

Work order and invoice management for a lighting landscape company

- Used Zoho Creator, CRM and Books for creating LEAD and then converting into Deals/Quote, WO, Sales Order and Invoices.
- Work order management
- Linked with Zoho books for invoicing

Creation of work order in Zoho Creator

Verify raanacredit: x Zoho CRM - x Zoho CRM - x Zoho CRM - x Zoho Creat: x Estimates | x

https://app.zohocreator.com/annietuttle/tech-work-order-app#Report:All_Work_Orders

Tech Work Order App Subscription Edit this application Help

Tech Work Order App

- Work Orders
- Work Orders
- All Work Orders
- Time Tracking
- Technicians
- Tracking Details
- Products

Work Orders

Work Order Information

Work Order #	<input type="text" value="1149"/>	Assigned Tech	<input type="text" value="-Select-"/>
Customer Name *	<input type="text" value="Test31 sns"/>	Work Order Date/Time	<input type="text" value="dd-MMM-yyyy HH:mm:ss"/>
Home Phone	<input type="text" value="+1 201-555-0123"/>	Mobile Phone	<input type="text" value="+1 201-555-0123"/>
Description	<input type="text"/>	Work Order Type	<input type="text" value="Service Call"/>
		Status	<input type="text" value="-Select-"/>
		Duration	<input type="text" value="-Select-"/>

Address Information

Billing Street	<input type="text"/>	Locate Map	<input type="text" value="-Select-"/>
Billing City	<input type="text"/>	Shipping Street	<input type="text"/>
Billing State	<input type="text"/>	Shipping City	<input type="text"/>

Kim Marron

Work order created in Creator will be accessible in CRM also

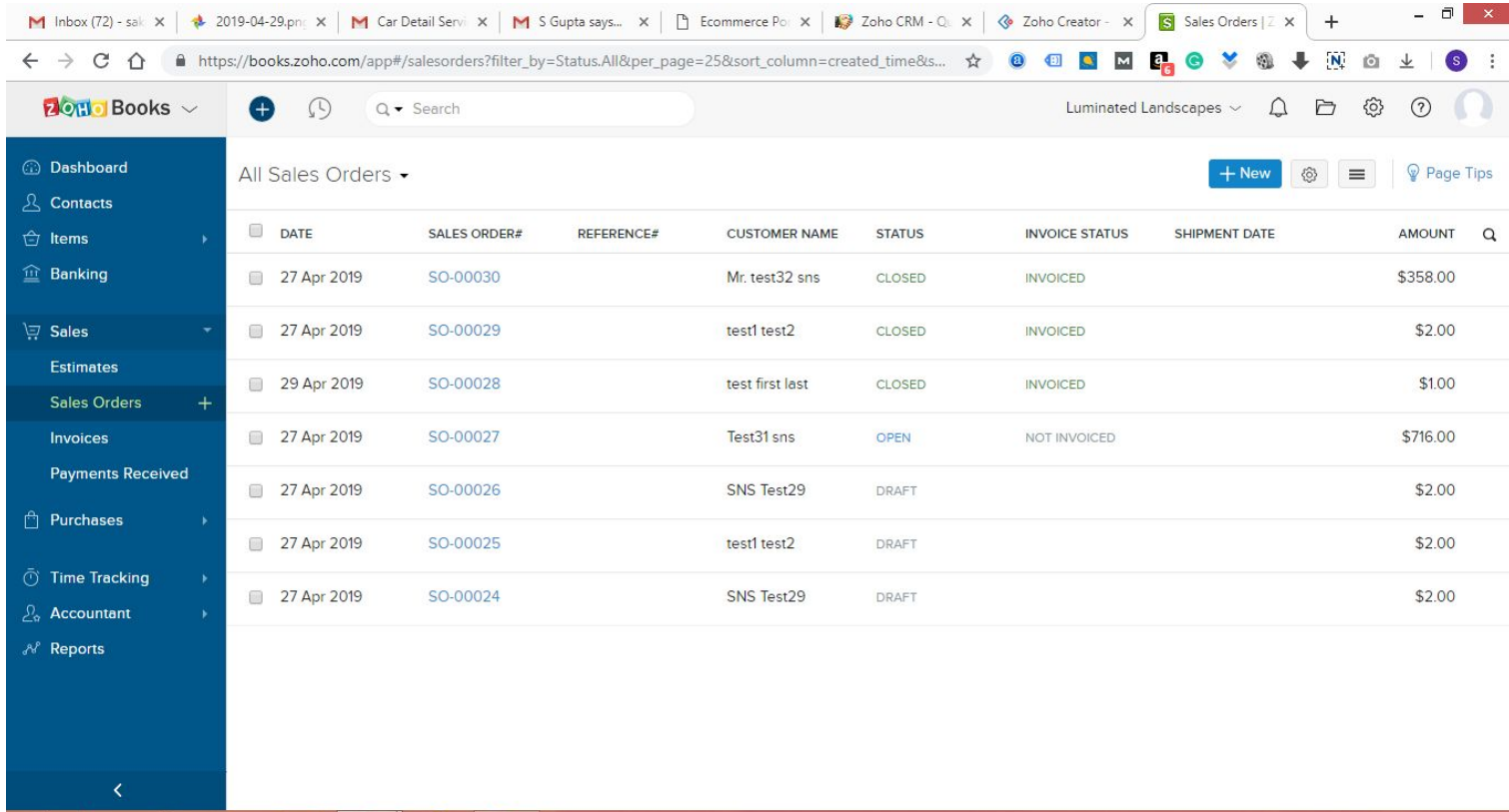
The screenshot displays the Zoho CRM interface with a list of work orders. The browser's address bar shows the URL: <https://crm.zoho.com/crm/org665817598/tab/SalesOrders/custom-view/318393000000087671/list>. The navigation menu includes Home, SalesInbox, Feeds, Leads, Accounts, Contacts, Deals, Work Orders, and Projects. The 'Work Orders' section is active, showing a list of records with columns for Subject, Work Order Number, Status, Grand Total, Deals Name, Contacts Name, and Work Order Owner. A sidebar on the left allows filtering work orders by various criteria.

FILTER WORK ORDERS BY	SUBJECT	WORK ORDER NUMBER	STATUS	GRAND TOTAL	DEALS NAME	CONTACTS NAME	WORK ORDER OWNER
<input type="checkbox"/> Touched Records	<input type="checkbox"/> Service Call	1032	Scheduled	\$ 0.00		Joe Priest	Kimberly Marron
<input type="checkbox"/> Untouched Records	<input type="checkbox"/> Service Call	1057	Scheduled	\$ 0.00		Dr. & Mrs. Carlson	Kimberly Marron
<input type="checkbox"/> Record Action	<input type="checkbox"/> Service Call	1058	Scheduled	\$ 0.00		Hideaway Grille	Kimberly Marron
<input type="checkbox"/> Related Records Action	<input type="checkbox"/> Service Call	1149	Scheduled	\$ 716.00		Test31 sns	Kimberly Marron
<input type="checkbox"/> Subject	<input type="checkbox"/> Service Call	1113	Not Scheduled	\$ 0.00		Dennis Rak	Kimberly Marron
<input type="checkbox"/> Work Order Number	<input type="checkbox"/> New Installation	1104	Not Scheduled	\$ 0.00		Matt Carlson	Kimberly Marron
<input type="checkbox"/> Status	<input type="checkbox"/> New Installation	1095	Not Scheduled	\$ 0.00		Saket Dwivedi	Kimberly Marron
<input type="checkbox"/> Grand Total							
<input type="checkbox"/> Deals Name							
<input type="checkbox"/> Contacts Name							
<input type="checkbox"/> Work Order Owner							
<input type="checkbox"/> Work Order Date/Time							
<input type="checkbox"/> Adjustment							

Total Count: 58

100 Records Per Page | < 1 to 58 >

Sales order got created in Zoho books



The screenshot shows the Zoho Books interface with a list of sales orders. The browser address bar indicates the URL: https://books.zoho.com/app#/salesorders?filter_by=Status.All&per_page=25&sort_column=created_time&...

The page title is "All Sales Orders" with a dropdown arrow. There are buttons for "+ New", settings, a menu icon, and "Page Tips".

DATE	SALES ORDER#	REFERENCE#	CUSTOMER NAME	STATUS	INVOICE STATUS	SHIPMENT DATE	AMOUNT	Q
27 Apr 2019	SO-00030		Mr. test32 sns	CLOSED	INVOICED		\$358.00	
27 Apr 2019	SO-00029		test1 test2	CLOSED	INVOICED		\$2.00	
29 Apr 2019	SO-00028		test first last	CLOSED	INVOICED		\$1.00	
27 Apr 2019	SO-00027		Test31 sns	OPEN	NOT INVOICED		\$716.00	
27 Apr 2019	SO-00026		SNS Test29	DRAFT			\$2.00	
27 Apr 2019	SO-00025		test1 test2	DRAFT			\$2.00	
27 Apr 2019	SO-00024		SNS Test29	DRAFT			\$2.00	

Creating Invoice in CRM

The screenshot displays the Zoho CRM interface for a 'Service Call' record. The browser address bar shows the URL: <https://crm.zoho.com/crm/org665817598/tab/SalesOrders/3183930000001592001>. The top navigation bar includes tabs for Home, SalesInbox, Feeds, Leads, Accounts, Contacts, Deals, Work Orders, and Projects. The left sidebar contains sections for Info, Timeline (Last Update: 09:24 AM), RELATED LIST, Notes, Invoices, Attachments, Open Activities, Closed Activities, Emails, LINKS, and What are links?. The main content area shows the 'Service Call' record with fields for Status (—) and Work Order Owner (Kimberly Marron). Below this, the 'CONTACTS' section lists 'Test38 SNS' with contact details: saket.dwivedi@snnssystem.com, (932) 942-2917, and (932) 942-2917. A 'HIDE DETAILS' link is visible. The 'Work Order Information' section is partially visible at the bottom. The top right of the record view features buttons for 'Convert', 'Edit', 'Create Invoice', and a three-dot menu. The 'Create Invoice' dropdown menu is open, showing options: 'Create Invoice', 'Create Button', and 'Manage Buttons'. The bottom status bar includes 'Here is your Smart Chat (Ctrl+Space)', 'Ask Zia', and a notification badge with the number '1'.

Once Invoice is created we can not create invoice again from Work order

The screenshot displays the Zoho CRM interface for a Work Order. A modal dialog box titled "Message Content" is open in the center, displaying the message "Invoice already Created!". The background page shows the "Work Order Information" section with the following details:

Work Order Information	
Subject	Service Call
Assigned Tech	—
Contacts Name	Test38 SNS
Work Order Type	Service Call
Deals Name	—
Work Order Date/Time	—
Purchase Order	—
Status	—
Currency	USD
Duration	—
Work Order Number	1160
Description	—

Below the work order information is the "Address Information" section:

Address Information	
Billing Street	12
Shipping Street	—

The interface also includes a navigation sidebar on the left with options like Home, SalesInbox, Feeds, and Leads. At the bottom, there is a "Locate Map" button and a status bar with "Here is your Smart Chat (Ctrl+Space)".