

REVIEW AND FINALIZE THE WORK ORDER

REVIEW THE WORK ORDER

OPEN THE WORK ORDER FROM THE DISPATCH SCREEN OR FROM INVOICING

DISPATCH SCREEN

From the Completed tab, click on the Edit button for the work order.

Dispatch (1) | Work Order (3) | Administrative (3) | Material (3)

Active/Travel 0 | Appts. 2 | Follow-Up 1 | Past Due 153 | Completed 3 | Online 0 | + | Search

Edit	WO	Tech	Customer	PO Status	Job Date	Status	Status Date	Code
	126978	B, Rebecca	Polk, James	✓	04/18/17 08:47 AM	Tech Comple	04/18/17 08:46 AM	COD
	126941	B, Rebecca	Hood, Robin	✓	12/22/16 08:00 AM	Tech Comple	01/30/17 10:03 PM	COD
	126940	B, Rebecca	Tennant, Lou	✓	12/22/16 08:53 AM	Tech Comple	01/30/17 10:03 PM	COD

Click on Edit button

INVOICING

- Open the Tech Completed screen in the Invoicing module.

Dispatch (1) | Work Order (3) | Administrative (3) | Material (3) | Accounting (1)

Invoicing

Search

Date: MM/dd/yyyy To: MM/dd/yyyy Choose

Options	Bill To Name	Address	Technician	Dispatch	Job	Job	Total

Search

Export To Excel

Paid Amount: \$0.00 Total Due: \$0.00 Balance: \$0.00

- All Not Processed
- Open Work Orders
- Tech Completed
- Reviewed (Ready to Finalize)
- Finalized (WSA Ready)
- AR All
- Opportunities (Unaccepted Tasks)

- Open the work order by clicking on the edit button.

Invoicing

Tech Completed ✕
 These Work Orders have been changed to a "Tech Completed" status, but have not been reviewed and finalized.

Date: To: Choose-

<input type="checkbox"/>	Options	Bill To Name	Address	Technician	Dispatch Code	Job Date	Job Status	Total Due	Balance	PO Total	Ticket #	ZW Inv#	Message
<input checked="" type="checkbox"/>		Polk, James	4155 BOX RANCH ROAD	B. Rebecca	COD	4/18/17	Tech Completed	\$246.97	\$0.00	\$20.00	126978		
<input checked="" type="checkbox"/>		Tennant, Lou	465 Dove Hill Ln	B. Rebecca	COD	1/30/17	Tech Completed	\$0.00	\$0.00	\$0.00	126940		
<input checked="" type="checkbox"/>		Hood, Robin	1837 Coopers Crossing Rd	B. Rebecca	COD	1/30/17	Tech Completed	\$0.00	\$0.00	\$0.00	126941		

Search ✕ 1 - 3 displayed, 3 in total

[Export To Excel](#) Paid Amount: Total Due: \$246.97 Balance: \$0.00

VERIFY

- Verify that Notes, Tasks, Parts, PO, Payments, Tax Authority, Warranty Claim and Split Pay Type are all correct on the work order. Any required changes should be made now. Once the work order has been Finalized, tasks and parts can no longer be changed.

CHANGE STATUS TO 'REVIEWED' THEN CLICK 'SAVE'.

Work Order Detail 🔒

Work Order
Options
Print
Save

Name:

Address:

Third Party Billing:

Work Authorization:

Work PO Number:

Phone:

Email Address:

Job Status: Reviewed
Reviewed
Tech Completed
Ready To Schedule
Request

Dir:

Skill Level:

Job Length:

Job Source:

Sec Source:

Specialty Scale:

Warranty:

Ticket #:

Zone:

Source:

Job Date:

Job Time:

Time Slot:

Schedule Confirmed:

Preferred Tech:

Techs:

Split Pay Type:

- If all of the parts have not been received to the Primary Tech's location, you will be prompted to transfer the inventory.

W.O. #126978

Open Combined View

Polk, James
4155 Box Ranch Rd, Bruceville, TX 76630, USA
(254) 555-1234

Total Billed: \$246.97
Amount Paid: \$246.97
Adjustments: \$0.00
Balance Remaining: \$0.00

Work Order

Options - Print - Save - Discard

Name: Polk, James Ticket #: 126978
Address: 76630 - Primary - 4155 BOX Zone: 2 - Lorena
Third Party Billing: Source: Customer Call
Work Authorization: Job Date: 04/18/2017
Work PO Number: Job Time: 08:46 am - 09:46 am
Phone: (254) 555-1234 Time Slot: PM
Email: rebecca.baker@dwyergroup.com Schedule Confirmed:
Address: Preferred Tech: B. Rebecca
Job Status: Tech Completed Techs: B. Rebecca
Dispatch Code: COD - COD Split Pay Type: All to Primary Tech
Skill Level: Standard Add Tax Authority: +
Accounting Class Code: Job Length: 60
Job Source: Internet Name Active Exempt
Sec Source: Texas
Specialty Scale: Claim Submitted:
Warranty:

ID:126978 Created:2016-12-21 Updated:2017-04-18

Inventory Transfer

Transfer

MFG #	Part Name	Quantity Needed	Address Name	Available Quantity
8194187	FLOAT	1		

Inventory Item: MFG #
Part Number Starting With

From Location:
To Location: T1 - Rebecca

Transfer Quantity: - + y Available: 0



- Click on Part, click on Location, click on Transfer.

Inventory Transfer

3. Click on Transfer

1. Click on Part

MFG #	Part Name	Quantity Needed	Address Name	Available Quantity
8194187	FLOAT	1	Staging	1

2. Click on Location

Inventory Item: 8194187
Part Number Starting With

From Location: Staging [1]
To Location: T1 - Rebecca

Transfer Quantity: - + y Available: 1

- Once the inventory has been transferred, change the status to Reviewed and click Save.
- Changing the status to Reviewed
 - Removes the parts from inventory
 - Allows the work order to be included in the Time & Revenue report
 - Moves the work order to the 'Reviewed' Invoicing screen

FINALIZE THE WORK ORDER

- Work Orders should be Reviewed and Finalized on a daily basis.
- Open the 'Reviewed' Invoicing screen.

Tech Completed

These Work Orders have been changed to a "Tech Completed" status, but have not been reviewed and finalized.

Date: MM/dd/yyyy To: MM/dd/yyyy Choose-

Options	Bill To Name	Address	Technician	Dispatch Code	Job Date	Job Status	Total Due	Balance	PO Total	Ticket #	ZW Inv#	Message
<input checked="" type="checkbox"/>	Polk, James	4155 BOX RANCH ROAD	B, Rebecca	COD	4/18/17	Tech Completed	\$246.97	\$0.00	\$20.00	126978		
<input checked="" type="checkbox"/>	Tennant, Lou	465 Dove Hill Ln	B, Rebecca	COD	1/30/17	Tech Completed	\$0.00	\$0.00	\$0.00	126940		

Click on Reviewed

- Click on the Finalize button at the bottom of the screen.

Reviewed

These Work Orders are ready to finalize.

Date: MM/dd/yyyy To: MM/dd/yyyy Choose-

Options	Bill To Name	Address	Technician	Dispatch Code	Job Date	Job Status	Total Due	Balance	PO Total	Ticket #	ZW Inv#	Message
<input checked="" type="checkbox"/>	Polk, James	4155 BOX RANCH ROAD	B, Rebecca	COD	4/18/17	Reviewed	\$246.97	\$0.00	\$20.00	126978		

Search [x] 1 - 1 displayed, 1 in total

Export To Excel Finalize

Paid Amount: \$246.97 Total Due: \$246.97 Balance: \$0.00

- Finalizing the work order:
 - Allows Invoices to be transferred to QB.
 - Locks the work order so that changes cannot be made to tasks, parts or amount charged.
 - Changes the status to WSA Ready
 - Only work orders that have a balance of \$0.00 go on a WSA
 - All work orders should be finalized regardless of whether or not there is a balance.
 - Moves work orders to AR and the WSA Ready Invoicing screen.