

# Work Orders

A **work order** is a record created for executing a contact service request.

Available in Editions: **All Editions**

## Create Work Orders

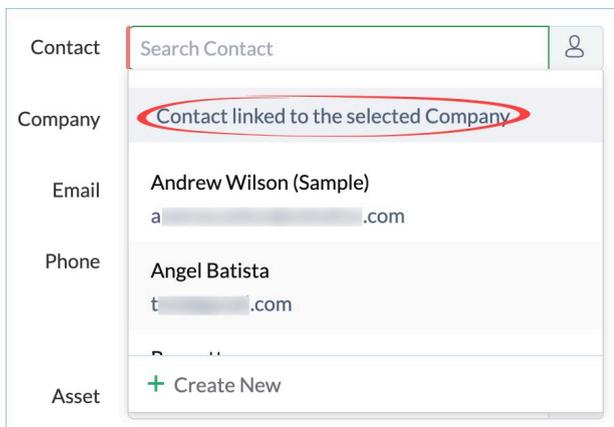
❗ **Permission Required:** [Work Orders](#)

A Work Order can be created in one of the following ways:

- **From Requests:** Use the **Convert to Work Order** option to create a work order for a request. This option will display the *Create Work Order* page with the field values pre-filled. Use the **Requests to Work Order** mapping to determine the Request field values that you want to pre-fill the fields in the *Create Work Order* page with. Refer to [this](#) page for details.
- **From Estimates:** Use the **Convert to Work Order** option to create a work order for an estimate. This option will display the *Create Work Order* page with field values pre-filled. Use the **Estimate to Work Order** mapping to determine the Estimate field values that you want to pre-fill the fields in the *Create Work Order* page with. Refer to [this](#) page for details.
- **From contact phone Requests:** The Customer Service Agent creates work orders for the contact requests received through phone calls.

To create a work order:

1. Select **Work Orders** from the **Work Order Management** menu and click **Create**.
2. Enter the following details, then click **Save**:
  - a. A **Summary** of the work order
  - b. A **Priority**
  - c. A **Type** to indicate the nature of the service the work order is being created for.  
Apart from the default values, you can also [add](#) custom values to this field.
  - d. A **Due Date** by which the work order should be closed
  - e. The **Contact** for whom the work order is being created
  - f. The **Company** the contact belongs to.  
Conversely, for a given company you can choose the contacts associated with it.



The screenshot shows a form with the following fields and their values:

- Contact:** Search Contact
- Company:** Contact linked to the selected Company (highlighted with a red oval)
- Email:** Andrew Wilson (Sample), a .....com
- Phone:** Angel Batista, t .....com
- Asset:** + Create New

- g. The **Phone** number of the contact
- h. The **Email** address of the contact  
If there is no email address associated with the contact, the email address of the company (if present) will be used.
- i. An **Asset**  
An [Asset](#) is added when the service is for a product that you have sold.
- j. The **Territory** in which the contact is located

k. A **Service Address**

This is the address where the service needs to be carried out. The service address present for the Asset, Company, or Contact will be used, in this order of preference. You can choose any other available address or click **Create New**.

Upon clicking **Create New**, the *Add Address* overlay will be displayed. To add a new address, enter the details and click **Save**. You can either choose to add an address to the Company/Contact or create a Single Use Address. The Single Use Address can be used only in the current Work Order record.

l. A **Billing Address**

### Create Work Order

Cancel Save and New Save

#### Work Order Summary

Summary: End of lease cleaning

Priority: Medium

Type: Service

Due Date: Nov 24, 2021

#### Contact Details

Contact: Joe Molinaro

Company: Nebula

Phone: 111-111-1111

Email: test@gmail.com

#### Asset

Asset:

#### Address

Territory: Zylker

Service Address: SERVICE ADDRESS  
10 Oak St,  
Oconee, Illinois, 62553,  
United States  
Tax : IllinoisSalesTax(6.25%)

Billing Address: BILLING ADDRESS  
Locust St,  
Oconee, Illinois, 62553,  
United States  
Tax : IllinoisSalesTax(6.25%)

m. **Preferred Date1**, and **Preferred Date2** for the service call

n. A **Preferred Time**.

o. Any additional **Preference Note** regarding the service call

p. Select a **Currency**.

The Currency and Exchange Rate will be displayed only if [multiple currencies](#) are enabled.

q. Entries for **Services**

These denote the services which have to be delivered for this work order. The Services added in [Services And Parts](#) module will be listed here. You can [search](#) a service using its SKU. If only a single service is added, then it will by default get associated with the Parts, and Skills that you add. [Service tasks](#), if present for the service will also get added.

Select a Tax Rate or choose non-taxable by providing a reason. Click [here](#) to find details about setting the tax rates. The default tax preferences will be set based on the sync settings.

Enter a percentage for the discount you wish to offer or a discount amount. You can choose whether to offer a discount at the line item level or the transaction level. Log in to Zoho Books/Invoice and navigate to **Settings > Preferences > General > Do you give discounts?** and choose the desired option.

### Create Work Order

[Cancel](#) [Save and New](#) [Save](#)

#### Preference

Preferred Date 1

Preferred Date 2

Preferred Time

Preference Note

#### Currency

Currency

Exchange Rate

#### Services

IllinoisSalesTax [change](#)

Service Name	Quantity	List Price	Discount	Tax Name	Line Item Total
Move out carpet cleaning	1 Ho... <input type="text"/>	100	0 \$ <input type="text"/>	IllinoisSalesTax <input type="text"/>	106.25
Description <input type="text"/>					
<a href="#">+ New line</a>					
Sub Total (\$) With tax					106.25

r. Add the **Parts** necessary for the services.

Select the **Service** for which the Part has been added. You can [search](#) a part using its SKU. Select a Tax Rate or choose non-taxable by providing a reason. Enter a percentage for the discount you wish to offer or a discount amount.

s. Add the **Skills** necessary for the services.

Select the **Service** for which the Skill has been added.

# Create Work Order

Cancel

Save and New

Save

## Parts

Part Name	Quantity	List Price	Discount	Sub Total	Tax Name
<input type="text" value="Hoover Carpet Cleaner with ."/> 	<input type="text" value="1"/> Each	<input type="text" value="79.69"/>	<input type="text" value="0"/> \$	79.69	IllinoisSalesTax
Description <input type="text"/>					
Service <input type="text" value="Move out carpet cleaning"/> 					
<input type="text" value="Fiber Rinse"/> 	<input type="text" value="1"/> Each	<input type="text" value="63.75"/>	<input type="text" value="0"/> \$	63.75	IllinoisSalesTax
Description <input type="text"/>					
Service <input type="text" value="Move out carpet cleaning"/> 					

+ New line

Sub Total (\$) 152.40  
With tax

Grand Total (\$) 258.65  
Services + Parts

## Skills

Skill Name	Service
<input type="text" value="Carpet Cleaning &amp; Stain Removal"/> 	<input type="text" value="Move out carpet cleaning"/> 

+ New line

**Skills:** These denote the professional capabilities needed for the work order.  
**Parts:** These denote the products which are required for carrying out this work order.

In the *Work Order Details* page, you will have the links to all its related records, such as Request, Estimate, and Appointments. A history of the activities on the record can be found under the tab [Timeline](#).

FSM Customers Work Order Management Dispatch Console Services And Parts Assets Reports

Work Orders > WO12  
End of lease cleaning  
Completed Service -None- Mary Cooper

Close Edit

Completed  
On May 20, 2022 04:54 AM (GMT -07:00)

Work Order Details  
Requests --  
Estimates --  
Parent Work Order --

Company & Contact  
ABC Services  
Ms. Lucy Robins  
111-111-1111

Asset  
Asset --

Address  
Territory Colona  
Service Address  
Service Address

Timeline Service and parts Appointments Notes Related list Invoices

Services

Service Line Item Name	Service	Quantity	List Price	Tax Name	Line Item Amount
SVC-27	Move out carpet cleaning	1 Hours	\$ 100	SalesTax [7%]	\$ 107
	Completed				
	None				

Parts

Part Line Item Name	Part	Quantity	List Price	Tax Name	Line Item Amount
PRT-27	Hoover Carpet Cleaner with Oxy Carpet Cleaning Solution (50oz)	1	\$ 79.69	SalesTax [7%]	\$ 85.27
	Service Line Item SVC-27				
PRT-28	Fiber Rinse	1 Each	\$ 63.75	SalesTax [7%]	\$ 68.21
	Service Line Item SVC-27				

Sub Total \$ 243.44  
Tax Amount \$ 17.04  
Discount --  
Adjustment --

## Create Follow-up Work Orders and Estimates

You can create a follow-up work order or estimate for an work order. If the agent finds additional work that needs to be completed during the initial work order, a follow-up work order can be created. A follow-up work order can also be created for routine maintenance on equipment, which can help prevent breakdowns and extend the lifespan of the equipment. Similarly, a follow-up estimate can be created to provide the customer with an accurate cost estimate for additional work or parts required for the original work order.

To create a follow-up work order or estimate:

1. Click the **Related List** tab of the work order for which you want to create the follow-up work order or estimate.
2. Click **Create** for **Follow Up Work Orders** or **Follow Up Estimates**.

FSM Home Customers Work Order Management Dispatch Console Services And Parts Assets Workforce

Standard Trial Upgrade

Work Orders > WO12  
End of lease cleaning  
Completed Service Not yet Invoiced Mary Cooper

Close Edit

Work Order Status  
Completed  
On May 20, 2022 05:24 PM

Work Order Details  
Requests --  
Estimates --  
Parent Work Order --

Company & Contact  
ABC Services  
Ms. Lucy Robins

Asset  
Asset --

Timeline Service and parts Appointments Notes **Related list** Invoices

Follow Up Work Orders **+ Create**  
No Records found

Follow Up Estimates **+ Create**  
No Records found

Skills  
No Records found

The created follow-up work order or estimate will be listed respectively under **Follow Up Work Orders** and **Follow Up Estimates**.

Work Orders > WO12  
End of lease cleaning  
Completed Service Not yet Invoiced Jeff Difford

Work Order Status: Completed  
On 20 May 2022 05:24 PM

Work Order Details: Requests, Estimates, Parent Work Order

Contact Details: Company ABC Services, Contact Lucy Robins, Email, Phone 111-111-1111, Mobile

Address: Territory Colona

Timeline Services and parts Service appointments Notes **Related list** Invoices

Follow Up Work Orders + Create

Work Order Name	Summary	Status	Billing Status	Priority	Grand Total	Modified Time
WO59	Some light fixtures need to be r...	New	Not yet Invoiced		\$ 299.27	05 Jan 2024

Follow Up Estimates + Create

Estimate Name	Grand Total	Summary	Status	Modified Time
ES27	\$ 271.47	Some light fixtures need to be replaced	New	19 Apr 2023 03:02 PM

Skills: No Records found

In the follow up work order, the work order from which it was created will be listed as the **Parent Work Order**.

Work Orders > WO59  
Some light fixtures need to be replaced  
New Service Not yet Invoiced Mary Cooper

Work Order Details: Requests, Estimates, Parent Work Order WO12

Contact Details: Company ABC Services, Contact Lucy Robins, Email, Phone 111-111-1111, Mobile

Address: Territory Colona, Service Address 4117 Kennedy Dr, East Moline, Illinois, 61244, United States

Timeline Services and parts **Service appointments** Notes Related list Invoices

Service Appointments + Create Service Appointment  
View, manage, schedule and dispatch Service Appointments to the field technicians.

Service Appointment(s) yet to be scheduled for the following service(s)

- Move out carpet cleaning (SVC-166)
- Plumbing (SVC-167)

No Service Appointment available

Click [here](#) to know how to create follow-up work order or estimate from the mobile app.

## Edit Work Orders

To edit work orders:

1. Select **Work Orders** from the **Work Order Management** menu.

2. Click the work order you want to edit. In the *Work Order details* page, click **Edit**.
3. Click **Save** after making the changes.

## Managing Addresses

You can perform the following actions on an address, Service or Billing, in the *Edit Work Order* overlay:

1. **Choose another address** : If there are multiple addresses present, then click the **Choose another** icon [  ] to select another address. In the *Select Billing/Service Address* pop-up, select the desired address.

**Select Service Address** ✕

Search Service Address

Name	Street 1	Street 2	City	State
Depot Address	708 S 6th St	—	Champaign	Illinois
Billing Address	2205 Sangamon Dr #4981	—	Champaign	Illinois
Service Address	2000 Ogden Ave	—	Aurora	Illinois

< 1 >

2. **Edit address**: To make changes to the Service/Billing address, click the **Edit** icon [  ]. In the *Edit Address* overlay make the necessary changes and click **Save**. If the checkbox **Also update this address in the <Parent> module** is selected, then the modified address will be updated in the parent (Company or Contact) module too.

**Edit Address** ✕

Address relation   
Contact

Address Name

Street 1

Street 2

City

State

Zip Code

Country

Territory  

Taxable  Taxable  Non-Taxable

Tax Name

Also update this address in the Contact module



3. **Add address**: Multiple addresses can be added to a contact. Click the **Add** icon [+]. In the *Add Address* overlay, enter the details and click **Save**.

## Delete Work Orders

You can either delete work orders individually or in bulk.

To delete a work order:

1. Select **Work Orders** from the **Work Order Management** menu.
2. Click the work order you want to delete. In the *Work Order details* page, click **Delete**.
3. Click **Delete** in the *Confirm Delete* popup.

**Work Orders** • WO12  
End of lease cleaning  
Completed Service -None- Mary Cooper

On May 20, 2022 04:54 AM (GMT -07:00)

**Work Order Details**

- Requests --
- Estimates --
- Parent Work Order --

**Company & Contact**

- ABC Services
- Ms. Lucy Robins
- 111-111-1111

**Asset**

- Asset --

**Address**

- Territory Colona
- Service Address
- Service Address

**Timeline** **Service and parts** Appointments Notes Related list Invoices

**Services**

Service Line Item Name	Service	Quantity	List Price	Tax Name	Line Item Amount
SVC-27	Move out carpet cleaning	1 Hours	\$ 100	SalesTax [7%]	\$ 107
	Completed --				
	None				

**Parts**

Part Line Item Name	Part	Quantity	List Price	Tax Name	Line Item Amount
PRT-27	Hoover Carpet Cleaner with Oxy Carpet Cleaning Solution (50oz)	1	\$ 79.69	SalesTax [7%]	\$ 85.27
	Service Line Item SVC-27				
PRT-28	Fiber Rinse	1 Each	\$ 63.75	SalesTax [7%]	\$ 68.21
	Service Line Item SVC-27				

Sub Total \$ 243.44  
Tax Amount \$ 17.04  
Discount --  
Adjustment --

To delete work orders in bulk:

1. In the *Work Orders List* page, select the work orders you want to delete or select the master checkbox to select all records and click **Delete**.
2. Click **Delete** in the *Confirm Delete* popup.

**Filter Work Orders**

Search by Work Orders

- Asset
- Cancellation Message
- Cancellation Reason
- Company
- Contact
- Currency
- Email
- Estimates
- Exchange Rate
- Grand Total
- Invalid Data
- Parent Work Order
- Phone
- Priority
- Requests
- Status
- Territory
- Type
- Work Order Name

**Delete** 3 Records Selected Clear Selection

<input checked="" type="checkbox"/>	Work Order Name	Summary	Status	Priority	Territory	Contact	Company	Work Order Owner	Created Time
<input checked="" type="checkbox"/>	WO3	End of lease cleaning	New	Medium	Zylker	Joe Molinaro	Nebula	Daniel Warne	25 Nov,2021 03:11
<input checked="" type="checkbox"/>	WO2	Deep clean carpet	New	Medium	Westbrook	Joe Molinaro	Nebula	Daniel Warne	16 Nov,2021 06:11
<input checked="" type="checkbox"/>	WO1	Move out carpet cleaning	Completed	Medium	Fillmore	Joe Molinaro	Nebula	Daniel Warne	16 Nov,2021 12:13

< 1 > 100 Records per page

## Clone Work Order

You can easily create a work order by replicating the details of another work order using the cloning feature. To clone a work order:

1. Select **Work Orders** from the **Work Order Management** menu.
2. Click the work order you want to clone and in the *Work Order details* page, click **Clone**.

The screenshot shows the FSM Work Order Management interface. The top navigation bar includes 'FSM', 'Customers', 'Work Order Management', 'Dispatch Console', 'Services And Parts', 'Assets', and 'Reports'. The main header displays 'Work Orders > WO12' and 'End of lease cleaning'. Below this, there are filters for 'Completed', 'Service', '-None-', and 'Mary Cooper'. The left sidebar contains sections for 'Completed', 'Work Order Details', 'Company & Contact', 'Asset', and 'Address'. The main content area is divided into 'Timeline', 'Service and parts', 'Appointments', 'Notes', 'Related list', and 'Invoices'. The 'Service and parts' section contains two tables: 'Services' and 'Parts'. The 'Services' table has one row: SVC-27, Move out carpet cleaning, 1 Hours, \$ 100, SalesTax [7%], \$ 107. The 'Parts' table has two rows: PRT-27, Hoover Carpet Cleaner with Oxy Carpet Cleaning Solution (50oz), 1, \$ 79.69, SalesTax [7%], \$ 85.27; and PRT-28, Fiber Rinse, 1 Each, \$ 63.75, SalesTax [7%], \$ 68.21. A summary table at the bottom right shows: Sub Total \$ 243.44, Tax Amount \$ 17.04, Discount --, and Adjustment --. A dropdown menu is open over the 'Edit' button, with 'Clone' highlighted by a red arrow.

3. Click **Save** after making any changes.  
All the details from the source work order will be prefilled.

The 'Clone Work Order' dialog box is shown with the following fields and values:

- Work Order Summary:**
  - Summary: End of lease cleaning
  - Priority: Select
  - Type: Service
  - Due Date: MMM DD, YYYY
- Contact Details:**
  - Company: ABC Services
  - Contact: Lucy Robins
  - Email: [redacted].com
  - Phone: 111-111-1111
- Asset:**
  - Asset: Search Asset
- Address:**
  - Territory: Colona
  - Service Address: Service Address, 4117 Kennedy Dr.

Buttons: Cancel, Save

## Change Owner

By default, the **Super Admin** is the owner of all the work orders. You can assign another user as the owner of a work order by following these steps:

1. Select **Work Orders** from the **Work Order Management** menu.

2. Click the work order whose owner you want to change and in the *Work Order details* page, click **Change Owner**.

Work Orders > WO12  
End of lease cleaning  
Completed Service -None- Mary Cooper

Completed  
On May 20, 2022 04:54 AM (GMT -07:00)

**Work Order Details**  
Requests --  
Estimates --  
Parent Work Order --

**Company & Contact**  
ABC Services  
Ms. Lucy Robins  
[redacted].com  
111-111-1111

**Asset**  
Asset --

**Address**  
Territory Colona  
Service Address  
Service Address

Timeline **Service and parts** Appointments Notes Related list Invoices

**Services**

Service Line Item Name	Service	Quantity	List Price	Tax Name	Line Item Amount
SVC-27	Move out carpet cleaning	1 Hours	\$ 100	SalesTax [7%]	\$ 107
	Completed				
	None				

**Parts**

Part Line Item Name	Part	Quantity	List Price	Tax Name	Line Item Amount
PRT-27	Hoover Carpet Cleaner with Oxy Carpet Cleaning Solution (50oz)	1	\$ 79.69	SalesTax [7%]	\$ 85.27
	Service Line Item SVC-27				
PRT-28	Fiber Rinse	1 Each	\$ 63.75	SalesTax [7%]	\$ 68.21
	Service Line Item SVC-27				

Sub Total \$ 243.44  
Tax Amount \$ 17.04  
Discount --  
Adjustment --

3. Select the user you want to be the owner and click **Save**.

**Change Owner** [X]

Owner Mary Cooper

Cancel Change

## Complete Work Orders

A work order can be completed only if service appointments have been created for all the associated services and all these service appointments have been completed. When a work order is completed, the status of the work order changes to **Completed**. You can also [automate](#) work order completion.

To complete a work order:

1. Select **Work Orders** from the **Work Order Management** menu.
2. Click the work order you want to complete and in the *Work Order details* page, click **Complete Work**.

FSM Customers Work Order Management Dispatch Console Services And Parts Assets Reports

Work Orders WO11  
Sundry repairs  
In Progress Medium Service Partially Invoiced Mary Cooper

Complete Work Edit

Work Order Details  
Requests --  
Estimates --  
Parent Work Order --

Company & Contact  
ABC Services  
Ms. Lucy Robins  
[redacted].com  
111-111-1111

Asset  
Asset --

Address  
Territory Colona  
Service Address  
4117 Kennedy Dr  
East Moline, Illinois, 61244,  
United States  
Email lathav.spring@gmail.com  
Billing Address

Timeline Service and parts Appointments Notes Related list Invoices

Service Appointments  
View, manage, schedule and dispatch service appointments to the field technicians.

Appointment Name	Total	Status	Actual Start Time	Actual End Time
AP-8 Sundry repairs	\$ 139.1	Completed	May 24, 2022 02:23 AM (GMT -07:00)	May 24, 2022 02:24 AM (GMT -07:00)
AP-7 Sundry repairs	\$ 107	Completed	May 24, 2022 02:25 AM (GMT -07:00)	May 24, 2022 02:25 AM (GMT -07:00)

You can also complete a work order when you try to complete a service appointment.

FSM Customers Work Order Management Dispatch Console Services And Parts Assets Complete Work

Service Appointments WO2 AP-3  
Dripping faucet  
In Progress Jeff Difford

SA Information  
Service(s)  
Leakage Repair (SVC-3)  
Scheduled Time  
Apr 28, 2022 11:00 AM (GMT-07:00)  
Apr 28, 2022 11:30 AM (GMT-07:00)  
Actual Time  
Apr 28, 2022 10:35 PM (GMT-07:00)  
Assigned Resources  
Jeff Difford (Lead)  
Company ABC Services  
Contact Lucy Robins  
Asset --  
Due Date --  
Territory Colona

Timeline Service and parts Trips  
View and manage the trips done by the technicians on appointments.

Complete Associated WorkOrder  
Do you also want to complete the workorder associated  
Do not complete work order Complete Work Order

Dripping faucet  
Customer Rating ☆☆☆☆☆  
Customer Feedback

Service Line Item Name	Service	Quantity	List Price	Tax Name	Line Item Amount
SVC-3 In Progress	Leakage Repair --	1 Hours	\$ 80	SalesTax [7%]	\$ 85.6

Part Line Item Name	Part	Quantity	List Price	Tax Name	Line Item Amount
PRT-3	Waterproof Tile Gap Filler -- Service Line Item SVC-3	1 Pack	\$ 20	SalesTax [7%]	\$ 21.4

Sub Total \$ 100  
Cancel Complete Work

You can also force complete a work order even when some of its line items are only partially completed.

**Force Complete**

The following service line items of the work order are only partially completed. Do you want to complete this work order through force completion of these line items?

Service & Task Details:  
Home Painting(SVC-26)

Painting (STL-70) | Apply primer (STL-69) | Sand or repair surfaces (STL-68)

Clean and prep wall (STL-67)

Cancel | Force Complete

Appointment Name	Total	Status	Actual Start Time	Actual End Time
AP-21 Remodeling of the Crawford House	\$ 85.6	Completed	Nov 20, 2022 04:50 AM (GMT -08:00)	Nov 20, 2022 04:52 AM (GMT -08:00)
AP-10 Remodeling of the Crawford House	\$ 642	Completed	Oct 11, 2022 11:44 PM (GMT -07:00)	Oct 12, 2022 04:56 AM (GMT -07:00)

## Close Work Orders

When all the activities related to a work order have been completed, then the work order can be closed. When a work order is closed, the status of the work order changes to **Closed**.

To close a work order:

1. Select **Work Orders** from the **Work Order Management** menu.
2. Click the work order you want to close and in the *Work Order details* page, click **Close**.

**Work Orders** • WO12  
End of lease cleaning  
Completed Service -None- Mary Cooper

Close Edit

**Services**

Service Line Item Name	Service	Quantity	List Price	Tax Name	Line Item Amount
SVC-27	Move out carpet cleaning	1 Hours	\$ 100	SalesTax [7%]	\$ 107

**Parts**

Part Line Item Name	Part	Quantity	List Price	Tax Name	Line Item Amount
PRT-27	Hoover Carpet Cleaner with Oxy Carpet Cleaning Solution (50oz)	1	\$ 79.69	SalesTax [7%]	\$ 85.27
PRT-28	Fiber Rinse	1 Each	\$ 63.75	SalesTax [7%]	\$ 68.21

Sub Total	\$ 243.44
Tax Amount	\$ 17.04
Discount	--
Adjustment	--

## Cancel Work Orders

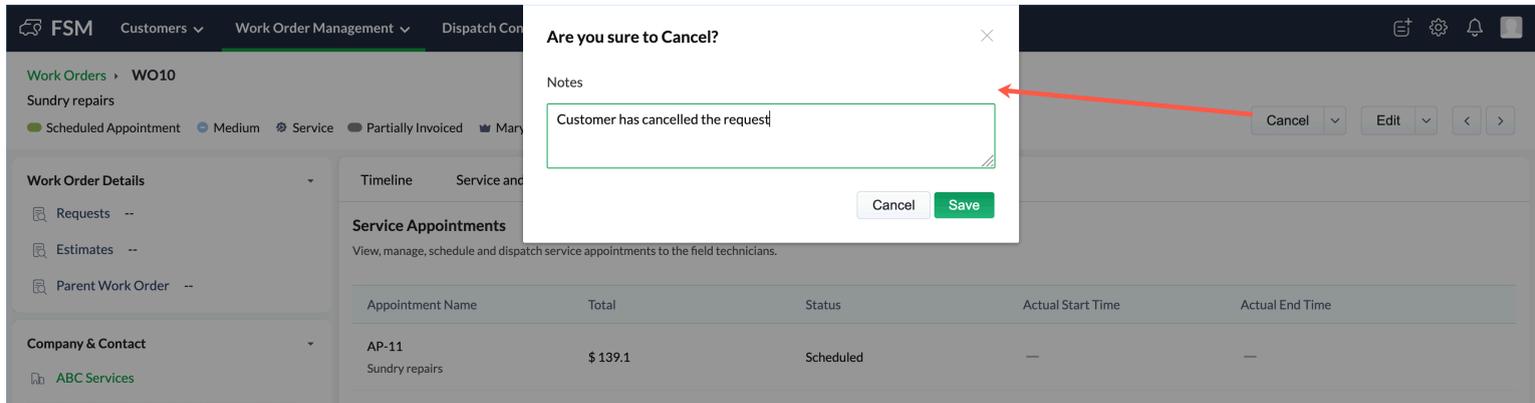
There may be instances when you do not want to proceed with a work order. For example, customer who had requested for an AC installation decides to not go ahead with the installation for the time being. In this case, the work order created for the this request will have to be cancelled.

When a work order is cancelled, the following changes occur:

- the status of the work order changes to **Cancelled**.
- the appointments created for the work order will also be automatically cancelled.

To cancel a work order:

1. Select **Work Orders** from the **Work Order Management** menu.
2. Click the work order you want to cancel and in the *Work Order details* page, click **Cancel**.
3. Click **Save** in the confirmation message.



## Terminate Work Orders

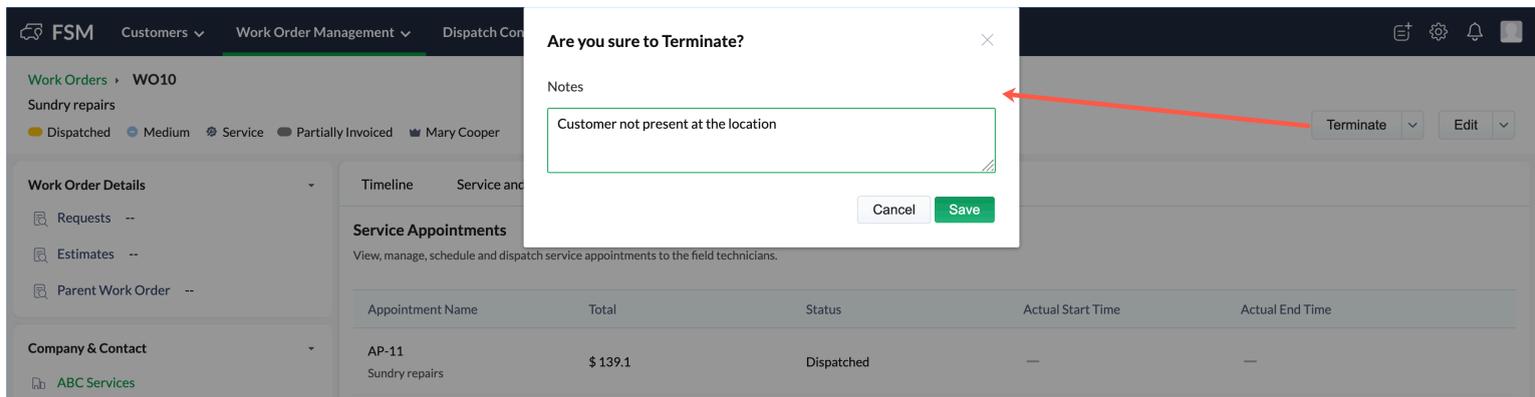
There may be instances when you cannot proceed with a work order. For example, the field agent goes to the service location and finds out that the customer is not present at the service location, or the field agent is unable to carry out their task due to faulty equipment. In these cases, the work order created for the this request will have to be terminated.

When a work order is terminated, the following changes occur:

- The status of the work order changes to **Cannot Complete**.
- The status of the appointments created for the work order will automatically change to **Cannot Complete**.

To terminate a work order:

1. Select **Work Orders** from the **Work Order Management** menu.
2. Click the work order you want to terminate. In the *Work Order details* page, click **Terminate**.
3. Click **Save** in the confirmation message.



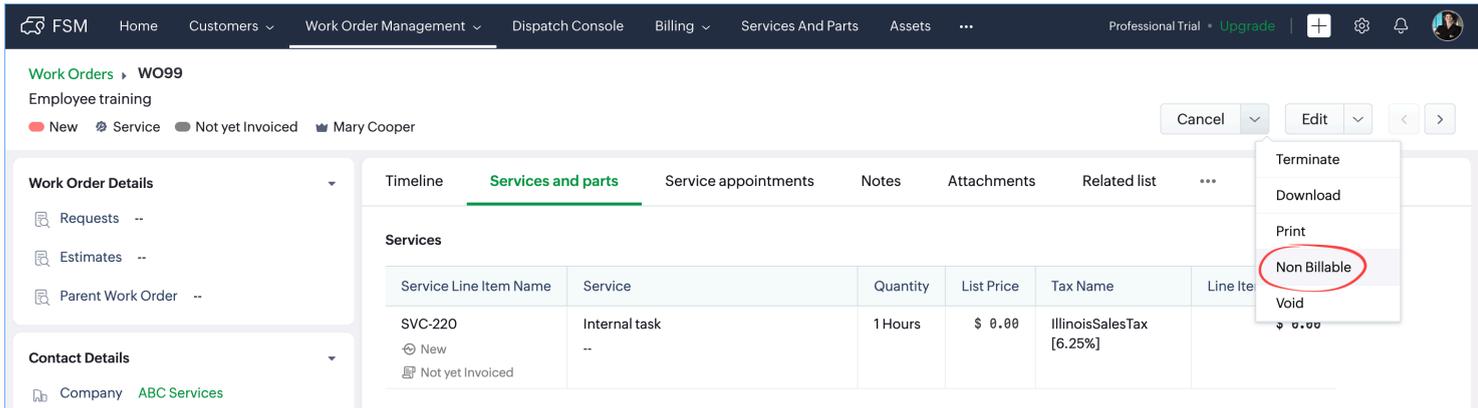
## Mark Billing Status As Non Billable

There are work orders that you undertake but do not charge clients for. These work orders are typically associated with internal activities that are necessary for the operation of the business but do not directly generate revenue. Common examples include employee training, internal meetings, administrative tasks, etc.

You can mark the billing status of these work orders as Non Billable. After you do so, you will not be able to create invoices for these work orders.

To mark the billing status of a work order as non billable:

1. Select **Work Orders** from the **Work Order Management** menu.
2. Click the desired work order. In the *Work Order details* page, click **Non Billable**.



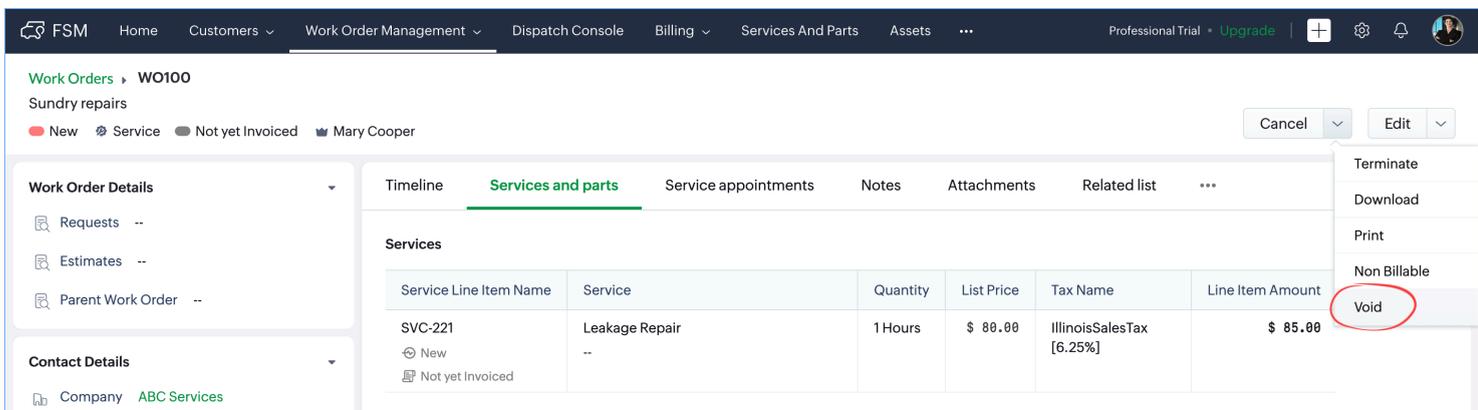
3. Click **Proceed** in the confirmation message.
4. Enter a reason for marking the billing status of the work order as non billable and click **Continue**.

## Mark Billing Status As Void

If there are work orders that are rendered invalid after they were created but you do not want to delete them, then you can mark their billing status as Void. After you do so, the status of the invoices generated for these work orders will be **Void**.

To mark the billing status of a work order as void:

1. Select **Work Orders** from the **Work Order Management** menu.
2. Click the desired work order. In the *Work Order details* page, click **Void**.



3. Click **Proceed** in the confirmation message.
4. Enter a reason for marking the billing status of the work order as void and click **Continue**.

## Create Service Appointments

Service appointments are jobs created for carrying out the services in a work order. These service appointments are assigned to field agents or crew who will then render the services at the contact location. You can create as many service appointments as the services in the work order.

Appointments can be created from the **Work Orders** module or the [Service Appointments](#) module.

To create a service appointment:

1. Select **Work Orders** from the **Work Order Management** menu and click the work order you want to add the service appointment to.
2. Select the **Appointments** tab and click **Create Appointment**.
3. Enter the following details, then click **Schedule**:
  - a. A **Summary** for the service appointment
  - b. The values for **Scheduled Start Date Time** and **Scheduled End Date Time**.

The **Scheduled Start Date Time** and **Scheduled End Date Time** should be within the same day. Use [multi-day scheduling](#) to schedule an appointment

spanning multiple days.

c. A **Field Agent** or a **Crew**

One or more resources can be assigned to the appointment.

The following agents or crews will be available for assignment:

- Active [agents](#) or [crews](#) assigned to the territory that is chosen in the work order
- The agents and crews who are active in the territory between the **Scheduled Start Date Time** and **Scheduled End Date Time**
- During the time when a field agent is part of a crew, they will not be available as an individual resource.

Hover over the name of an unavailable agent to know the reason for their unavailability.

## Create Appointment



Service

Summary

Asset

Preferred Date 1 Apr 29, 2022  
Preferred Date 2 Apr 30, 2022  
Preferred Time Morning  
Preferred Note Would prefer the task to be completed in a day  
Due Date Apr 30, 2022

Scheduled Start Date Time   (GMT -07.00)

Scheduled End Date Time   (GMT -07.00)

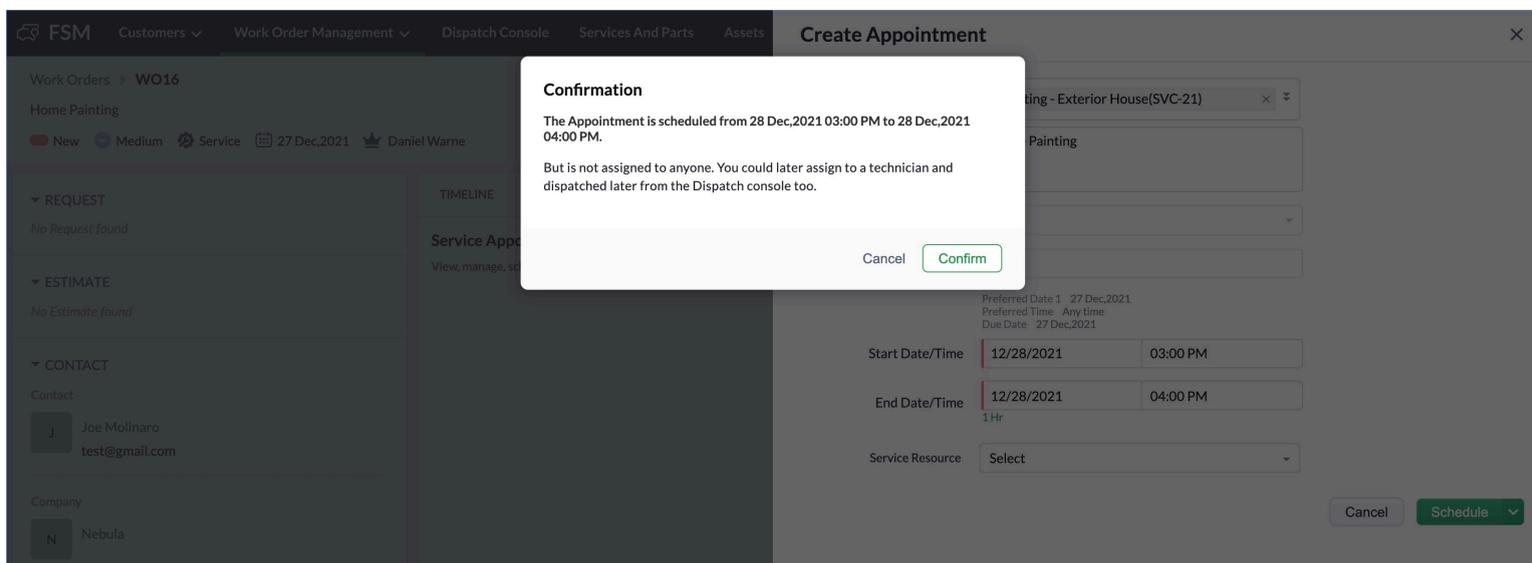
Service Resource

Cancel

Schedule



If you schedule an appointment without assigning it to a service resource (see screenshot below), then the appointment created will be in [New](#) status.



## Creating Service Appointment for a Service

You can create a service appointment for a work order or for the individual services. Appointments for the services can be created as explained below:

To create a service appointment for a work order line item:

1. Select **Work Orders** from the **Work Order Management** menu and click the work order you want to add the service appointment to.
2. Select **Appointments** tab and click **Create Appointment**.
3. Enter the following details, then click **Schedule**:
  - a. In the **Service** field, retain the services or [service tasks](#) you want to create the appointment for.
  - b. A **Summary** for the service appointment
  - c. The values for **Scheduled Start Date Time** and **Scheduled End Date Time**.

The **Scheduled Start Date Time** and **Scheduled End Date Time** should be within the same day. Use [multi-day scheduling](#) to schedule an appointment spanning multiple days.
  - d. A **Field Agent** or a **Crew**

One or more resources can be assigned to the appointment.

A new service appointment can be created for the work order or service after the existing one has been canceled or terminated.

## Create Appointment



Service

- Move out carpet cleaning(SVC-9) ×
- Plumbing(SVC-10) ×

Summary

End of lease cleaning

Asset

Search Asset

Preferred Date 1 Apr 29, 2022  
Preferred Date 2 Apr 30, 2022  
Preferred Time Morning  
Preferred Note Would prefer the task to be completed in a day  
Due Date Apr 30, 2022

Scheduled Start Date Time

Apr 29, 2022	04:00 PM	(GMT -07.00)
--------------	----------	--------------

Scheduled End Date Time

Apr 29, 2022	05:00 PM	(GMT -07.00)
--------------	----------	--------------

Service Resource

Jeff Difford ×

Cancel

Schedule



### Link Service

You can link a service which has been newly added to a work order, to one of its service appointments. Following are the steps to link a service to an existing service appointment:

1. Add a service to an existing work order.

**Edit Work Order** ✕

Services SalesTax (7%)

Service	Quantity	List Price	Tax Name	Line Item Amount
Move out carpet clea	1 Hours ▾	100	SalesTax (7% ▾)	107
Add a Description				
Plumbing	1 Hours ▾	100	SalesTax (7% ▾)	107
Add a Description				
Extermination	1 Select ▾	500	SalesTax (7% ▾)	535
Add a Description				

+ New Line

---

Parts

Part	Quantity	List Price	Tax Name	Line Item Amount

Cancel Save

2. Select the service appointment of the work order to which you want to add the newly added service. Click **Link Service**.

FSM Customers ▾ Work Order Management ▾ Dispatch Console Services And Parts Assets Reports

Service Appointments > WO26 > AP-28  
End of lease cleaning  
Scheduled Jeff Difford

Dispatch ▾ Edit ▾ Link Service

**SA Information**

Service(s)  
Move out carpet cleaning (SVC-54)  
Plumbing (SVC-55)

Scheduled Time  
Jul 08, 2022 09:00 AM (GMT -07:00)  
Jul 08, 2022 11:00 AM (GMT -07:00)

Actual Time  
Appointment not yet started

Assigned Resources  
Jeff Difford (Lead)

**Other Details**

Company ABC Services

Contact Lucy Robins

Asset --

Due Date Jul 09, 2022

**Address Details**

Timeline Service and parts Time sheets Service report Trips Notes

**Services**

Service Line Item Name	Service	Quantity	List Price	Tax Name	Line Item Amount
SVC-54 In Progress None	Move out carpet cleaning --	1 Hours	\$ 100	SalesTax (7%)	\$ 107
SVC-55 In Progress None	Plumbing --	1 Hours	\$ 100	SalesTax (7%)	\$ 107

**Parts**

Part Line Item Name	Part	Quantity	List Price	Tax Name	Line Item Amount
PRT-44	Hoover Carpet Cleaner with Oxy Carpet Cleaning Solution (50oz) -- Service Line Item SVC-54	1	\$ 79.69	SalesTax (7%)	\$ 85.27
PRT-45	Beehive Max Toilet Plunger -- Service Line Item SVC-55	1 Each	\$ 30	SalesTax (7%)	\$ 32.1

3. Click **Save**.

**Link Service** ✕

Service

Cancel Save

The service will get added to the service appointment.

SA Information

- Service(s)
  - Move out carpet cleaning (SVC-54)
  - Plumbing (SVC-55)
  - Extermination (SVC-56)
- Scheduled Time
  - Jul 08, 2022 09:00 AM (GMT -07:00)
  - Jul 08, 2022 11:00 AM (GMT -07:00)
- Actual Time
  - Appointment not yet started
- Assigned Resources
  - Jeff Difford (Lead)

Other Details

- Company ABC Services
- Contact Lucy Robins
- Asset --
- Due Date Jul 09, 2022

Address Details

- Territory Colona
- Service Address

Timeline Service and parts Time sheets Service report Trips Notes

Services

Service Line Item Name	Service	Quantity	List Price	Tax Name	Line Item Amount
SVC-54 In Progress None	Move out carpet cleaning --	1 Hours	\$ 100	SalesTax [7%]	\$ 107
SVC-55 In Progress None	Plumbing --	1 Hours	\$ 100	SalesTax [7%]	\$ 107
SVC-56 In Progress None	Extermination --	1	\$ 500	SalesTax [7%]	\$ 535

Parts

Part Line Item Name	Part	Quantity	List Price	Tax Name	Line Item Amount
PRT-44	Hoover Carpet Cleaner with Oxy Carpet Cleaning Solution (50oz) -- Service Line Item SVC-54	1	\$ 79.69	SalesTax [7%]	\$ 85.27
PRT-45	Beehive Max Toilet Plunger -- Service Line Item SVC-55	1 Each	\$ 30	SalesTax [7%]	\$ 32.1