

Add Items to a Work Order

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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.

The screenshot shows the 'Work Order 2563' interface. On the left, a summary box displays costs: Service Fee \$85.00, Labor \$93.75, Parts \$0.00, and Total \$199.48. The main area contains a form with fields for Status (New), Site (#3719-01 Emily Wood - 45722 Chandler), System (Burglar Alarm - 9173-01), Tax (MI), Type (Service Call), Requested By (Emily Wood), Phone ((734) 258-4646), Email (emilyLwood@gmail.com), PO Number (Purchase Order), Work Order Date (4/1/2022), Technician (Carolyn Johnson), Salesperson (Dan Brown), Sales Package, Service Level (Time and Material Residential), and Warehouse (Main Warehouse). Below the form is a navigation bar with tabs: Appointments, Items (1), Parts (0), RMR (0), Billing, Notes (0), System Parts, System Notes, Documents, and Custom Fields. The 'Items' tab is active, showing a table with one item: Fuel Surcharge. A blue '+ Add Items' button is circled in green in the top left of the table area. The total cost for items is \$10.00.

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.

The screenshot shows the 'Add Items' dialog box. At the top, there is a search bar and 'Items Selected: 1'. Below is a table of items with checkboxes and a grid of item details. The 'Discount (tax)' item is selected. At the bottom, there are '+ Add Items' and 'X Cancel' buttons.

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