

# Work Order Types

Wed, Jan 17, 2024 [Work Order](#)

This screen allows for the configuration of Work Order Types. “Work Order Types” allow you to determine what type of Work Order (WO) is to be raised. Click the “Work Order Types” button to view the Work Order Types currently in the system.

**Note:** Work Order and Sub Work Order Types must exist prior to adding related Equipment and Service Types

1. The first step is to select the Client that will be used. For information on how to do this, see the [Client Selection](#) page.

2. This is the Work Order Types screen. It is possible to tick and un-tick the desired Work Order Types depending on which types need to be available throughout the system. As with many other parts of the application, there is the ability to add items and edit items within the list using the "Add" and "Edit" buttons.

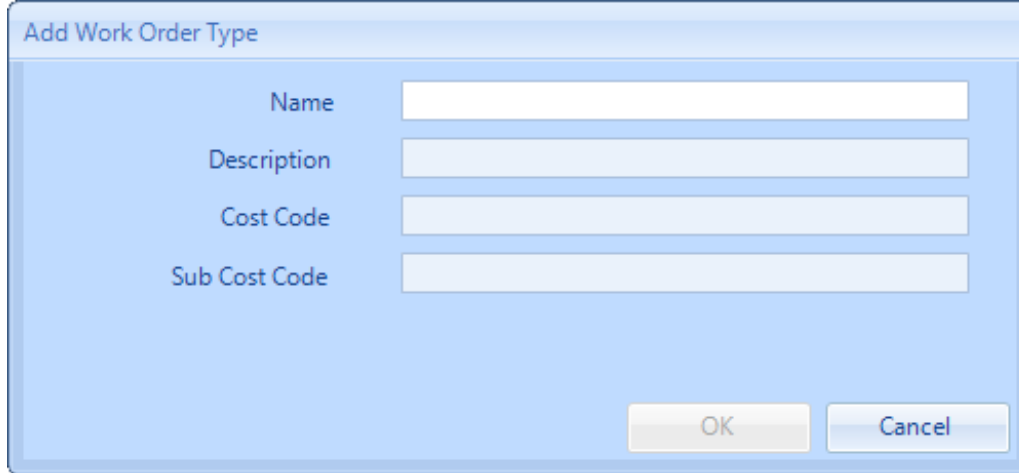
The screenshot shows the 'Demo Residential Work Order Types' application. The left pane, 'Work Order Types', has an 'Add' button and a list of categories with checkboxes. The right pane, 'Work Order Type Details', has an 'Edit' button and shows details for the selected 'AESTHETIC FEATURE'.

| Work Order Type Details |                   |
|-------------------------|-------------------|
| Name                    | AESTHETIC FEATURE |
| Description             | Aesthetic Feature |

3. Click on “Add” to add a WO type. Choose whether to add a “Work Order Type” or a “Sub Work Order Type” under the currently selected WO type.

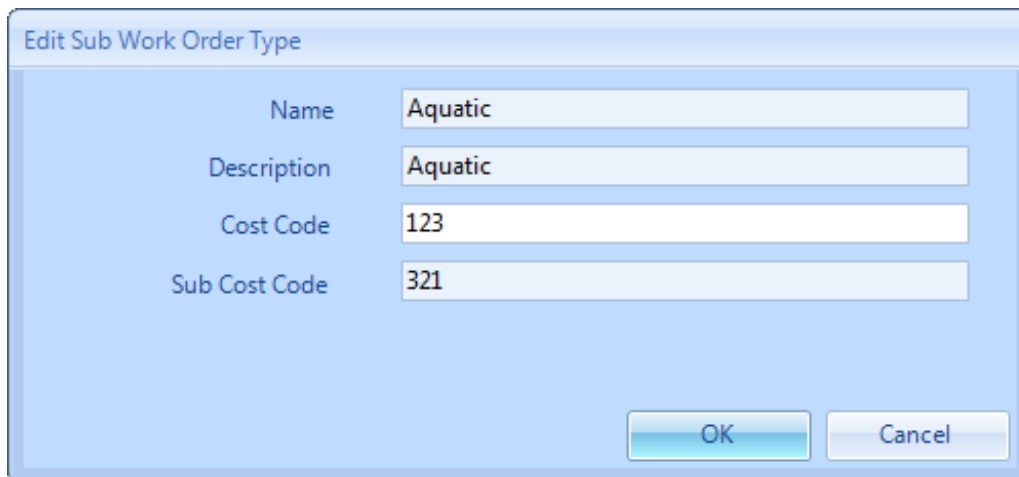
Sub Work Order Type under 'AESTHETIC FEATURE'  
Work Order Type

4. Depending on what WO type is to be added, the “Add Work Order Type” or “Add Sub Work Order Type” screen will appear. Provide the “Name” and “Description” of the new type. Users also have the ability to provide the “Cost Code” and “Sub Cost Code”. Click on “OK” to commit the information.



A dialog box titled "Add Work Order Type" with a light blue background. It contains four text input fields arranged vertically, each with a label to its left: "Name", "Description", "Cost Code", and "Sub Cost Code". At the bottom right, there are two buttons: "OK" and "Cancel".

5. It is also possible to edit items in the list by clicking a Work Order and clicking the "Edit" button. Depending on whether a "Work Order Type" or "Sub Work Order Type" is being updated, the "Edit Work Order Type" or "Edit Sub Work Order Type" screen will appear although they work in the same way. This screen provides the ability to modify the "Name" and "Description" of the type as well as the "Cost Code" and "Sub Cost Code". Click "OK" when the changes have been made.



A dialog box titled "Edit Sub Work Order Type" with a light blue background. It contains four text input fields arranged vertically, each with a label to its left: "Name", "Description", "Cost Code", and "Sub Cost Code". The fields contain the following text: "Aquatic", "Aquatic", "123", and "321" respectively. At the bottom right, there are two buttons: "OK" and "Cancel".

6. Once all the changes have been made, click "Save" to apply them.

Online URL: <https://ostarasystems.knowledgebase.co/article.php?id=79>