

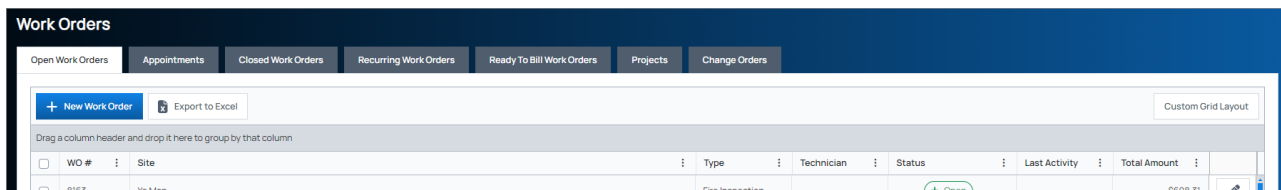
Add a Work Order

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

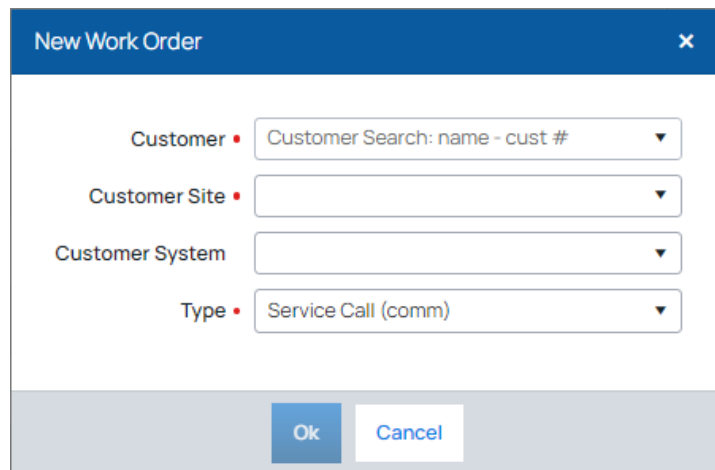
New work orders may be created from the Open Work Orders tab of the Work Order List or from a customer record.

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.

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 fields: 'Customer' with a dropdown menu showing 'Customer Search: name - cust #', 'Customer Site' with a dropdown menu, 'Customer System' with a dropdown menu, and 'Type' with a dropdown menu showing 'Service Call (comm)'. At the bottom of the dialog, there are two buttons: 'Ok' and 'Cancel'.

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.

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: Requested By

Phone: (444) 444-4446

Email: test121as@yopmail.com

PO Number: Purchase Order

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 #

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 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.

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 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.

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.
