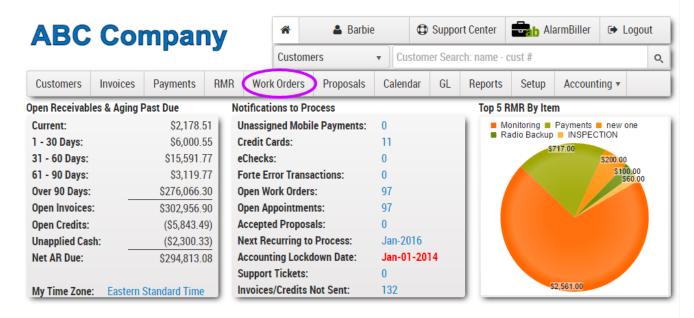
Work Orders Page

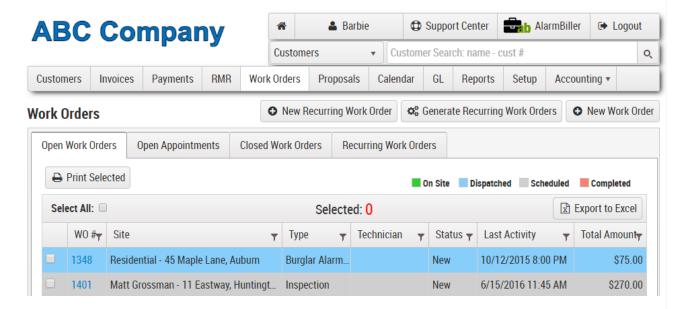
Last Modified on 11/08/2016 10:09 pm EST

Accessing Work Orders Page

To access lists of your open work orders, open appointments, closed work orders, and recurring work orders at a dealer level click "Work Orders" on the top of the page:

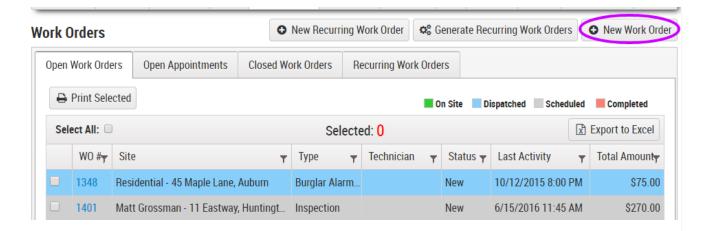


The Work Orders Page will appear:



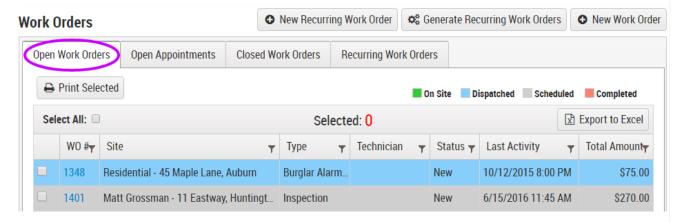
New Work Order

Click "New Work Order" at the top of the page to create a new work order.



Open Work Orders Tab

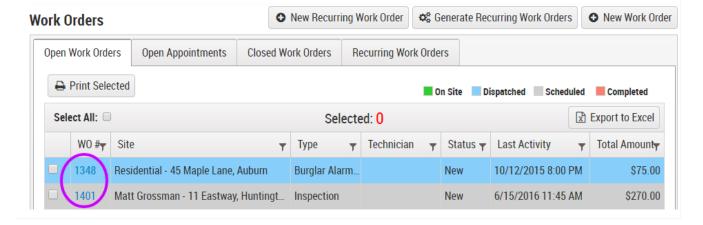
Access a list of all your open work orders at the dealer level from this tab. The status of these work orders will be color coded according to the legend in the upper right corner of the page.



The following will discuss the finctions within this tab.

Work Order Details Page

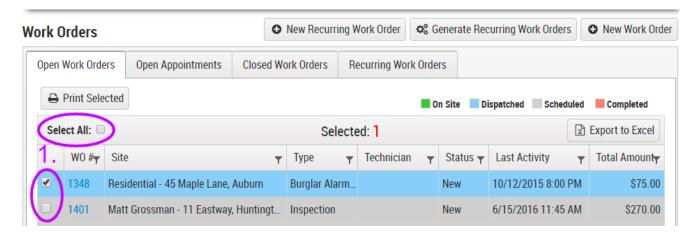
Click the blue "WO #" hyperlink to the left of a work order to open the work order detail page. This page will give you a detailed information about the work order.



Printing Open Work Orders

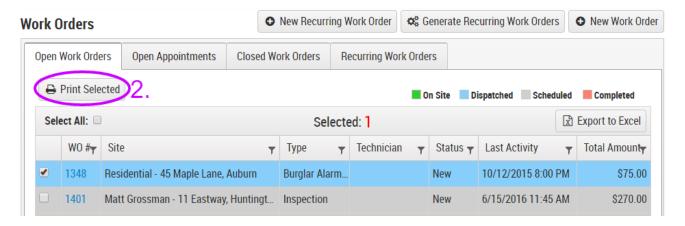
1. Check Boxes

Check the box(es) to the left of the work order(s) you would like to print. Check the "Select All" box If you would like to print all of your open work orders:



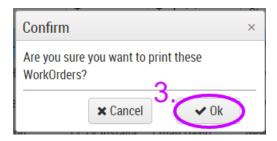
2. Print Selected

Click "Print selected" in the top left corner of the page:



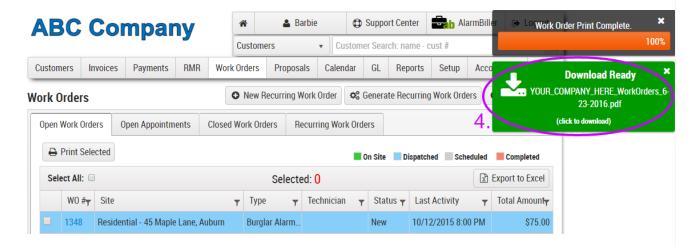
3. Confirm

Click "Ok" in the bottom right corner of the confirm box that appears:



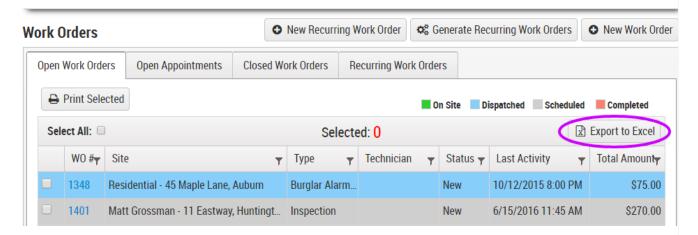
4. Dowload Ready

After work order print is 100% complete a "Download Ready" box will appear in the upper right corner of the page. Click this box to download a pdf of the work order(s) you can view and print:



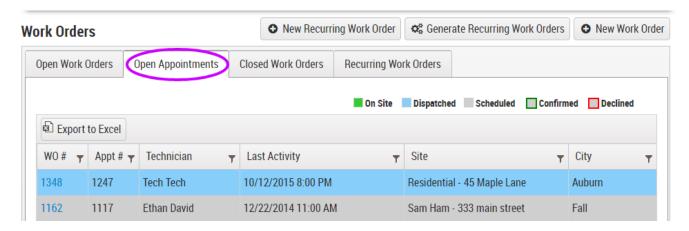
Export to Excel

Click "Export to Excel" in the upper right corner of the page to export a list of your open work orders to an excel file. A file of your open work orders will download to your documents:



Open Appointments Tab

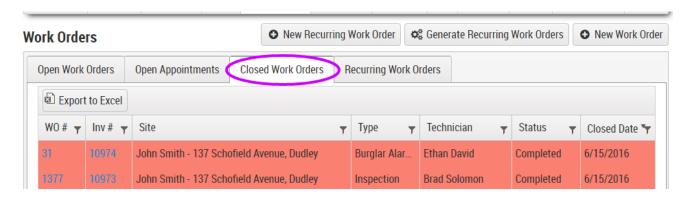
Click the "Open Appointments" tab to access a list of all your open appointments or closed work orders at a dealer level:



The "Export to Excel" and "Work Order Details Page" functions explained in the "Open Work Orders" tab apply to the "Open Appointments" Tab.

Closed Work Orders Tab

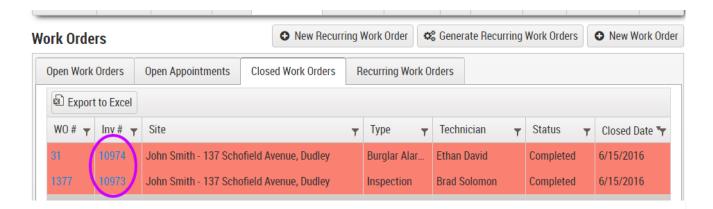
Click the "Closed Work Orders" tab to access a list of all your open appointments or closed work orders at a dealer level:



The "Export to Excel" and "Work Order Details Page" functions explained in the "Open Work Orders" tab apply to the "Closed Work Orders" tab.

Invoice Details Page

In the "Closed Work Orders" tab you can access the Invoice Details Page linked to a work order by clicking the blue "Inv #" hyperlink to the left of the work order.



Recurring Work Orders Tab

For more infomation on recurring work orders, go to the recurring work order appointment section in the calendar.