

# Review Work Order Charges

Last Modified on 03/29/2024 11:18 am EDT

Pathway: Operations > Dispatch - Services List



This process works one day behind the current day to post charges for services completed. Select 'Work Order Posting' from the drop down field located under the 'To' and 'From' date fields to display additional billing and posting columns.

DISPATCH											OPERATIONS > DISPATCH				
FROM	TO	DIVISION		LINE OF BUSINESS											
03/21/24	03/21/24	Example, DAYTON, QAWASTE, CORPUS, HEARNE, HILLSB...		Commercial											
Work Order Posting											Select Route Sheet		Search		
	ROUTE ↑	DRIVER	SCHEDULED	SERVICED	PENDING	DO NOT SERVICE	EXCEPTIONS	PENDING TO POST	READY TO POST	POSTED	BILLED	REVENUE			
- CORPUS - Commercial - Thursday Mar 21, 2024 ( 0 of 5 Completed)															
<input type="checkbox"/>	COR 201	Michael Smith -...	59	0	59 (100%)	0	0	59 (100%)	0	0	0	\$ 0.00			
<input type="checkbox"/>	COR 202	Rudy Eddy - Dri...	77	0	77 (100%)	0	0	77 (100%)	0	0	0	\$ 0.00			
<input type="checkbox"/>	COR 203	Marco Henry -...	74	0	74 (100%)	0	0	74 (100%)	0	0	0	\$ 0.00			
<input type="checkbox"/>	COR 204		1	0	1 (100%)	0	0	1 (100%)	0	0	0	\$ 0.00			
<input type="checkbox"/>	COR 301	Juan Brown - D...	1	0	1 (100%)	0	0	1 (100%)	0	0	0	\$ 0.00			
- DAYTON - Commercial - Thursday Mar 21, 2024 ( 0 of 4 Completed)															
<input type="checkbox"/>	DAY 201	Olivia Peters - S...	101	0	101 (100%)	0	0	101 (100%)	0	0	0	\$ 0.00			
<input type="checkbox"/>	DAY 202	Curtis Thomas -...	64	0	64 (100%)	0	0	64 (100%)	0	0	0	\$ 0.00			
<input type="checkbox"/>	DAY 203	Amanda Fred -...	94	0	94 (100%)	0	0	94 (100%)	0	0	0	\$ 0.00			
<input type="checkbox"/>	DAY CO SU...		11	0	11 (100%)	0	0	11 (100%)	0	0	0	\$ 0.00			

## Permissions

The permissions outlined below are relevant to not only viewing the work order information, but also modifying its charges.

Permission ID	Permission Name
88	Dispatch
334	Add Charge Code to Work Order
335	Delete Charge Code From Work Order
336	Edit Charge Code Rate for Work Order

## Review Work Orders

When the Services List displays, select Billing from the grid-view drop down. This will display the Revenue, Recurring Rate and Posting Status fields that are relevant to reviewing and posting work orders.

The screenshot displays the 'SERVICES LIST' interface. At the top, there are navigation buttons: 'Billing', 'Select Print Format', 'SET POSTING', 'EDIT', and 'PRINT COMPLETED'. Below this is a table of services with columns: ROUTE, LOCATION, SCHEDULED DATE, WO#, WO TYPE, QTY, CHARGE QTY, EQUIPMENT, REVENUE, RECURRING RATE, and POSTING STATUS. The 'EDIT SERVICE RECORD' window is open, showing details for a service. It includes a 'WORK ORDER' section with fields for WORK ORDER, QTY, SERVICE CODE, EQUIPMENT, WORK TYPE, and ORDER TYPE. Below this are 'ORDER NOTES', 'PO NUMBER', 'EXTERNAL ID', 'SCHEDULED DATE', 'ROUTE', 'SEQUENCE', 'DESTINATION / ORIGIN', 'WORK STATUS', 'EXCEPTION REASON', and 'POSTING STATUS'. At the bottom of the window, there are tabs for 'Charges', 'Disposal / Ship', 'Payments', 'Completion', 'Attachments', 'Inventory', 'Labels', 'Photos', and 'Timeline'. The 'Charges' tab is highlighted with a red box, and the 'Completion' tab is also highlighted with a red box. Below the tabs, there are checkboxes for 'Charges must match Equipment' and 'Charges must match Material', and a 'WO MINIMUM' field. A table of charges is shown with columns: GROSS QTY, LABELS, NO CHARGE QTY, CHARGE QTY, UOM, CHARGE CODE, PER UNIT, VENDOR RATE, MINIMUM TYPE, MINIMUM, and TOTAL. The table contains one row with values: 0, , 0, each, Roll Off Haul, \$ 237.00, None, \$ 0.00.

1. From the Dispatch screen, enter the **From/To Dates**, **Division** and **Line of Business**, then select **Load**.
2. Select **'Work Order Posting'** from the grid view drop down (Dispatch screen) to display the additional Posting and Billing columns.
3. Select the value in the **'Pending To Post'** column (Dispatch screen) to open a route's Services List.
  - This count excludes work orders with a *Ready to Post* or *Posted* status.
4. From *Services List*, select the **Billing** view. This will display additional Posting Status and Revenue columns.
5. Double-click on a service location to display the **Edit Service Record**.
  - Review the **Completion** tab for any driver notes which may impact charges.
  - Review the **Disposal/Ship** tab to confirm disposal was completed.
  - Review the **Charges** tab to verify the charges applied are correct. If additional charges are incurred they can be applied as follows:
    - Select the **green plus icon**
    - Search and select the applicable charge
    - Enter a quantity value in the **Gross Qty** field. Entries here will update the Charge Qty field
6. After reviewing the work order, follow your established process and procedures before updating the **Posting Status**.