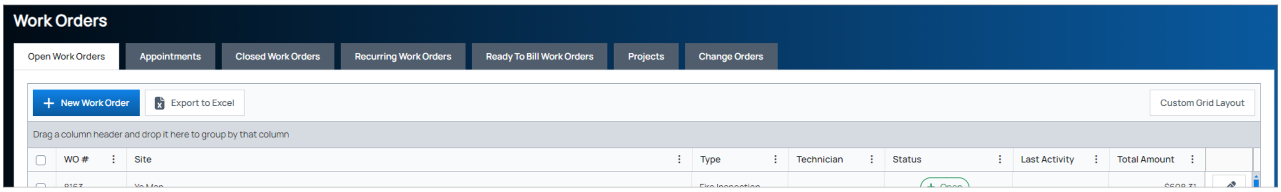
Add a Work Order

Last Modified on 09/16/2024 9:40 pm EDT

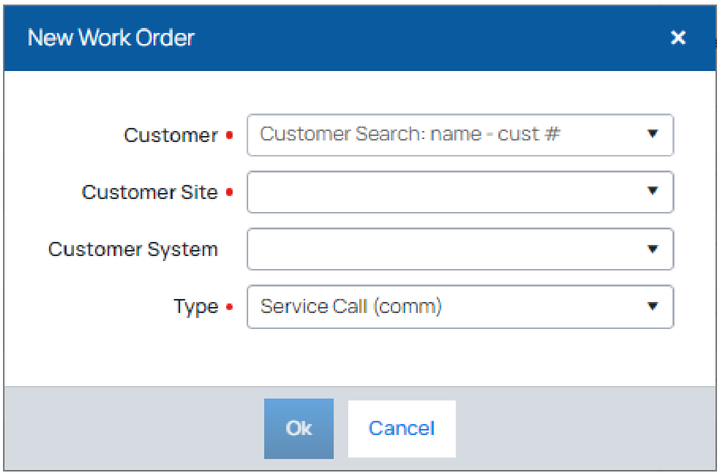
New work orders may be created from the Open Work Orders tab of the Work Order List or from a customer record.

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 is displayed. Click the **New Work Order** button.



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

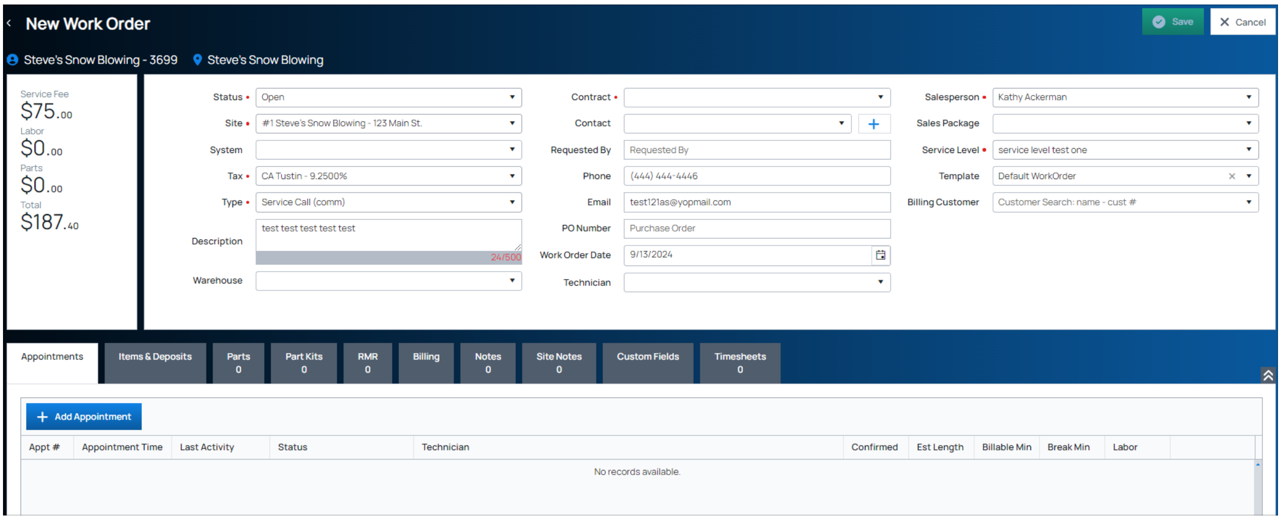


The New Work Order page is displayed. Most of the fields displayed in the upper right panel of the page will auto-fill with information from the Customer, Site, and System. Any of this information may be changed if necessary. You can enter information into four optional fields.

- **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.

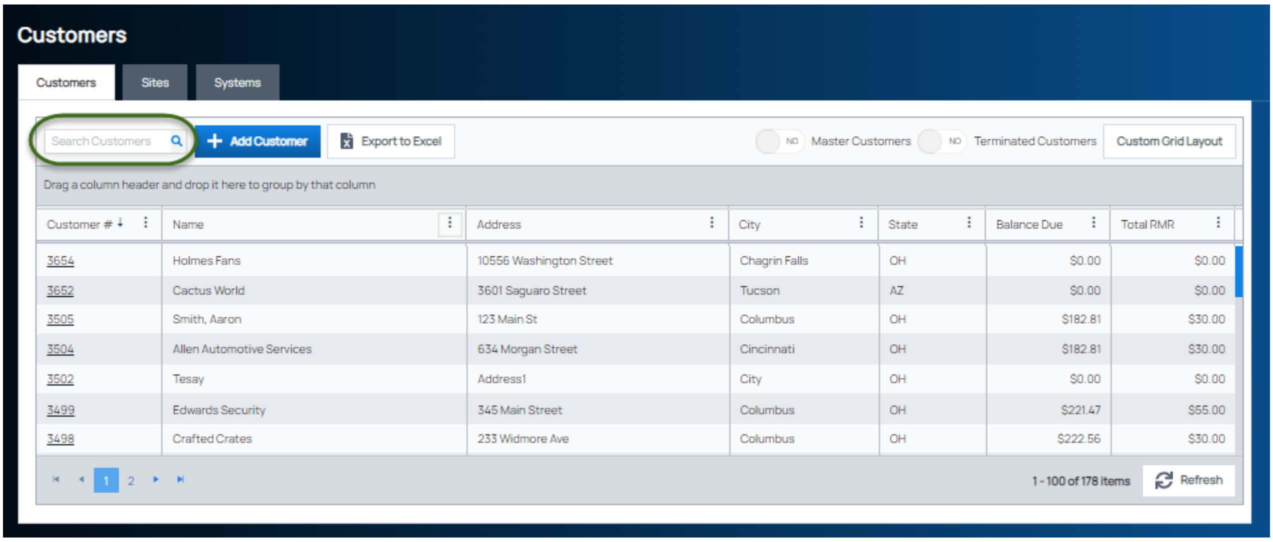
Once the work order is saved, users may navigate to the various tabs to add appointments, items, parts, notes, etc.



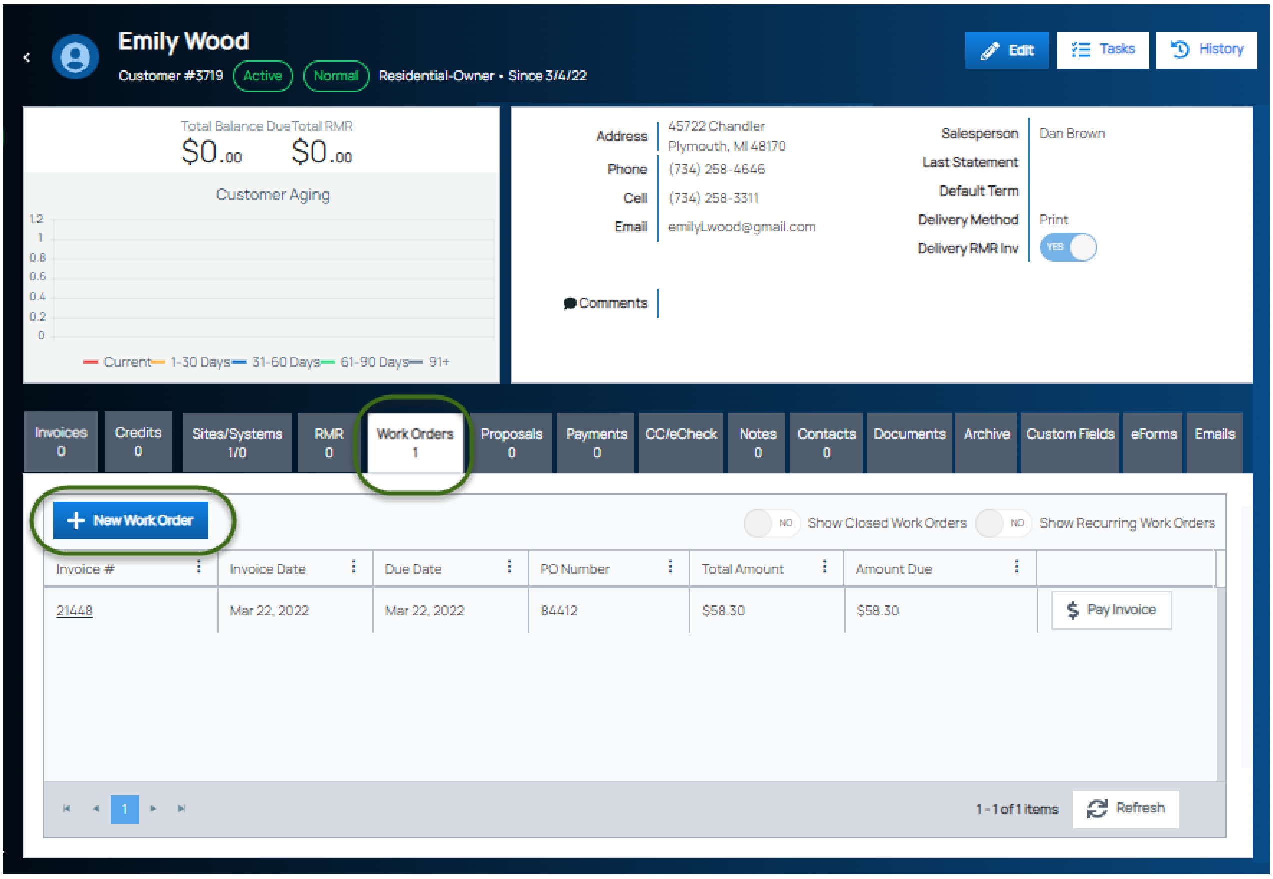
Add a Work Order from a Customer Record

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

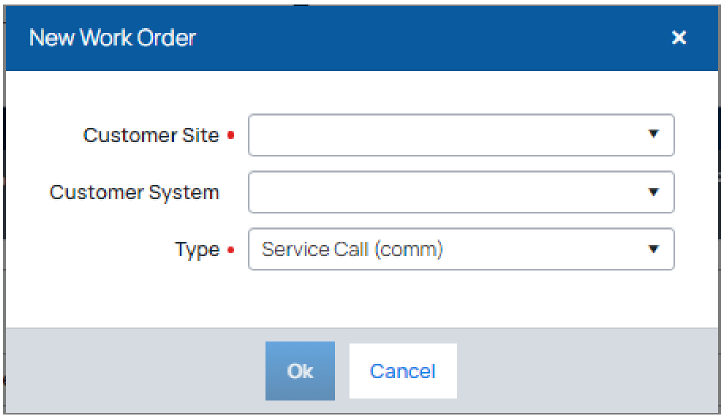
The Customers list is displayed. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.



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



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



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