

Edit a Work Order Appointment

Last Modified on 06/14/2024 4:40 pm EDT

Edit appointments from the work order or the calendar. You can edit any information on the appointment. If the appointment needs to be rescheduled, select a different date. After saving, the appointment is moved to the new date selected. For editing appointments from the calendar, refer to the Calendar category.

To edit an appointment, access the work order from the customer record or by selecting the work order from Accounts Receivable > Work Orders > Open Work Orders tab.

Once the work order is open on your screen, click the **Edit** button at the upper right of the page.

Work Order 2556





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


Service Fee: \$85.00 | Labor: \$0.00 | Est Tax: \$0.00 | Total: \$0.00

Map: 45722 Chandler Plymouth, MI 48170

Type	Service Call	Salesperson	Dan Brown
Requested By	-	Sales Package	-
Phone	7342584646	Service Level	SVC T&M RES
Email	emilyLwood@gmail.com	Base	85
PO Number	-	Increment	15
Proposal	-	Labor	75
Work Order Date	March 30, 2022	Bill After	30
Next Appointment	-	Warranty Labor	Labor - 1 Year
Technician	-	Warranty Parts	Parts - 1 Year

Export to Excel

Appt #	Appointment Time	Last Activity	Status	Technician	Est Length	Billable Min	Break Min	Labor	
1697	3/31/22, 11:00 AM	3/31/22, 11:00 AM	Scheduled	Bill Toro	60	0	0	\$0.00	 
1699	3/30/22, 11:15 AM	3/30/22, 11:15 AM	Scheduled	Kathy Ackerman	60	0	0	\$0.00	 

0 - 0 of 0 items 





The work order is displayed in edit mode. Click the Appointments tab. Locate the appointment you want to edit, and then click the edit button (pencil icon).

Work Order 2556 Save Cancel Void

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

Service Fee \$85.00	Status • New	Requested By Emily Wood	Technician Carolyn Johnson
Labor \$0.00	Site • #3719-01 Emily Wood - 45722 Chandler	Phone (734) 258-4646	Salesperson • Dan Brown
Est Tax \$5.10	System Burglar Alarm - 9173-01	Email emilyLwood@gmail.com	Sales Package
Total \$100.10	Tax • MI	PO Number Purchase Order	Service Level • Time and Material Residential
	Type • Service Call	Work Order Date 3/29/2022	Warehouse Main Warehouse

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

Appt #	Appointment Time	Last Activity	Status	Technician	Est Length	Billable Min	Break Min	Labor	
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1699	3/30/22, 11:15 AM	3/30/22, 11:15 AM	Scheduled	Kathy Ackerman	60	0	0	\$0.00	 

0 - 0 of 0 items

The Edit Appointment form is displayed. Make the necessary changes, and then click the **Save** button at the bottom of the form when finished.

Edit Appointment X

Details Breaks

Appointment Time • 3/31/2022 11:00 AM	Dispatch Time	Now
All Day <input type="radio"/>	Arrival Time	Now
Technician • Bill Toro	Completed Time	Now
Additional Technicians	Length (minutes)	0
Expected Length (in minutes) 60.00	Billable minutes	0
Hourly Labor Rate • 75.00	Total Labor Amount	\$0.00
Customer Confirmed <input type="radio"/>		

Save Cancel

Lastly, click the **Save** button at the upper right of the Work Order page.