About Completing a Work Order

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Completing and invoicing a work order may be done from the Work Order page or from the Ready to Bill tab of the Work Orders listing. Both methods are covered in this section.

Typically, a staff member in the service department reviews work orders prior to invoicing to ensure that all charges and costs have been accounted for. If the person reviewing the work orders is not performing the invoicing, they change the work order status to Ready To Bill. This places the work order on the Ready To Bill Work Orders list where invoicing can be performed for multiple work orders at the same time.

The person who actually creates the invoice is determined by your internal company policies and procedures and provides the users with the appropriate permissions to do so.

If your customer system records have accurate warranty codes, warranty start dates, and correct service levels assigned, charges are automatically calculated by the software. Automatically calculated charges for parts and items with default rates can be changed on individual work orders.

If the system is still covered by the original warranty, no charges will be calculated; however, if the customer caused the damage, you can override the warranty.

Work Order Review

It is a good practice to develop a company checklist of the items to review on a work order prior to creating a customer invoice. This minimizes billing errors that would require corrections to the original invoice or crediting-off and re-invoicing the customer. Below is a sample checklist of work order items to review.

- Purchase Orders
- Notes
- Appointments
- Items
- Parts
- RMR
- Billing
- System Parts
- System Notes
- Documents
- Custom Fields