

Work Orders Overview

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Work Orders are a vehicle for managing installation or service work performed by technicians. There are two types of work orders: regular work orders, which are used for performing installations and service calls, and recurring work orders, which are used for preventive maintenance work or system inspections.

There are many functions that you can perform from a work order. Each of these functions is covered under separate articles.

- Schedule/Dispatch technician appointments (Appointments tab)
- Add items and deposits from customers (Items & Deposits tab)
- Add parts used, which includes ordering parts, issuing and returning parts, and entering RMAs (Parts tab)
- Add part kits (if any) (Part Kits tab)
- Add new RMR (RMR tab)
- Enter bills and invoices (Billing tab)
- Add change orders (Change Orders tab)
- Enter notes (Notes tab)
- Add system parts (System Parts tab)
- Add system notes (System Notes tab)
- View zones (Zones tab)
- Create purchase orders for parts or services (Purchase Orders tab)
- View the work order history for the site (Site Work Order History tab)
- Attach documents (Documents tab)
- View general ledger entries associated with the work order (General Ledger tab)
- View part ledger entries associated with the work order (Part Ledger tab)
- Enter Custom Field information (Custom Fields tab)
- View and edit work order commission (Work Order Commission tab)
- View, add, and edit timesheets (Timesheets tab)
- View and edit work order costing (Costing tab)
- View, edit, and delete work order tasks (Tasks tab)