Work order

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

Version 1.0

Job

ID	Field	Entry
J01	Work order reference	[unique work order reference]
J02	Job reference	[existing job reference]
J03	Revision	[revision]
J04	Prepared by role	[role]
J05	Issued date	[date]
J06	Business name	[your business name]
J07	Customer	[customer record name or reference]
J08	Job location	[site and precise work location]
J09	Site contact role	[role and existing contact record reference]
J10	Contact record location	[approved customer/contact record, not copied contact details]
J11	Requested by role	[requester and request reference]
J12	Assigned technician role	[responsible role and cover route]
J13	Planned visit	[date and agreed access window]
J14	Priority	Routine
J15	Reported problem	[customer’s description, not a diagnosis]
J16	Accepted scope reference	[quote, revision and accepted scope reference, or other existing authority]
J17	Scope approval evidence	[where the existing approval can be opened]
J18	Scope decision role and date	[authorised role and decision date]
J19	Access instructions	[practical access notes, no credentials]
J20	Separate site and safety instructions	[applicable competent instruction references; resolve missing instructions before work]
J21	Exclusions	[work excluded from this instruction]

Tasks

Task ID	Action	Completion evidence needed	Scope reference	Status	Actual work and findings
T01	[one task]	[observable result or evidence]	[scope reference]	Not started	
T02	[one task]	[observable result or evidence]	[scope reference]	Not started	
T03	[one task]	[observable result or evidence]	[scope reference]	Not started	
T04	[one task]	[observable result or evidence]	[scope reference]	Not started	
T05	[one task]	[observable result or evidence]	[scope reference]	Not started	
T06	[one task]	[observable result or evidence]	[scope reference]	Not started	

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	[date]
J23	Overall work status	Not started
J24	Work completed	[what was actually done; reference task IDs]
J25	Remaining work	[unfinished work or explicit None]
J26	Remaining work owner and due date	[role and date, or Not applicable]
J27	Technician record	[role, date and record reference; an entry is not an electronic signature]
J28	Customer acknowledgement role	[role, or reason no acknowledgement is available]
J29	Customer acknowledgement outcome	Not requested
J30	Acknowledgement date and evidence	[date/reference, or reason not applicable]

Changes

Reference	Change requested	Requested by role	Change decision	Decision role and date	Approval evidence reference	Priced line references
V-01						
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					
EV-02					
EV-03					
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	Unconfirmed
J33	Tax treatment confirmation	[person’s confirmed treatment/reference; never infer from trade or line name]
J34	Draft invoice reference	[existing draft reference, or Not yet prepared]
J35	Accounts handover owner	[role receiving this record]
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	[authorised role/date, or Not reviewed]
J41	Handover decision	Hold
J42	Hold reason and next owner	[reason, next role and due date, or None after review]
J43	Acknowledgement boundary	Acknowledgement records receipt of this visit record. It does not approve a variation or authorise payment.
J44	Saved job record location	[approved file location and version]
J45	Notes	[other relevant handover note, or None]
J46	Arithmetic state	Formula in Excel; manual check in Word/PDF

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											
L02											
L03											
L04											
L05											
L06											
L07											
L08											
L09											
L10											
L11											
L12											
L13											
L14											
L15											
L16											

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
L17											
L18											
L19											
L20											

Totals by invoice decision (manual)

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

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.