

# 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:

**ABC Company**

Home | Barbie | Support Center | AlarmBillr | Logout

Customers | Customer Search: name - cust #

Customers | Invoices | Payments | RMR | **Work Orders** | Proposals | Calendar | GL | Reports | Setup | Accounting

**Open Receivables & Aging Past Due**

|                 |              |
|-----------------|--------------|
| Current:        | \$2,178.51   |
| 1 - 30 Days:    | \$6,000.55   |
| 31 - 60 Days:   | \$15,591.77  |
| 61 - 90 Days:   | \$3,119.77   |
| Over 90 Days:   | \$276,066.30 |
| Open Invoices:  | \$302,956.90 |
| Open Credits:   | (\$5,843.49) |
| Unapplied Cash: | (\$2,300.33) |
| Net AR Due:     | \$294,813.08 |

My Time Zone: Eastern Standard Time

**Notifications to Process**

|                             |             |
|-----------------------------|-------------|
| Unassigned Mobile Payments: | 0           |
| Credit Cards:               | 11          |
| eChecks:                    | 0           |
| Forte Error Transactions:   | 0           |
| Open Work Orders:           | 97          |
| Open Appointments:          | 97          |
| Accepted Proposals:         | 0           |
| Next Recurring to Process:  | Jan-2016    |
| Accounting Lockdown Date:   | Jan-01-2014 |
| Support Tickets:            | 0           |
| Invoices/Credits Not Sent:  | 132         |

**Top 5 RMR By Item**

| Item         | Amount     |
|--------------|------------|
| Monitoring   | \$2,561.00 |
| Payments     | \$717.00   |
| new one      | \$200.00   |
| Radio Backup | \$100.00   |
| INSPECTION   | \$60.00    |

The Work Orders Page will appear:

**ABC Company**

Home | Barbie | Support Center | AlarmBillr | Logout

Customers | Customer Search: name - cust #

Customers | Invoices | Payments | RMR | **Work Orders** | Proposals | Calendar | GL | Reports | Setup | Accounting

**Work Orders** | New Recurring Work Order | Generate Recurring Work Orders | New Work Order

Open Work Orders | Open Appointments | Closed Work Orders | Recurring Work Orders

Print Selected | On Site | Dispatched | Scheduled | Completed

Select All:  Selected: 0 Export to Excel

| WO #                          | Site                                    | Type             | Technician | Status | Last Activity      | Total Amount |
|-------------------------------|---|------------------|------------|--------|--------------------|--------------|
| <input type="checkbox"/> 1348 | Residential - 45 Maple Lane, Auburn     | Burglar Alarm... |            | New    | 10/12/2015 8:00 PM | \$75.00      |
| <input type="checkbox"/> 1401 | Matt Grossman - 11 Eastway, Huntingt... | Inspection       |            | New    | 6/15/2016 11:45 AM | \$270.00     |

## New Work Order

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

## Work Orders

[+ New Recurring Work Order](#)

[Generate Recurring Work Orders](#)

[+ New Work Order](#)

Open Work Orders

Open Appointments

Closed Work Orders

Recurring Work Orders

[Print Selected](#)

■ On Site ■ Dispatched ■ Scheduled ■ Completed

Select All:

Selected: 0

[Export to Excel](#)

|                          | WO # | Site                                    | Type             | Technician | Status | Last Activity      | Total Amount |
|--------------------------|------|---|------------------|------------|--------|--------------------|--------------|
| <input type="checkbox"/> | 1348 | Residential - 45 Maple Lane, Auburn     | Burglar Alarm... |            | New    | 10/12/2015 8:00 PM | \$75.00      |
| <input type="checkbox"/> | 1401 | Matt Grossman - 11 Eastway, Huntingt... | Inspection       |            | New    | 6/15/2016 11:45 AM | \$270.00     |

## 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.

## Work Orders

[+ New Recurring Work Order](#)

[Generate Recurring Work Orders](#)

[+ New Work Order](#)

Open Work Orders

Open Appointments

Closed Work Orders

Recurring Work Orders

[Print Selected](#)

■ On Site ■ Dispatched ■ Scheduled ■ Completed

Select All:

Selected: 0

[Export to Excel](#)

|                          | WO # | Site                                    | Type             | Technician | Status | Last Activity      | Total Amount |
|--------------------------|------|---|------------------|------------|--------|--------------------|--------------|
| <input type="checkbox"/> | 1348 | Residential - 45 Maple Lane, Auburn     | Burglar Alarm... |            | New    | 10/12/2015 8:00 PM | \$75.00      |
| <input type="checkbox"/> | 1401 | Matt Grossman - 11 Eastway, Huntingt... | Inspection       |            | New    | 6/15/2016 11:45 AM | \$270.00     |

The following will discuss the functions 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.

## Work Orders

[+ New Recurring Work Order](#)

[Generate Recurring Work Orders](#)

[+ New Work Order](#)

Open Work Orders

Open Appointments

Closed Work Orders

Recurring Work Orders

[Print Selected](#)

■ On Site ■ Dispatched ■ Scheduled ■ Completed

Select All:

Selected: 0

[Export to Excel](#)

|                          | WO # | Site                                    | Type             | Technician | Status | Last Activity      | Total Amount |
|--------------------------|------|---|------------------|------------|--------|--------------------|--------------|
| <input type="checkbox"/> | 1348 | Residential - 45 Maple Lane, Auburn     | Burglar Alarm... |            | New    | 10/12/2015 8:00 PM | \$75.00      |
| <input type="checkbox"/> | 1401 | Matt Grossman - 11 Eastway, Huntingt... | Inspection       |            | New    | 6/15/2016 11:45 AM | \$270.00     |

# 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:

**Work Orders** New Recurring Work Order Generate Recurring Work Orders New Work Order

Open Work Orders | Open Appointments | Closed Work Orders | Recurring Work Orders

Print Selected On Site Dispatched Scheduled Completed

**Select All:**  **Selected: 1** Export to Excel

|    | WO #                                | Site | Type                                    | Technician       | Status | Last Activity      | Total Amount |
|----|-------------------------------------|------|---|------------------|--------|--------------------|--------------|
| 1. | <input checked="" type="checkbox"/> | 1348 | Residential - 45 Maple Lane, Auburn     | Burglar Alarm... | New    | 10/12/2015 8:00 PM | \$75.00      |
|    | <input type="checkbox"/>            | 1401 | Matt Grossman - 11 Eastway, Huntingt... | Inspection       | New    | 6/15/2016 11:45 AM | \$270.00     |

## 2. Print Selected

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

**Work Orders** New Recurring Work Order Generate Recurring Work Orders New Work Order

Open Work Orders | Open Appointments | Closed Work Orders | Recurring Work Orders

Print Selected On Site Dispatched Scheduled Completed

**Select All:**  **Selected: 1** Export to Excel

|  | WO #                                | Site | Type                                    | Technician       | Status | Last Activity      | Total Amount |
|--|-------------------------------------|------|---|------------------|--------|--------------------|--------------|
|  | <input checked="" type="checkbox"/> | 1348 | Residential - 45 Maple Lane, Auburn     | Burglar Alarm... | New    | 10/12/2015 8:00 PM | \$75.00      |
|  | <input type="checkbox"/>            | 1401 | Matt Grossman - 11 Eastway, Huntingt... | Inspection       | New    | 6/15/2016 11:45 AM | \$270.00     |

## 3. Confirm

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

**Confirm** ×

Are you sure you want to print these WorkOrders?

Cancel Ok

## 4. Download 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:

The screenshot shows the ABC Company software interface. At the top, there is a navigation bar with tabs for Customers, Invoices, Payments, RMR, Work Orders, Proposals, Calendar, GL, Reports, Setup, and Accounts. A user profile for 'Barbie' and a 'Support Center' link are visible. A 'Work Order Print Complete.' notification box in the top right corner shows '100%' completion. Below this, a green 'Download Ready' notification box is highlighted with a purple circle. It contains a download icon and the text: 'Download Ready', 'YOUR\_COMPANY\_HERE\_WorkOrders\_6-23-2016.pdf', and '(click to download)'. The main content area is titled 'Work Orders' and includes a 'Print Selected' button, a legend for status (On Site, Dispatched, Scheduled, Completed), and a table of work orders. The table has columns for WO #, Site, Type, Technician, Status, Last Activity, and Total Amount. One work order is listed with WO # 1348, Site 'Residential - 45 Maple Lane, Auburn', Type 'Burglar Alarm...', Status 'New', Last Activity '10/12/2015 8:00 PM', and Total Amount '\$75.00'.

## 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:

The screenshot shows the ABC Company software interface for the 'Work Orders' section. It features a navigation bar with tabs for 'Open Work Orders', 'Open Appointments', 'Closed Work Orders', and 'Recurring Work Orders'. A 'Print Selected' button is visible. Below the tabs, there is a legend for status (On Site, Dispatched, Scheduled, Completed) and a 'Select All' checkbox. The 'Export to Excel' button is highlighted with a purple circle. The main content area is a table of work orders with columns for WO #, Site, Type, Technician, Status, Last Activity, and Total Amount. Two work orders are listed: one with WO # 1348, Site 'Residential - 45 Maple Lane, Auburn', Type 'Burglar Alarm...', Status 'New', Last Activity '10/12/2015 8:00 PM', and Total Amount '\$75.00'; and another with WO # 1401, Site 'Matt Grossman - 11 Eastway, Huntingt...', Type 'Inspection', Status 'New', Last Activity '6/15/2016 11:45 AM', and Total Amount '\$270.00'.

## 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:

## Work Orders

+ New Recurring Work Order

⚙️ Generate Recurring Work Orders

+ New Work Order

Open Work Orders

Open Appointments

Closed Work Orders

Recurring Work Orders

■ On Site ■ Dispatched ■ Scheduled ■ Confirmed ■ Declined

📄 Export to Excel

| WO # | Appt # | Technician  | Last Activity       | Site                        | City   |
|------|--------|-------------|---------------------|-----------------------------|--------|
| 1348 | 1247   | Tech Tech   | 10/12/2015 8:00 PM  | Residential - 45 Maple Lane | Auburn |
| 1162 | 1117   | Ethan David | 12/22/2014 11:00 AM | Sam Ham - 333 main street   | Fall   |

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:

## Work Orders

+ New Recurring Work Order

⚙️ Generate Recurring Work Orders

+ New Work Order

Open Work Orders

Open Appointments

Closed Work Orders

Recurring Work Orders

📄 Export to Excel

| WO # | Inv # | Site                                      | Type            | Technician   | Status    | Closed Date |
|------|-------|---|-----------------|--------------|-----------|-------------|
| 31   | 10974 | John Smith - 137 Schofield Avenue, Dudley | Burglar Alar... | Ethan David  | Completed | 6/15/2016   |
| 1377 | 10973 | John Smith - 137 Schofield Avenue, Dudley | Inspection      | Brad Solomon | Completed | 6/15/2016   |

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.

## Work Orders

+ New Recurring Work Order

⚙️ Generate Recurring Work Orders

+ New Work Order

Open Work Orders

Open Appointments

Closed Work Orders

Recurring Work Orders

📄 Export to Excel

| WO # ▼ | Inv # ▼ | Site ▼                                    | Type ▼          | Technician ▼ | Status ▼  | Closed Date ▼ |
|--------|---------|---|-----------------|--------------|-----------|---------------|
| 31     | 10974   | John Smith - 137 Schofield Avenue, Dudley | Burglar Alar... | Ethan David  | Completed | 6/15/2016     |
| 1377   | 10973   | John Smith - 137 Schofield Avenue, Dudley | Inspection      | Brad Solomon | Completed | 6/15/2016     |

## Recurring Work Orders Tab

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