Work Order Details Page

Last Modified on 11/08/2016 9:48 pm EST

The Work Order Details is the homepage for each of your customer's individuals work orders.

Accessing the Work Order Page

Access this page from the "Work Orders" tab on a "Customer Manager Page" by clicking the blue number to the left of the Work Order you would like to view. (Select Show Closed Work Orders to view completed and VOID work orders). Customer Manager Page < Work Orders< WO #
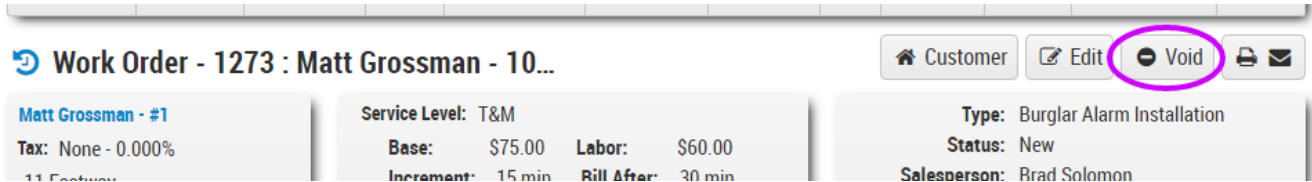

Edit Work Order

Here you will see a dashboard of information and tabs regarding the work order. If this is an open work order, you can edit these fields and tabs by clicking "Edit" in the upper right corner.

Voiding a Work Order

If you wish to VOID work an open work order, click "Void Work Order" the upper right corner. This will close the work order.

*Note: VOID work orders appear in the "Work Orders Tab" in the "Customer Manager Page" after checking the "Show Closed Work Orders" box on the right side of the page. To reopen a VOID work order, open the "Customer Work Order" page for that work order and click "Reopen" in the upper right corner:

Print/Email a Work Order

To email or print a work order, click the print/email icon in the upper right corner:

A "Work Order Delivery Options" page will appear:

To print the work order, click "Print" on the right side of the page. This will download a pdf of the work order to your documents, which you can access, preview, and print.

To email the work order, enter the email address you would like to send the work order to in the white box and click "Email" on the right side of the page. This will send the work order in a pdf attachment to the email address you entered along with any documents you may have attached.

View the Invoice for a Completed Work Order

This only applies to completed work orders. Click "View Invoice" in the upper right corner.

Customers | Invoices | Payments | RMR | Work Orders | Proposals | Calendar | GL | Reports | Setup | Accounting ▾
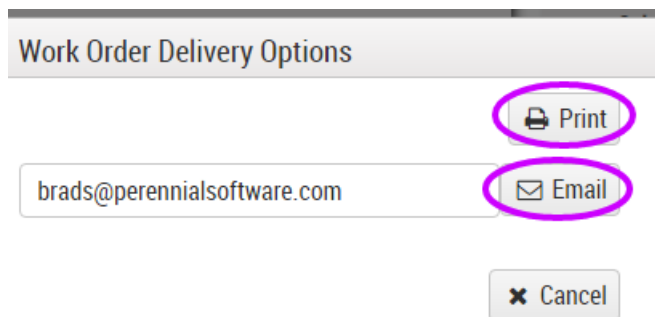
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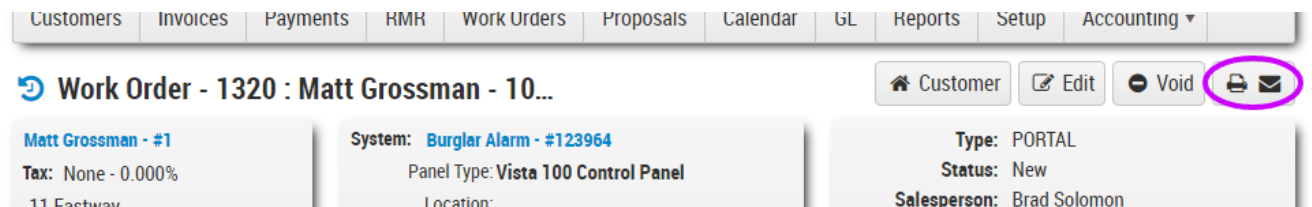
Matt Grossman - #1
Tax: None - 0.000%

System: Burglar Alarm - #123
Panel Type: Vista 100 Control Panel

Type: Burglar Alarm Installation
Status: Completed