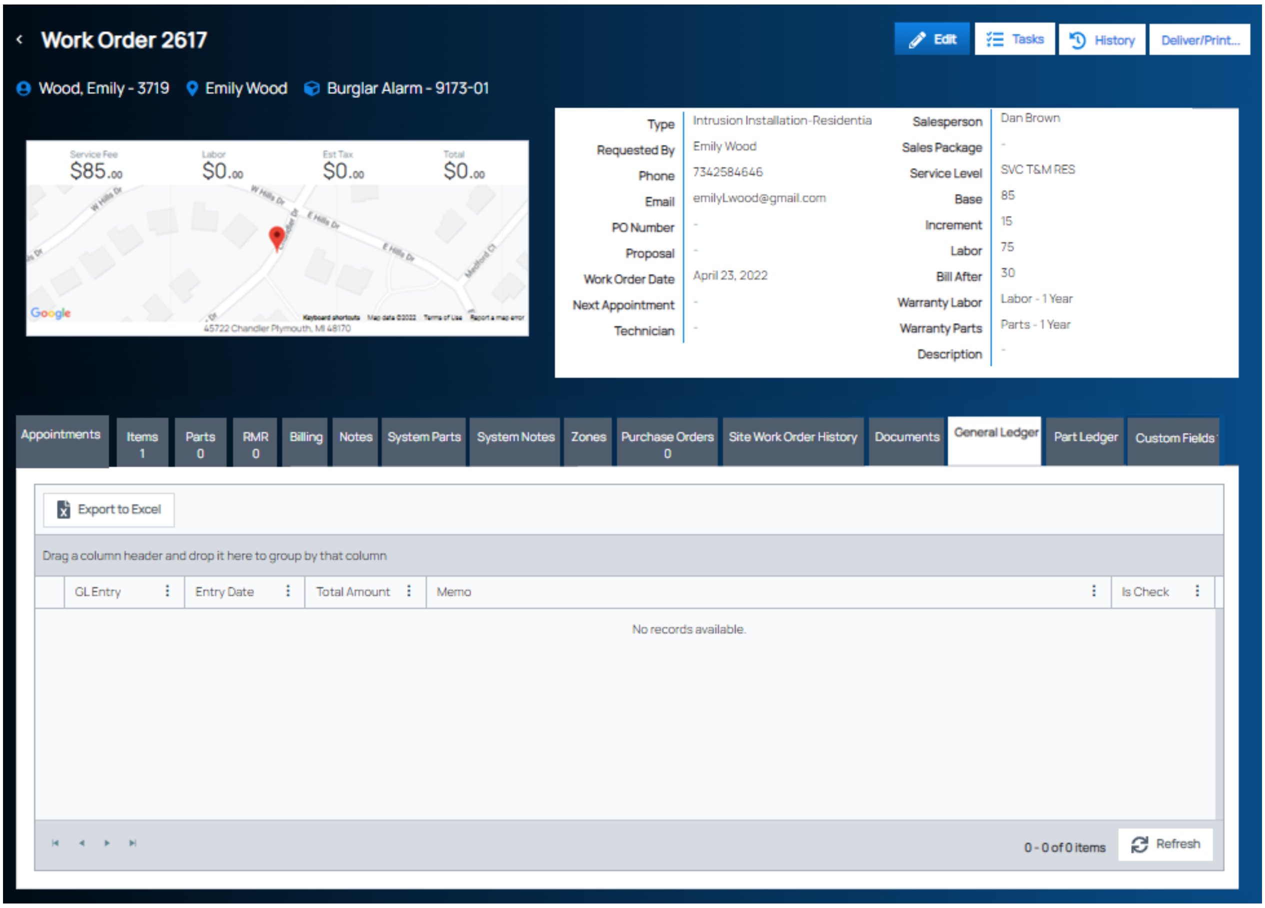
Documents

Existing documents that have been uploaded to the work order will be displayed. New documents may be uploaded, and existing documents may be edited or deleted.



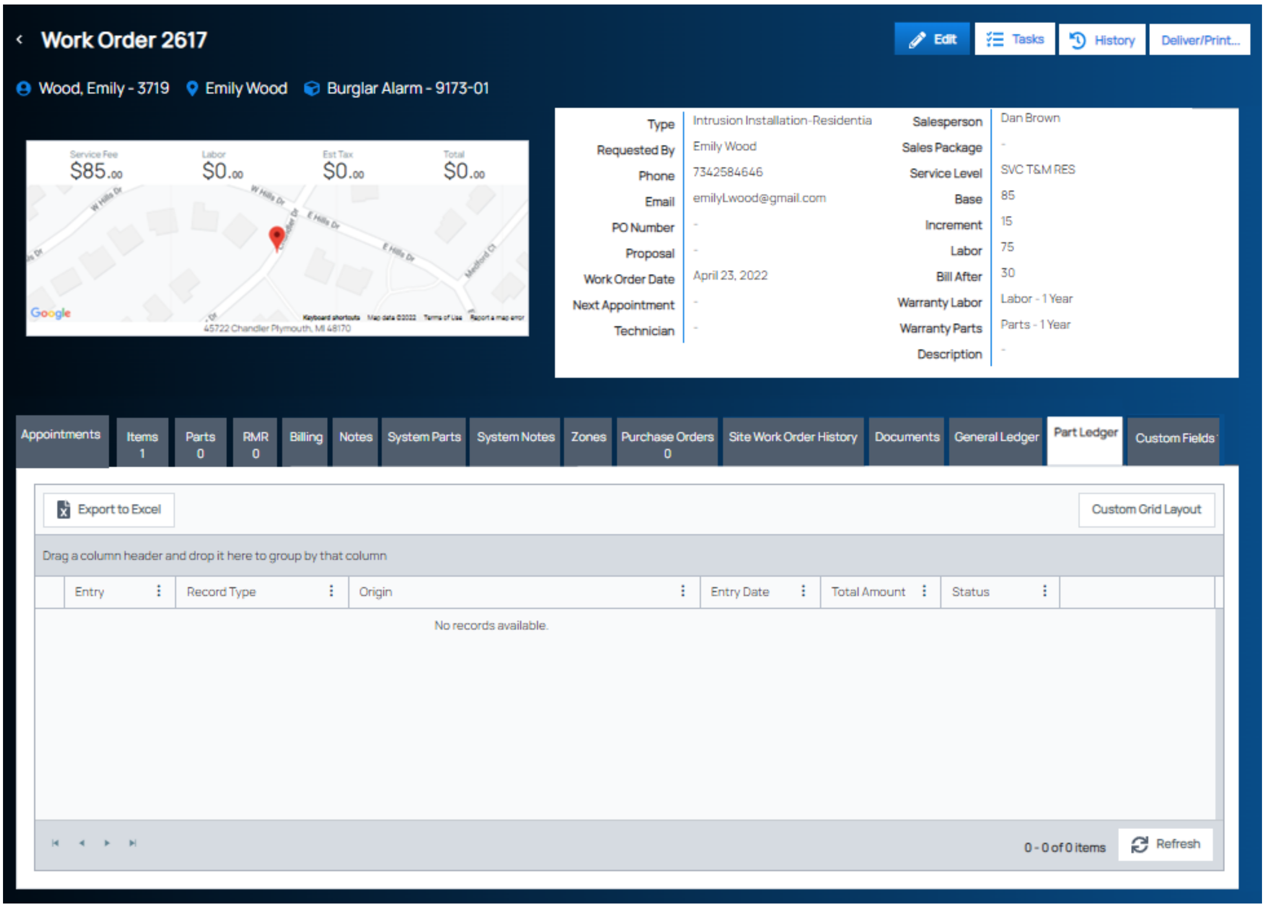
General Ledger

Any financial transactions related to the work order will be displayed within the grid area.



Part Ledger

The Part Ledger displays any inventory part activity related to the work order.



Custom Fields

If Custom Fields have been setup for Work Orders, users are able to populate or modify existing information.