

Delete a Work Order Appointment

Last Modified on 06/14/2024 4:37 pm EDT

Appointments can be deleted from the work order or the calendar. For instructions on deleting an appointment from the calendar, refer to the Calendar category.

To delete 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.

The screenshot displays the 'Work Order 2556' interface. At the top, there are navigation buttons for 'Edit', 'History', 'Tasks', and 'Deliver/Print'. Below this, the work order details are shown, including the customer 'Wood, Emily - 3719', location 'Emily Wood', and service 'Burglar Alarm - 9173-01'. A summary table shows: Service Fee \$85.00, Labor \$0.00, Est Tax \$0.00, and Total \$0.00. A map shows the location at 45722 Chandler Plymouth, MI 48170. A detailed table lists work order attributes such as Type (Service Call), Salesperson (Dan Brown), Requested By, Phone (7342584646), Email (emilyLwood@gmail.com), PO Number, Proposal, Work Order Date (March 30, 2022), Next Appointment, and Technician. Below the details is a navigation bar with tabs for 'Appointments', 'Items', 'Parts', 'RMR', 'Billing', 'Notes', 'System Parts', 'System Notes', 'Zones', 'Purchase Orders', 'Site Work Order History', 'Documents', 'General Ledger', and 'Part Ledger'. The 'Appointments' tab is active, showing a table with columns: Appt #, Appointment Time, Last Activity, Status, Technician, Est Length, Billable Min, Break Min, Labor, and action icons. Two appointments are listed: 1697 (3/31/22, 11:00 AM) by Bill Toro and 1699 (3/30/22, 11:15 AM) by Kathy Ackerman, both with a 'Scheduled' status. At the bottom right, it shows '0 - 0 of 0 items' and a 'Refresh' button.

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	

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

Work Order 2556 Save Cancel Void

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

Service Fee
\$85.00

Labor
\$0.00

Est Tax
\$5.10

Total
\$100.10

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: 3/29/2022

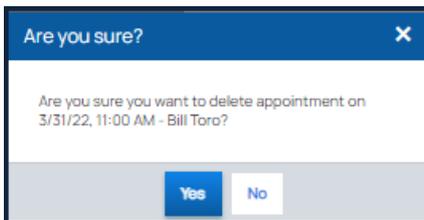
Warehouse: Main Warehouse

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

+ Add Appointment									
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

A confirmation message is displayed. If you are certain you want to delete the appointment, click the Yes button.



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