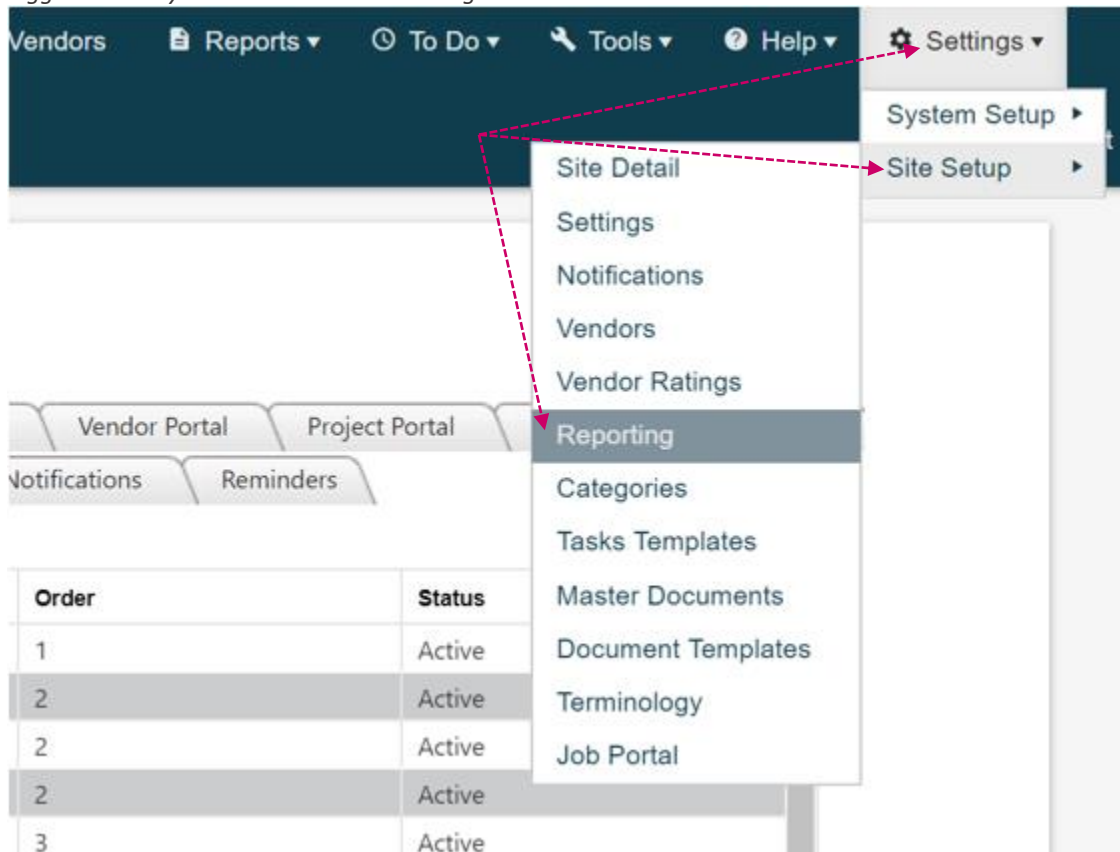


Work Order Email Subject Line

The subject line of an emailed Work Order can be configured by the Administrator of the application by going to Settings → Site Setup → Reporting.

Note: If you have more than one Site (Location, Division or Office) the subject line will need to be setup in each Site. You must be logged into only one Site to edit Site Settings.



In the middle of the page under **Work order Report Settings** is the; **Work Order Email Subject Line Settings**.


You can type directly into the Send WO Email Subject Line and also use the Job, List, WO (Work Order), Business, Project, Site and/or Vendor merge fields.

Important: Please refer to Page two (2) for merge fields and definitions.

Work Order Email Subject Line Settings

Send WO Email Subject Line:

Fields:

Note: The Send WO icon  must be clicked within the Work Order Detail page or the List Management page. In order for the custom Subject Line to appear.

Default Email Subject Line: The beginning of the subject line equals the Work Order Title, the rest of the subject is the default subject.

Work Order | Work Order 1003-002, Job ID TS16-7007, 7007 Turtle Bay Cove, Ponte Vedra Beach, FL 32082 for Service Software

Work Order Title *Default Subject*

Work Order Email Subject Line

Sample of the Work Order Subject Line setup:

Work Order Email Subject Line Settings
 Send WO Email Subject Line:

Sample of the Work Order Subject Line:

WO# 1050-001 is Due on 9/22/2016 for Jack Wonderful - Job Address: 1458 Jax Beach Blvd Jax Beach, FL 32250

Note: The Work Order Title will no longer display in the Email subject line if a custom subject line has been setup.

Merge Fields and Definition

Below is a description of what each merge field represents. Please note some of the merge fields are terminology driven and you may be using a different terminology than noted in the merge field and definitions below.

Job Merge Fields

<u>Merge Field</u>	<u>Definition</u>
Address Bldg and Unit	Job Bldg and Unit in one field
Address Building	Job Building details
Address City	Job City
Address City State Zip	Job City, State & Zip
Address City Zone	Job City Zone
Address Full	Job Full address in one field
Address Line 1	Job Address 1
Address Line 2	Job Address 2
Address Number	Job Address 1 Number
Address State	Job State
Address State Name	Job State Name
Address Street	Job Address 1 Street Name
Address Unit	Job Unit
Address Zip	Job Zip
Current Date	Current Date
Date Closed	Date Closed
Date Pre Close	Date Pre Close
Date Sold	Date Sold
Date Start	Date Start
Date Structure Expire	Date Structure Expire
Date Warranty Expire	Date Warranty Expire
Estimate Costs	Total Estimated costs for the Job
Floor Plan Name	Floor Plan Name
Full Address	Job Full Address
Job Custom 1	Job Custom field order 1
Job Custom 2	Job Custom field order 2
Job Custom 3	Job Custom field order 3
Job Custom 4	Job Custom field order 4
Job Custom 5	Job Custom field order 5
Job Custom 6	Job Custom field order 6
Job ID	Job ID
Job Lost	Job Lost (Yes or No)
Job Name	Job Name
Job Notes	Job Notes
Job Staff Full Name	Typically the Warr Rep's Full Name
Job Status	Job Status – Active, Inactive, Deleted
Job Super Full Name	Typically the Proj Mgr/Supers Full Name
Lot Block	Lot/Block #
Primary Contact Address 1	Job Primary Contact - Address 1

Work Order Email Subject Line

Primary Contact Address 2
 Primary Contact City
 Primary Contact City, State, Zip
 Primary Contact Email
 Primary Contact First Name
 Primary Contact Full Address

Job Primary Contact - Address 2
 Job Primary Contact - City
 Job Primary Contact - City, State, Zip
 Job Primary Contact - Email Address
 Job Primary Contact - First Name
 Job Primary Contact - Full Address

Job Merge Fields - continued

Merge Field

Primary Contact Full Name
 Primary Contact Last Name
 Primary Contact Logon Name
 Primary Contact MI
 Primary Contact Phone 1
 Primary Contact Phone 1 Type
 Primary Contact Phone 2
 Primary Contact Phone 2 Type
 Primary Contact Phone 3
 Primary Contact Phone 3 Type
 Primary Contact Phone 4
 Primary Contact Phone 4 Type
 Primary Contact Phone 5
 Primary Contact Phone 5 Type
 Primary Contact State Code
 Primary Contact State Name
 Primary Contact Title
 Primary Contact Zip
 Red Flag
 Secondary Contact First Name
 Secondary Contact Full Name
 Secondary Contact Initials
 Secondary Contact Last Name
 Secondary Contact Logon Name
 Secondary Contact Middle Initial
 Secondary Contact Phone 1
 Secondary Contact Phone 1 Type
 Secondary Contact Phone 2
 Secondary Contact Phone 2 Type1
 Secondary Contact Title
 Staff Email
 Staff First Name
 Staff Full Name
 Staff Initials
 Staff Last Name
 Staff MI
 Staff Phone 1
 Staff Phone 1 Type
 Staff Phone 2
 Staff Phone 2 Type
 Staff Phone 3
 Staff Phone 3 Type
 Staff Phone 4
 Staff Phone 4 Type
 Staff Phone 5
 Staff Phone 5 Type

Definition

Job Primary Contact – Full Name
 Job Primary Contact – Last Name
 Job Primary Contact – Job Portal Logon Details
 Job Primary Contact – Middle Initial
 Job Primary Contact – Phone Number in Phone field 1
 Job Primary Contact – Type of Number associated with Phone field 1
 Job Primary Contact – Phone Number in Phone field 2
 Job Primary Contact – Type of Number associated with Phone field 2
 Job Primary Contact – Phone Number in Phone field 3
 Job Primary Contact – Type of Number associated with Phone field 3
 Job Primary Contact – Phone Number in Phone field 4
 Job Primary Contact – Type of Number associated with Phone field 4
 Job Primary Contact – Phone Number in Phone field 5
 Job Primary Contact – Type of Number associated with Phone field 5
 Job Primary Contact – 2 Digit State Code
 Job Primary Contact – 2 Digit State Code
 Job Primary Contact Title
 Job Primary Contact Zip Code
 Job Red Flag Notes
 Secondary Job Contact – First Name
 Secondary Job Contact – Full Name
 Secondary Job Contact – Initials
 Secondary Job Contact – Last Name
 Secondary Job Contact – Job Portal Logon Details
 Secondary Job Contact – Middle Initial
 Secondary Job Contact - Phone Number in Phone field 1
 Secondary Job Contact - Type of Number associated with Phone field 1
 Secondary Job Contact - Phone Number in Phone field 2
 Secondary Job Contact - Type of Number associated with Phone field 2
 Secondary Job Contact - Title
 Typically the Warr Rep - Email Address
 Typically the Warr Rep – First Name
 Typically the Warr Rep – Full Name
 Typically the Warr Rep - Initials
 Typically the Warr Rep – Last Name
 Typically the Warr Rep – Middle Initial
 Typically the Warr Rep - Phone Number in Phone field 1
 Typically the Warr Rep - Type of Number associated with Phone field 1
 Typically the Warr Rep - Phone Number in Phone field 2
 Typically the Warr Rep - Type of Number associated with Phone field 2
 Typically the Warr Rep - Phone Number in Phone field 3
 Typically the Warr Rep - Type of Number associated with Phone field 3
 Typically the Warr Rep - Phone Number in Phone field 4
 Typically the Warr Rep - Type of Number associated with Phone field 4
 Typically the Warr Rep - Phone Number in Phone field 5
 Typically the Warr Rep - Type of Number associated with Phone field 5

Work Order Email Subject Line

Super Email	Typically the Proj Mgr/Super – Email Address
Super First Name	Typically the Proj Mgr/Super – First Name
Super Full Name	Typically the Proj Mgr/Super – Full Name

Job Merge Fields - continued

Merge Field

Super Last Name
 Super MI
 Super Phone 1
 Super Phone 1 Type
 Super Phone 2
 Super Phone 2 Type
 Super Phone 3
 Super Phone 3 Type
 Super Phone 4
 Super Phone 4 Type
 Super Phone 5
 Super Phone 5 Type

Definition

Typically the Proj Mgr/Super – Last Name
 Typically the Proj Mgr/Super – Middle Initial
 Typically the Proj Mgr/Super – Phone Number in Phone field 1
 Typically the Proj Mgr/Super – Type of Number associated with Phone field 1
 Typically the Proj Mgr/Super – Phone Number in Phone field 2
 Typically the Proj Mgr/Super – Type of Number associated with Phone field 2
 Typically the Proj Mgr/Super – Phone Number in Phone field 3
 Typically the Proj Mgr/Super – Type of Number associated with Phone field 3
 Typically the Proj Mgr/Super – Phone Number in Phone field 4
 Typically the Proj Mgr/Super – Type of Number associated with Phone field 4
 Typically the Proj Mgr/Super – Phone Number in Phone field 5
 Typically the Proj Mgr/Super – Type of Number associated with Phone field 5

List Merge Fields

Merge Field

Current Date
 Date List Closed
 Date List Opened
 List Notes
 List Number
 List Staff Full Name
 List Super Full Name
 List Type

Definition

Current Date
 Date Closed
 Date Received
 List Notes
 List Number
 Typically the Warr Rep’s Full Name
 Typically the Proj Mgr/Supers Full Name
 List Type (Warranty, 30 Day, Year-End, etc.)

WO (Work Order) Merge Fields

Merge Field

ActionTaken
 Area
 Category
 Closed
 Current Date
 Customer Request
 Date Due
 Date Review Scheduled
 Date Review Scheduled Duration
 Date Review Scheduled Time
 Date Vendor Scheduled
 Date Vendor Scheduled Duration
 Date Vendor Scheduled Time
 Deleted
 Determination
 Fax Number
 Item Date Completed

Definition

WO Action Taken Notes
 WO Area
 WO Category
 WO Closed (True or False)
 Current Date
 WO Homeowner Request
 Date WO is Due
 Date the Internal Review is scheduled
 How long the Internal Review is going to take
 Time the Internal Review is scheduled to start
 Date the Vendor is scheduled to begin the work
 How long the Vendor is going to take
 Time the Vendor is scheduled to start
 WO Deleted (True or False)
 WO Determination
 Vendor Fax Number
 Date WO was completed

Work Order Email Subject Line

WO (Work Order) Merge Fields - continued

Merge Field

Item Number
 Item Service
 Phone Number
 Progress
 Service Request
 Sign Off Owner Date
 Sign Off Owner Name
 Sign Off Staff Date
 Sign Off Staff Name
 Sign Off Vendor Date
 Sign Off Vendor Name
 Sub Category
 Vendor Address Line 1
 Vendor Address Line 2
 Vendor City
 Vendor City State Zip
 Vendor Full Address
 Vendor Name
 Vendor State
 Vendor State Name
 Vendor Zip

Definition

WO Number
 Item Service
 Vendor Phone Number
 WO Progress
 WO Service Requested field typically the work to be performed
 Date the Homeowner signed off the WO is complete
 Homeowner Name
 Date the Warr Rep signed off the WO is complete
 Typically the Warr Rep's Name
 Date the Vendor signed off the WO is complete
 Vendor Name
 WO Sub Category
 Vendor Address
 Vendor Address 2
 Vendor City
 Vendor City, State & Zip
 Vendor Full Address
 Vendor Name
 Vendor State Code
 Vendor State Name
 Vendor Zip

Business Merge Fields (Tools→ System Setup→ System Information)

Merge Field

Builder Address Line 1
 Builder Address Line 2
 Builder Full Address
 City
 City State Zip
 Current Date
 Name
 Owner Web Site
 Phone 1
 Phone 1 Type
 Phone 2
 Phone 2 Type
 Phone 3
 Phone 3 Type
 Phone 4
 Phone 4 Type
 Phone 5
 Phone 5 Type
 State
 State Name
 Vendor Web Site
 Web Site
 Zip

Definition

Address
 Address 2
 Full Address
 City
 City, State & Zip
 Current Date
 Business Name
 Job Contact Website
 Phone Number
 Field Not Available
 Fax Number
Field Not Available
Field Not Available
Field Not Available
Field Not Available
Field Not Available
 State Code
 State Name
 Sub/Tech Website
 Business Website
 Zip

Work Order Email Subject Line

Site Merge Fields (Tools→ Site Setup→ Site Detail)

Merge Field

Site Description
 Site Address Line 1
 Site Address Line 2
 Site City
 Site State
 Site State Name
 Site ZIP
 Site City State Zip
 Site Full Address
 Site Contact
 Site Phone
 Site Fax
 Site Email

Definition

Typically Company Name
 Builders Address
 Builders Address 2
 Builders City
 Builders State Code
 Builders State Name
 Builders Zip
 Builders City, State & Zip
 Builders Full Address
 Builders Contact Full Name
 Builders Phone Number
 Builders Fax Number
 Builders Email Address

Project Merge Fields

Merge Field

Project
 Project Code
 Project City
 Project State
 Project State Name
 Project ZIP
 Project City State ZIP
 Project County
 Project Location
 Project Primary Contact First Name
 Project Primary Contact MI
 Project Primary Contact Last Name
 Project Primary Contact Full Name
 Project Primary Contact Address Line 1
 Project Primary Contact Address Line 2
 Project Primary Contact City
 Project Primary Contact State
 Project Primary Contact State Name
 Project Primary Contact ZIP
 Project Primary Contact City State Zip
 Project Primary Contact Full Address
 Project Primary Contact Email
 Project Primary Contact Title
 Project Primary Contact Phone 1
 Project Primary Contact Phone 2
 Project Primary Contact Phone 3
 Project Primary Contact Phone 4
 Project Primary Contact Phone 5
 Project Primary Contact Phone 1 Type
 Project Primary Contact Phone 2 Type
 Project Primary Contact Phone 3 Type
 Project Primary Contact Phone 4 Type

Definition

Project Name
 Project Code
 Project City
 Project State Code
 Project State Name
 Project Zip
 Project City, State & Zip
 Project County
 Project Location
 Project Primary Contact First Name
 Project y Primary Contact Middle Initial
 Project Primary Contact Last Name
 Project Primary Contact Last Name
 Project Primary Contact Address
 Project Primary Contact Address 2
 Project Primary Contact City
 Project Primary Contact State Code
 Project Primary Contact State Name
 Project Primary Contact Zip
 Project Primary Contact City, State & Zip
 Project Primary Contact Full Address
 Project Primary Contact Email Address
 Project Primary Contact Title
 Project Primary Contact Phone Field 1
 Project Primary Contact Phone Field 2
 Project Primary Contact Phone Field 3
 Project Primary Contact Phone Field 4
 Project Primary Contact Phone Field 5
 Project Primary Contact Type of Number associated with Phone field 1
 Project Primary Contact Type of Number associated with Phone field 2
 Project Primary Contact Type of Number associated with Phone field 3
 Project Primary Contact Type of Number associated with Phone field 4

Work Order Email Subject Line

Project Merge Fields - continued

Merge Field

Project Primary Contact Phone 5 Type
 Project Secondary Contact First Name
 Project Secondary Contact MI
 Project Secondary Contact Last Name
 Project Secondary Contact Full Name
 Project Secondary Contact Address Line 1
 Project Secondary Contact Address Line 2
 Project Secondary Contact City
 Project Secondary Contact State
 Project Secondary Contact State Name
 Project Secondary Contact ZIP
 Project Secondary Contact City State Zip
 Project Secondary Contact Full Address
 Project Secondary Contact Email
 Project Secondary Contact Title
 Project Secondary Contact Phone 1
 Project Secondary Contact Phone 2
 Project Secondary Contact Phone 3
 Project Secondary Contact Phone 4
 Project Secondary Contact Phone 5
 Project Secondary Contact Phone 1 Type
 Project Secondary Contact Phone 2 Type
 Project Secondary Contact Phone 3 Type
 Project Secondary Contact Phone 4 Type
 Project Secondary Contact Phone 5 Type
 Project Plat
 Project Subdivision
 Project Zone

Definition

Project Primary Contact Type of Number associated with Phone field 5
 Project Secondary Contact First Name
 Project Secondary Contact Middle Initial
 Project Secondary Contact Last Name
 Project Secondary Contact Full Name
 Project Secondary Contact Address
 Project Secondary Contact Address 2
 Project Secondary Contact City
 Project Secondary Contact State Code
 Project Secondary Contact State Name
 Project Secondary Contact Zip
 Project Secondary Contact City, State & Zip
 Project Secondary Contact Full Address
 Project Secondary Contact Email Address
 Project Secondary Contact Title
 Project Secondary Contact Phone Field 1
 Project Secondary Contact Phone Field 2
 Project Secondary Contact Phone Field 3
 Project Secondary Contact Phone Field 4
 Project Secondary Contact Phone Field 5
 Project Secondary Contact Type of Number associated with Phone field 1
 Project Secondary Contact Type of Number associated with Phone field 2
 Project Secondary Contact Type of Number associated with Phone field 3
 Project Secondary Contact Type of Number associated with Phone field 4
 Project Secondary Contact Type of Number associated with Phone field 5
 Project Plat
 Project Subdivision
 Project Zone

Vendor Merge Fields

Merge Field

Current Date
 Vendor Primary Contact Logon
 Vendor Primary Contact Password
 VENDOR Name
 VENDOR Vendor ID
 VENDOR DBA
 VENDOR Name Short
 VENDOR Address 1
 VENDOR Address 2
 VENDOR City
 VENDOR State Code
 VENDOR State Name
 VENDOR Zip
 VENDOR City, State, Zip
 VENDOR Full Address

Definition

Current Date
 Vendor Primary Contact Portal Logon
 Vendor Primary Contact Portal Password
 Vendor Name
 Vendor ID
 Vendor DBA (Doing Business As)
 Vendor Short Name
 Vendor Address
 Vendor Address 2
 Vendor City
 Vendor State Code
 Vendor State Name
 Vendor Zip
 Vendor, State & Zip
 Vendor Full Address

Vendor Merge Fields - continued

Merge Field

Definition

Work Order Email Subject Line

VENDOR_Phone	Vendor Phone Number
VENDOR_Fax	Vendor Fax Number
VENDOR_Website	Vendor Website
VENDOR_Open Status	Vendor Open WO Status
VENDOR_Closed Status	Vendor Closed WO Status
VENDOR On Call	Vendor On Call (True or False)
VENDOR INS Auto Cert	Vendor Auto Ins. Certificate Number
VENDOR INS Auto Date	Vendor Auto Ins. Expiration Date
VENDOR INS Liability Cert	Vendor Liability Ins. Certificate Number
VENDOR INS Liability Date	Vendor Liability Ins. Expiration Date
VENDOR INS Workmans Comp Cert	Vendor Workers Comp Certificate Number
VENDOR INS Workmans Comp Date	Vendor Workers Comp Expiration Date
VENDOR Taxable	Vendor Taxable (True or False)
VENDOR Billing Company	Vendor Billing Company
VENDOR Billing Attention	Vendor Billing Attention Full Name
VENDOR Billing Address 1	Vendor Billing Address
VENDOR Billing Address 2	Vendor Billing Address 2
VENDOR Billing City	Vendor Billing City
VENDOR Billing State Code	Vendor Billing State Code
VENDOR Billing State Name	Vendor Billing State Name
VENDOR Billing Zip	Vendor Billing Zip
VENDOR Billing City, State, Zip	Vendor Billing City, State & Zip
VENDOR Billing Full Address	Vendor Billing Full Address
VENDOR Billing Phone	Vendor Billing Phone Number
VENDOR Billing Fax	Vendor Billing Fax Number
VENDOR Billing Contact Name	Vendor Billing Contact Full Name
VENDOR Billing Contact Email	Vendor Billing Contact Email Address
VENDOR Billing FEIN	Vendor Billing Contact FEIN Number
VENDOR PC Contact ID	Vendor Primary Contact ID
VENDOR PC First Name	Vendor Primary Contact First Name
VENDOR PC MI	Vendor Primary Contact Middle Initial
VENDOR PC Last Name	Vendor Primary Contact Last Name
VENDOR PC Full Name	Vendor Primary Contact Full Name
VENDOR PC Initials	Vendor Primary Contact Initials
VENDOR PC Address 1	Vendor Primary Contact Address
VENDOR PC Address 2	Vendor Primary Contact Address 2
VENDOR PC City	Vendor Primary Contact City
VENDOR PC Phone 1 Type	Vendor Primary Contact Type of Number associated with Phone field 1
VENDOR PC Phone 2	Vendor Primary Contact Phone Field 2
VENDOR PC State Code	Vendor Primary Contact State Code
VENDOR PC Phone 2 Type	Vendor Primary Contact Type of Number associated with Phone field 2
VENDOR PC State Name	Vendor Primary Contact State Name
VENDOR PC Phone 3	Vendor Primary Contact Phone Field 3
VENDOR PC Zip	Vendor Primary Contact Zip
VENDOR PC City, State, Zip	Vendor Primary Contact City, State & Zip
VENDOR PC Phone 3 Type	Vendor Primary Contact Type of Number associated with Phone field 3
VENDOR Full Address	Vendor Primary Contact Full Address
VENDOR PC Phone 4	Vendor Primary Contact Phone Field 4
VENDOR PC On Call	Vendor Primary Contact On Call (True or False)

Vendor Merge Fields - continued

Merge Field

VENDOR PC Phone 4 Type

Definition

Vendor Primary Contact Type of Number associated with Phone field 4

Work Order Email Subject Line

VENDOR PC Email
VENDOR PC Phone 5
VENDOR PC Phone 1
VENDOR PC Phone 5 Type
VENDOR PC Status

Vendor Primary Contact Email Address
Vendor Primary Contact Phone Field 5
Vendor Primary Contact Phone Field 1
Vendor Primary Contact Type of Number associated with Phone field 5
Vendor Primary Contact Status (Active, Inactive or Deleted)