



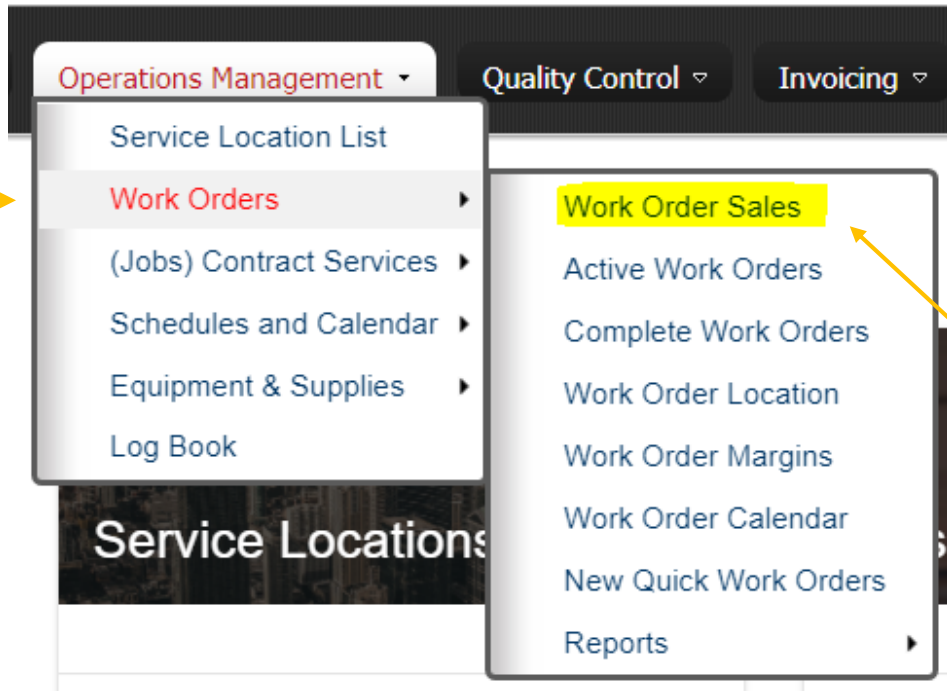
# Quote to Invoice

How to complete a work order

Send Work Orders to Invoicing

# Completing Work Orders

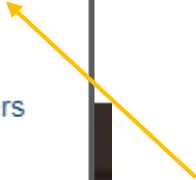
1. Hover over Operations Management



2. Hover over Work Orders



3. Click Work Order Sales



## You will see a list of all In Process (Open) Work Orders

### Work Orders

This is a list of work orders.

Quick Find												
« Previous   Page: 1 2 3 4 5 6 7 ... 90   Next »												
<input type="checkbox"/>	Actions	Work Order#↓	Service Location	Work Order Type	Service	Branch	Contact Name	Date To Complete	Job Number	Sales Person	Created By	Current Status
<input type="checkbox"/>	<a href="#">view</a>	35379	TSG Bethlehem	Recurring	Hourly Cleaning	HQ	Rossi, Maria	6/26/2018	Brite Test	Jaime Maddison	n/a	In Process
<input type="checkbox"/>	<a href="#">view</a>	35378	TSG Bethlehem	Recurring	Hourly Cleaning	HQ	Rossi, Maria	6/25/2018	Brite Test	Jaime Maddison	n/a	In Process
<input type="checkbox"/>	<a href="#">view</a>	35377	TSG Bethlehem	Recurring	Hourly Cleaning	HQ	Rossi, Maria	6/22/2018	Brite Test	Jaime Maddison	n/a	In Process
<input type="checkbox"/>	<a href="#">view</a>	35376	TSG Bethlehem	Recurring	Hourly Cleaning	HQ	Rossi, Maria	6/21/2018	Brite Test	Jaime Maddison	n/a	In Process
<input type="checkbox"/>	<a href="#">view</a>	35375	TSG Bethlehem	Recurring	Hourly Cleaning	HQ	Rossi, Maria	6/20/2018	Brite Test	Jaime Maddison	n/a	In Process

Click into the record you'd like to complete

Inside the record, click on Work Order Status

Work Orders	Work Order Summary	Work Order Status	Additional Billing Information
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## You will see a list of all In Process (Open) Work Orders

**Work Orders** | **Work Order Summary** | **Work Order Status**

### Work Order Status

Total Hours	<input type="text"/>
	<input type="checkbox"/> Accepted
Accepted Date Time	<input type="text"/>
	<input type="checkbox"/> On Site
On Site Date Time	<input type="text"/>
	<input checked="" type="checkbox"/> Completed
Completed Date Time	4/24/2018
	<input type="checkbox"/> Send To Invoice
Send To Invoice Date	<input type="text"/>
Send To Invoice By	N/A
	<input type="checkbox"/> Cancelled
Cancelled Date Time	<input type="text"/>
Signature	N/A
Completed Time	<input type="text"/>

**OK**

Click Completed

Completed date defaults to today's date

Click OK to complete

# To Send to Invoicing

## From the same Work Order Sales grid

### Work Orders

This is a list of work orders.

<input type="text" value="Quick Find"/> <input type="button" value="New Work Orders"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Report"/> <input type="button" value="Print Batch Work Order Ticket"/> <input type="button" value="Print Work Order Schedules"/> <input type="button" value="Print Pricing"/>												
« Previous   Page: 1 2 3 4 5 6 7 ... 90   Next »											Item	
<input type="checkbox"/>	Actions	Work Order#↓	Service Location	Work Order Type	Service	Branch	Contact Name	Date To Complete	Job Number	Sales Person	Created By	Current Status
<input type="checkbox"/>	<a href="#">view</a>	35379	TSG Bethlehem	Recurring	Hourly Cleaning	HQ	Rossi, Maria	6/26/2018	Brite Test	Jaime Maddison	n/a	In Process
<input type="checkbox"/>	<a href="#">view</a>	35378	TSG Bethlehem	Recurring	Hourly Cleaning	HQ	Rossi, Maria	6/25/2018	Brite Test	Jaime Maddison	n/a	In Process
<input type="checkbox"/>	<a href="#">view</a>	35377	TSG Bethlehem	Recurring	Hourly Cleaning	HQ	Rossi, Maria	6/22/2018	Brite Test	Jaime Maddison	n/a	In Process
<input type="checkbox"/>	<a href="#">view</a>	35376	TSG Bethlehem	Recurring	Hourly Cleaning	HQ	Rossi, Maria	6/21/2018	Brite Test	Jaime Maddison	n/a	In Process
<input type="checkbox"/>	<a href="#">view</a>	35375	TSG Bethlehem	Recurring	Hourly Cleaning	HQ	Rossi, Maria	6/20/2018	Brite Test	Jaime Maddison	n/a	In Process

Click into the record you'd like to Invoice

Work Orders

Work Order Summary

Work Order Status

### Work Order Status

Total Hours	<input type="text"/>
	<input type="checkbox"/> Accepted
Accepted Date Time	<input type="text"/>
	<input type="checkbox"/> On Site
On Site Date Time	<input type="text"/>
	<input type="checkbox"/> Completed
Completed Date Time	<input type="text"/>
	<input type="checkbox"/> Send To Invoice
Send To Invoice Date	<input type="text"/>
Send To Invoice By	N/A

Check Send To Invoice

Status changed to Yes  
Date auto-populates

Work Orders

Work Order Summary

Work Order Status

### Work Order Status

Total Hours	N/A
	No
Accepted Date Time	N/A
	No
On Site Date Time	N/A
	No
Completed Date Time	N/A
	Yes
Send To Invoice Date	4/24/2018
Send To Invoice By	N/A

Click OK to finish

OK