

Add Items to a Work Order

Last Modified on 05/05/2022 2:26 pm EDT

To add Items to a Work Order, open the work order from the customer record or from Accounts Receivable > Work Orders.

Once the work order is displayed, click on the Items tab, and then click on the edit button at the upper right of the page. Click on the Add Items button.

Work Order 2563 [Edit] [Cancel] [Void]

Wood, Emily - 3719 | Emily Wood | Burglar Alarm - 9173-01

Service Fee: \$85.00
Labor: \$93.75
Parts: \$0.00
Total: \$199.48

Status: New | Requested By: Emily Wood | Technician: Carolyn Johnson
Site: #3719-01 Emily Wood - 45722 Chandler | Phone: (734) 258-4646 | Salesperson: Dan Brown
System: Burglar Alarm - 9173-01 | Email: emilyLwood@gmail.com | Sales Package:
Tax: MI | PO Number: Purchase Order | Service Level: Time and Material Residential
Type: Service Call | Work Order Date: 4/11/2022 | Warehouse: Main Warehouse

Appointments | **Items 1** | Parts 0 | RMR 0 | Billing | Notes 0 | System Parts | System Notes | Documents | Custom Fields

+ Add Items [Items \$10.00]

Item Code	Item Description	Qty	Rate	Taxable	Tax Code	Amount	Item Cost	Total Cost	Labor Units	Total Labor	
Fuel	Fuel Surcharge	1	\$10.00	NO	MI	\$10.00	\$5.00	\$5.00	1	1	[Trash] [Print]

0 - 0 of 0 Items

The Add Items page will be displayed. Check the box to the left of each Item to add to the work order. When finished making item selections, click on the Add Items button at the bottom of the page.

The selected items will appear in the grid area on the work order Items tab. If the amount that auto-fills is incorrect, double-click on the row to edit the amount.

Click the Save button at the upper right of the page.

Add Items [Search Items] [Items Selected: 1] [Create Item]

Item Code	Name	Taxable	Recurring	Rate	Cost	GL	Taxable	Recurring	Rate	Cost	Labor Units
<input type="checkbox"/>	Discount	NO	YES	\$0.00	\$0.00		NO	YES	\$0.00	\$0.00	0
<input type="checkbox"/>	Discount (no tax)	NO	YES	\$0.00	\$0.00		NO	YES	\$0.00	\$0.00	0
<input checked="" type="checkbox"/>	Discount (tax)	NO	YES	\$0.00	\$0.00		NO	YES	\$0.00	\$0.00	0
<input type="checkbox"/>	Fuel	NO	NO	\$10.00	\$5.00		NO	NO	\$10.00	\$5.00	1

1 - 36 of 36 items [Refresh]

+ Add Items [Cancel]