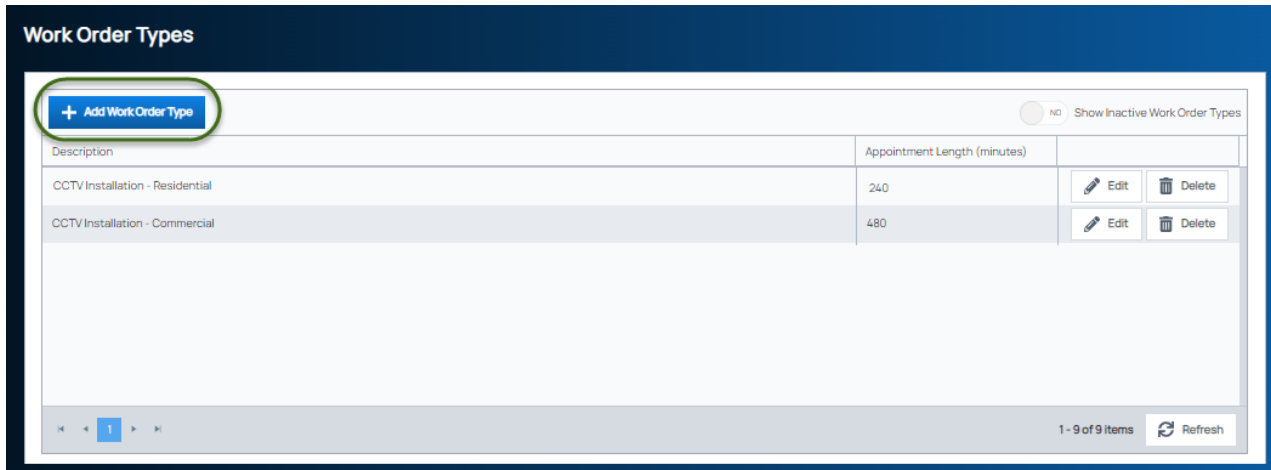


# Add a Work Order Type

Last Modified on 11/01/2024 7:27 pm EDT

From the main menu, arrive at the Work Order Types setup with this path: Setup > Operations > Work Order Types.

The Work Order Types list is displayed. Click the **Add Work Order Type** button at the upper left of the form.



The Add Work Order Type form is displayed.

- **Name:** Type a short name to identify the work order type. (required)
- **Description:** Type in a description. Maximum of 50 characters.
- **Category:** If needed choose a category to use as a default for the work order type. Categories are used for grouping income and expense transactions to produce departmentalized profit and loss statements. Categories come from Setup > Accounting > Categories.
- **Appointment Length (minutes):** This is an estimated amount of time, in minutes, that it will take to complete the work. (required)
- **Use Change Orders?:** A switch allowing work orders using this work order type to use change orders. Change orders is a feature of Managely Pro.
- **Use Job Costing?:** A switch to use job costing on work orders using this work order type. The costing is determined by all the expenses applied to the job. Setting this switch to Yes shows additional fields: Use Overhead? and Allow Costing on Closed W/O?
- **Use Overhead?:** A switch to use overhead on work orders that use this work order type. This field is hidden if Use Job Costing is set to No.
- **Costing Method:** Select the costing method to use:
  - Accrued Work in Progress (this shows additional fields)
  - Direct Expense
  - Work In Progress (this shows additional fields)
- **Misc WIP GL:** Shown only if the Costing Method is Accrued Work in Progress or Work in Progress. Select the GL account for miscellaneous work in progress.
- **Material WIP GL:** Shown only if the Costing Method is Accrued Work in Progress or Work in Progress. Select the GL account for material work in progress.
- **Accrued Income GL:** Shown only if the Costing Method is Accrued Work in Progress. Select the GL account for accrued income.
- **Cost of Goods GL:** Select the GL account for the cost of goods.
- **Alt Cost of Goods Amount:** If used, enter an alternate cost of goods amount. If this amount is more than zero, there is an additional field added to the form called Alt Cost of Goods GL.
- **Alt Cost of Goods GL:** Select the GL account for the alternate cost of goods. This field is shown only if the Alt

Cost of Goods Amount is more than zero.

- **Overhead Type:** Shown only if Use Overhead is set to Yes. Select whether to use an overhead percentage or a flat amount.
- **Overhead % Amount** or **Overhead Flat Amount:** Shown only if Use Overhead is set to Yes. This is the overhead as a percentage of the work order's total labor dollar value or a flat dollar amount that will be added as an additional expense to the work order.
- **Hold Back %:** This defaults to zero; 1 equals 100%. Enter a percentage to hold back from invoices and progress invoices. This amount will need to be invoiced after the work order is complete. [Hold back](#) is a feature of Managely Pro.
- **Hold Back Item:** This is hidden until the Hold Back % is greater than zero. Choose an item to use for the hold back percent. This item appears on invoices. Hold back is a feature of Managely Pro.
- **Allow Costing on Closed W/O?:** A switch allowing costing changes on closed work orders that use this work order type.
- **Labor Commissionable?:** A switch allowing commission on labor.
- **Materials Commissionable?:** A switch allowing commission on materials (parts).
- **Recurring Commissionable?:** A switch allowing commission on recurring charges.
- **Non-Recurring Commissionable?:** A switch allowing commission on non-recurring changes.

When finished, click the **Save** button at the bottom of the form.

The screenshot shows a form titled "Add Work Order Type" with a close button (X) in the top right corner. The form contains the following fields and controls:

- Name:** Text input field with placeholder "Name".
- Description:** Text input field with placeholder "Description".
- Category:** Dropdown menu.
- Appointment Length (minutes):** Spin box with value "0".
- Use Change Orders?:** Toggle switch set to "NO".
- Use Job Costing?:** Toggle switch set to "NO".
- Costing Method:** Dropdown menu with "Direct Expense" selected.
- Cost of Goods GL:** Dropdown menu.
- Alt Cost of Goods Amount:** Spin box with a help icon (?) on the right.
- Hold Back %:** Spin box with value "0%".
- Labor Commissionable?:** Toggle switch set to "NO".
- Materials Commissionable?:** Toggle switch set to "NO".
- Recurring Commissionable?:** Toggle switch set to "NO".
- Non-Recurring Commissionable?:** Toggle switch set to "NO".

At the bottom of the form, there are two buttons: a green "Save" button and a white "Cancel" button with a grey border.

