Work Order List

Last Modified on 05/07/2025 8:14 pm EDT

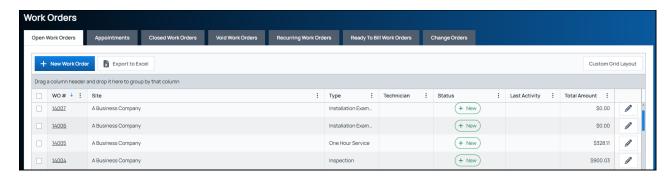
When selecting Work Orders from the Accounts Receivable menu, several tabs are displayed. Each of these tabs is covered under this topic section.

- 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

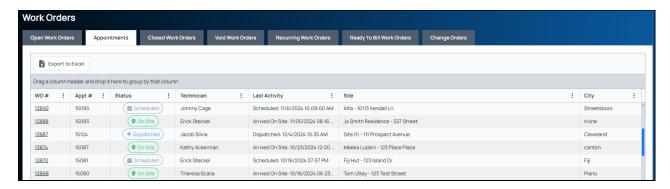
The Open Work Orders tab displays all work orders that have not been voided or closed.

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



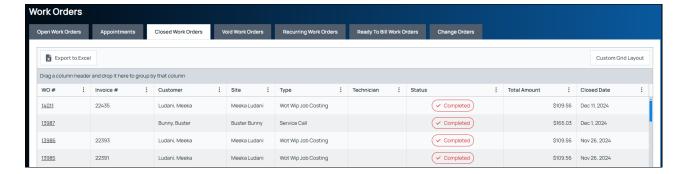
Appointments Tab

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.



Closed Work Orders Tab

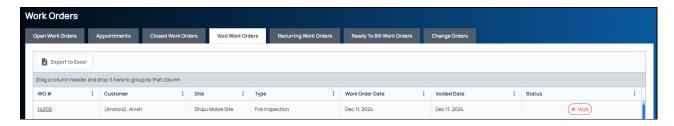
The Closed Work Orders tab displays all work orders that have been completed/closed or voided. You can open and view closed work orders, or export the list to Excel.



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

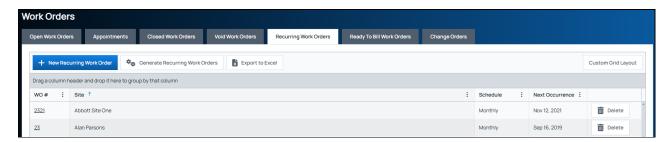
Void Work Orders

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



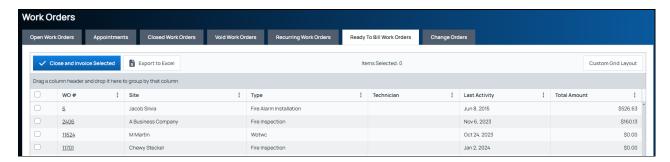
Recurring Work Orders Tab

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.



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.



Change Orders Tab

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

