

Invoicing from a Work Order

Last Modified on 11/02/2023 10:24 am EDT

To complete and invoice a work order, 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 2563' interface. At the top, there are navigation buttons for 'Edit', 'History', 'Tasks', and 'Deliver/Print'. Below this, the customer information is shown: 'Wood, Emily - 3719', 'Emily Wood', and 'Burglar Alarm - 9173-01'. A map shows the location with a red pin and a summary of charges: Service Fee \$85.00, Labor \$0.00, Est Tax \$0.00, and Total \$0.00. To the right of the map is a table with details for the work order, including 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, Technician, Sales Package, Service Level (SVC T&M RES), Base (85), Increment (15), Labor (75), Bill After (30), Warranty Labor (Labor - 1 Year), and Warranty Parts (Parts - 1 Year). Below the map and table is a horizontal menu 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 selected, showing a table with columns: Appt #, Appointment Time, Last Activity, Status, Technician, Est Length, Billable Min, Break Min, Labor, and an edit icon. The table contains one entry: Appt # 1709, Appointment Time 4/1/22, 8:00 AM, Last Activity 4/1/22, 9:00 AM, Status Completed (circled in red), Technician Thomas Wilson, Est Length 60, Billable Min 75, Break Min 0, Labor \$93.75. At the bottom right of the appointments table, it says '0 - 0 of 0 items' and has a 'Refresh' button.

Review information on each of the tabs of the work order.

Appointments Tab

Make certain all technician appointments have been completely dispatched and the dates/times are correct. Also, review the calculated labor charges for accuracy. To review the dispatch dates/times, click the edit button (pencil icon) to open the appointment information.

Work Order 2563 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 \$93.75 | Site: #3719-01 Emily Wood - 45722 Chandler | Phone: (734) 258-4646 | Salesperson: Dan Brown |
| Parts \$0.00 | System: Burglar Alarm - 9173-01 | Email: emilyLwood@gmail.com | Sales Package: |
| Total \$199.48 | Tax: MI | PO Number: Purchase Order | Service Level: Time and Material Residential |
| | Type: Service Call | Work Order Date: 4/1/2022 | 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 | |
|--------|------------------|-----------------|-----------|---------------|------------|--------------|-----------|---------|--|
| 1709 | 4/1/22, 8:00 AM | 4/1/22, 9:00 AM | Completed | Thomas Wilson | 60 | 75 | 0 | \$93.75 | |

0 - 0 of 0 items

If dispatch times were entered incorrectly, these can be modified. If any changes are made, click the Save button at the bottom of the Edit Appointment form.

Items Tab

Review the items added to the list to ensure correct pricing and the descriptions that will print on the invoice are customer-friendly.

Work Order 2563 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 \$93.75 | Site: #3719-01 Emily Wood - 45722 Chandler | Phone: (734) 258-4646 | Salesperson: Dan Brown |
| Parts \$0.00 | System: Burglar Alarm - 9173-01 | Email: emilyLwood@gmail.com | Sales Package: |
| Total \$199.48 | Tax: MI | PO Number: Purchase Order | Service Level: Time and Material Residential |
| | Type: Service Call | Work Order Date: 4/1/2022 | Warehouse: Main Warehouse |

Appointments **Items 1** Parts 0 RMR 0 Billing Notes 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 | |

0 - 0 of 0 items

If the quantity or the pricing is incorrect, double-click on the row to edit the information. If any changes are made, click **OK** at the bottom of the Edit Work Order Item form.

Parts Tab

Review the parts used and verify the correct warehouse is selected (in the header of the work order) for issuing the parts. Make certain the correct part numbers are selected and the prices are correct.

If the incorrect part was selected, click the delete button (trashcan icon) of the part row to remove it, and then add the correct part.

If the part is correct, but the quantity or price is incorrect, double-click on the part row to edit the information.

Work Order 2563 Save 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 1** | RMR 0 | Billing | Notes 0 | System Parts | System Notes | Documents | Custom Fields

Parts \$125.00

| Part Code | Part Description | Zone / Location | Qty | Rate | Taxable | Tax Code | Amount | Part Cost | Total Cost | Labor Units | Total Labor | |
|-----------|--------------------------|-----------------|-----|----------|-------------------------------------|----------|----------|-----------|------------|-------------|-------------|--|
| 5800PIR | Wireless Motion Detector | | 1 | \$125.00 | <input checked="" type="checkbox"/> | MI | \$125.00 | \$62.10 | \$62.10 | 1 | 1 | |

0 - 0 of 0 items

If any changes are made, click **OK** at the bottom of the Edit Work Order Part form.

RMR Tab

If RMR was sold on the work order, verify the information is correct. Double-click the RMR row to view the details. If any of the information is incorrect, make the necessary changes and save.

Work Order 2563 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 \$93.75 | Site: #3719-01 Emily Wood - 45722 Chandler | Phone: (734) 258-4646 | Salesperson: Dan Brown |
| Parts \$0.00 | System: Burglar Alarm - 9173-01 | Email: emilyLwood@gmail.com | Sales Package: |
| Total \$199.48 | 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 RMR RMR \$0.00

| Item Code | Description | Billing Cycle | Next Invoice Date | Cancel Date | Monthly Amount | Cycle Amount |
|-----------------------|-------------|---------------|-------------------|-------------|----------------|--------------|
| No records available. | | | | | | |

0 - 0 of 0 items

Billing Tab

The Billing tab displays several options, each of which is explained below.

Work Order 2563 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 \$93.75 | Site: #3719-01 Emily Wood - 45722 Chandler | Phone: (734) 258-4646 | Salesperson: Dan Brown |
| Parts \$0.00 | System: Burglar Alarm - 9173-01 | Email: emilyLwood@gmail.com | Sales Package: |
| Total \$199.48 | 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

Do Not Invoice OFF
 Deliver Invoice OFF
 Activation Date:
 Next Invoice Date:
 Override Warranty OFF
 Remove Service Fee OFF
 Hide Totals OFF
 Invoice Memo: 0/2000

Credit Card:
 eCheck:
 Printed Name:
 Signature:

Billing Options


- **Do Not Invoice** – If there are billable charges on the work order and you want to waive all charges, set the toggle button to On.

- **Deliver Invoice** – Once the invoice is saved, if the customer’s delivery method is email or mail, setting this toggle button to On will automatically deliver the invoice to the customer.
- **Activation Date** – If a new system was installed on this work order, enter the activation date.
- **Next Invoice Date** – This field is not used at this time.
- **Override Warranty** – If the site or system associated with the work order is still covered by the initial warranty, and the customer caused the damage, you can override the warranty by setting this toggle button to On. Charges will be recalculated based on the business rules of the site or system’s service level.
- **Remove Service Fee** – If you do not want to charge the customer the default service fee, set this toggle button to On.
- **Hide Totals** – Use this to hide the totals on the invoice.
- **Invoice Memo** – You can type text into this field, which will print on the customer’s invoice. A maximum of 2,000 characters is allowed.
- **Credit Card** – If the customer has a credit card on file and has authorized your company to charge the credit card for the work order billable charges, click on the drop-down arrow to select the credit card. If the customer has provided a new credit card, click the **New CC** button to enter the credit card information.
- **eCheck** – If the customer has an eCheck bank account on file and has authorized your company to debit their bank account for the work order billable charges, click on the drop-down arrow to select the eCheck bank. If the customer has provided a new bank account, click the **New EC** button to enter the information.
- **Printed Name** – Type the name of the customer who approved the work performed.
- **Signature** – If your technicians are using the mobile application, they will have the customer sign to approve the work performed.

Notes Tab

Read the notes to see if any parts were used. Check the Parts tab to make certain the parts were entered. Reading the notes can help to determine whether some or all of the work order charges are billable.

Make certain there are no typos or misspelled words in the note; correct if needed.

 If your company has activated the Customer Portal option, when your customer logs into the portal, they will be able to read notes on their account that are set to customer access level.

Work Order 2563 Save 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: 4/1/2022

Warehouse: Main Warehouse

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

[+ Add Note](#)

| Note | Modified | Modified By | Type | Expiration | |
|--|--------------------------|---------------|----------|------------|---|
| Motion installed in office. Verified signals with central station. | Apr 1, 2022, 11:41:17 AM | Papay, Travis | Standard | | Edit Delete |
| Install motion in office | Apr 1, 2022, 11:15:26 AM | Papay, Travis | Standard | | Edit Delete |

0 - 0 of 0 items

System Parts Tab

If parts were replaced, make certain to enter the removal date on the part that was replaced.

Work Order 2563 Save 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: 4/1/2022

Warehouse: Main Warehouse

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

[+ Add Parts](#) [Export to Excel](#)

| Part Code | Part Description | Location | Zone # | Install Date | Removal Date | Serial Number | |
|-----------|--------------------------|--------------------|--------|--------------|--------------|---------------|---|
| 5800PIR | Wireless Motion Detector | Hallway | 2 | 3/7/22 | | | Docs Delete |
| 5816 | Door/Window Transmitter | Front Door | 1 | 3/7/22 | | | Docs Delete |
| 6160 | Keypad | Left of entry door | | 3/7/22 | | | Docs Delete |
| Vista20P | 8-zone control panel | Entry Closet | | 3/7/22 | | | Docs Delete |
| IM-1270 | 12V Battery | Panel | | 3/7/22 | 3/31/22 | | Docs Delete |
| 5800PIR | Wireless Motion Detector | | | 3/31/22 | | | Docs Delete |
| IM-1270 | 12V Battery | | | 3/31/22 | | | Docs Delete |
| 5800PIR | Wireless Motion Detector | | | 3/31/22 | | | Docs Delete |

1 - 8 of 8 items [Refresh](#)

System Notes Tab

The notes displayed are mostly for informational purposes. If the technician observed any noteworthy conditions, enter a system note.

Work Order 2563 Save 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
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
Warehouse: Main Warehouse

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

[+ Add Note](#)

| Note | Modified | Modified By | Type | Expiration | |
|--|--------------------------|---------------|----------|------------|---|
| This system was originally installed by an ADT dealer. | Mar 29, 2022, 2:48:08 PM | Papay, Travis | Standard | | Edit Delete |

0 - 0 of 0 Items

Documents Tab

If it is your company’s policy for technicians to take pictures of site or system conditions, and the technicians are using the mobile application, they can upload pictures to the work order. Even if your company is not using the mobile application, you can upload as many pertinent documents as needed.

Work Order 2563 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 \$93.75 | Site • #3719-01 Emily Wood - 45722 Chandler | Phone (734) 258-4646 | Salesperson • Dan Brown |
| Parts \$0.00 | System Burglar Alarm - 9173-01 | Email emilyLwood@gmail.com | Sales Package |
| Total \$199.48 | 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 1 System Parts System Notes Documents Custom Fields

Select files... Drop files here to select *Max file size 5MB Show deleted documents

| File Name | Type | Security | Modified Date |
|-----------------------|------|----------|---------------|
| No records available. | | | |

0 - 0 of 0 items

Custom Fields Tab

If your company has set up custom fields for work orders, make certain selections have been made according to your company's policies and procedures.

Work Order 2563 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 \$93.75 | Site • #3719-01 Emily Wood - 45722 Chandler | Phone (734) 258-4646 | Salesperson • Dan Brown |
| Parts \$0.00 | System Burglar Alarm - 9173-01 | Email emilyLwood@gmail.com | Sales Package |
| Total \$199.48 | 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 1 System Parts System Notes Documents Custom Fields

CustomerSatisfied

Once the Work Order has been reviewed and is ready for invoicing, you have two options:

- Change the **Work Order Status** to **Completed**, and then create the invoice/close the work order.

- Change the **Work Order Status to Ready To Bill**, which will add the work order to the Ready To Bill Work Orders tab from Accounts Receivable > Work Orders.

Complete / Invoice / Close

When using this option, make certain you are in edit mode for the work order.

1. In the work order header, change the Status to Completed.
2. Changing the Status to Completed will take you to the Billing tab. If you do not already have a printed name and signature, you must fill in both of these required fields.
3. Click the **Complete** button at the upper right of the page. You should receive a confirmation message indicating the customer invoice was successfully saved.

Work Order 2563

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

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

Status: Completed (1)

Requested By: Emily Wood | Technician: Carolyn Johnson
Phone: (734) 258-4646 | Salesperson: Dan Brown
Email: emilyLwood@gmail.com
PO Number: Purchase Order
Work Order Date: 4/11/2022 | Warehouse: Main Warehouse

System: Burglar Alarm - 9173-01
Tax: MI
Type: Service Call

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

Do Not Invoice: OFF
Deliver Invoice: OFF
Activation Date: [Field]
Next Invoice Date: [Field]
Override Warranty: OFF
Remove Service Fee: OFF
Hide Totals: OFF
Invoice Memo: [Field]

Credit Card: [Field] + New CC
eCheck: [Field] + New EC
Printed Name: Emily Wood (2)
Signature: [Field] Clear

Sending a Work Order to the Ready To Bill Work Orders List

When using this option, make certain you are in edit mode for the work order.

1. Click on the Billing tab. If you do not already have a printed name and signature, you must fill in both of these required fields.
2. In the work order header, change the **Status** to Ready To Bill.
3. Click the **Save** button at the upper right of the page.

Work Order 2563

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

3 Save Cancel Void

| | | | |
|--|--|--|--|
| Service Fee \$85.00 Labor \$93.75 Parts \$0.00 Total \$199.48 | Status • Ready To Bill 2 Site • #3719-01 Emily Wood - 4500 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 Warehouse • Main Warehouse |
|--|--|--|--|

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

Do Not Invoice OFF

Deliver Invoice OFF

Activation Date

Next Invoice Date

Override Warranty OFF

Remove Service Fee OFF

Hide Totals OFF

Invoice Memo

Credit Card

eCheck

Printed Name 1

Signature

Work Orders

Open Work Orders Open Appointments Closed Work Orders Recurring Work Orders Ready To Bill Work Orders

✓ Close and Invoice Selected
Export to Excel
Items Selected: 0
Custom Grid Layout

| <input type="checkbox"/> | WO # | Site | Type | Technician | Last Activity | Total Amount |
|--------------------------|------|------------|--------------|------------------|---------------|--------------|
| <input type="checkbox"/> | 2563 | Emily Wood | Service Call | Johnson, Carolyn | Apr 1, 2022 | \$199.48 |

0 - 0 of 0 items
Refresh