

Work Order List

Last Modified on 01/08/2026 12:03 pm EST

When selecting Work Orders from the Accounts Receivable menu, several tabs are displayed. Each of these tabs is covered under this topic section.

- **Open Work Orders** – All work orders that have not been closed.
- **Appointments** – All appointments that have not been completely dispatched.
- **Closed Work Orders** – All completed/closed work orders.
- **Void Work Orders** – Work order that have been voided
- **Recurring Work Orders** – List of work orders that occur on a periodic basis.
- **Ready to Bill Work Orders** – Work orders where the Work Order Status has been set to Ready To Bill.
- **Change Orders** – List of change orders associated with work orders

Open Work Orders Tab

The Open Work Orders tab displays all work orders that have not been voided or closed.

You can create new work orders, open existing work orders for editing or processing, or export the list to Excel.

Work Orders																	
Open Work Orders		Appointments		Closed Work Orders		Void Work Orders		Recurring Work Orders									
<div>+ New Work Order Export to Excel Custom Grid Layout</div>																	
Drag a column header and drop it here to group by that column																	
WO #	Type	Technician	Status	Last Activity	Total Amount	Site	Appt #	City									
14007	Installation Exam...		+ New		\$0.00	A Business Company			edit								
14006	Installation Exam...		+ New		\$0.00	A Business Company			edit								
14005	One Hour Service		+ New		\$32811	A Business Company			edit								
14004	Inspection		+ New		\$900.03	A Business Company			edit								

At the bottom right side of the work orders grid, there is a Total Amount field. This is a total of all work orders visible on all grid pages. The total will change if you filter out any work orders.

Total: \$5,015,862.75

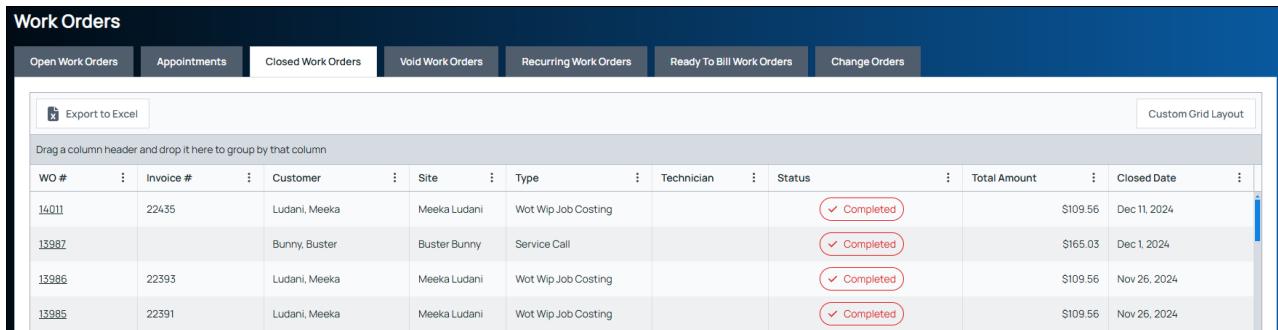
Appointments Tab

The Appointments tab displays all work orders with a scheduled appointment that has not been completely dispatched. You can open existing work orders for editing, processing, or exporting the list to Excel.

Work Orders																	
Open Work Orders		Appointments		Closed Work Orders		Void Work Orders		Recurring Work Orders									
<div>Export to Excel</div>																	
Drag a column header and drop it here to group by that column																	
WO #	Appt #	Status	Technician	Last Activity	Site		City										
13892	15095	Scheduled	Johnny Cage	Scheduled: 11/6/2024 10:09:00 AM	Aita - 10113 Kendall Ln				Streetsboro								
13888	15093	On Site	Erick Steckel	Arrived On Site: 11/05/2024 08:16 ...	Jo Smith Residence - 527 Street				Irvine								
13887	15124	Dispatched	Jacob Silvia	Dispatched: 12/4/2024 10:35 AM	Site 01 - 111 Prospect Avenue				Cleveland								
13874	15087	On Site	Kathy Ackerman	Arrived On Site: 10/23/2024 12:00 ...	Meeka Ludani - 123 Place Place				canton								
13870	15081	Scheduled	Erick Steckel	Scheduled: 10/16/2024 07:57 PM	Fiji Hut - 123 Island Dr				Fiji								
13868	15080	On Site	Theresa Scalia	Arrived On Site: 10/16/2024 06:23 ...	Tom Utley - 123 Test Street				Plano								

Closed Work Orders Tab

The Closed Work Orders tab displays all work orders that have been completed/closed or voided. You can open and view closed work orders, or export the list to Excel.

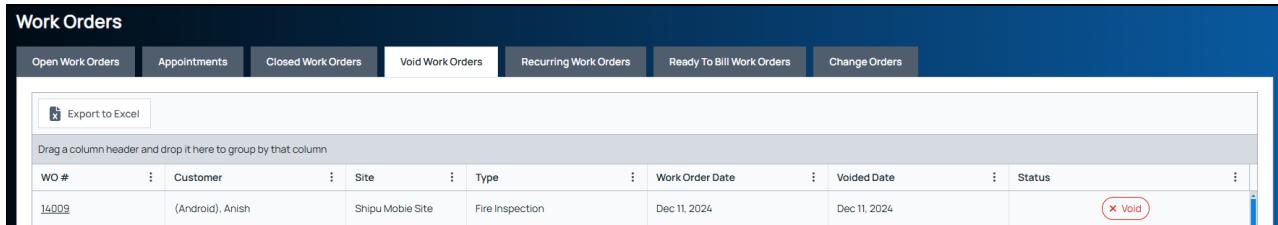


WO #	Invoice #	Customer	Site	Type	Technician	Status	Total Amount	Closed Date
14011	22435	Ludani, Meeka	Meeka Ludani	Wot Wip Job Costing		✓ Completed	\$109.56	Dec 11, 2024
13987		Bunny, Buster	Buster Bunny	Service Call		✓ Completed	\$165.03	Dec 1, 2024
13986	22393	Ludani, Meeka	Meeka Ludani	Wot Wip Job Costing		✓ Completed	\$109.56	Nov 26, 2024
13985	22391	Ludani, Meeka	Meeka Ludani	Wot Wip Job Costing		✓ Completed	\$109.56	Nov 26, 2024

On the Closed Work Orders tab, you can add columns for custom fields to the grid.

Void Work Orders

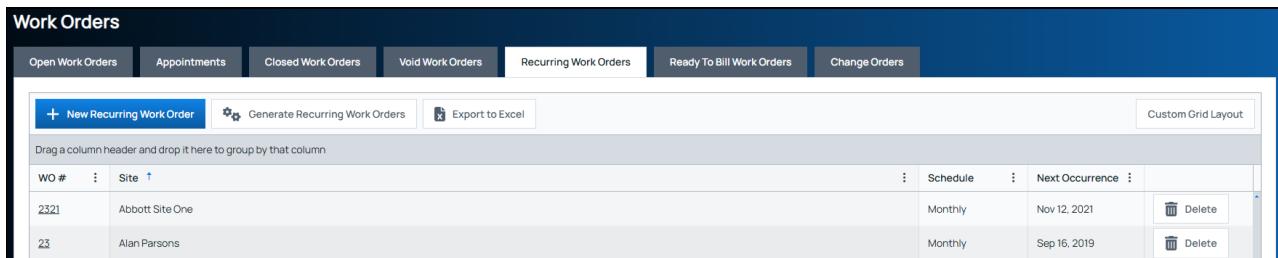
The Void Word Orders tab shows voided work orders. You can export the list to Excel.



WO #	Customer	Site	Type	Work Order Date	Voided Date	Status
14009	(Android), Anish	Shipu Mobile Site	Fire Inspection	Dec 11, 2024	Dec 11, 2024	✗ Void

Recurring Work Orders Tab

The Recurring Work Orders tab displays a list of work orders that occur on a periodic basis. You can add, edit, or delete recurring work orders, generate recurring work orders, or export the list to Excel.



WO #	Site	Schedule	Next Occurrence
2321	Abbott Site One	Monthly	Nov 12, 2021
23	Alan Parsons	Monthly	Sep 16, 2019

Ready to Bill Work Orders Tab

The Ready To Bill Work Orders tab displays a list of completed work orders where the work order status has been set to Ready To Bill. You can open work orders for viewing, and invoice one or multiple work orders from this page.

Work Orders											
Open Work Orders		Appointments		Closed Work Orders		Void Work Orders		Recurring Work Orders			
Ready To Bill Work Orders		Change Orders									
<input checked="" type="checkbox"/> Close and Invoice Selected		<input type="checkbox"/> Export to Excel		Items Selected: 0				Custom Grid Layout			
Drag a column header and drop it here to group by that column											
<input type="checkbox"/>	WO #	Site	Type	Technician	Last Activity	Total Amount					
<input type="checkbox"/>	6	Jacob Silvia	Fire Alarm Installation		Jun 8, 2015	\$526.63					
<input type="checkbox"/>	2406	A Business Company	Fire Inspection		Nov 6, 2023	\$160.13					
<input type="checkbox"/>	11624	M Martin	Wotwc		Oct 24, 2023	\$0.00					
<input type="checkbox"/>	11701	Chewy Steckel	Fire Inspection		Jan 2, 2024	\$0.00					

Change Orders Tab

The Change Orders tab shows any existing change orders. You can open change orders and create new ones.

Work Orders													
Open Work Orders		Appointments		Closed Work Orders		Void Work Orders		Recurring Work Orders					
Ready To Bill Work Orders		Change Orders											
+ New Change Order													
Drag a column header and drop it here to group by that column													
Change Order	Work Order	Site	City	State	Status	Sold Date	Projected Start Date	Projected End Date	Total Amount				
1042	13997	Meeka Ludani	canton	MI	>New				\$0.00				
1041	13993	Chaz Michaels	Chagin Falls Ohio	OH	Completed				\$219.1				
1040	13992	Fiji Hut	Fiji	OH	New				\$0.00				
1039	13981	Meeka Ludani	canton	MI	New				(\$2,193.36)				