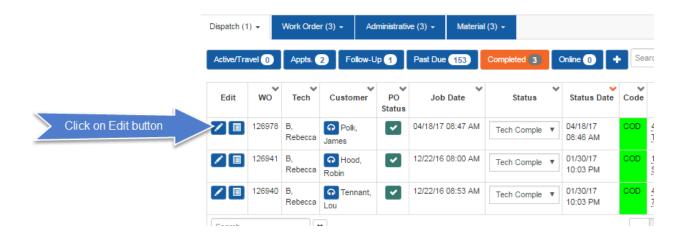# REVIEW AND FINALIZE THE WORK ORDER

REVIEW THE WORK ORDER

OPEN THE WORK ORDER FROM THE DISPATCH SCREEN OR FROM INVOICING

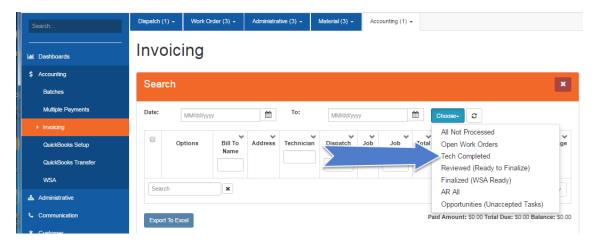#### DISPATCH SCREEN

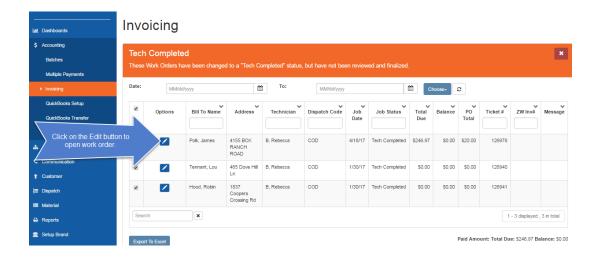From the Completed tab, click on the Edit button for the work order.

INVOICING

- Open the Tech Completed screen in the Invoicing module.

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

Invoicing

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'.

- o 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

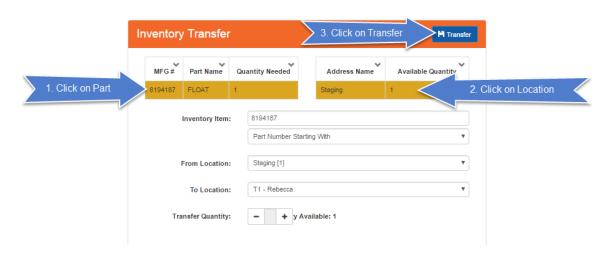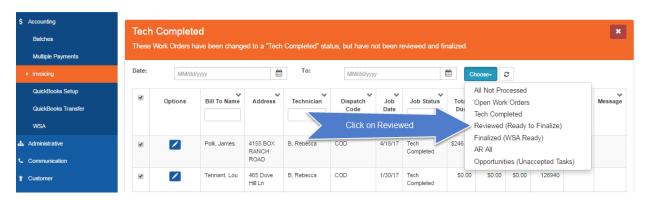| Total Billed:	$246.97
Amount Paid:	$246.97
Adjustments:	$0.00
Balance Remaining:	$0.00

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 Address:	rebecca.baker@dwyergroup.com	Schedule Confirmed:	☐
Job Status:	Tech Completed	Preferred Tech:	B, Rebecca
Dispatch Code:	COD - COD	Techs:	B, Rebecca ✕
Skill Level:	Standard	Split Pay Type:	All to Primary Tech
Accounting Class Code:		Add Tax Authority:	▾ +
Job Length:	60	Name	Active	Exempt
Job Source:	Internet	Texas	☑	☐
Sec Source:			
Specialty Scale:			
Claim Info:			
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

⚠ Insufficient Inventory. Cannot set Work Order to Reviewed status.

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

Inventory Transfer   3. Click on Transfer   Transfer

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

1. Click on Part   2. Click on Location

Inventory Item: 8194187
Part Number Starting With
From Location: Staging [1]
To Location: T1 - Rebecca
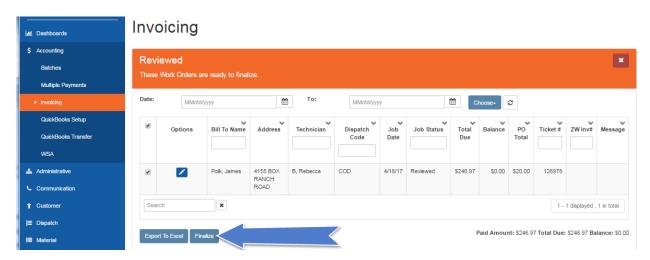Transfer Quantity: − + y Available: 1

o Once the inventory has been transferred, change the status to Reviewed and click Save.

- Changing the status to Reviewed
  - o Removes the parts from inventory
  - o Allows the work order to be included in the Time & Revenue report
  - o Moves the work order to the 'Reviewed' Invoicing screen

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

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

- 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.