

Work Order List

Last Modified on 11/02/2023 10:01 am EDT

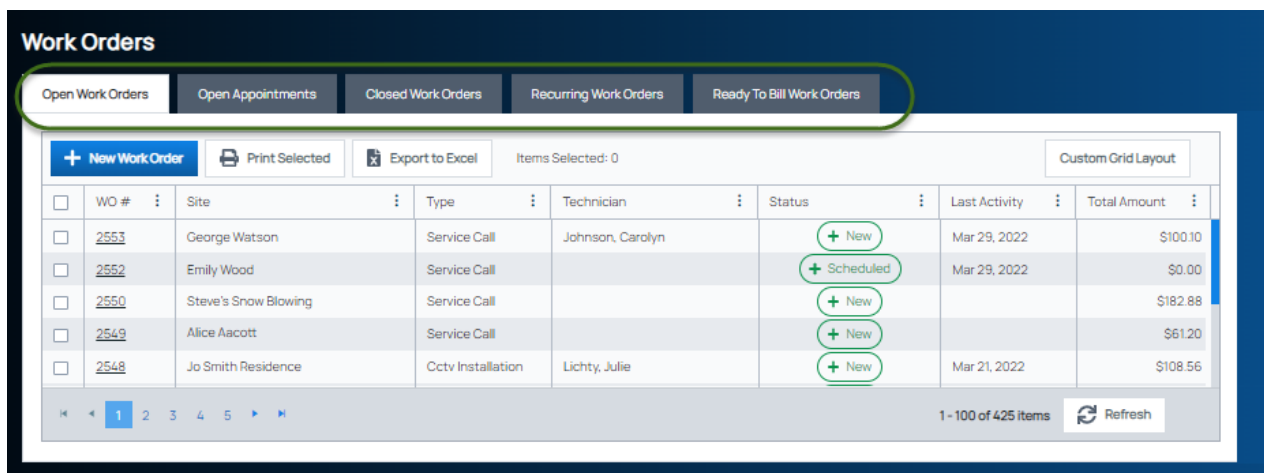
When selecting Work Orders from the Accounts Receivable menu, several tabs are displayed. Each of these tabs is covered under this topic section.

- **Open Work Orders** – All work orders that have not been closed.
- **Open Appointments** – All appointments that have not been completely dispatched.
- **Closed Work Orders** – All completed/closed work orders.
- **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.



WO #	Site	Type	Technician	Status	Last Activity	Total Amount
2553	George Watson	Service Call	Johnson, Carolyn	+ New	Mar 29, 2022	\$100.10
2552	Emily Wood	Service Call		+ Scheduled	Mar 29, 2022	\$0.00
2550	Steve's Snow Blowing	Service Call		+ New		\$182.88
2549	Alice Aacott	Service Call		+ New		\$61.20
2548	Jo Smith Residence	Cctv Installation	Lichty, Julie	+ New	Mar 21, 2022	\$108.56

Open Appointments Tab

The Open 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 | Open Appointments | Closed Work Orders | Recurring Work Orders | Ready To Bill Work Orders

Export to Excel

WO #	Appt #	Technician	Last Activity	Site	City
2553	1690	Johnson	3/29/22, 10:38 AM		
2552	1687	Toro	3/29/22, 9:59 AM		
2552	1688	Toro	3/29/22, 10:14 AM		
2552	1689	Johnson	3/29/22, 10:20 AM		
2548	1685	Lichty	3/21/22, 8:40 PM		
2547	1684	Ackerman	3/12/22, 2:10 PM		

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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 | Open Appointments | Closed Work Orders | Recurring Work Orders | Ready To Bill Work Orders

Export to Excel Custom Grid Layout

WO #	Invoice #	Customer	Site	Type	Technician	Status	Total Amount	Closed Date
2551		Wood, Emily	Emily Wood	Service Call		✓ Completed	\$235.25	Mar 28, 2022
2434	14103	Parsons, Alan	Alan Parsons	Fire Inspection	Nduji, Queen	✓ Completed	\$113.98	Aug 25, 2021
2435	14170	Cocker, Alta	Alta	Inspection	Scalia, Theresa	✓ Completed	\$6513	Oct 12, 2021
2440	14167	Aaron's Rentals	Aaron's Rentals	Burglar Alarm Inst..	Tech, Toby	✓ Completed	\$0.00	Oct 11, 2021
2525	14235	Cocker, Alta	Alta Cocker	Service Call		✓ Completed	\$0.00	Dec 3, 2021
2519	14327	Donoson, Bill	Jacob Silvia	Fire Inspection	Gaetjens, Jeff	✓ Completed	\$113.98	Mar 29, 2022
2516	14236	Papay, Travis	Stages Co	Fire Inspection	Gaetjens, Jeff	✓ Completed	\$113.98	Dec 6, 2021
2498		Cocker, Alta	Alta	Fire Inspection	Scalia, Theresa	✓ Void Work Order	\$6513	Dec 2, 2021

1 - 85 of 85 items Refresh

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 | Open Appointments | Closed Work Orders | **Recurring Work Orders** | Ready To Bill Work Orders

+ New Recurring Work Order | Generate Recurring Work Orders | Export to Excel | Custom Grid Layout

WO #	Site	Schedule	Next Occurrence	
2529	Jo Smith Residence	Appointment Based	Jan 3, 2022	Delete
2499	Roger Waters	Appointment Based	Dec 2, 2022	Delete
2473	Alta	Appointment Based	Jan 2, 2022	Delete
2445	Alan Parsons	Appointment Based	Dec 9, 2021	Delete
2438	Alan Parsons	Appointment Based	Sep 10, 2021	Delete
2437	Jacob Silvia	Appointment Based	Sep 13, 2021	Delete

1 - 38 of 38 items | Refresh

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 | Open Appointments | Closed Work Orders | Recurring Work Orders | **Ready To Bill Work Orders**

Close and Invoice Selected | Export to Excel | Items Selected: 0 | Custom Grid Layout

<input type="checkbox"/>	WO #	Site	Type	Technician	Last Activity	Total Amount
<input type="checkbox"/>	2553	George Watson	Service Call	Johnson, Carolyn	Mar 29, 2022	\$100.10
<input type="checkbox"/>	2552	Emily Wood	Service Call		Mar 29, 2022	\$0.00
<input type="checkbox"/>	2550	Steve's Snow Blowing	Service Call			\$182.88

0 - 0 of 0 items | Refresh

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
- Recurring Work Orders
- Ready To Bill Work Orders
- Projects
- Change Orders

+ New Change Order

Change Order	Work Order	Site	City	State	Status	Sold Date	Projected Start Date	Projected End Date	Total Amount
3	4541	Alice Ascott	Columbus	OH	New				\$0.00
2	4540	Alice Ascott	Columbus	OH	New				\$50.00
1	4539	Alan Parsons	Chagrin Falls	OH	New				\$17.37

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