

Work Order List

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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 Ready To Bill Work Orders Change Orders									
+ New Work Order Export to Excel Custom Grid Layout									
Drag a column header and drop it here to group by that column									
<input type="checkbox"/>	WO #	Site	Type	Technician	Status	Last Activity	Total Amount		
<input type="checkbox"/>	14007	A Business Company	Installation Exam...		+ New		\$0.00		
<input type="checkbox"/>	14006	A Business Company	Installation Exam...		+ New		\$0.00		
<input type="checkbox"/>	14005	A Business Company	One Hour Service		+ New		\$328.11		
<input type="checkbox"/>	14004	A Business Company	Inspection		+ New		\$900.03		

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.

New Work Orders	Total: \$5,015,862.75
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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 Ready To Bill Work Orders Change Orders							
Export to Excel							
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	Alta - 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	Piano	

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.

Work Orders

Open Work Orders

Appointments

Closed Work Orders

Void Work Orders

Recurring Work Orders

Ready To Bill Work Orders

Change Orders

Export to Excel

Custom Grid Layout

Drag a column header and drop it here to group by that column

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.

Work Orders

Open Work Orders

Appointments

Closed Work Orders

Void Work Orders

Recurring Work Orders

Ready To Bill Work Orders

Change Orders

Export to Excel

Drag a column header and drop it here to group by that column

WO #	Customer	Site	Type	Work Order Date	Voided Date	Status
14009	(Android), Anish	Shipu Moblie 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.

Work Orders

Open Work Orders

Appointments

Closed Work Orders

Void Work Orders

Recurring Work Orders

Ready To Bill Work Orders

Change Orders

+ New Recurring Work Order

Generate Recurring Work Orders

Export to Excel

Custom Grid Layout

Drag a column header and drop it here to group by that column

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

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

✓ Close and Invoice Selected

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"/>	5	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"/>	11524	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				\$2191
1040	13992	Fiji Hut	Fiji	OH	New				\$0.00
1039	13981	Meeka Ludani	canton	MI	New				(\$2,193.36)