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Work Order Overview

🕐 **Jun 3, 2022** · **Knowledge**

> ## PERMISSIONS
>
> Users: Account Owners and Administrators have full access to manage Work Orders. Regular Users must have the appropriate role permissions to create, edit, delete, export, view Statuses, and view and Manage Documents.
>
> Plans: Work Orders are available for Advanced plans (https://www.fleetio.com/manage/pricing).

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Work Orders offer a robust way to log completed Service Tasks (/s/article/Service-Task-Overview) and Issues (/s/article/Issues-Overview) - the routine Preventative Maintenance and one-time repairs that are performed on Fleetio vehicles.

Work Orders offer greater detail and workflow management options than Service Entries (/s/article/Service-Entry-Overview). Service Entries are typically logged after completion, while Work Orders allow you to capture the entire lifecycle of work performed. Update and monitor Work Order Statuses (/s/article/Work-Order-Statuses) in order to track progress through completion. Additional Parts and Labor detail which is available in the Work Order allow for greater data analysis and cost reporting.

Work Orders are used in conjunction with Service Reminders (/s/article/Service-Reminders-Overview) and Service Programs (/s/article/Service-Programs-Overview) to help you stay on top of scheduled tasks.

> **NOTE:** A completed **Work Order** will *automatically* generate a **Service Entry**, therefore Work Order data will appear along with Service Entry data in Service History Lists and Reports.

> **TIP:** Learn more in the Work Orders Training Video (/s/article/Work-Orders-Training-Video), and see the explanation of maintenance terminology in the Service Tasks vs. Issues, Service Entries vs. Work Orders (/s/article/Service-Tasks-Vs-Issues-Service-Entries-Vs-Work-Orders) article.

Work Order Permissions

Account Owners and Administrators have full access to manage Work Orders, but any role can be customized to your organization's needs.

Change a role's permissions by selecting **Roles** from the **Administration** section of your **Account Information**. Select the **More Actions** menu for the role, then select **Edit**.

Some permissions are coupled. For example, if users can create Work Orders, they also must be able to view incomplete WOs. You can choose, however, to allow users to create, view, and edit incomplete WOs, but not view ones with completed. **Chat with an Expert**

statuses. This may be the case if you want an administrator to be the only user who can complete a Work Order. If that's the case, but you still want to provide users access to view completed service, clear the checkbox for "View Completed Statuses," then select the "View" permission in the Service Entries section.

> **NOTE:** Certain permissions can affect the statuses users can see and update to in Fleetio, but these can be adjusted at any time.

Work Order Labels

Labels are a great way to help categorize and/or prioritize Work Orders. Labels can be added to a Work Order when it is initially created or can be updated later from a Work Order's details page. A few examples of Labels may be Priority: High, Priority: Low, Tires, and Engine.

Just begin typing the name of a Label and select from an existing list, or add a new Label by typing the full name.

> **TIP:** For best results, create an internal process for the use of Labels to ensure consistency throughout the system. Learn more in the Labels Overview (/s/article/Labels-Overview) article.

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View, Filter, and Search

Select **Work Orders** from the **Service** section of the left sidebar menu to view the Work Order List for the entire fleet.

Work Orders can be viewed by status using the tabs at the top. Narrow down Work Orders even further by using the filters available on the screen, or select **All Filters** to access a comprehensive list.

You can also view the Work Order List for a specific Vehicle by going to the **Vehicle Overview** and clicking the **Work Orders** tab.

Click any Work Order row to view detail. At the top of the screen, you can:

- Select **Watch** (a) to watch the Work Order and get updates about changes
- Use the **More Actions** menu (b) to print, make a copy of the record, view the change history, or delete it
- Change the status (c)
- Edit (d) the Work Order details, line items, issues, and more

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The Work Order screen is divided into general details, Line Items (/s/article/Work-Order-Line-Items-Service-Tasks-Labor-Parts) (including **Labor** and **Part**), and a collapsible section for photos, comments, and documents.

Work Order Status

A Work Order allows for workflow management by tracking progress through various customizable statuses. Changing Work Order status to "completed" will resolve all selected Issues, as well as log all Service Tasks attached to the Work Order. Service Entries are also automatically generated at this time so that all maintenance for a vehicle is centralized in lists and reports. Re-opening a completed Work Order will automatically delete the associated Service Entry.

> **TIP:** Learn more about the power of Work Order Statuses in the Work Order Statuses (/s/article/Work-Order-Statuses) article.

Add a Work Order

For complete instructions, please refer to the Add Work Orders (/s/article/Add-Work-Orders) and Work Order Line Items (/s/article/Work-Order-Line-Items-Service-Tasks-Labor-Parts) articles.

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Edit or Delete

On the Work Order list, you can edit or delete an open Work Order by hovering over a record and selecting the menu.

When viewing the Work Order detail screen, there is an Edit button as well as an option to delete the Work Order by selecting the menu.
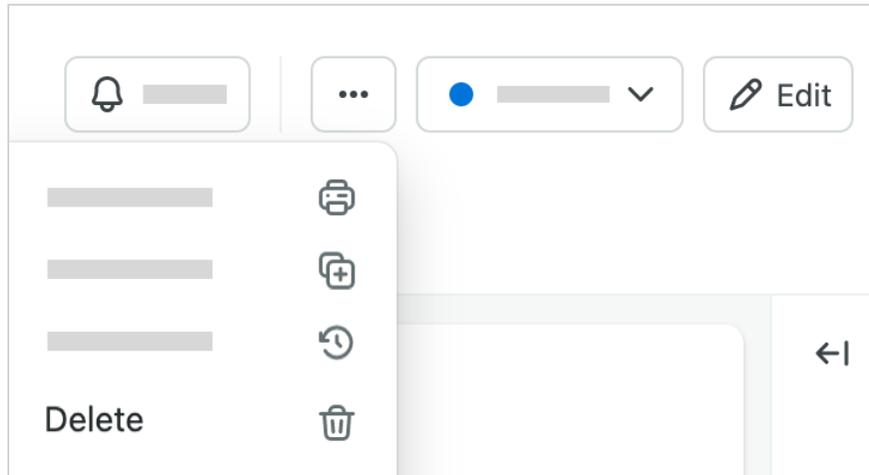
Edit or Delete - Completed Work Orders

There may come a time when you need to go back and make modifications to a completed Work Order. If you have permission to see Work Orders that have been updated to "complete," you can change it back to an open status by using the status drop-down menu in the Work Order.

Once the Work Order status is set back to "open," click the **Edit Work Order** button.

You can now edit all items on the Work Order. After editing, be sure to change the **Status** field back to "completed."

Work Order Notifications

Users who are Watching a Vehicle (/s/article/Watching-A-Vehicle) will receive a notification email when a Work Order is created and when a Work Order Status (/s/article/Work-Order-Statuses) is changed.

Export Work Order List

Using Fleetio, you can choose to export the Work Order List to a CSV directly from the list page. Reference this article (https://help.fleetio.com/help/s/article/Working-With-Your-Data-on-a-List-Page#export-list) for more instructions on exporting the list.

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Work Order Reports

Work Order details for a specific vehicle can be found from the Work Orders or Service Entries lists on the vehicle's profile page.

The Reports area of Fleetio also includes the following reports which contain data related to Work Orders:

- Work Orders > Work Orders List
- Work Orders > Work Orders by Vehicle
- Work Orders > Work Order Status Summary
- Service > Service Summary
- Service > Service History by Vehicle
- Service > Service Task Summary

Using Fleetio (/s/topic/0TO5G0000010yDlWAI...

Maintenance (/s/topic/0TO5G0000010yIRWA...

Work Orders (/s/topic/0TO5G0000010yXFWA...

Related Articles

Work Order Line Items: Service Tasks, Labor, Parts (/s/article/Work-Order-Line-Items-Service-Tasks-Labor-Parts)

Add Work Orders (/s/article/Add-Work-Orders)

Work Order Statuses (/s/article/Work-Order-Statuses)

Purchase Orders Overview (/s/article/Purchase-Orders-Overview)

Work Orders in Fleetio Go (/s/article/Work-Orders-In-Fleetio-Go)

Work Order Meter Validation (/s/article/Work-Order-Meter-Validation)

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Clock In to a Work Order (/s/article/Clock-In-To-A-Work-Order)

Bulk Update Work Orders (/s/article/Bulk-Update-Work-Orders)

Clocking In and Out of Work Orders in Fleetio Go (/s/article/Clocking-In-And-Out-of-Work-Orders-In-Fleetio-Go)

Work Orders Training Video (/s/article/Work-Orders-Training-Video)

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