

# Work Order Record Definitions

Last Modified on 12/02/2025 1:14 pm EST

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

## Appointments

This tab displays all scheduled technician appointments for the work order. If the work order is in edit mode, you can add new appointments.

Work Order 2617

EditTasksHistoryDeliver/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

Requested By

Emily Wood

Phone

7342584646

Email

emilylwood@gmail.com

PO Number

-

Proposal

-

Work Order Date

April 23, 2022

Next Appointment

-

Technician

-

Salesperson

Dan Brown

Sales Package

-

Service Level

SVC T&M RES

Base

85

Increment

15

Labor

75

Bill After

30

Warranty Labor

Labor - 1 Year

Warranty Parts

Parts - 1 Year

Description

-

Appointments

Items1

Parts0

RMR0

Billing

Notes

System Parts

System Notes

Zones

Purchase Orders0

Site Work Order History

Documents

General Ledger

Part Ledger

Custom Fields

Export to Excel

Appt #	Appointment Time	Last Activity	Status	Technician	Est Length	Billable Min	Break Min	Labor
No records available.								

0 - 0 of 0 items

Refresh


## Items

The Items tab displays all invoice items that have been added to the work order. If the work order is in edit mode, you can add, edit, and delete items.

[Edit](#)
[Tasks](#)
[History](#)
[Deliver/Print...](#)

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	Parts	RMR	Billing	Notes	System Parts	System Notes	Zones	Purchase Orders	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	\$1,200.00	<input checked="" type="radio"/> YES	MI	\$1,200.00	\$15.00	\$15.00	1	1

1
2

1 - 2 of 2 items
Refresh

The Parts tab displays all inventory parts that have been added to the work order. If the work order is in edit mode, you can add, edit, and delete parts.

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

Requested By

Emily Wood

Phone

7342584646

Email

emilylwood@gmail.com

PO Number

-

Proposal

-

Work Order Date

April 23, 2022

Next Appointment

-

Technician

-

Salesperson

Dan Brown

Sales Package

-

Service Level

SVC T&M RES

Base

85

Increment

15

Labor

75

Bill After

30

Warranty Labor

Labor - 1 Year

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"/> NO	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

1 - 8 of 8 items

Refresh

## RMR

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



 Edit
  Tasks
  History
  Deliver/Print...

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

W Hills Dr E Hills Dr Mulford Ln

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45722 Chandler Plymouth, MI 48170

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
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		Description	-

Appointments	Items	Parts	RMR	<b>Billing</b>	Notes	System Parts	System Notes	Zones	Purchase Orders	Site Work Order History	Documents	General Ledger	Part Ledger	Custom Fields
--------------	-------	-------	-----	----------------	-------	--------------	--------------	-------	-----------------	-------------------------	-----------	----------------	-------------	---------------

Do Not Invoice	<input type="checkbox"/>	Credit Card	<input type="text"/>
Deliver Invoice	<input type="checkbox"/>	eCheck	<input type="text"/>
Activation Date	<input type="text"/>	Printed Name	<input type="text"/>
Next Invoice Date	<input type="text"/>	Signature	<input type="text"/>
Override Warranty	<input type="checkbox"/>		
Remove Service Fee	<input type="checkbox"/>		
Hide Totals	<input type="checkbox"/>		
Invoice Memo	<input type="text"/>		

Enter, edit, and delete any notes associated with the work order on this tab.



Work Order 2617

Edit

Tasks

History

Deliver/Print...

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Emily Wood

Burglar Alarm - 9173-01

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\$85.00

Labor

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Est Tax

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Total

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Warranty Labor

Labor - 1 Year

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 Parts

Export to Excel

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

1

1 - 8 of 8 items

Refresh

## System Notes

If the work order is linked to a system, this tab shows all notes entered on the system. You can add, edit, and delete notes.







Work Order 2617

Edit

Tasks

History

Deliver/Print...

Wood, Emily - 3719

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\$85.00

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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

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

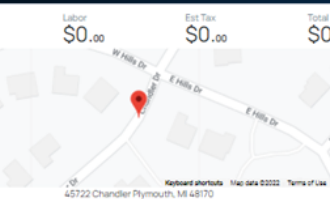
Refresh

## Documents

This tab shows existing documents that have been uploaded to the work order. You can upload new documents and edit and delete existing documents.

< 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

45722 Chandler Plymouth, MA 01870

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
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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

+ Add Document
NO Show deleted documents

File Name	Type	Security	Modified Date
No records available.			

◀ ▶ 🔍 🔄
0 - 0 of 0 items Refresh

# General Ledger

This tab shows any financial transactions related to the work order.



Work Order 2617

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Tasks
History
Deliver/Print...

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Est Tax

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Total

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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

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

This tab shows any custom fields that have been setup for work orders. You can enter new or modify existing information.

Work Order 2617

Edit
Tasks
History
Deliver/Print...

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Emily Wood
Burglar Alarm - 9173-01

Service Fee

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Labor

\$0.00

Est Tax

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Total

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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

OFF

