

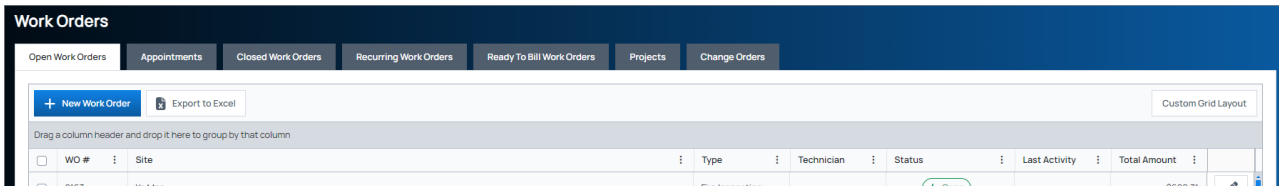
Add a Work Order

Last Modified on 12/20/2024 1:56 pm EST

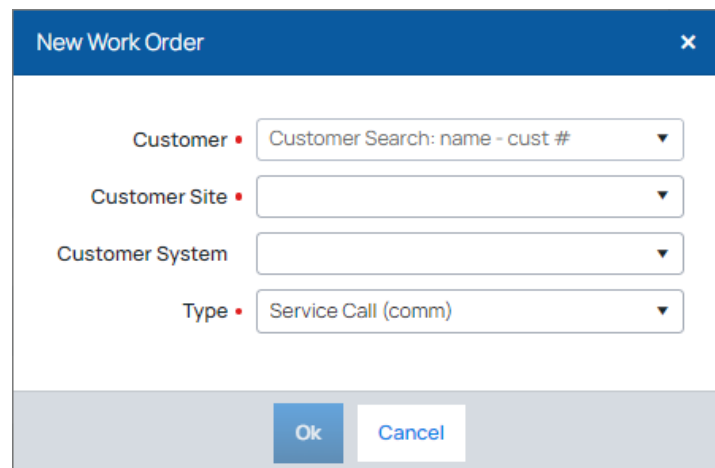
New work orders can be created from the Open Work Orders tab of the Work Order List or from a customer record.

Add a Work Order from the Open Work Orders Tab

To add a new Work Order from the Open Work Orders tab, from the main menu, navigate to Accounts Receivable > Work Orders. The Open Work Orders page opens. Click the **New Work Order** button.



The New Work Order dialog box opens. Select the Customer, Site, and System (selecting a System is optional but recommended). When finished, click the **OK** button.

A screenshot of the 'New Work Order' dialog box. The dialog has a blue header with the title 'New Work Order' and a close button (X). The main area contains four dropdown menus: 'Customer' with the text 'Customer Search: name - cust #', 'Customer Site', 'Customer System', and 'Type' with the text 'Service Call (comm)'. At the bottom of the dialog, there are two buttons: 'Ok' and 'Cancel'.

The New Work Order page opens. Most of the fields displayed in the upper right panel of the page auto-fill with information from the Customer, Site, and System. Any of this information can be changed if necessary. You can enter information into four optional fields.

- **Requested By:** Type in the name of the person requesting this work order.
- **PO Number:** If the customer has provided a purchase order number for billing purposes, enter that value into this field.
- **Technician:** From the drop-down list, you select a preferred technician. This is for informational purposes, and will not schedule an appointment.
- **Warehouse:** If parts are used on the work order, select the warehouse from which inventory will be relieved.

When finished, click the **Save** button at the upper right of the page.

Once the work order is saved, navigate to the various tabs to add appointments, items, parts, notes, etc.

New Work Order Save Cancel

Steve's Snow Blowing - 3699 Steve's Snow Blowing

Service Fee \$75.00 Labor \$0.00 Parts \$0.00 Total \$187.40	Status: Open Site: #1 Steve's Snow Blowing - 123 Main St. System: Tax: CA Tustin - 9.2500% Type: Service Call (comm) Description: test test test test Warehouse:	Contract: Contact: Requested By: Phone: (444) 444-4446 Email: test121as@yopmail.com PO Number: Work Order Date: 9/13/2024 Technician:	Salesperson: Kathy Ackerman Sales Package: Service Level: service level test one Template: Default WorkOrder Billing Customer: Customer Search: name - cust #
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Appointments: 0 | Items & Deposits: 0 | Parts: 0 | Part Kits: 0 | RMR: 0 | Billing: 0 | Notes: 0 | Site Notes: 0 | Custom Fields: 0 | Timesheets: 0

+ Add Appointment

Appt #	Appointment Time	Last Activity	Status	Technician	Confirmed	Est Length	Billable Min	Break Min	Labor
No records available.									

Add a Work Order from a Customer Record

To add a new Work Order from a Customer record, from the main menu, navigate to CRM > Customers.

The Customers list opens. Locate the customer in the list, and then click the hyperlink in the Customer # column to open the customer record.

Customers

Customers | Sites | Systems

Search Customers + Add Customer Export to Excel NO Master Customers NO Terminated Customers Custom Grid Layout

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

Customer #	Name	Address	City	State	Balance Due	Total RMR
3654	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
3652	Cactus World	3601 Saguaro Street	Tucson	AZ	\$0.00	\$0.00
3505	Smith, Aaron	123 Main St	Columbus	OH	\$182.81	\$30.00
3504	Allen Automotive Services	634 Morgan Street	Cincinnati	OH	\$182.81	\$30.00
3502	Tesay	Address1	City	OH	\$0.00	\$0.00
3499	Edwards Security	345 Main Street	Columbus	OH	\$221.47	\$55.00
3498	Crafted Crates	233 Widmore Ave	Columbus	OH	\$222.56	\$30.00

1 - 100 of 178 items Refresh

The Customer record opens. Click the Work Orders tab, and then click the **New Work Order** button.

Emily Wood
Customer #3719 Active Normal Residential-Owner • Since 3/4/22

Total Balance Due Total RMR
\$0.00 \$0.00

Customer Aging

Address 45722 Chandler Plymouth, MI 48170
Phone (734) 258-4646
Cell (734) 258-3311
Email emilyLwood@gmail.com

Salesperson Dan Brown
Last Statement
Default Term
Delivery Method Print
Delivery RMR Inv YES

Invoices 0 Credits 0 Sites/Systems 1/0 RMR 0 **Work Orders 1** Proposals 0 Payments 0 CC/eCheck 0 Notes 0 Contacts 0 Documents Archive Custom Fields eForms Emails

+ New Work Order

Invoice #	Invoice Date	Due Date	PO Number	Total Amount	Amount Due	
21448	Mar 22, 2022	Mar 22, 2022	84412	\$58.30	\$58.30	\$ Pay Invoice

The New Work Order dialog box opens. Select the Customer Site and Customer System (selecting a System is optional but recommended). When finished, click the **Ok** button.

New Work Order

Customer Site • [Dropdown]

Customer System [Dropdown]

Type • Service Call (comm) [Dropdown]

Ok Cancel

The New Work Order page opens. Most of the fields displayed in the upper right panel of the page auto-fill with information from the Customer, Site, and System. Any of this information can be changed if necessary. You can enter information into four optional fields.

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When finished, click the **Save** button at the upper right of the page.

Once the work order is saved, users may navigate to the various tabs to add appointments, items, parts, notes, etc.
