Work Order Tabs

Last Modified on 03/13/2025 12:22 pm 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.

< Work Or	der 2617						🥒 Edit	Έ Tasks 🔊 Ι	History Deliver/Print
😑 Wood, Emily	- 3719 ♀ Emily Wood	🜍 Burglar Alarm -	9173-01						
				Туре	Intrusion Inst	allation-Residentia	Salesperson	Dan Brown	
Service Fee	Labor	EstTax	Total	Requested By	Emily Wood		Sales Package	-	
\$85	\$0.00	\$0	\$0.00	Phone	7342584646		Service Level	SVC T&M RES	
Winner	ri Halla Dr	in the		Email	emilyLwood@	gmail.com	Base	85	
		r Hills Dr		PO Number	-		Increment	15	
a pr		E Home Dr	all	Proposal	-		Labor	75 30	
				Work Order Date	April 23, 2022		Bill After	Labor - 1 Year	
Google	45722 Chandler Plymo	Keyboard shortouts Map data 02022 Terr	na of Lise Report a map anor	Next Appointment			Warranty Labor Warranty Parts	Parts - 1 Year	
	No722 Chandler Hymo	00%, MF48170		Technician	-		Description		
								I	
Appointments	Items Parts RMR B	silling Notes System P	Parts System Notes	s Zones Purchase C	Orders Site Wo	ork Order History	Documents Gene	ral Ledger Part Led	ger Custom Fields
	1 0 0			0					
Export to	o Excel								
Appt #	Appointment Time	Last Activity	Status	Technicia	n	Est Length	Billable Min	Break Min	Labor
				No records ava	ailable.				
н н н	н						0-0of0	items 🔁 Refre	sh

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 Ord	der 2617								Edit 🚝	Tasks	History	Deliver/Print
				77.04								
wood, Emily -	- 3719 ♀ Emily Wood	🤝 Bur	glar Alarm - 91	/3-01								
						Type	ion Installation-Res		esperson	Dan Brown		
Service Fee \$85.00	\$0.00	Est Tao		50.00	Reques		Wood 84646		Package	SVC T&M RES		
00.COÇ	QU.00	ŞU.	.00	50.00		FIIORE	.wood@gmail.com	Ser	AICE LEVEL	35		
WHE	- 07	SO.		S //	201	Email emilyL	woodegmail.com		Dase	5		
			Elter	10		oposal -			ior of the fire	15		
			10	ander	Work Orde		3, 2022			50		
Google					Next Appoir			Warra	nty Labor L	abor - 1 Year		
Google	45722 Chandler Plyr	Keyboard shorts nouth, MI 48170	what Map data 02022 Terms of	Usa Report a map error	Tech	nician -		Warra	nty Parts	Parts - 1 Year		
						1		De	scription			
Export to	Items Parts RMR 2 0 0	Billing No	otes System Par	ts System Note	es Zones Pu	chase Orders 0	Site Work Order His	tory Document	ts General L	edger Part	Item	210.00
Item Code	Item Description	Qty	Rate	Taxable	Tax Code	Amount	Item Cost	Total Cost	Labor Units	Total Lab	or	
Fuel	Fuel Surcharge	1	\$10.00	NO	м	\$10.00	\$5.00	\$5.00	1		1	
Installation - Taxable	System Installation	1	\$1,200.00	YES	М	\$1,200.00	\$15.00	\$15.00	1		1	

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.

lood, Emily	- 3719 ♀ Emily Woo	d 🛛 😌 Burglar A	larm - s	9173-01								
						Type	Intrusion Inst	tallation-Reside	ntia Sal	esperson Da	n Brown	
Service Fee	Labor	Est Tax		Total	Req	uested By	Emily Wood		Sales	Package		
\$85.00	\$0.00	\$0.00		\$0.00		Phone	7342584646		Ser	ALCO LOVOI	C T&M RES	
W Holls Dr	" Mala					Email	emilyLwood@	@gmail.com		Base 85		
		SU			P	Number	-		Ir	ncrement 15		
			tills by	and C		Proposal	-			Labor 75 Bill After 30		
				1		Order Date	April 23, 2022	2	14/200	Dimenter	bor - 1 Year	
gle	45722 Chandler Pi	Keyboard shortouts Map dat	02022 Terms	a of Use Report a map and		pointment Technician				incy Labor	rts - 1 Year	
		yn ou o'r mae'r o				lechnician				scription		
intments (items Parts RMR 1 6 0	Billing Notes \$	System P	arts System	Notes Zones	Purchase O 0	rders Site W	'ork Order Histor	y Document	s General Lei	dger Part Ledg	er Custom Fiek
intments I	1 6 0	Billing Notes \$	System P	arts System	Notes Zones		rders Site W	fork Order Histor	y Document	s General Lee	dger PartLedg	er Custom Field
	1 6 0	Billing Notes S	System P	arts System			rders Site W	fork Order Histor	y Document	General Lee	dger Part Ledg Total Labor	er Custom Field
Export to	1 6 0				Taxable 1	0						er Custom Field
Export to Part Code	Part Description SMOKE SENSOR		Oty	Rate	Taxable 1	0 Tax Code	Amount	Part Cost	Total Cost	Labor Units	Total Labor	
Part Code	Part Description SMOKE SENSOR WIRELESS Door/Window		Oty 1	Rate \$125.00	Taxable 1 TIL 1 TIL 1 TIL 1	0 Tax Code MI	Amount \$125.00	Part Cost \$63.21	Total Cost \$63.21	Labor Units 0	Total Labor 0	0 Docs
Part Code 5806 5816	Part Description SMOKE SENSOR WIRELESS Door/Window Transmitter Wireless Pet Immune		Qty 1	Rate \$125.00 \$50.00		Tax Code MI MI	Amount \$125.00 \$50.00	Part Cost \$63.21 \$30.00	Total Cost \$63.21 \$30.00	Labor Units 0	Total Labor 0	0 Docs
Part Code 5806 5816 5890	1 6 0 Description SMOKE SENSOR WIRELESS Door/Window Transmitter Wireless Pet Immune Motion		Oty 1 1	Rate \$125.00 \$50.00 \$145.00	Taxable 7 Taxable 9 Taxable 9 T	Tax Code Mi Mi Mi	Amount \$125.00 \$50.00 \$145.00	Part Cost \$63.21 \$30.00 \$79.53	Total Cost \$63.21 \$30.00 \$79.53	Labor Units 0 0	Total Labor 0 0	O Docs O Docs O Docs O Docs O Docs

RMR

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

Work Order 26	17					🧪 Edit	Tasks	S History	Deliver/Print
Wood, Emily - 3719		🖸 Duralar Ala	rm - 0177-01						
wood, Enny - 3719			111-91/3-01		Intrusion Installation-Resi	identia Salespers	Dan Brow	n	
				Type Requested By	Emily Wood	Sales Packa	on		
Service Fee \$85.00	\$0.00	SO.00	Total \$0.00	Phone	7342584646	Service Le		RES	
a tella Dr	\$0.00 W Heats Co			Email	emilyLwood@gmail.com	Ba	se 85		
		E Hills Dy		PO Number	-	Increme	nt ¹⁵		
, CH	- × y	E Halla	4 40	Proposal	-	Lat	or 75		
			- sale	Work Order Date	April 23, 2022	Bill Af			
Google		Kerboard shortouts - Man data 02	022 Terms of Liss Reports map error	Next Appointment	-	Warranty Lab			
	45722 Chandler Plymo			Technician	-	Warranty Pa		ear	
						Descripti	on		
Item Code	Description		Billing Cycle	Next Invoice Date	Cancel Date	Monthly Amount	Cycle Amoun	+	
					Callerbate				
Monitoring	Monitoring	Services	Quarterly	May 1, 2022		\$45.00	s	135.00	
14 4 Þ ÞI							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	ž Tasks	3 History	y Deliver/Print
😬 Wood, Emily - 3719 💡 E	Emily Wood	😌 Burglar Alarm	n - 9173-01							
				Туре	Intrusion Installa	ition-Residentia	Salesperson	Dan Brow	n	
Service Fee La	ibor	Est Tax	Total	Requested By	Emily Wood		Sales Package	-		
\$85.00 \$	80.00	\$0 m	50.00	Phone	7342584646		Service Level	SVC T&M	RES	
Billion Cr.	W Halls Dr			Email	emilyLwood@gm	nail.com	Base	85		
//		ring Dr		PO Number	1993) 1993		Increment	15		
JA DA		E Holla Dr	and a	Proposal	-		Labor	75		
			- an -	Work Order Date	April 23, 2022		Bill After	30		
	*	Kayboard shortouts Map data 02022	Terms of Lise Bacort a map error	Next Appointment	-		Warranty Labor	Labor - 11 Parts - 1Y		
4	5722 Chandler Plymo	kuth, MI 48170		Technician	57 S		Warranty Parts	Parts - I Y	ear	
							Description	I		
Appointments Items Part:	s RMR B	Illing Notes Syste	m Parts System Notes	s Zones Purchase O	ndoro Dito Made	Order History	Documents Gene	all adapt	Part Ledger	Custom Fields
1 0		Notes Syste	in Parts System Notes	o 201es Purchase 0	Ideis Sile Work	Order History	Documents Gene	ai Leogei	Part Leuger	Custom Fields
Do Not Invoice	OFF				Credit Card				Ŧ	
Deliver Invoice	OFF								*	
Activation Date			(**) (*)		eCheck				· ·	
Next Invoice Date					Printed Name					
Override Warranty	OFF									
Remove Service Fee	OFF				Signature					
Hide Totals	OFF									
Invoice Memo										

Notes

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

									-		
Work Order 2617							Ø	Edit	Tasks	Histor	y Deliver/Print.
😌 Wood, Emily - 3719 🛛 💡 Emily Woo	d 🛛 😌 Burglar Alarm - 🤉	9173-01									
				Type	Intrusion In	stallation-Residentia	sa Sa	lesperson	Dan Bro	wn	
Service Fee Labor	Est Tax	Total	Rec	quested By	Emily Wood		Sale	s Package	-		
\$85.00 \$0.00	\$0	\$0.00		Phone	734258464	6	Ser	rvice Level	SVC T&I	MRES	
H Han Cr	a de la compañía de			Email	emilyLwood	l@gmail.com		Base	85		
	\$0.00		1	PO Number	-			Increment	15		
80	E Huna Da	and C		Proposal				Labor	75		
		- an	Work	Order Date	April 23, 20	22		Bill After	30 Labor - 1	1 Marca	
Google	Keyboard shortouts Map data 02022 Term	aofilias Reporta mapienor		pointment	-			anty Labor	Parts - 1		
45722 Chandler P	lymouth, MI 48170			Technician				anty Parts escription	-	real	
							0	escription			
Appointments Items Parts RMR	Billing Notes System P	arts System Notes	Zones	Purchase On	dere Site	Work Order History	Documer	nts Gener	ral Ledoer	Part Ledger	Custom Fields
1 0 0	1	0,010		0		india chaci matary	Bacanta		ioi coogoi	, a chooge.	Custoinnielus
+ Add Note											
Note	:	Modified	:	Modified By	:	Туре	: Exp	piration	:		
Call customer 20 minutes prior to arrival.		Apr 22, 2022, 2:26:	05 PM	Papay, Travis	1	Standard				J Edit	Delete
		1									
									1-3	2 of 2 items	C 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.

	r 2617							🥜 E	dit 🧍	Tasks	😗 Histo	ry Deliver/
Vood, Emily - 3	719 ♀ Emily Wood	😌 Burglar Ala	arm - 9173-01									
					Ту	e Intrusion Ins	tallation-Residentia	Sales	person	Dan Brov	wn	
Service Fee	Labor	Est Tax	Total		Requested	By Emily Wood		Sales Pa	ackage	-		
\$85.00	\$0	\$0.00	\$0.00		Pho	7342584646	5	Servic	e Level	SVC T&N	/ RES	
W Hole Dr	\$0.00 */http://				Em	ail emilyLwood	@gmail.com		Base	85		
		E Halls Dr			PO Numb	er -		Incr	rement	15		
		E Hay	the state		Propo			-	Labor	75 30		
					Work Order Da		2		ill After	Labor - 1	Year	
ogle	45722 Chandler Plymou	Keyboard shortouts Map data 0 th. MI 48170	2022 Terms of Lise Report a map error		Next Appointme Technici			Warrant		Parts - 1		
					Technici	an			ription	-		
pintments Item 1	ns Parts RMR Bil	ling Notes ^{Sy}	stem Parts System No	otes Z	Zones Purcha	e Orders Site V 0	Vork Order History	Documents	Genera	l Ledger	Part Ledger	Custom Field
hintments Item 1 + Add Parts		ling Notes Sy	stem Parts System No	otes Z	Zones Purcha		Vork Order History	Documents	Genera	l Ledger	Part Ledger	Custom Field
1	0 0	Location	stem Parts System No	otes Z	Zones Purcha	0	Removal Date		Genera	al Ledger	Part Ledger	Custom Field
1 + Add Parts	0 0	: Location	stem Parts System No			0					Part Ledger	
Add Parts Part Code	0 0	E Location	stem Parts System No		Zone #	0 Install Date						:5
+ Add Parts Part Code : 5800PIR	C C C	E Location			Zone # :	Install Date						25 वि
Add Parts Part Code 5800PIR 5816	D D D D D D D D D D O Transmitter	Location Hallway Front Door	/door		Zone # :	0 Install Date 3/7/22 3/7/22						
Add Parts Part Code S800PIR 5816 6160	Contract to Excel Part Description Wireless Motion Detector Door/Window Transmitter Keypad	E Location Hallway Front Door Left of entry	/door		Zone # :	Install Date 3/7/22 3/7/22 3/7/22						
Add Parts Part Code i 5800PIR 5816 5160 5150 Vista20P Vista20P	Construction C	Entry Closed Panel	/door		Zone # :	Install Date 3/7/22 3/7/22 3/7/22 3/7/22 3/7/22	Removal Date					23
+ Add Parts Part Code i 5800PIR 5816 6160 Vista20P IM-1270	Control panel Control	Entry Closed Panel	/door		Zone # :	Install Date 3/7/22 3/7/22 3/7/22 3/7/22 3/7/22	Removal Date					3 1 35 1 35 1 35 1 35 1 36 1 37 1 38 1 39 1 30 1 31 1 32 1

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 20 	617							-	- Teele		Dellared	
	01/						Ø 6		Tasks	🕤 History	Deliver/	Print
😑 Wood, Emily - 3719	💡 Emily Wood	😌 Burglar Alarm - S	9173-01									
				Тур	Intrusion In	stallation-Residentia	Sales	person	Dan Brow	'n		
Service Fee	Labor	Est Tax	Total	Requested B	Emily Wood	1	Sales P	ackage	-			
\$85.00	\$0.00	\$0.00	\$0.00	Phon	734258464	6	Servic	e Level	SVC T&M	RES		
WHERE	\$U	en -		Ema	emilyLwood	d@gmail.com		Base	85			
		rining Dr		PO Numbe	r		Inc	rement	15			
a th		E Holla Dr	all all a lot a	Proposa				Labor	75 30			
			\sim	Work Order Dat		22		ill After	Labor - 1	Vear		
Google	45722 Chandler Plymo	Keyboard shortouts Map data 02022 Term	actual Reports map anor	Next Appointmen			Warrant Warrant		Parts - 1			
	45722 Chandler Hymo	001, MI 48170		Technicia				ription	-			
Appointments Items 1 + Add Note	Parts RMR B 0 0	illing Notes System P	System Notes	Zones Purchasi (Work Order History	Documents	Genera	al Ledger	Part Ledger	Custom Field	ds.
Note		÷	Modified	: Modified	By :	Туре	: Expira	tion	:			
This system was installed	d by an ADT dealer.		Apr 22, 2022, 10:50	0:02 AM Papay, T	mán	Standard				n Edit	Delete	
					dvia	Citandard						
					8113						C 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	0617				/ Edit	🖅 Tasks 📲) History	Deliver/Print
work Order	2017				g cuit		History	Deliver/Print
Wood, Emily - 371	9 ♀ Emily Wood 🛛 😌	Burglar Alarm - 9173-01						
			Туре	Intrusion Installation-Residentia	Salesperson	Dan Brown		
Service Fee	Labor E	ist Tax Total	Requested By	Emily Wood	Sales Package			
\$85	\$0.00 Mining for the first	st Tax Total \$0.00 \$0.00	Phone	7342584646	Service Level			
W Hart D	These for the state		Email	emilyLwood@gmail.com	Base			
		10	PO Number	-	Increment			
a br		E range Co	Proposal	- April 23, 2022	Labor			
			Work Order Date	April 25, 2022	Bill After Warranty Labor			
Google	45722 Chandler Plymouth, MI	dishortovts Map data 02022 Terms of Use Report a 48170	Next Appointment Technician	-	Warranty Parts			
			Technician	1	Description			
Zone #	Parts RMR Billing 0 0 Signal Type	Notes System Parts Sys	tem Notes Zones Purchase 0	Orders Site Work Order History	Documents Gene	eral Ledger Part	Ledger (Custom Fields
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					
нчьы						1-6 of 6	items 🖌	Refresh
						1-0010	Notifio N	

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 26	617						🥜 Ed	it ș	Tasks	🔊 Histo	ry Deli	ver/Print
0	Wood, Emily - 3719	Emily Wood	😌 Burglar Alarr	m - 9173-01									
						Туре	Intrusion Installation-Resident	tia Salesp	person	Dan Brow	n		
Г	Service Fee	Labor	EstTax	Total	Request	ed By	Emily Wood	Sales Pa	ackage	-			
	\$85	\$0.00	\$0.00	\$0.00	P	hone	7342584646	Service	e Level	SVC T&M	RES		
	H HIMA DP	W India Cr	E Frank Dr			Email	emilyLwood@gmail.com		Base	85			
			e Halla Dr		PO Nu	umber	-	Incr	ement	15			
205		. × 🔊	E Halle La	and a	Pro	posal	-		Labor	75			
				- an	Work Order	Date	April 23, 2022		il After	30			
G	oogle	.0	Keyboard shortouts Map data 0202	2 Terms of Lise Reports map error	Next Appoint			Warranty		Labor - 1) Parts - 1 Y			
		45722 Chandler Plymo	uth, MI 48170		Techr	nician	-	Warrant		Parts - I 1	ear		
								Desc	ription				
App	ointments Items	Parts RMR B	illing Notes Syste	em Parts System Notes	Zones Purch	hase Ord	ders Site Work Order History	Documents	Genera	al Ledger	Part Ledger	Custom	Fields
	1	0 0			20100	0		Seconditio			artzougo.	Custom	icius
	+ Create Purchase	Order											
-	PO#			Vendor		Order	Date	Total Amount					
					No records av	ailable.							
	14 - F - FI									0-00	of 0 items	C Refre	sh

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.

	order 2617					🥜 Edit	E Tasks	🔊 History	Deliver/Prin
Wood, Emi	ily - 3719 ♀ Emily Wood ፍ	Burglar Alarm - 917	3-01						
				Type Intrusion Insta	allation-Residentia	Salesperson	Dan Brown	1	
Service Fe	ia Labor	Est Tax Tota	Reque	sted By Emily Wood		Sales Package	-		
\$85.	··· \$0	\$0 \$0	D.00	Phone 7342584646		Service Level	SVC T&M R	ES	
N 100			0 /	Email emilyLwood@	gmail.com	Base	85		
		Mala Dr	POT	Number -		Increment			
CA.		E Halla Da	P	roposal		Labor			
			Work Ord	der Date April 23, 2022		Bill After	30		
Google		mand shortouts Map data 02022 Terms of Use	Report a map error	intment -		Warranty Labor			
	45722 Chandler Plymouth, I	MI 48170	Tec	chnician -		Warranty Parts		ar	
						Description			
WO #	System	Type	Status	Closed	Modified	Description			
WO #	System Burglar Alarm - 9173-01	Type Service Call	Status	Closed Mar 28, 2022	Modified Mar 28, 2022	Description			
						Description	_		
2551	Burglar Alarm - 9173-01	Service Call	Completed	Mar 28, 2022	Mar 28, 2022	Description			
<u>2551</u> <u>2552</u>	Burglar Alarm - 9173-01 Burglar Alarm - 9173-01	Service Call Service Call	Completed Void Wark Order	Mar 28, 2022 Mar 31, 2022	Mar 28, 2022 Mar 31, 2022	Description			
2551 2552 2555	Burglar Alarm - 9173-01 Burglar Alarm - 9173-01 Burglar Alarm - 9173-01	Service Call Service Call Service Call	Void Wark Order	Mar 28, 2022 Mar 31, 2022 Mar 31, 2022	Mar 28, 2022 Mar 31, 2022 Mar 31, 2022	Description			
2551 2552 2555 2556	Burglar Alarm - 9173-01 Burglar Alarm - 9173-01 Burglar Alarm - 9173-01 Burglar Alarm - 9173-01	Service Call Service Call Service Call Service Call Service Call	Completed Void Work Order Completed Completed Completed	Mar 28, 2022 Mar 31, 2022 Mar 31, 2022 Mar 31, 2022	Mar 28, 2022 Mar 31, 2022 Mar 31, 2022 Mar 31, 2022	Description			
2551 2552 2555 2556 2560	Burglar Alarm - 9173-01 Burglar Alarm - 9173-01 Burglar Alarm - 9173-01 Burglar Alarm - 9173-01 Burglar Alarm - 9173-01	Service Call Service Call Service Call Service Call Service Call	Completed Void Work Order Completed Completed Completed Completed	Mar 28, 2022 Mar 31, 2022 Mar 31, 2022 Mar 31, 2022 Mar 31, 2022	Mar 28, 2022 Mar 31, 2022 Mar 31, 2022 Mar 31, 2022 Mar 31, 2022	Description			
2551 2552 2555 2556 2560 2563	Burglar Alarm - 9173-01 Burglar Alarm - 9173-01	Service Call	Completed Void Work Order Ompleted Completed	Mar 28, 2022 Mar 31, 2022 Mar 31, 2022 Mar 31, 2022 Mar 31, 2022	Mar 28, 2022 Mar 31, 2022 Mar 31, 2022 Mar 31, 2022 Mar 31, 2022 Apr 1, 2022	Description			
2551 2552 2555 2556 2560 2563 2569	Burglar Alarm - 9173-01 Burglar Alarm - 9173-01	Service Call	Completed Completed Completed Completed Completed Completed Completed New Completed New Completed Completed C	Mar 28, 2022 Mar 31, 2022 Mar 31, 2022 Mar 31, 2022 Mar 31, 2022	Mar 28, 2022 Mar 31, 2022 Mar 31, 2022 Mar 31, 2022 Mar 31, 2022 Apr 1, 2022 Apr 3, 2022	Description			
2551 2552 2555 2556 2560 2563 2569	Burglar Alarm - 9173-01 Burglar Alarm - 9173-01	Service Call	Completed Completed Completed Completed Completed Completed Completed New Completed New Completed Completed C	Mar 28, 2022 Mar 31, 2022 Mar 31, 2022 Mar 31, 2022 Mar 31, 2022	Mar 28, 2022 Mar 31, 2022 Mar 31, 2022 Mar 31, 2022 Mar 31, 2022 Apr 1, 2022 Apr 3, 2022	Description	1-8 <i>c</i> 1	f 8 items	P 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 2	617					🧪 Edit	Tasks 5 History Deliver/Print
😫 Wood, Emily - 3719	💡 Emily Wood 📢	🕽 Burglai	Alarm - 9173-01				
				Туре	Intrusion Installation-Residentia	Salesperson	Dan Brown
Service Fee	Labor	Est Tax	Total	Requested By	Emily Wood	Sales Package	
\$85.00	\$0	\$0.00	\$0	Phone	7342584646	Service Level	SVC T&M RES
W HOME DA	Within Dr			Email	emilyLwood@gmail.com	Base	85
· // ••		reals Dr		PO Number	-	Increment	15
MON			Change La Band	Proposal	-	Labor	75
			- un	Work Order Date	April 23, 2022	Bill After	30
Google		board shortouts Ma	o data 02022 Terms of Lise Report a map error	Next Appointment	-	Warranty Labor	Labor - 1 Year
	45722 Chandler Plymouth,	MI 48170		Technician	-	Warranty Parts	Parts - 1 Year
						Description	-
Appointments Items						Documents Conor	
Appointments Items 1	Parts RMR Billin 0 0	ng Notes	System Parts System N	lotes Zones Purchase C 0	rders Site Work Order History	Gener	al Ledger Part Ledger Custom Fields
		_					
+ Add Document							NO Show deleted documents
File Name		:	Туре :	Security	: Modified Date	:	
				No records available.			
H 4 F H							0-0 of 0 items C Refresh

General Ledger

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

Work Order 2617 🔀 Tasks 🖑 History Deliver/Print.											
😑 Wood, Emily - 3719 🛛 💡 Emily Wood 🛛 😌 Burglar Alarm - 9173-01											
				Туре	Intrusion Installation-Residentia	Salesperson					
Service Fee	Labor	Est Tax	Total	Requested By	Emily Wood	Sales Package					
\$85.00	\$0.00 Wheelow	\$0.00	Total \$0.00	Phone	7342584646	Service Level	SVC T&M RES				
Humb	"Halls Dr	the state	and a second	Email	emilyLwood@gmail.com	Base	85				
//		e Halls Dy		PO Number	-	Increment	75 30				
M.Cr.		E Holla Dr		Proposal	-	Labor					
				Work Order Date	April 23, 2022	Bill After					
Google		Keyboard shortouts Map data 02022	terna of Lise Reports map anor	Next Appointment	-	Warranty Labor	Parts - 1 Year				
	45722 Chandler Plymo.	ith, MI 48170		Technician	-	Warranty Parts	-				
						Description					
Appointments Items 1 X Export to Excel Drag a column header ar	0 0	illing Notes System	n Parts System Notes	Zones Purchase C 0	rders Site Work Order History	Documents Genera	al Ledger Part Ledger	Custom Fields			
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Part Ledger

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

Work Order 2	617							🥖 Ec	lit 🥇	Tasks	🔊 Histo	Deliver/Print	
😑 Wood, Emily - 3719 ♀ Emily Wood 🛭 📦 Burglar Alarm - 9173-01													
			Type Intrusion Installation-Residentia			Sales	Salesperson		Dan Brown				
Service Fee	Labor	Requested By	Emily	Wood		Sales Pa	ickage						
\$85.00	\$0.00	.00 \$0.00	Phone	73425	84646		Service	e Level					
Witten D	\$0.00 Write Cr 4	1		Email	emilyLwood@gmail.com				Base		85		
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				Work Order Date	April 2	April 23, 2022			Bill After				
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Custom Fields

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

< Work Order 2	617							🧳 Edit	₹Ξ Tasks	3 History	Deliver/Print
😫 Wood, Emily - 3719	Emily Wood	d 😌 Burglar	Alarm - 9173-	-01							
Service Fee \$85.00 events	SO.co	Est Tax \$0.00	Total SO.	.00	F Work (Phone Email Proposal	Intrusion Installation-Residentia Emily Wood 7342584646 emilyLwood@gmail.com - - April 23, 2022	Sales Packa Service Le	vel SVCT&A ase 85 ent 15 bor 75 ter 30	IRES	
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