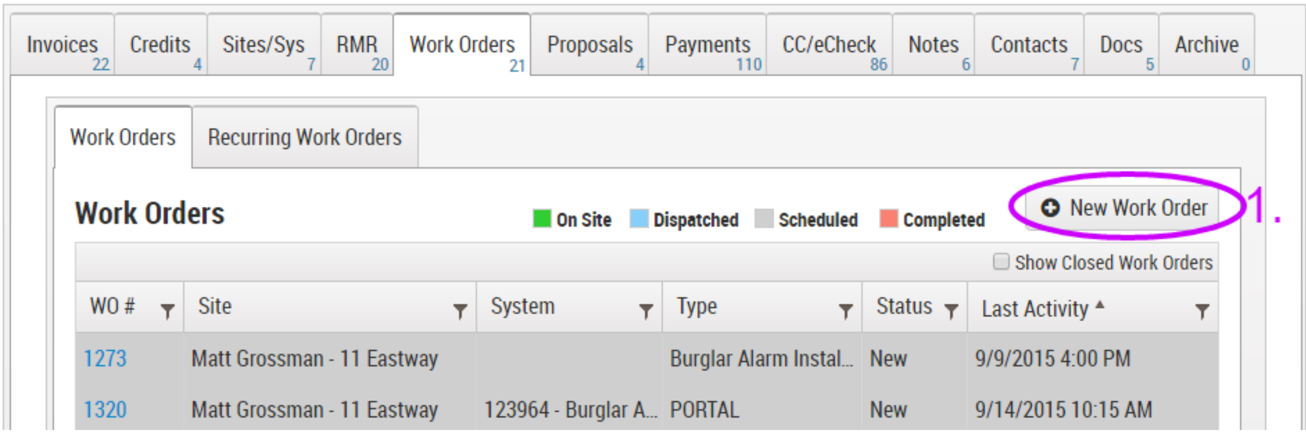
New Work Order

Last Modified on 11/08/2016 9:46 pm EST

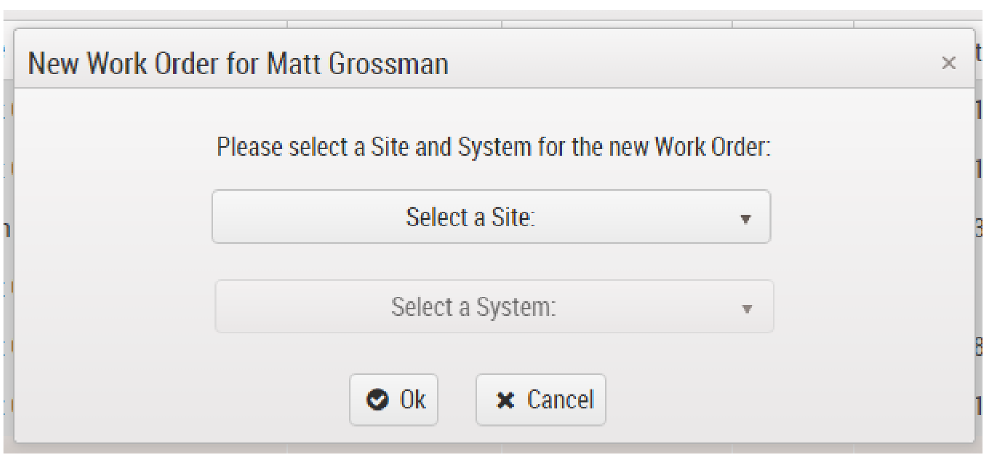
1. New Work Order

Click "New Work Order" on the right side of the page.



2. Select Work Order Site and System

Select the site and system you would like to link the work order to from the dropdown box and click "Ok". Selecting a site is a required field, but you do not need to select a system if it is not applicable to your business.



3. Complete Work Order Fields

Complete the dashboard fields on the New Work Order page that appears. Most of these fields will be pre-populated.

Site

If you need to change the site linked to this work order, select a new one from dropdown box. View the Site Details Page for the selected site by clicking the blue "Site" hyperlink to the left of the dropdown box.

Tax

The sales tax rate will auto-fill based on the site you selected, but you can edit this using the dropdown box.

Requested by

Enter who requested the work order in the white box.

Phone

Enter the customer's phone number in the white box.

Email

Enter the customer's email in the white box

Purchase Order Number

Enter the purchase order number if applicable.

System

Select the system linked to this work order from the dropdown box if applicable. View the System Details Page for the selected system by clicking the blue "System" hyperlink to the left of the dropdown box.

Service Level

Select the service level for the work order (hyperlink to setup table service levels). Information on the "Base", "Labor", "Increment", and "Bill After" fields for this service level are listed below the dropdown box.

Warranty Labor/Parts

Based on the system selected, labor and parts warranty information will be listed.

Type

Select the work order type from the dropdown box. The "Estimated Length" field will pre-populate when scheduling an appointment based on the work order type you select.

Status

Select the work order's status from the dropdown box. The Complete status is the only status that will allow an invoice to be created from the work order.

Salesperson

Select the customer's salesperson from the dropdown box.

Technician

Select the technician linked to the work order from the dropdown box.

Brief Description

Enter a brief description of the work order.

4. Appointments Tab

The Appointments Tab is located below the dashboard. View and edit appointments scheduled for this work order in this tab. The status of appointments are denoted by the color coded legend.

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*Note: In order for a work order to be completed, all appointments must be completed (in red).
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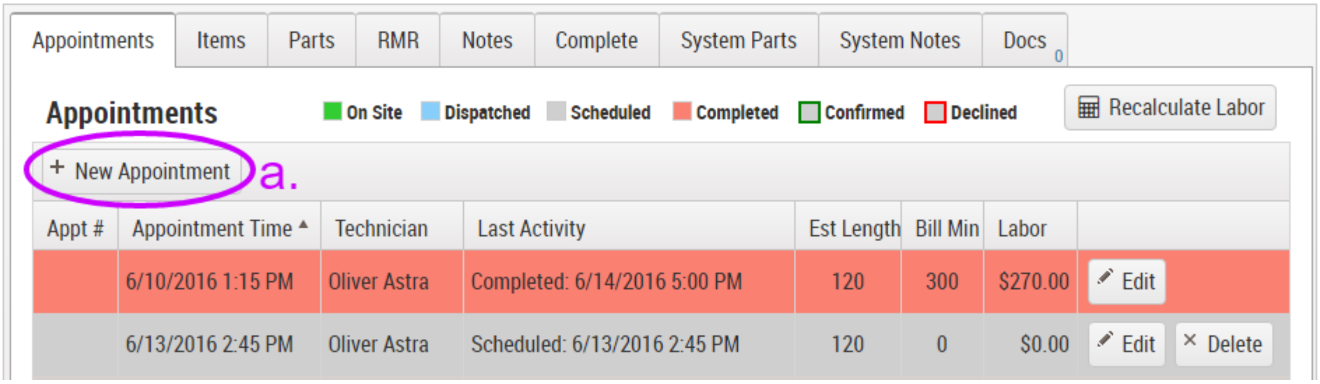
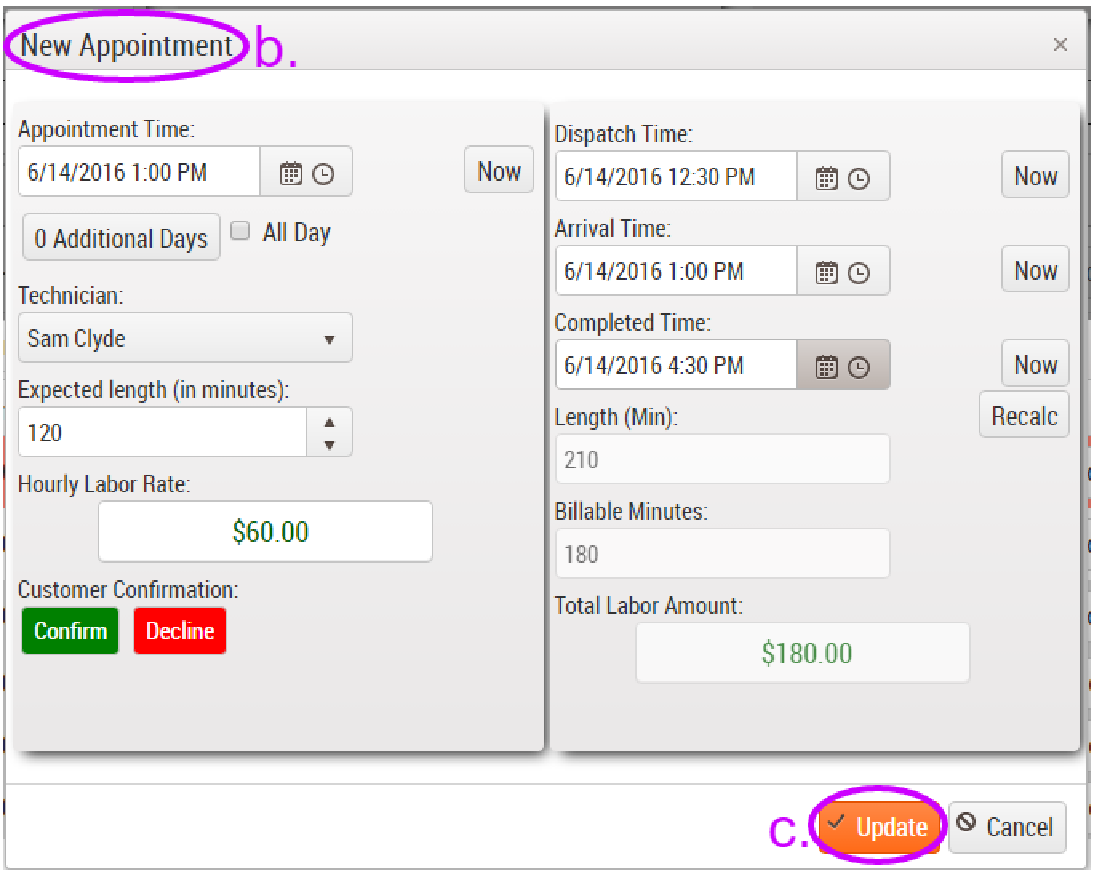
a. New Appointment

Click new appointment on the left side of the page:



b. Complete Fields

Complete the fields in the "New Appointment" page that appears:



Appointment Time

Select the date and time the appointment is estimated to begin.

Additional Days

If you wish to duplicate this appointment on multiple dates, click the "Additional Days" box and click the other dates you want this appointment to occur. These additional appointment(s) will be exact copies of the first appointment, will be listed above the first appointment, and cannot be edited individually.

All Day

If you check this box, the technician's entire day will be blocked out as busy on the calendar.

Technician

Select the technician for this appointment from the dropdown box.

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*Note: If you wish to have multiple technicians for one appointment you will need to create a duplicate appointment and li
nk it to another technician.
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Expected Length

Edit how long you expect the appointment to last, this effects how much time is blocked out on the technician's calendar. This field is pre-populated based on what work order type you select.

Hourly Labor Rate

The hourly labor rate you're charging based on the service level you entered. Edit if desired.

Customer Confirmation

If the customer has already confirmed or declined this appointment, you can select the corresponding icon. This can also be done at a later time.

Dispatch Time

Enter the technician's dispatch time (not required).

Arrival Time

Enter the time the technician arrives at the site.

Completed Time

Enter the time the technician completes the appointment.

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*Note: To track billable minutes, the technician (or you) will need to complete the "Arrival Time" and "Completed time" Fiel
ds.
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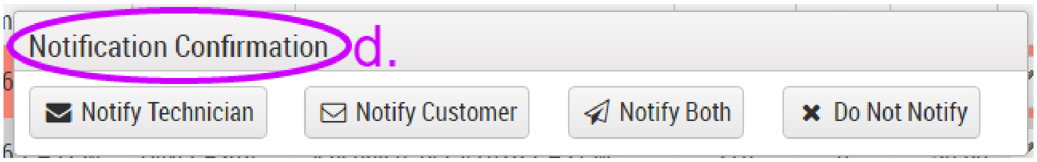
c. Update

Click "Update" in the bottom right corner to save.

d. Notification Confirmation

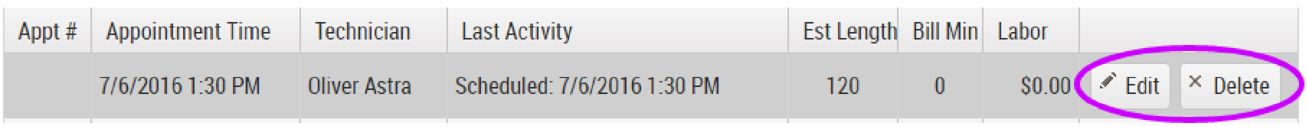
Notify the technician (by email and text), the customer (by email), both, or neither about the appointment by clicking the corresponding icon.



> *Note: To keep track of your technicians' appointment schedules more closely, click "Calendar" on the top of the AlarmBiller website page. (hyperlink)

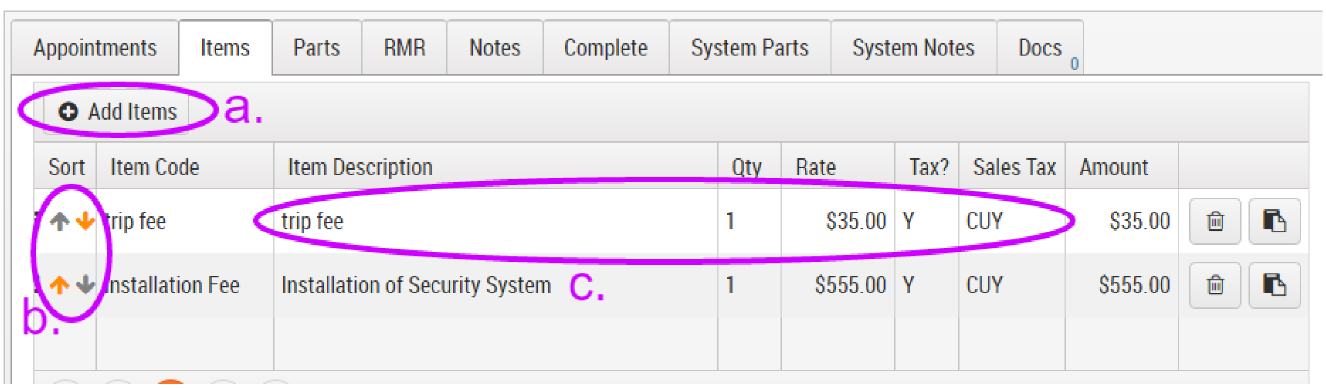
e. Edit/Delete

Edit or delete an appointment by clicking the corresponding button to the right of the appointment. You cannot delete an appointment if you have anything entered in the "Dispatch Time", "Arrival Time", or "Completed Time" fields.



5. Work Order Items/Parts Tab

To add items or parts to a work order, click on the respective tabs and complete the following steps. The same steps apply for parts and items:



a. Add Items

Click "Add items". An "Add Items" page will appear. Check the boxes to the left of the items you would like add to the work order. If you would like to create a new item, select "Create Item" in the upper right corner, complete the fields in the "New Item" page that appears, and press save in the bottom right corner. When you are done adding items, click "Add Items" in the bottom right corner.

b. Edit Fields

Once you have added items, edit fields by clicking the space beneath each heading. You can edit all fields aside from "Item Code".

c. Sorting

To sort the order you would like items to appear on the work order use the arrows to the left of the item you would like to move.

6. Work Order RMR tab

a. New RMR

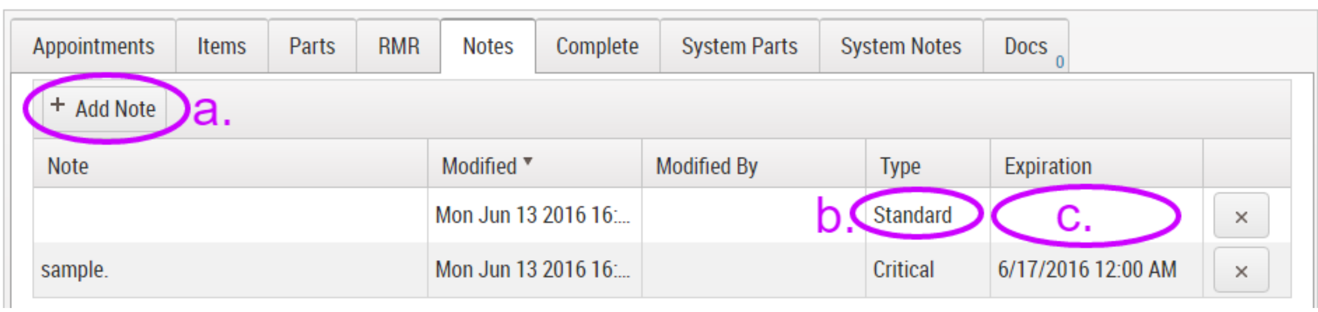
To link an RMR to this Work Order, click "New RMR on the right side of the page. Fill out fields (link to new customer RMR) and click "Update" in the bottom right corner to save.

b. Edit/Delete

Edit or Delete by clicking the corresponding button to the left of the RMR.

7. Notes

Add notes to a work order. THESE NOTES WILL APPEAR ON THE WORK ORDER. Edit fields by clicking the space beneath each heading.



a. Add Note

Click Add Note on the left side of the page.   Type note in the space beneath the "Note" header.

b. Type

Select note type from the dropdown box.

Standard

This is a standard note that will appear on the "proposal".

Critical

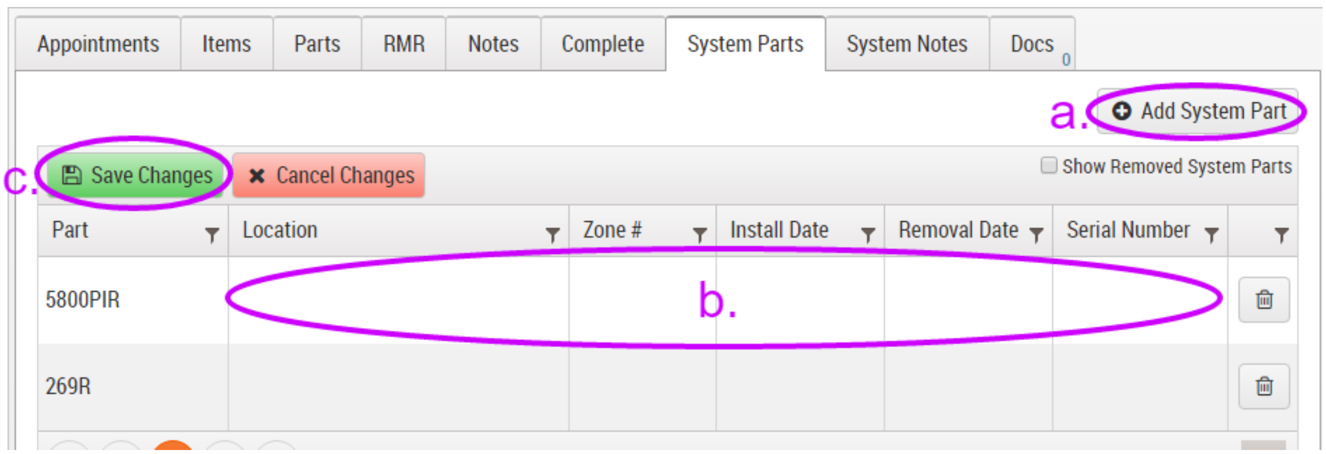
This is a note that will appear on the proposal and will also appear every time you open the "Customer Work Order".

c. Expiration

"Expiration" only applies to critical notes. Select the date and time you would like the note to expire. The note will no longer appear every time you open this work order after this date.

8. Work Order System/Site Parts Tabs

If you selected a system to link with the work order, a system parts tab will appear. If you did not select a system to link with the work order a site parts tab will appear. You have the choice to build a parts list on the site or system level in this tab. The same steps apply for site parts and system parts:



a. Add System Part

click "Add System Part" on the right side of the page. An "Add Parts" page will appear. Check the boxes to the left of the part's name to choose which parts you would like to add. if you would like to create a new part, select "Create Part" in the upper right corner, fill out the fields in the "New Part" page that appears, and press save in the bottom right corner. When you are done adding system parts, click "Add Parts" in the bottom right corner.

b. Complete Fields

Complete the applicable fields for each part by clicking the space beneath each heading.

Location

Input the part's location.

Zone

Select the part's zone number from the dropdown box. To add zones to this system go to the hyperlink to zones systems tab).

Install Date

Input the date this part was installed.

Removal Date

Input the date this part was removed if applicable.

Serial Number

input the part's serial number if applicable.

c. Save Changes

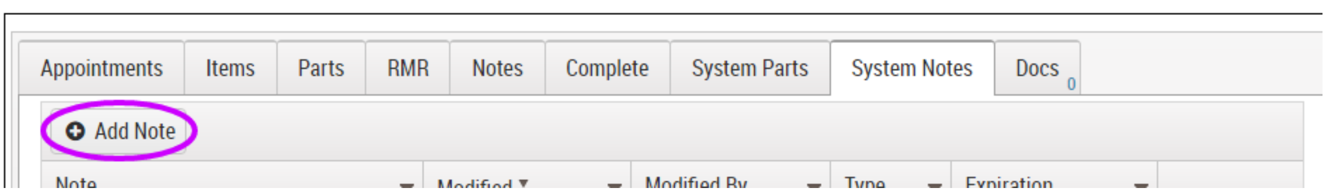
Click "Save Changes" on the left side of the page to update.

9. Work Order Site/System Notes

If you selected a system to link with the work order, a system notes tab will appear. If you did not select a system to link with the work order, a site notes tab will appear. Add internal work order notes on the site or system level. The same steps apply for site parts and system parts:

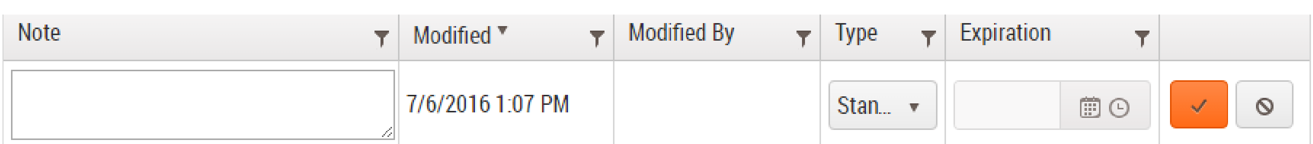
Add Note

Click Add Note on the left side of the page.



Complete Fields

type the note in the space under the "Note" header.



Type

Standard

This is an internal note at the site level.

Critical

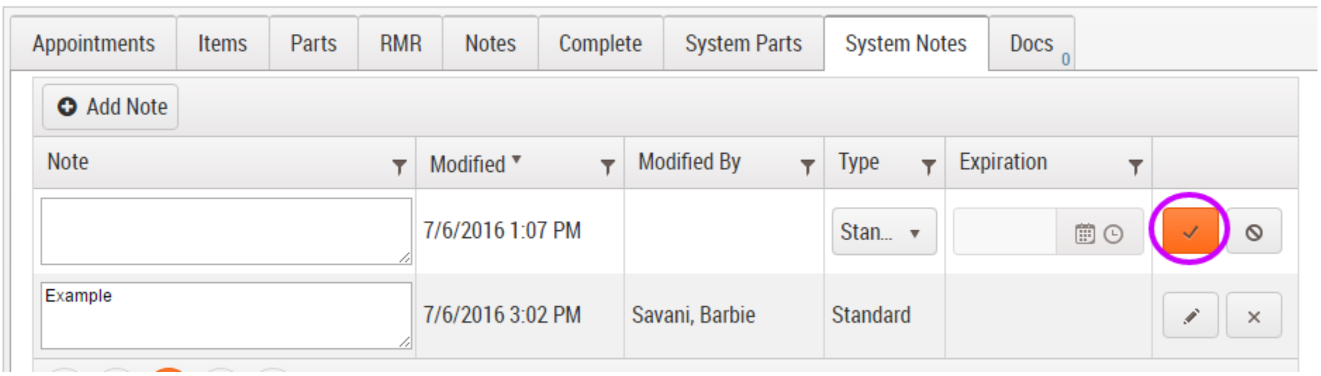
This is an internal note at the site level that will appear every time you open this "Customer Work Order Page".

Expiration

"Expiration" only applies to critical notes. Select the date you would like the note to expire. The note will no longer appear everytime you open this "Customer Work Order Page" after this date.

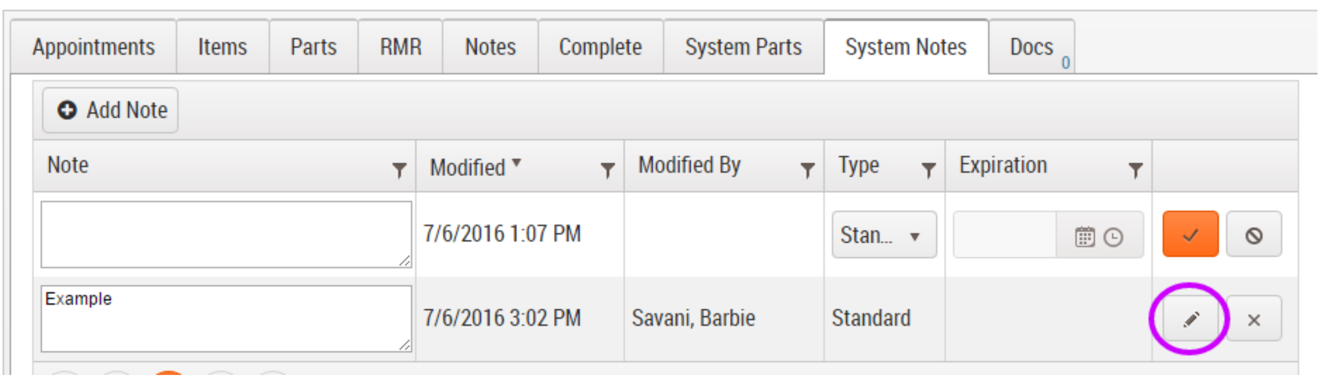
Save

Click the check mark on the right side of the screen to save.



Editing a Note

Click the pencil icon to the to the right of the note you would like to edit.

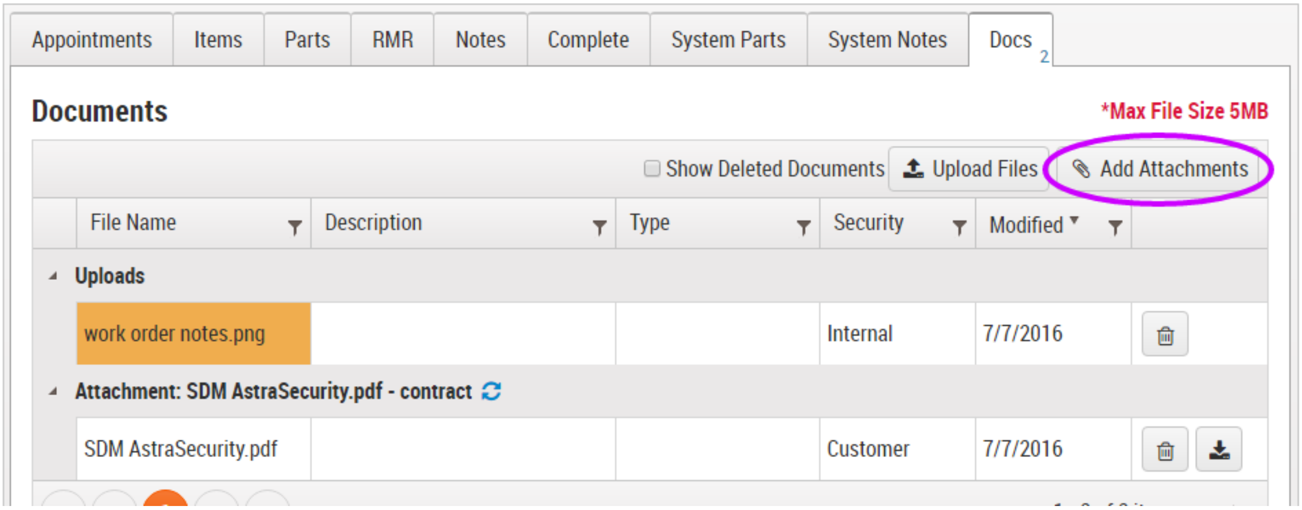


10. Docs

Upload documents and/or attachments you wish to link to the work order.

Add Attachments

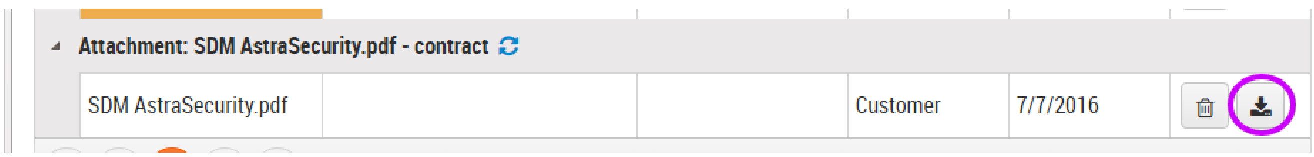
To upload attachment(s) (documents you have already added in the "Utilities" page in the setup table, click the "Add Attachments" button on the right side of the page, check the boxes to the right of the attachment(s) you would like to add, and click "Add" in the bottom right corner of the page.



*Note: You cannot edit "Description", "Type", or "Security" fields for attachments.

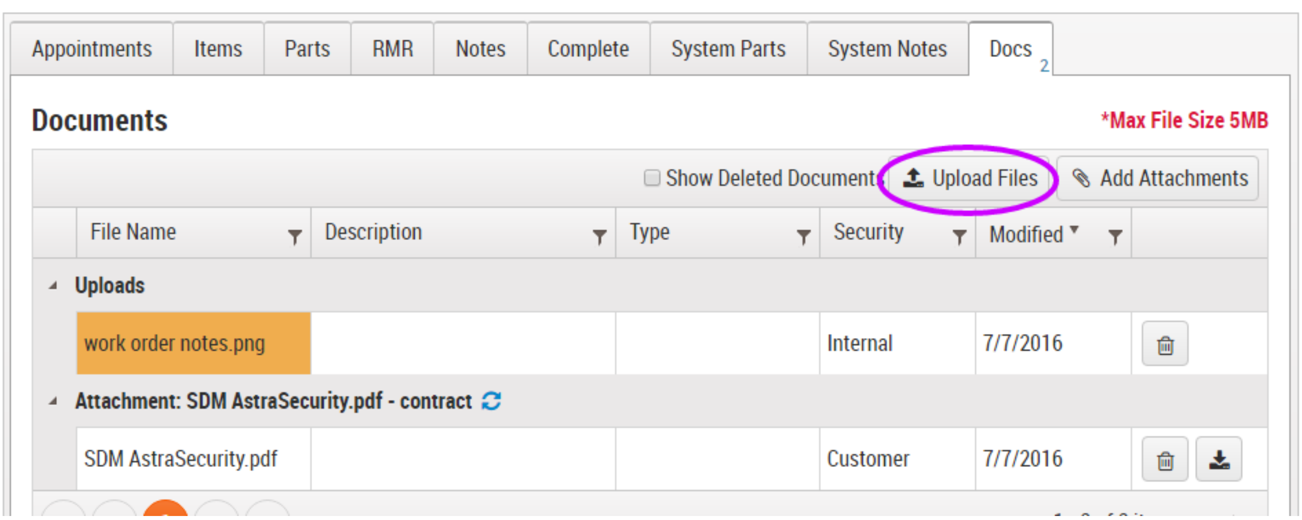
Download Attachment

To download an attachment to your documents, click the download icon to the right of the attachment you wish to download.



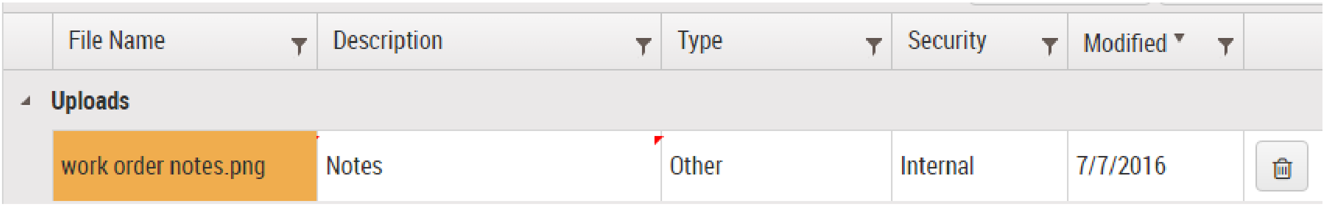
Upload Files

To upload a file from your documents to attach to this proposal, click "Upload Files" on the right side of the page.   Select the file you would like to add from your documents and click the "Enter" key on your keyboard.



Complete Fields

Complete document fields by clicking the space beneath each heading.



File Name

Edit the file name in the white box. If you wish to upload a new file to overwrite this document click the upload icon that appears in this field.

Description

enter a brief description of the document.

Type

Select the document type from the dropdown box.

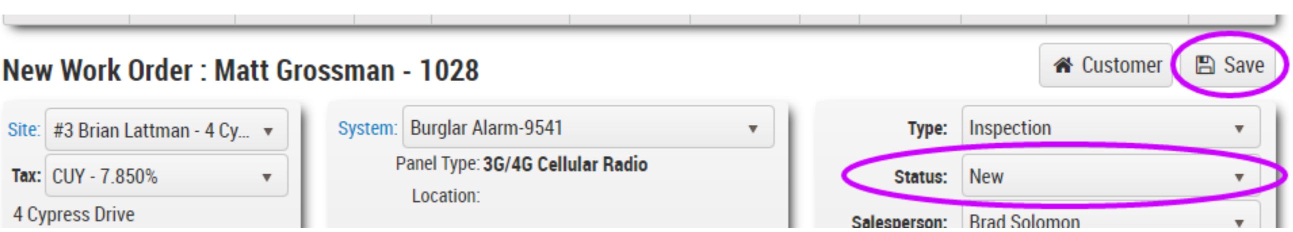
Security

If you would like the customer to be able to view the file when the work order is sent, select "Customer" from the dropdown box. If you would like this file to be internal, select "Internal".

You can proceed in one of two ways with the work order:

1. Save Open Work Order

If a work order is still in progress, or you do not wish to turn a finished work order into an invoice at this time, select a "status" that does not indicate completion and click "Save" in the upper right corner of the page:

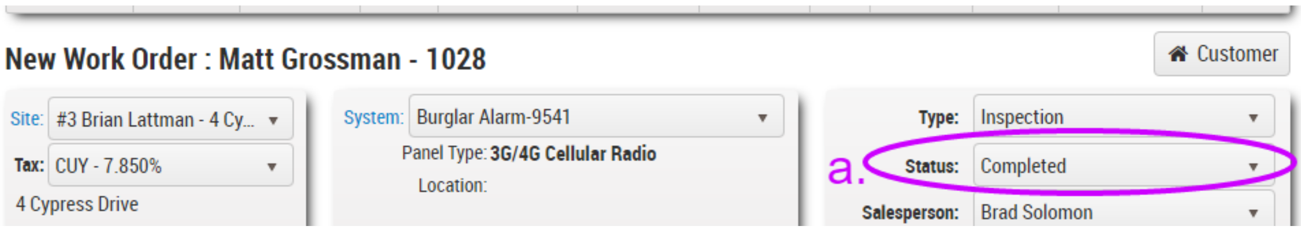


*Note: Open work orders will appear in the "Work Orders" tab in the "Customer Manager Page".

2. Complete Work Order

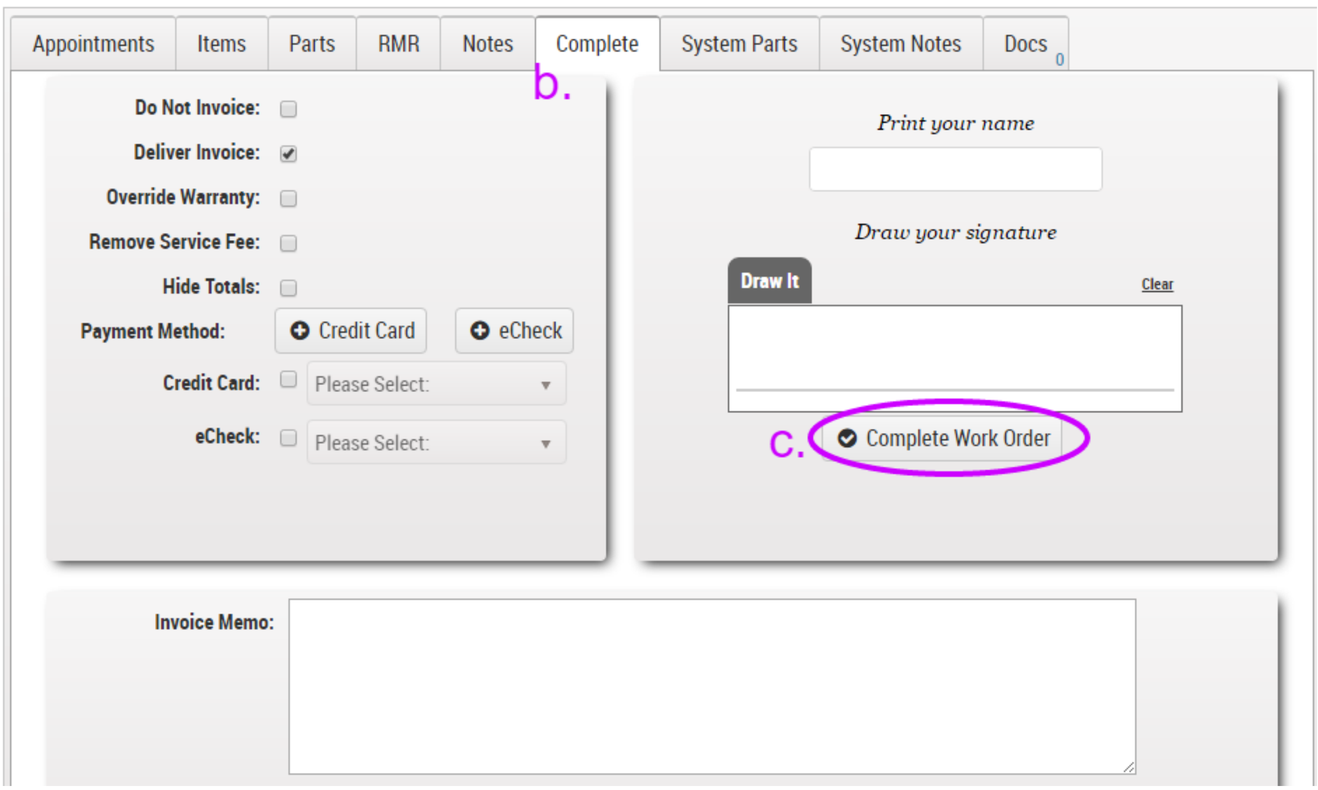
a. Status

if the work order has been completed and you are ready to convert it to an invoice, select a "Status" that indicates completion.



b. Complete Tab

fill out fields in the "Complete Tab":



Do Not Invoice

Check this box if you do not wish to invoice the customer for this work order.

Deliver Invoice

Check this box if you would like to send the invoice to the customer immediately after completing the work order. The invoice will be sent via their pre-selected delivery method.

Override Warranty

Click this box if you would like to override the system's warranty for this work order.

Remove Service Fee

Check this box if you would like to remove the service fee (aka the "Base" fee) from this work order.

Hide Totals

Check this box if you would like to hide totals on this page. This will not hide totals on the invoice.

Payment Method

If you would like to pay for this work order now by credit card or eCheck, check the box next to the corresponding field and select the customer's credit card or eCheck they wish to pay with from the dropdown box. If you need to add a new credit card or eCheck, click the "+ Credit Card" or "+ eCheck" button, enter the necessary information on the page that appears ,and click "Save" in the upper right corner.

Invoice Memo

If you would like, enter a memo that will appear on the invoice.

Print Your Name

Enter the customer's name (not required).

Draw Your Signature

Have the customer sign their name using his/her finger or mouse (not required).

c. Complete Work Order

Click the complete work order button below the signature box to convert this work order into an invoice. The "Customer Work Order" page will appear.

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*Note:  Because the work order has turned into an invoice, it can no longer be edited.
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