

Add Parts to a Work Order

Last Modified on 03/13/2025 9:51 am EDT

To add Parts 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 Parts tab, and then click the **Edit** button at the upper right of the page. Click the **Add Parts** button.

The screenshot displays the 'Work Order 2563' interface. At the top left, there is a navigation breadcrumb: < Work Order 2563. To the right are three buttons: 'Save' (green), 'Cancel' (white), and 'Void' (red). Below this is a header bar with user and location information: 'Wood, Emily - 3719', 'Emily Wood', and 'Burglar Alarm - 9173-01'. The main content area is divided into a left sidebar with a cost breakdown and a right section with form fields. The sidebar shows: Service Fee \$85.00, Labor \$93.75, Parts \$0.00, and Total \$199.48. The form fields include: 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 1, RMR 0, Billing, Notes 0, System Parts, System Notes, Documents, and Custom Fields. The 'Parts 1' tab is active. Below the tabs is a table with a '+ Add Parts' button circled in red. The table has columns: Part Code, Part Description, Zone / Location, Qty, Rate, Taxable, Tax Code, Amount, Part Cost, Total Cost, Labor Units, and Total Labor. The total cost for parts is shown as \$125.00. At the bottom right of the table area, it says '0 - 0 of 0 items'.

The Add Parts page opens. Select the checkbox to the left of each part to add it to the work order. Click the **Add Parts** button at the bottom of the page.

Add Parts ×

Search Parts Parts Selected: 0 + Create Part

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

<input type="checkbox"/>	Stock?	Image	Part Code	Name	MFR	Type	Subtype	Rate	Cost	Labor Uni	GL	Is Panel?	QTY
<input type="checkbox"/>	NO		Billi	Part for billi				\$10.00	\$20.00	1		NO	-19
<input type="checkbox"/>	NO		CE936WIR	BULLET CAMERA WITH IR	Clinton	CCTV Dev...	Camera	\$200.00	\$90.00	0		NO	23
<input type="checkbox"/>	NO		CECC115	COLOR CAMERA	Clinton	CCTV Dev...	Camera	\$350.00	\$135.00	0		NO	25
<input type="checkbox"/>	NO		DMECO16C500	16CH 500 GIG DVR	Dedicat...	CCTV Dev...	DVR / NVR	\$1300.00	\$550.00	0		NO	28
<input type="checkbox"/>	NO		DSC-G525ANTQ	DSC 25" Cell Antenna	General EI...			\$95.70	\$45.00	0		NO	145
<input type="checkbox"/>	NO		DSC-GSM-ANT3DB	Antenna Accessory	General EI...			\$165.00	\$85.00	0		NO	126
<input type="checkbox"/>	NO		EV15	Idfjsdofiu	General EI...	Fire Devic...		\$75.00	\$55.00	1		NO	3
<input type="checkbox"/>	NO		GE-60010250195R	GE NetWoks NX Reciever	General EI...			\$98.95	\$25.00	0		NO	53
<input type="checkbox"/>	NO		GE-600106495R	GE 4 Button Remote	General EI...			\$28.60	\$12.00	0		NO	61
<input type="checkbox"/>	NO		GE-60362NI03195	GE Wireless Door Contact	General EI...	Intrusion ...	Door Cont...	\$36.64	\$11.00	0		NO	148
<input type="checkbox"/>	NO		GE-6067095R	GE Wireless Saw Door Cont	General EI...			\$33.99	\$15.00	0		NO	144

◀ 1 2 3 ▶
50 items per page
51 - 100 of 142 items Refresh

+ Add Parts
✕ Cancel

The selected parts appear in the grid area on the work order Parts tab. If the amount or quantity that auto-fills is incorrect, click on the row to edit.

When picked parts are added to a work order, the stocked parts show their warehouse, non-stocked parts do not show a warehouse.

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