Work order

SAMPLE, NOT FOR ISSUE: illustrative records, not client data

Work instruction and visit record. Prepare a separate invoice after review.

Version 1.0

Job

ID	Field	Entry
J01	Work order reference	WO-SAMPLE-3101
J02	Job reference	JOB-SAMPLE-3101
J03	Revision	1, SAMPLE
J04	Prepared by role	Office coordinator, SAMPLE
J05	Issued date	5 November 2026, SAMPLE
J06	Business name	Supplier A, sample
J07	Customer	Customer A, sample
J08	Job location	[sample site], store-room door
J09	Site contact role	Customer facilities role; CONTACT-SAMPLE-01
J10	Contact record location	SAMPLE folder / Customer A / Contact
J11	Requested by role	Customer facilities role; REQUEST-SAMPLE-01
J12	Assigned technician role	Technician A, sample; office coordinator arranges cover
J13	Planned visit	5 November 2026, 10:00 to 12:30, SAMPLE
J14	Priority	Time agreed
J15	Reported problem	Customer reports that the store-room door does not close consistently.
J16	Accepted scope reference	Q-SAMPLE-3051 revision 1; base tasks T01 and T02
J17	Scope approval evidence	SAMPLE folder / Approvals / BASE-01
J18	Scope decision role and date	Customer facilities role; 5 November 2026; illustrative record only
J19	Access instructions	Meet the site contact. Keep the store-room route available. No credentials in this record.
J20	Separate site and safety instructions	SITE-SAMPLE-01; separate instruction assumed for illustration, not supplied by this template
J21	Exclusions	No electrical, structural or fire-system work; no replacement door. Refer a changed request to the office.

Tasks

Task ID	Action	Completion evidence needed	Scope reference	Status	Actual work and findings
T01	Adjust the store-room door closer within the separate site instruction.	Finished-operation record and after photo	Q-SAMPLE-3051	Done	Adjustment recorded; door operation observed with site contact.
T02	Replace two fixing kits in the agreed scope.	Quantity recorded and after photo	Q-SAMPLE-3051	Done	Two kits recorded on L02; no other parts billed.
T03	Fit the customer-supplied stop, following the separately agreed change.	V-01 evidence and after photo	V-01	Done	Customer-supplied stop fitted; additional billable labour is L03.
T04					
T05					
T06					

Task status: Not started, Done, Part done, No access, Deferred. No status is a safety or legal certification.

Visit record

ID	Field	Entry
J22	Actual visit date	5 November 2026, SAMPLE
J23	Overall work status	Complete
J24	Work completed	T01 to T03 recorded complete. This is an illustrative visit record.
J25	Remaining work	None within this SAMPLE instruction.
J26	Remaining work owner and due date	Not applicable: no remaining SAMPLE task.
J27	Technician record	Technician A, sample; 5 November 2026; TECH-SAMPLE-01
J28	Customer acknowledgement role	Not recorded in this SAMPLE.
J29	Customer acknowledgement outcome	Not requested
J30	Acknowledgement date and evidence	Not applicable: not requested in this specimen.

Changes

Reference	Change requested	Requested by role	Change decision	Decision role and date	Approval evidence reference	Priced line references
V-01	Fit customer-supplied door stop; add half an hour of billable labour.	Customer facilities role, sample	Agreed	Customer facilities role; 5 November 2026; illustrative only	APP-SAMPLE-01, in the SAMPLE approvals folder	L03
V-02						
V-03						
V-04						
V-05						

Change decision: Awaiting agreement, Agreed, Declined. An Agreed entry needs the actual decision role, date and evidence reference before a person includes that change in an invoice handover.

Evidence

Reference	Evidence type	File or record location	Captured by role and date	Opened by office role and date	Office result
EV-01	Before photo, illustrative	SAMPLE folder / JOB-SAMPLE-3101 / before.jpg	Technician A, sample; 5 November 2026	Office role, sample; 5 November 2026; illustrative entry	Opened
EV-02	After photo, illustrative	SAMPLE folder / JOB-SAMPLE-3101 / after.jpg	Technician A, sample; 5 November 2026	Office role, sample; 5 November 2026; illustrative entry	Opened
EV-03	Changed-scope approval, illustrative	SAMPLE folder / Approvals / APP-SAMPLE-01	Office role, sample; 5 November 2026	Office role, sample; 5 November 2026; illustrative entry	Opened
EV-04					
EV-05					

Office result: Opened, Missing, Unreadable, Not needed. A file name alone is not proof that it opens.

Invoice handover

ID	Field	Entry
J31	Price basis	Selling rates excluding GST; not wages or actual costs
J32	GST position	Registered
J33	Tax treatment confirmation	Taxable 10% assumed for all three SAMPLE lines. Confirm for real work.
J34	Draft invoice reference	Not yet prepared
J35	Accounts handover owner	Accounts role, sample
J36	Scope and change evidence review	Pending
J37	Attachment review	Pending
J38	Duplicate invoice search	Not done
J39	Tax coding review	Pending
J40	Commercial reviewer and date	Not reviewed: SAMPLE specimen
J41	Handover decision	Hold
J42	Hold reason and next owner	SAMPLE, NOT FOR ISSUE. No real reviewer, approval or attachments. Office owner must replace all SAMPLE records.
J43	Acknowledgement boundary	Acknowledgement records receipt of this visit record. It does not approve a variation or authorise payment.
J44	Saved job record location	SAMPLE folder / JOB-SAMPLE-3101 / WO-SAMPLE-3101 revision 1
J45	Notes	SAMPLE figures illustrate arithmetic only. No real work or approval is asserted.
J46	Arithmetic state	ARITHMETIC VALID

Priced work record

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Selling rates excluding GST; not wages or actual costs. Word and PDF totals are manual: work them out by hand, line by line, then by decision.

Calculate each net line to the nearest cent (half a cent up), then GST on a taxable line as 10% of that net, rounded the same way. Excel does this for you.

Line ID	Type	Work or material description	Unit	Quantity	Unit selling rate, A$ excl. GST	Tax treatment	Scope or change reference	Invoice decision	Net, A$ excl. GST	GST, A$	Total, A$ incl. GST
L01	Labour	Base labour for T01 and T02	hour	2.000	120.00	Taxable 10%	Q-SAMPLE-3051	Include	240.00	24.00	264.00
L02	Material	Two fixing kits for T02	kit	2.000	40.00	Taxable 10%	Q-SAMPLE-3051	Include	80.00	8.00	88.00
L03	Labour	Additional labour for T03; customer supplies stop	hour	0.500	120.00	Taxable 10%	V-01	Include	60.00	6.00	66.00
L04											
L05											
L06											
L07											
L08											
L09											
L10											
L11											
L12											
L13											
L14											
L15											

Line ID	Type	Work or material description	Unit	Quantity	Unit selling rate, A$ excl. GST	Tax treatment	Scope or change reference	Invoice decision	Net, A$ excl. GST	GST, A$	Total, A$ incl. GST
L16											
L17											
L18											
L19											
L20											

Totals by invoice decision (manual)

Invoice decision	Net, A$ excl. GST	GST, A$	Total, A$ incl. GST
Include	380.00	38.00	418.00
Hold	0.00	0.00	0.00
Do not bill	0.00	0.00	0.00
All recorded lines	380.00	38.00	418.00

Include is the proposed invoice amount. All recorded lines is not the invoice. Hold and Do not bill stay visible and are excluded from Include. This priced record does not establish what the customer legally owes.

Read this before use

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Item	Topic	Instruction
R01	Start	Save one copy per work order and revision in the business's approved location. Replace every bracketed prompt.
R02	Scope	Copy the existing scope reference and where its approval can be opened. This record does not grant authority.
R03	Site work	Confirm access and the separate competent site and safety instructions. This template is business paperwork.
R04	Record the visit	Complete task findings, work status and remaining work. Do not mark a partly completed visit Complete.
R05	Changes	Keep each request, decision, role, date, evidence and affected line reference together. Resolve an unagreed change with the authorised person.
R06	Evidence	Open each required file from the office's saved record. Mark a missing or unreadable item and name its next owner.
R07	Pricing	Enter selling rates excluding GST, not wages or actual job costs. Billable hours are separate from payroll.
R08	Tax	Confirm GST registration and each line's treatment. Taxable 10% works only with Registered. Ask your adviser when unsure.
R09	Calculation	Excel rounds each net line to cents, then its taxable GST to cents. Word and PDF totals are manual.
R10	Invoice decisions	Include enters the proposed invoice amount. Hold and Do not bill remain visible but are excluded. A person decides which applies.
R11	Check	ARITHMETIC VALID checks the line inputs only. Review authority, evidence, duplicates, tax coding and the commercial amount separately.
R12	Acknowledgement	A visit acknowledgement does not approve changed scope or authorise payment. Keep the actual decision evidence separately.
R13	More rows	Use a numbered continuation bearing the work order and revision. Consolidate its amounts once; do not double count the carried total.
R14	SAMPLE	SAMPLE, NOT FOR ISSUE is illustrative. No actual visit, approval, signature, attachment opening or professional review is represented.
R15	File behaviour	No macros, external workbook references or data connections. Nothing is uploaded by these files. Save and share using your own approved tools.
R16	General information	General information only, not legal, WHS or tax agent advice. Confirm the document and tax treatment for your work.
R17	Sources	Sources read 6 November 2026. ATO GST learning page: https://smallbusiness.taxsuperandyou.gov.au/goods-and-services-tax/fast-facts . Hili field notes: https://hiliai.com/templates/work-order-template/ . Australian visit-record example: https://smokobooks.com.au/templates/service-report-template .
R18	Author and AI	Renzo Demartini, Chartered Accountant (CA ANZ). Drafted with AI, reviewed and spot-checked by me.