

Work Order Record Definitions

Last Modified on 05/06/2022 9:29 am EDT

Once a new Work Order is saved, several tabs are displayed in the lower panel of the page. When clicking on the Edit button at the upper right of the work order page, additional buttons will be exposed on the various tabs to add data. Each of these tabs will be explained below.

Appointments

This tab will display all scheduled technician appointments for the work order. If the work order is in edit mode, new appointments may be added.

The screenshot displays the 'Work Order 2617' interface. At the top, there are navigation buttons for 'Edit', 'Tasks', 'History', and 'Deliver/Print...'. Below this, the work order details are shown: 'Wood, Emily - 3719', 'Emily Wood', and 'Burglar Alarm - 9173-01'. A summary card on the right lists various fields such as 'Type', 'Requested By', 'Phone', 'Email', 'PO Number', 'Proposal', 'Work Order Date', 'Next Appointment', and 'Technician'. A map on the left shows the location with a red pin and a cost breakdown: Service Fee \$85.00, Labor \$0.00, and Est Tax \$0.00, totaling \$0.00. Below the map and summary card is a tabbed interface with the following tabs: 'Appointments', 'Items', 'Parts', 'RMR', 'Billing', 'Notes', 'System Parts', 'System Notes', 'Zones', 'Purchase Orders', 'Site Work Order History', 'Documents', 'General Ledger', 'Part Ledger', and 'Custom Fields'. The 'Appointments' tab is currently selected, showing a table with columns: 'Appt #', 'Appointment Time', 'Last Activity', 'Status', 'Technician', 'Est Length', 'Billable Min', 'Break Min', and 'Labor'. The table is currently empty, displaying 'No records available.' at the bottom. At the very bottom of the interface, there is a pagination bar showing '0 - 0 of 0 items' and a 'Refresh' button.

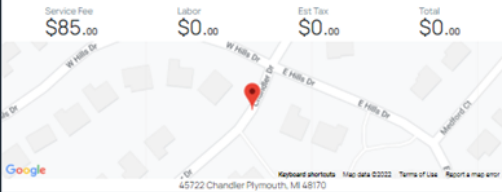
Items

The Items tab will display all invoice items which have been added to the work order. If the work order is in edit mode, new items may be added, edited, or deleted.

Work Order 2617 Edit Tasks History Deliver/Print...

Wood, Emily - 3719 Emily Wood Burglar Alarm - 9173-01

Service Fee \$85.00 Labor \$0.00 Est Tax \$0.00 Total \$0.00



Type	Intrusion Installation-Residential	Salesperson	Dan Brown
Requested By	Emily Wood	Sales Package	-
Phone	7342584646	Service Level	SVC T&M RES
Email	emilyLwood@gmail.com	Base	85
PO Number	-	Increment	15
Proposal	-	Labor	75
Work Order Date	April 23, 2022	Bill After	30
Next Appointment	-	Warranty Labor	Labor - 1 Year
Technician	-	Warranty Parts	Parts - 1 Year
		Description	-

Appointments **Items 2** Parts 0 RMR 0 Billing Notes System Parts System Notes Zones Purchase Orders 0 Site Work Order History Documents General Ledger Part Ledger Custom Fields

Export to Excel Items \$1,210.00

Item Code	Item Description	Qty	Rate	Taxable	Tax Code	Amount	Item Cost	Total Cost	Labor Units	Total Labor
Fuel	Fuel Surcharge	1	\$10.00	<input type="radio"/> NO	MI	\$10.00	\$5.00	\$5.00	1	1
Installation - Taxable	System Installation	1	\$1200.00	<input checked="" type="radio"/> YES	MI	\$1,200.00	\$15.00	\$15.00	1	1

1 - 2 of 2 items Refresh

Parts

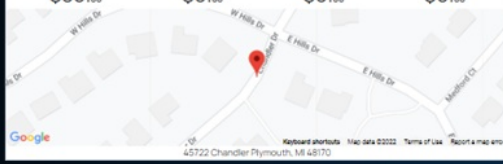
The Parts tab will display all inventory parts which have been added to the work order. If the work order is in edit mode, new parts may be added, edited, or deleted.

Work Order 2617

Edit Tasks History Deliver/Print...

Wood, Emily - 3719 Emily Wood Burglar Alarm - 9173-01

Service Fee	Labor	Est Tax	Total
\$85.00	\$0.00	\$0.00	\$0.00



Type	Intrusion Installation-Residentia	Salesperson	Dan Brown
Requested By	Emily Wood	Sales Package	-
Phone	7342584646	Service Level	SVC T&M RES
Email	emilylwood@gmail.com	Base	85
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Proposal	-	Labor	75
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Technician	-	Warranty Parts	Parts - 1 Year
		Description	-

- Appointments
- Items 1
- Parts 6**
- RMR 0
- Billing
- Notes
- System Parts
- System Notes
- Zones
- Purchase Orders 0
- Site Work Order History
- Documents
- General Ledger
- Part Ledger
- Custom Fields

Export to Excel

Part Code	Part Description	Zone / Location	Qty	Rate	Taxable	Tax Code	Amount	Part Cost	Total Cost	Labor Units	Total Labor	
5806	SMOKE SENSOR WIRELESS		1	\$125.00	<input checked="" type="checkbox"/>	MI	\$125.00	\$63.21	\$63.21	0	0	0 Docs
5816	Door/Window Transmitter		1	\$50.00	<input checked="" type="checkbox"/>	MI	\$50.00	\$30.00	\$30.00	0	0	0 Docs
5890	Wireless Pet Immune Motion		1	\$145.00	<input type="checkbox"/>	MI	\$145.00	\$79.53	\$79.53	0	0	0 Docs
6150	Vista Keypad		1	\$78.10	<input checked="" type="checkbox"/>	MI	\$78.10	\$40.00	\$40.00	0	0	0 Docs
Vista128FBP	Fire/Burg Control Panel		1	\$950.00	<input checked="" type="checkbox"/>	MI	\$950.00	\$401.00	\$401.00	0	0	0 Docs
WAVE2	Honeywell 2 Tone Siren		1	\$20.90	<input checked="" type="checkbox"/>	MI	\$20.90	\$8.00	\$8.00	0	0	0 Docs

1 - 8 of 8 items Refresh

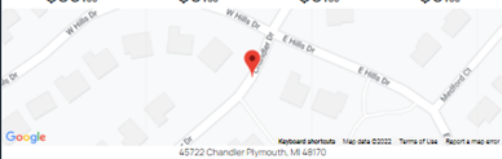
RMR

If recurring services were sold on the work order, this tab is used to add those recurring type invoice items.

Work Order 2617 Edit Tasks History Deliver/Print...

Wood, Emily - 3719 Emily Wood Burglar Alarm - 9173-01

Service Fee	Labor	Est Tax	Total
\$85.00	\$0.00	\$0.00	\$0.00



Type	Intrusion Installation-Residential	Salesperson	Dan Brown
Requested By	Emily Wood	Sales Package	-
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Email	emilylwood@gmail.com	Base	85
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Technician	-	Warranty Parts	Parts - 1 Year
		Description	-

Appointments
Items 1
Parts 0
RMR 1
Billing
Notes
System Parts
System Notes
Zones
Purchase Orders 0
Site Work Order History
Documents
General Ledger
Part Ledger
Custom Fields

Item Code	Description	Billing Cycle	Next Invoice Date	Cancel Date	Monthly Amount	Cycle Amount
Monitoring	Monitoring Services	Quarterly	May 1, 2022		\$45.00	\$135.00

1 - 1 of 1 items Refresh

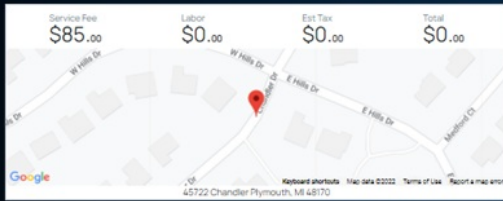
Billing

The Billing tab contains options, which control if and how the customer will be invoiced for charges on the work order.

Work Order 2617

Edit Tasks History Deliver/Print...

Wood, Emily - 3719 Emily Wood Burglar Alarm - 9173-01



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Proposal	-	Labor	75
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		Description	-

Appointments Items 1 Parts 0 RMR 0 Billing Notes System Parts System Notes Zones Purchase Orders 0 Site Work Order History Documents General Ledger Part Ledger Custom Fields

Do Not Invoice OFF

Deliver Invoice OFF

Activation Date

Next Invoice Date

Override Warranty OFF

Remove Service Fee OFF

Hide Totals OFF

Invoice Memo

Credit Card

eCheck

Printed Name

Signature

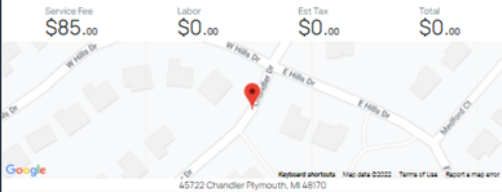
Notes

Any notes associated with the work order are entered, edited, or deleted from this tab.

Work Order 2617 Edit Tasks History Deliver/Print...

Wood, Emily - 3719 Emily Wood Burglar Alarm - 9173-01

Service Fee	Labor	Est Tax	Total
\$85.00	\$0.00	\$0.00	\$0.00



Type	Intrusion Installation-Residential	Salesperson	Dan Brown
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Appointments
Items 1
Parts 0
RMR 0
Billing
Notes 1
System Parts
System Notes
Zones
Purchase Orders 0
Site Work Order History
Documents
General Ledger
Part Ledger
Custom Fields

+ Add Note

Note	Modified	Modified By	Type	Expiration	
Call customer 20 minutes prior to arrival.	Apr 22, 2022, 2:26:05 PM	Papay, Travis	Standard		Edit Delete

1 - 2 of 2 items Refresh

System Parts


If a list of installed parts is setup on the Site or System they will be displayed in the grid area. Users are able to add, edit or delete parts from this list.

Work Order 2617

Edit Tasks History Deliver/Print...

Wood, Emily - 3719 Emily Wood Burglar Alarm - 9173-01

Service Fee	Labor	Est Tax	Total
\$85.00	\$0.00	\$0.00	\$0.00



Type	Intrusion Installation-Residential	Salesperson	Dan Brown
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Phone	7342584646	Service Level	SVC T&M RES
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		Description	-

Appointments Items 1 Parts 0 RMR 0 Billing Notes System Parts System Notes Zones Purchase Orders 0 Site Work Order History Documents General Ledger Part Ledger Custom Fields

Part Code	Part Description	Location	Zone #	Install Date	Removal Date	Serial Number	Docs	Trash
5800PIR	Wireless Motion Detector	Hallway	2	3/7/22			Docs	Trash
5816	Door/Window Transmitter	Front Door	1	3/7/22			Docs	Trash
6160	Keypad	Left of entry door		3/7/22			Docs	Trash
Vista20P	8-zone control panel	Entry Closet		3/7/22			Docs	Trash
IM-1270	12V Battery	Panel		3/7/22	3/31/22		Docs	Trash
5800PIR	Wireless Motion Detector			3/31/22			Docs	Trash
IM-1270	12V Battery			3/31/22			Docs	Trash

1 - 8 of 8 items Refresh

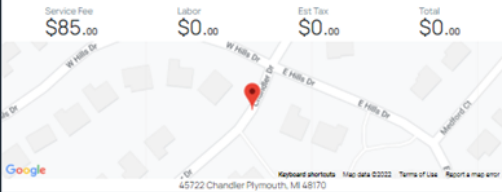
System Notes

If the work order is linked to a System record, all notes entered on the system record will be displayed. Additional notes may be added, and existing notes may be edited or deleted.

Work Order 2617 Edit Tasks History Deliver/Print...

Wood, Emily - 3719 Emily Wood Burglar Alarm - 9173-01

Service Fee	Labor	Est Tax	Total
\$85.00	\$0.00	\$0.00	\$0.00



Type	Intrusion Installation-Residential	Salesperson	Dan Brown
Requested By	Emily Wood	Sales Package	-
Phone	7342584646	Service Level	SVC T&M RES
Email	emilylwood@gmail.com	Base	85
PO Number	-	Increment	15
Proposal	-	Labor	75
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Technician	-	Warranty Parts	Parts - 1 Year
		Description	-

Appointments **Items 1** **Parts 0** **RMR 0** **Billing** **Notes** **System Parts** **System Notes** **Zones** **Purchase Orders 0** **Site Work Order History** **Documents** **General Ledger** **Part Ledger** **Custom Fields**

+ Add Note

Note	Modified	Modified By	Type	Expiration	
This system was installed by an ADT dealer.	Apr 22, 2022, 10:50:02 AM	Papay, Travis	Standard		Edit Delete

1 - 1 of 1 items Refresh

Zones


If a zone list was entered for the Site or System associated with the work order, the zones will be displayed. If the work order is in edit mode, new zones may be added, and existing zones may be edited or deleted.

Work Order 2617

Edit Tasks History Deliver/Print...

Wood, Emily - 3719 Emily Wood Burglar Alarm - 9173-01

Service Fee	Labor	Est Tax	Total
\$85.00	\$0.00	\$0.00	\$0.00



Type	Intrusion Installation-Residential	Salesperson	Dan Brown
Requested By	Emily Wood	Sales Package	-
Phone	7342584646	Service Level	SVC T&M RES
Email	emilylwood@gmail.com	Base	85
PO Number	-	Increment	15
Proposal	-	Labor	75
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Next Appointment	-	Warranty Labor	Labor - 1 Year
Technician	-	Warranty Parts	Parts - 1 Year
		Description	-

Appointments Items 1 Parts 0 RMR 0 Billing Notes System Parts System Notes Zones Purchase Orders 0 Site Work Order History Documents General Ledger Part Ledger Custom Fields

Zone #	Signal Type	Authority	Description
1	Burglar Alarm	MI - Plymouth City PD	Front Door
2	Burglar Alarm	MI - Plymouth City PD	Hallway
3	Burglar Alarm	MI - Plymouth City PD	Master Bedroom Window
4	Burglar Alarm	MI - Plymouth City PD	Office
5	Burglar Alarm		Garage
6	Fire Alarm		Kitchen

1 - 6 of 6 items Refresh


Purchase Orders

Any purchase orders created which are linked to the work order will be displayed. Users are able to create new purchase orders and edit or delete existing purchase orders.

Work Order 2617 Edit Tasks History Deliver/Print...

Wood, Emily - 3719 Emily Wood Burglar Alarm - 9173-01

Service Fee: \$85.00 Labor: \$0.00 Est Tax: \$0.00 Total: \$0.00



Type	Intrusion Installation-Residentia	Salesperson	Dan Brown
Requested By	Emily Wood	Sales Package	-
Phone	7342584646	Service Level	SVC T&M RES
Email	emilylwood@gmail.com	Base	85
PO Number	-	Increment	15
Proposal	-	Labor	75
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Technician	-	Warranty Parts	Parts - 1 Year
		Description	-

Appointments
Items 1
Parts 0
RMR 0
Billing
Notes
System Parts
System Notes
Zones
Purchase Orders 0
Site Work Order History
Documents
General Ledger
Part Ledger
Custom Fields

[+ Create Purchase Order](#)

PO #	Vendor	Order Date	Total Amount
No records available.			

0 - 0 of 0 items Refresh

Site Work Order History


All open and closed work orders associated with the Site or System will be displayed. Users may click on the hyperlink of a work order within the grid to open and view the work orders.

Work Order 2617

Edit Tasks History Deliver/Print...

Wood, Emily - 3719 Emily Wood Burglar Alarm - 9173-01

Service Fee	Labor	Est Tax	Total
\$85.00	\$0.00	\$0.00	\$0.00



Type	Intrusion Installation-Residential	Salesperson	Dan Brown
Requested By	Emily Wood	Sales Package	-
Phone	7342584646	Service Level	SVC T&M RES
Email	emilyLwood@gmail.com	Base	85
PO Number	-	Increment	15
Proposal	-	Labor	75
Work Order Date	April 23, 2022	Bill After	30
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Technician	-	Warranty Parts	Parts - 1 Year
		Description	-

Appointments Items 1 Parts 0 RMR 0 Billing Notes System Parts System Notes Zones Purchase Orders 0 Site Work Order History Documents General Ledger Part Ledger Custom Fields

WO #	System	Type	Status	Closed	Modified	Description
2551	Burglar Alarm - 9173-01	Service Call	Completed	Mar 28, 2022	Mar 28, 2022	
2552	Burglar Alarm - 9173-01	Service Call	Void Work Order	Mar 31, 2022	Mar 31, 2022	
2555	Burglar Alarm - 9173-01	Service Call	Completed	Mar 31, 2022	Mar 31, 2022	
2556	Burglar Alarm - 9173-01	Service Call	Completed	Mar 31, 2022	Mar 31, 2022	
2560	Burglar Alarm - 9173-01	Service Call	Completed	Mar 31, 2022	Mar 31, 2022	
2563	Burglar Alarm - 9173-01	Service Call	Completed	Apr 1, 2022	Apr 1, 2022	
2569	Burglar Alarm - 9173-01	Service Call	+ New		Apr 3, 2022	
2594	Burglar Alarm - 9173-01	Inspection	+ New		Apr 20, 2022	

1 - 8 of 8 items Refresh

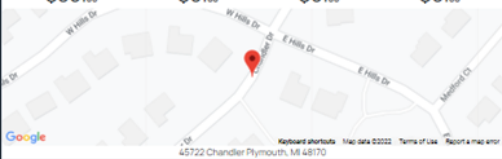
Documents

Existing documents that have been uploaded to the work order will be displayed. New documents may be uploaded, and existing documents may be edited or deleted.

Work Order 2617 Edit Tasks History Deliver/Print...

Wood, Emily - 3719 Emily Wood Burglar Alarm - 9173-01

Service Fee	Labor	Est Tax	Total
\$85.00	\$0.00	\$0.00	\$0.00



Type	Intrusion Installation-Residential	Salesperson	Dan Brown
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Technician	-	Warranty Parts	Parts - 1 Year
		Description	-

Appointments Items 1 Parts 0 RMR 0 Billing Notes System Parts System Notes Zones Purchase Orders 0 Site Work Order History **Documents** General Ledger Part Ledger Custom Fields

+ Add Document NO Show deleted documents

File Name	Type	Security	Modified Date
No records available.			

0 - 0 of 0 items Refresh

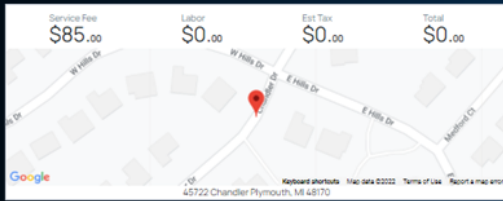
General Ledger

Any financial transactions related to the work order will be displayed within the grid area.

Work Order 2617

Edit Tasks History Deliver/Print...

Wood, Emily - 3719 Emily Wood Burglar Alarm - 9173-01



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		Description	-

Appointments Items 1 Parts 0 RMR 0 Billing Notes System Parts System Notes Zones Purchase Orders 0 Site Work Order History Documents General Ledger Part Ledger Custom Fields

Export to Excel

Drag a column header and drop it here to group by that column

GL Entry	Entry Date	Total Amount	Memo	Is Check
No records available.				

0 - 0 of 0 items Refresh

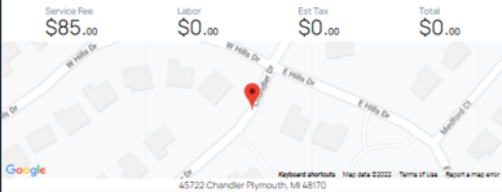
Part Ledger

The Part Ledger displays any inventory part activity related to the work order.

Work Order 2617 Edit Tasks History Deliver/Print...

Wood, Emily - 3719 Emily Wood Burglar Alarm - 9173-01

Service Fee: \$85.00 Labor: \$0.00 Est Tax: \$0.00 Total: \$0.00



Type	Intrusion Installation-Residential	Salesperson	Dan Brown
Requested By	Emily Wood	Sales Package	-
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Technician	-	Warranty Parts	Parts - 1 Year
		Description	-

Appointments | Items 1 | Parts 0 | RMR 0 | Billing | Notes | System Parts | System Notes | Zones | Purchase Orders 0 | Site Work Order History | Documents | General Ledger | **Part Ledger** | Custom Fields

Export to Excel Custom Grid Layout

Drag a column header and drop it here to group by that column

Entry	Record Type	Origin	Entry Date	Total Amount	Status
No records available.					

0 - 0 of 0 items Refresh

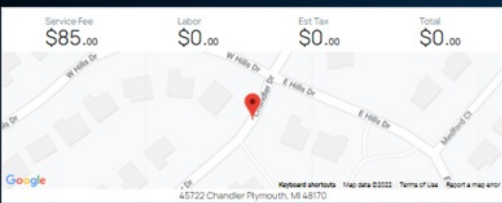
Custom Fields

If Custom Fields have been setup for Work Orders, users are able to populate or modify existing information.

Work Order 2617 Edit Tasks History Deliver/Print...

Wood, Emily - 3719 Emily Wood Burglar Alarm - 9173-01

Service Fee: \$85.00 Labor: \$0.00 Est Tax: \$0.00 Total: \$0.00



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Appointments | Items 1 | Parts 0 | RMR 0 | Billing | Notes | System Parts | System Notes | Zones | Purchase Orders 0 | Site Work Order History | Documents | General Ledger | Part Ledger | **Custom Fields**

History

CustomerSatisfied