

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 individual 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 #

The screenshot shows a dashboard with navigation tabs at the top: Invoices (23), Credits (4), Sites/Sys (7), RMR (20), Work Orders (22), Proposals (4), Payments (110), CC/eCheck (86), Notes (6), Contacts (7), Docs (5), and Archive (0). Below these is a 'Work Orders' section with a sub-tab for 'Recurring Work Orders'. A legend indicates status colors: On Site (green), Dispatched (blue), Scheduled (grey), and Completed (red). A '+ New Work Order' button and a 'Show Closed Work Orders' checkbox (circled in purple) are visible. A table lists work orders with columns: WO #, Site, System, Type, Status, and Last Activity. The first row shows WO # 1273 (circled in purple), Site: Matt Grossman - 11 Eastway, System: Burglar Alarm Instal..., Status: New, and Last Activity: 9/9/2015 4:00 PM.

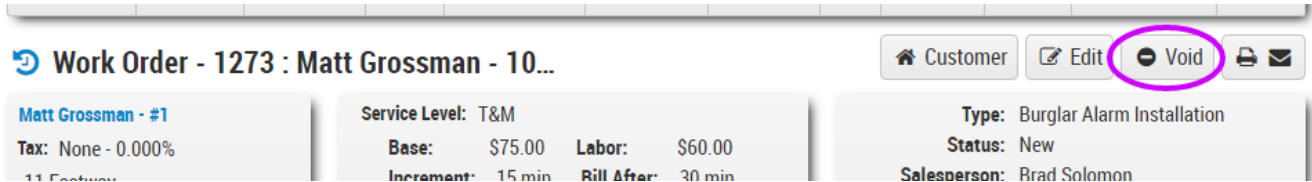
Edit Work Order

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.

The screenshot shows the 'Work Order - 1273 : Matt Grossman - 10...' page. In the top right, there are buttons for 'Customer', 'Edit' (circled in purple), 'Void', and a mail icon. The main content is divided into three panels: 1) Customer info for Matt Grossman - #1, including address (11 Eastway, Huntington, GA 11111) and email (brads@perennialsoftware.com). 2) Service Level: T&M, with Base: \$75.00, Labor: \$60.00, Increment: 15 min., and Bill After: 30 min. 3) Warranty Labor: No Warranty, Warranty Parts: No Warranty. A right-hand panel shows: Type: Burglar Alarm Installation, Status: New, Salesperson: Brad Solomon, Technician: [blank], and Next Appointment: 9/9/2015 4:00 PM. Below this is a text area with the value '1aua8s7f 0af a07ft a0sfya sdf'. At the bottom, a summary table shows: Service Fee: \$0.00, Labor: \$0.00, Items: \$1,000.00, Parts: \$95.00, Tax: \$0.00, Total: \$1,095.00, and RMR: \$30.00. A bottom navigation bar includes tabs for Appointments, Items, Parts, RMR, Notes, Complete, Site Parts, Site Notes, and Docs (0).

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.



Work Order - 1273 : Matt Grossman - 10...

Customer Edit Void Print Email

Matt Grossman - #1
Tax: None - 0.000%

Service Level: T&M
Base: \$75.00 Labor: \$60.00
Increment: 15 min Bill After: 30 min

Type: Burglar Alarm Installation
Status: New
Salesperson: Brad Solomon

*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:



Work Order - 1273 : Matt Grossman - 1028

Customer Reopen Print Email

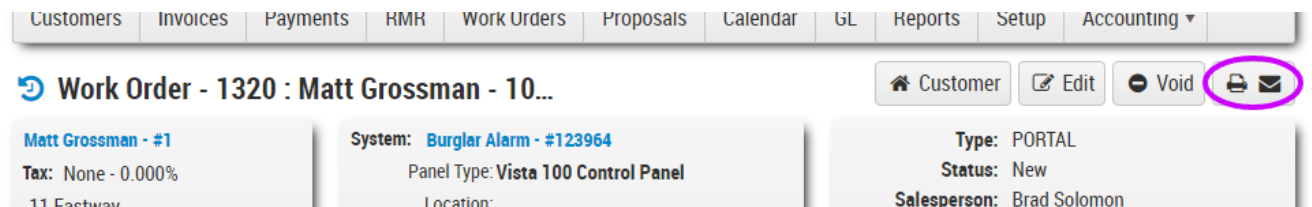
Matt Grossman - #1
Tax: None - 0.000%

Service Level: T&M
Base: \$75.00 Labor: \$60.00
Increment: 15 min Bill After: 30 min

Type: Burglar Alarm Installation
Status: Void Work Order
Salesperson: Brad Solomon

Print/Email a Work Order

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



Customers Invoices Payments HMR Work Orders Proposals Calendar GL Reports Setup Accounting

Work Order - 1320 : Matt Grossman - 10...

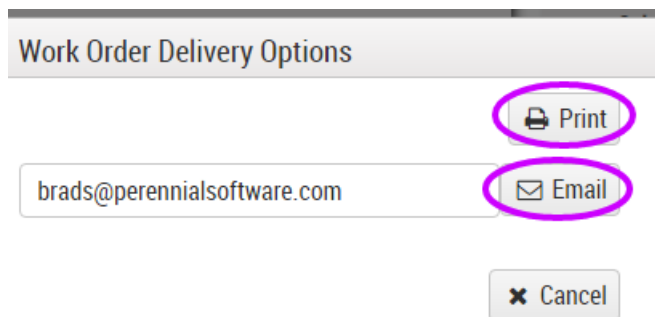
Customer Edit Void Print Email

Matt Grossman - #1
Tax: None - 0.000%

System: Burglar Alarm - #123964
Panel Type: Vista 100 Control Panel
Location:

Type: PORTAL
Status: New
Salesperson: Brad Solomon

A "Work Order Delivery Options" page will appear:



Work Order Delivery Options

Print

brads@perennialsoftware.com

Email

Cancel




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 | RMK | Work Orders | Proposals | Calendar | GL | Reports | Setup | Accounting ▾

 **Work Order - 26 : Matt Grossman - 1028** Customer View Invoice  

Matt Grossman - #1 Tax: None - 0.000%	System: Burglar Alarm - #123 Panel Type: Vista 100 Control Panel	Type: Burglar Alarm Installation Status: Completed
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