



Quote to Invoice

Printing Work Orders

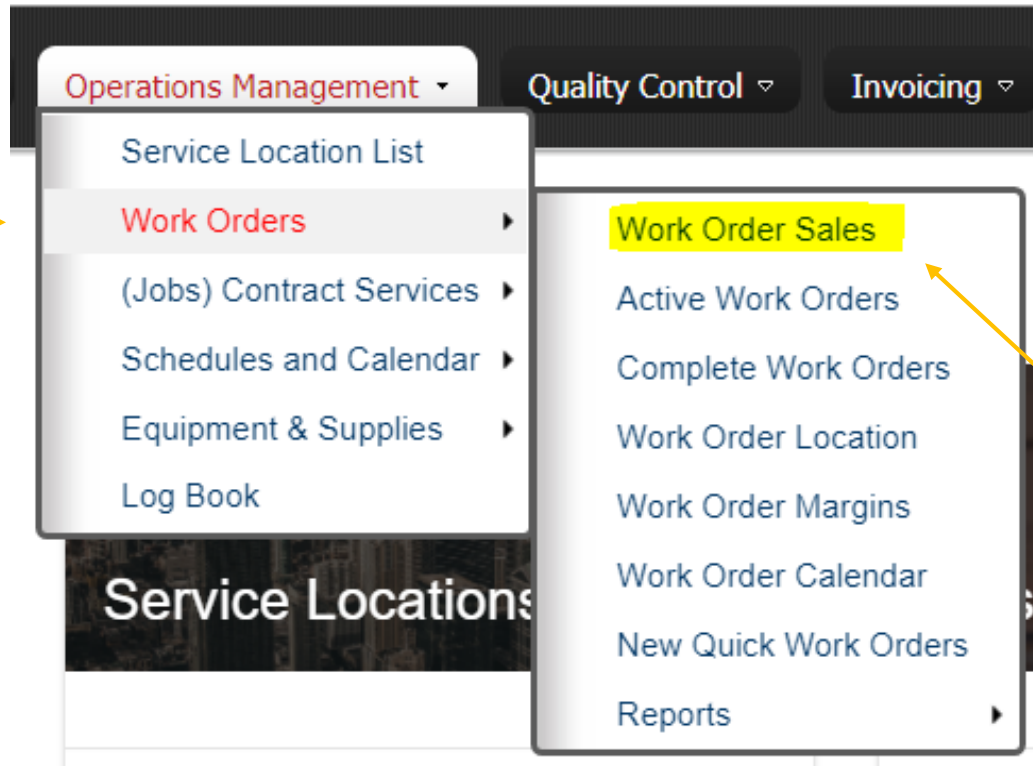
Assigning Work Orders

Printing Work Orders

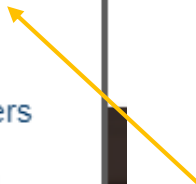
1. Hover over Operations Management



2. Hover over Work Orders



3. Click Work Order Sales



You will see the Work Order Sales Grid

Choose from multiple
Printing options

Work Orders

This is a list of work orders.

<input type="text" value="Quick Find"/>				Report ▾					
« Previous Page: 1 2 3 4 5 6 7 ... 90 Next »									
<input checked="" type="checkbox"/>	Actions	Work Order#↓	Service Location	Work Order Type	Service	Branch	Contact Name	Date To Complete	Job Number
<input checked="" type="checkbox"/>	view	35379	TSG Bethlehem	Recurring	Hourly Cleaning	HQ	Rossi, Maria	6/26/2018	Brite Test
<input checked="" type="checkbox"/>	view	35378	TSG Bethlehem	Recurring	Hourly Cleaning	HQ	Rossi, Maria	6/25/2018	Brite Test
<input checked="" type="checkbox"/>	view	35377	TSG Bethlehem	Recurring	Hourly Cleaning	HQ	Rossi, Maria	6/22/2018	Brite Test
<input checked="" type="checkbox"/>	view	35376	TSG Bethlehem	Recurring	Hourly Cleaning	HQ	Rossi, Maria	6/21/2018	Brite Test

Select one or
Multiple WO

- Print Batch Work Orders
- Print Work Order Schedules
- Print Pricing

Assigning Work Orders

From the Work Order Sales Grid
Click View to enter the record

Work Order Sales

Work Orders

This is a list of work orders.

Actions	Work Order#	Service Location	Work Order Type	Service	Branch	Contact Name	Date To Complete	Job Number	Sales Person	Created By	Current Status	Created On	Service Location Number
view	35379	TSG Bethlehem	Recurring	Hourly Cleaning	HQ	Rossi, Maria	6/26/2018	Brite Test	Jaime Maddison	n/a	In Process	n/a	n/a
view	35378	TSG Bethlehem	Recurring	Hourly Cleaning	HQ	Rossi, Maria	6/25/2018	Brite Test	Jaime Maddison	n/a	In Process	n/a	n/a
view	35377	TSG Bethlehem	Recurring	Hourly Cleaning	HQ	Rossi, Maria	6/22/2018	Brite Test	Jaime Maddison	n/a	In Process	n/a	n/a
view								rite Test	Jaime Maddison	n/a	In Process	n/a	n/a
view								rite Test	Jaime Maddison	n/a	In Process	n/a	n/a
view								rite Test	Jaime Maddison	n/a	In Process	n/a	n/a
view								rite Test	Jaime Maddison	n/a	In Process	n/a	n/a
view								rite Test	Jaime Maddison	n/a	In Process	n/a	n/a
view								rite Test	Jaime Maddison	n/a	In Process	n/a	n/a

Work Orders | **Work Order Summary** | **Work Order Status** | **Additional Billing Information**

Work Orders

These are the fields of the work orders record that can be edited.

Work Order ID	35379
Service Location *	TSG Bethlehem
Contact Name	Rossi, Maria
Job Number	Brite Test
Date Promised	6/26/2018
Date To Complete	6/26/2018
PO Number	5446
Sales Person	Jaime Maddison
Internal Comments	
Work Order Type	Recurring
Accounting Code	5200

↑ ↓ * - indicates a required field

Work Order Details | **Work Order Supplies** | **Email Notifications** | **Invoice History** | **Work Order Costing**

This is a list of work order details.

Description	Service
Jan 5, shop 5	Hourly Cleaning

The Work Order information appears

The Work Order details appear

Click the description to enter the details

Assigning Work Orders

Work Order Details | Status

Work Order Details
These are the fields of the work order details record that can be edited.

Charge Method	N/A
Description	Jan 5, shop 5, edit delete
Service *	Hourly Cleaning
Quantity	1.00
Unit of Measure	SqFt
Rate	
Overhead	(select)
Total Rate	N/A
Overhead Cost	
Floor	
Space	
Production Rate per Hour	1
Total Task Time Hours	1,590.00
Assign Type	Employee
Employee	N/A

* - indicates a required field

Assign Type: Employee

Employee: Maria Rossi

Auto Notify

Schedule Time

View the service and Pricing details

Click the Assign Type dropdown
Choose Employee, Sub or Crew

Check Auto Notify to send the Work Order, click OK