

Creating and Invoicing Work Orders

Creating the Work Order –

From the Main Menu select the following options:

#1 Sales

#1 Invoices, Estimates, and Work Orders

Enter Sales Person Number, Field Exit

Enter Customer Number, Field Exit

Enter

Enter Customer P.O. number, or person who placed order if required by customer, Enter

Type in part numbers, Enter

Type Qty Ordered and Qty Shipped

Type in Order Code: “O” to Order Parts (important step for inventory tracking)

Enter, you will be prompted to enter the Purchase Order number to associate this Work Order with.

After all part numbers have been entered, F9 Entry Completed takes you to Payment Screen

Choose whether this purchase is a Charge Customer, Credit Card, or Cash.

If Customer makes Deposit on Work Order, enter that amount on this screen in Deposit Amount.

Enter

F13 To print the Work Order

F14 To not print the Work Order

Invoicing the Work Order –

From the Main Menu select the following options:

#1 Sales

#1 Invoices, Estimates, and Work Orders

On first screen enter the Work Order Number to Invoice

Enter

<p>Tip: Purchase Order that is associated with Work Order to be invoiced must have appropriate parts Updated before you can Invoice a Work Order. If there are parts that are on backorder, and need to be invoiced separately be sure to mark them as backordered in the Purchase Order program.</p>

Enter through the screens just like a normal invoice – when you get to the payment screens there should be a Y in the Ready Code – this confirms that PO has been updated and parts received.

F7 Print Invoice

Work Order Number will print on Invoice for reference

If you need additional information, email support@southpoint.net or call our office.