

# Work Orders and Invoices



Work Orders (WOs) and Invoices are totally different concepts. Work Orders (also called Job Tickets) describe what we intend to do. Invoices are built once we have done the work. Working with both is core to your business and running it successfully.

## Work Orders

Work orders (WOs) are single records or papers describing the work we intend to do. They are frequently printed out on NCR paper and carried by the technician to the job site. Each WO is separate. A WO provides all the information your technician needs to do the work correctly. It describes the pests, location, customer, service, date and time, and any notes provided by the customer about their need. After the technician's work is complete he/she will log the chemicals used and other information about the job. One copy of the WO is left with the customer, for them to pay from.

## Route Sheets

A route sheet is a compact list of all WO's for a tech for a day, in order. Unlike WO's, the route sheet also includes driving directions and confidential notes about the client and/or the stop. Each tech get his/her own route sheet for the day.

## Invoices

An invoice is a description of what we actually did, and need payment for. So, a WO and an invoice are almost the same thing. The critical difference is that a WO represents what we intended to do and an Invoice represents what we actually did. This difference is small but critical. Although they may be printed for some customers, most invoices are never printed. One last small detail: Invoices are "posted", thus allowing payments to be entered against them. (Posting basically means locking the record to preclude additional changes.) PestaRoo's accounts receivable system is based on invoices.

As you print Route Sheets for the day, PestaRoo automatically creates the corresponding invoices for you. All appropriate information is automatically transferred from the WO to the Invoice. Then, when your tech comes into the office at the end of the day, the WO handwritten info is entered into the invoice and posted.

## Using WO's and Invoices in the Daily Workflow

Each day, using a button on Home Page, you will find all the WO's for tomorrow. You will land on the View and Schedule screen of Work Orders. If you use NCR paper, put it in the printer now. Click on "Print WO Found Set." This will sort all the found records by technician and print double copies. Next, put plain paper back in your printer, and click "Print Route Sheets Found Set" to print the route sheets for each tech. Besides printing your Route Sheets, this also creates the invoices needed for posting.

**Caution-** There have been reports of NCR paper catching fire in laser printers. Use NCR paper at your own risk. At the very least, don't print a large number of sheets and leave them in the printer.

As the tech come in with their completed work for the day, you have three easy steps to do. 1) enter the hand-written info on the invoice 2) schedule any followup visits, and, 3) post any payments.

Starting on Home Page, click "Choose Invoice." or "View Unposted Invoices". Either of these

screens will let you quickly navigate to the invoice you need to post.

Click, “Data Entry” and type in your tech’s hand-written info.

If they did not pay the tech, click “Post only” when you have entered all necessary info. This will post your invoice.

If they **did** pay your tech, click “Post and Pay Now.” This will post your invoice, and take you to a blank payment for this customer.

To learn how to make or complete payments, see the help article “Entering Payments.”

To visualize these processes in a larger view, see the help article “A Typical Day with PestaRoo”.