

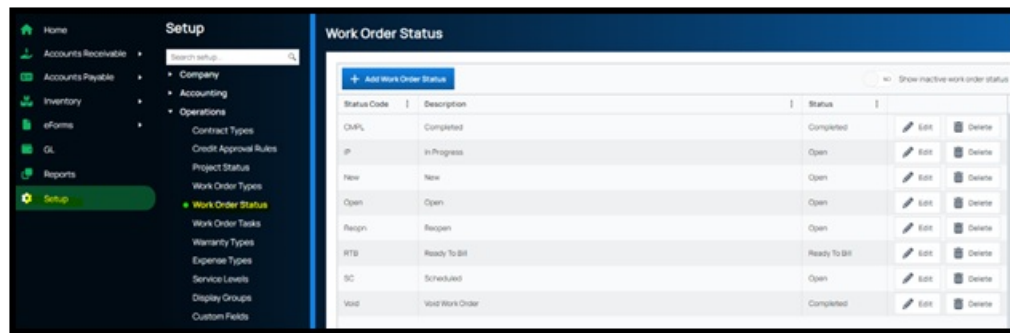
Managely – How to setup/implement the workflow of using Ready To Bill queue before invoice is generated

02/12/2024 6:08 pm EST

Managely gives the ability to move all work orders in a separate queue (for revision) before a customer is invoiced.

This feature can be used by managers or billing staff for a more organized workflow for reviewing the work orders/charges before a customer is invoiced based on a work order.

This option can be enabled by going into the Setup -> Work Order Status.



If the status for Ready To Bill does not exist, please create it as follows:

1. Click the 'Add Work Order Status' button.
2. Fill out the fields as indicated below:

Edit Work Order Status

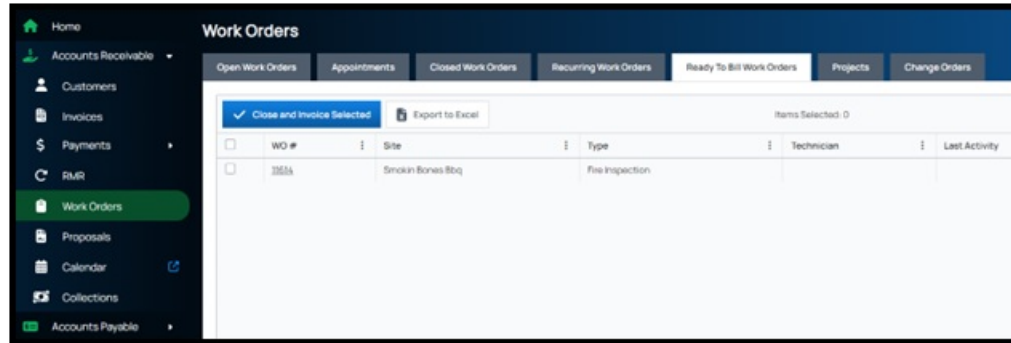
Status Code •

Status Description •

Status

3. For this feature to work, the Status needs to display the option 'Ready To Bill' from the dropdown menu.

Once the setup is completed and a work order(s) status is changed to 'Ready To Bill', the work order(s) will show up on a Separate queue in the Work Orders menu, called Ready To Bill Work Orders



This feature will create an organized workflow for the office personnel who invoice customers, if the technicians on the field, will change the status of their work orders to 'Ready To Bill' and not 'Completed' once their appointment/work is finished.

Another benefit would be that all work orders are double-checked before the customer gets invoiced.