



Using QuickBooks* to Schedule Work

**This feature is available only in the Premier and Enterprise Solutions editions. In QuickBooks Basic and Pro you can work with existing sales orders but cannot create new ones.*

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Using Sales Order to schedule work flow:

- Make sure the sales order feature is turned on.
- From the Customers menu, choose Create Sales Orders .
- Type the name of the customer or job.
- Modify the Sales Order Template by adding the SHIP DATE FIELD to the form, changing the field name to DATE SCHEDULED
- Change the name of the template to “WORK ORDER”

When an order comes for you to schedule services in the future:

- Open Sales Orders, look for template named WORK ORDER
- Enter the date the work is to be performed in the DATE SCHEDULED Field

Creating a report that will show all future work to be performed:

- Modify the OPEN SALES ORDER by Item Report, name the report WORK SCHEDULE
- Modify the report by removing the DUE DATE column and adding the SHIP DATE Column.
- Sort the report by SHIP DATE column
- In the Header add the information “Ship Date is WORK SCHEDULE Date”
- Memorize the report with the modifications

QuickBooks will list each scheduled service date in chronological order by service type.

Invoicing from an open work order (which is an open sales order)

- Click Customer tab, create invoice, choose customer (QB will advise of open sales order)
- Answer “Yes” to invoice from open sales order (which is really your work order).
- This will clear the WORK ORDER and create an invoice (that shows up on your accounts receivable).