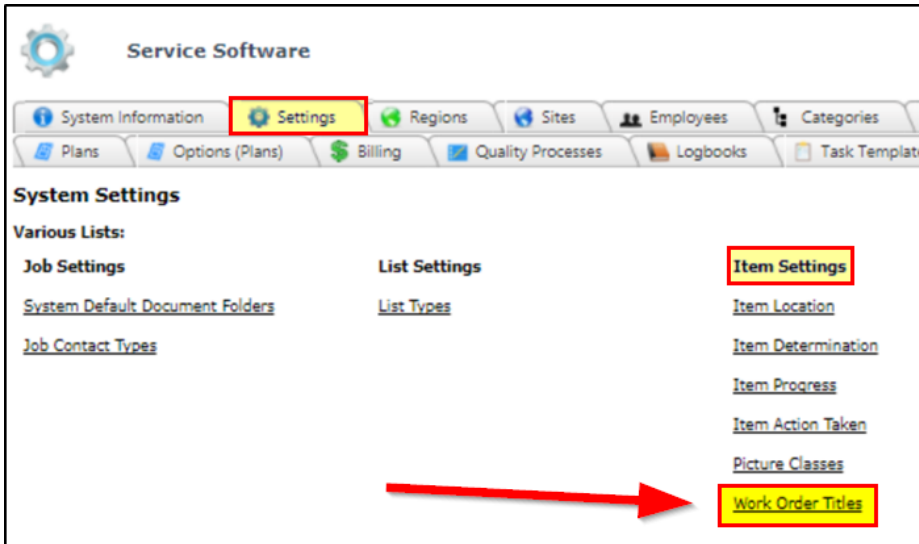


Work Order Titles – How to Add

The Work Order (Item) has a title that displays in bold at the top of the pdf work order. This title can be customized to include merge fields. The title will be captured in the auto stamp when sending the work order through the SEND WO or EMAIL or REQUEST acceptance buttons. It begins the subject line of the email that is sent if using the email subject line default settings.

STEP 1- CREATE WORK ORDER TITLES

Tools → System Setup → Settings → ITEM SETTINGS > Work Order Titles



Click to Add

Work Order Titles:




Description	Order	Status
Work Order	1	Active
Reminder Notice - Work Order Due on [Date Due]	2	Active
Scheduled WO [Date Vendor Scheduled] at [Date Vendor Scheduled Time]	2	Active
Work Order Scheduled and Due on [Date Due]	2	Active
Service Review	3	Active
Trade Day - Purchase Order Scheduled for [Date Vendor Scheduled]	4	Active
Reviewed [Staff Initials] on [Date Review Scheduled] at [Date Review Scheduled Time]	5	Active
Chargeable work for Customer (Maintenance)	7	Active
Scheduled Work Order Notice [Job Custom 1][Date Vendor Scheduled Time]	8	Active
Trade Day - Scheduled for [Date Vendor Scheduled]	10	Active

+ ←

Work Order Titles – How to Add

Description: Order: Status: Active ▼

Add Merge Fields to Description: ▼

Add the Description (Title)
 Add the preferred Order Number
 Add Merge Field (optional, see end of this documents for details on merge fields)

Examples of Work Order Title

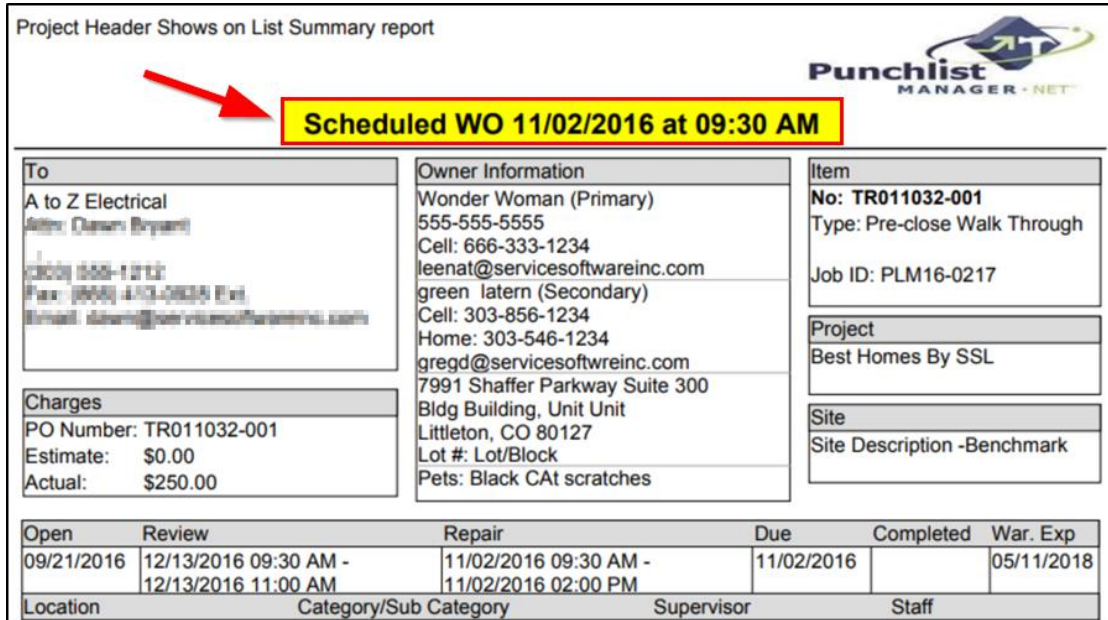
Work Order Titles:	
Description	Order
Work Order	1
Reminder Notice - Work order Due on [Date Due]	2
Scheduled WO [Date Vendor Scheduled] at [Date Vendor Scheduled Time]	2
Work Order Scheduled and Due on [Date Due]	2
Service Review	3
Trade Day - Purchase Order Scheduled for [Date Vendor Scheduled]	4
Reviewed [Staff Initials]on [Date Review Scheduled] at [Date Review Scheduled Time]	5
Chargeable work for Customer (Maintenance)	7
Scheduled Work Order Notice [Job Custom 1][Date Vendor Scheduled Time]	8
Trade Day - Scheduled for [Date Vendor Scheduled]	10

Work Order Titles – How to Add

Display of Work Order Titles

Option A- Work Order PDF

Project Header Shows on List Summary report



Punchlist
MANAGER · NET™

To A to Z Electrical Attn: (Caren Bryant) (202) 555-1234 Fax: (800) 473-0838 Ext. Email: cbryant@servicesoftwareinc.com	Owner Information Wonder Woman (Primary) 555-555-5555 Cell: 666-333-1234 leenat@servicesoftwareinc.com green latern (Secondary) Cell: 303-856-1234 Home: 303-546-1234 gregd@servicesoftwareinc.com 7991 Shaffer Parkway Suite 300 Bldg Building, Unit Unit Littleton, CO 80127 Lot #: Lot/Block Pets: Black CAT scratches	Item No: TR011032-001 Type: Pre-close Walk Through Job ID: PLM16-0217 Project Best Homes By SSL Site Site Description -Benchmark
Charges PO Number: TR011032-001 Estimate: \$0.00 Actual: \$250.00		

Open	Review	Repair	Due	Completed	War. Exp
09/21/2016	12/13/2016 09:30 AM - 12/13/2016 11:00 AM	11/02/2016 09:30 AM - 11/02/2016 02:00 PM	11/02/2016		05/11/2018
Location	Category/Sub Category	Supervisor	Staff		

Option A-Action Taken Stamp notation

Item Details | Sign Offs | Notes | Charges | Pictures | Billing | Request For Bid | Documents

Service | **Action**

Action Taken: [Home] [Dropdown]

Name/Date/Time Stamp

Action Taken History:

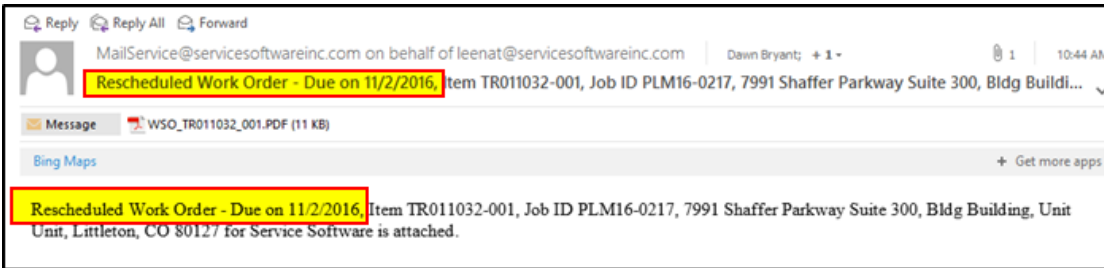
10/17/2017 10:37:22 AM Sent To: A to Z Electrical ([Email]) by email Rescheduled Work Order - Due on [Date] - Due] - Sent by Employee: Leena Trinidad

Spoke to homeowner for additional details as follows:

[Leena Trinidad] 10/14/2016 09:07 AM (Mountain Daylight)

Option B- Email Subject Line and Body *default

Work Order Titles – How to Add



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.

WO (Work Order) Merge Fields

Merge Field

Definition

Work Order Titles – How to Add

ActionTaken	WO Action Taken Notes
Area	WO Area
Category	WO Category
Closed	WO Closed (True or False)
Current Date	Current Date
Customer Request	WO Homeowner Request
Date Due	Date WO is Due
Date Review Scheduled	Date the Internal Review is scheduled
Date Review Scheduled Duration	How long the Internal Review is going to take
Date Review Scheduled Time	Time the Internal Review is scheduled to start
Date Vendor Scheduled	Date the Vendor is scheduled to begin the work
Date Vendor Scheduled Duration	How long the Vendor is going to take
Date Vendor Scheduled Time	Time the Vendor is scheduled to start
Deleted	WO Deleted (True or False)
Determination	WO Determination
Fax Number	Vendor Fax Number
Item Date Completed	Date WO was completed
Item Number	WO Number
Item Service	Item Service
Phone Number	Vendor Phone Number
Progress	WO Progress
Service Request	WO Service Requested field typically the work to be performed
Sign Off Owner Date	Date the Homeowner signed off the WO is complete
Sign Off Owner Name	Homeowner Name
Sign Off Staff Date	Date the Warr Rep signed off the WO is complete
Sign Off Staff Name	Typically the Warr Rep's Name
Sign Off Vendor Date	Date the Vendor signed off the WO is complete
Sign Off Vendor Name	Vendor Name
Sub Category	WO Sub Category
Vendor Address Line 1	Vendor Address
Vendor Address Line 2	Vendor Address 2
Vendor City	Vendor City
Vendor City State Zip	Vendor City, State & Zip
Vendor Full Address	Vendor Full Address
Vendor Name	Vendor Name
Vendor State	Vendor State Code
Vendor State Name	Vendor State Name
Vendor Zip	Vendor Zip

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

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

Work Order Titles – How to Add

List Type

List Type (Warranty, 30 Day, Year-End, etc.)

Job Merge Fields

Merge Field

Address Bldg and Unit
 Address Building
 Address City
 Address City State Zip
 Address City Zone
 Address Full
 Address Line 1
 Address Line 2
 Address Number
 Address State
 Address State Name
 Address Street
 Address Unit
 Address Zip
 Current Date
 Date Closed
 Date Pre Close
 Date Sold
 Date Start
 Date Structure Expire
 Date Warranty Expire
 Estimate Costs
 Floor Plan Name
 Full Address
 Job Custom 1
 Job Custom 2
 Job Custom 3
 Job Custom 4
 Job Custom 5
 Job Custom 6
 Job Custom 7
 Job Custom 8
 Job Custom 9
 Job Custom 10

Definition

Job Bldg and Unit in one field
 Job Building details
 Job City
 Job City, State & Zip
 Job City Zone
 Job Full address in one field
 Job Address 1
 Job Address 2
 Job Address 1 Number
 Job State
 Job State Name
 Job Address 1 Street Name
 Job Unit
 Job Zip
 Current Date
 Date Closed
 Date Pre Close
 Date Sold
 Date Start
 Date Structure Expire
 Date Warranty Expire
 Total Estimated costs for the Job
 Floor Plan Name
 Job Full Address
 Job Custom field order 1
 Job Custom field order 2
 Job Custom field order 3
 Job Custom field order 4
 Job Custom field order 5
 Job Custom field order 6
 Job Custom field order 7
 Job Custom field order 8
 Job Custom field order 9
 Job Custom field order 10

Work Order Titles – How to Add

Job Merge Fields - continued

Job Custom 12	Job Custom field order 12
Job Custom 11	Job Custom field order 11
Job Custom 13	Job Custom field order 13
Job Custom 14	Job Custom field order 14
Job Custom 15	Job Custom field order 15
Job Custom 16	Job Custom field order 16
Job Custom 17	Job Custom field order 17
Job Custom 18	Job Custom field order 18
Job Custom 19	Job Custom field order 19
Job Custom 20	Job Custom field order 20
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
Primary Contact Address 2	Job Primary Contact - Address 2
Primary Contact City	Job Primary Contact - City
Primary Contact City, State, Zip	Job Primary Contact - City, State, Zip
Primary Contact Email	Job Primary Contact - Email Address
Primary Contact First Name	Job Primary Contact - First Name
Primary Contact Full Address	Job Primary Contact – Full Address
Primary Contact Full Name	Job Primary Contact – Full Name
Primary Contact Last Name	Job Primary Contact – Last Name
Primary Contact Logon Name	Job Primary Contact – Job Portal Logon Details
Primary Contact MI	Job Primary Contact – Middle Initial
Primary Contact Phone 1	Job Primary Contact – Phone Number in Phone field 1
Primary Contact Phone 1 Type	Job Primary Contact – Type of Number associated with Phone field 1
Primary Contact Phone 2	Job Primary Contact – Phone Number in Phone field 2
Primary Contact Phone 2 Type	Job Primary Contact – Type of Number associated with Phone field 2
Primary Contact Phone 3	Job Primary Contact – Phone Number in Phone field 3
Primary Contact Phone 3 Type	Job Primary Contact – Type of Number associated with Phone field 3
Primary Contact Phone 4	Job Primary Contact – Phone Number in Phone field 4
Primary Contact Phone 4 Type	Job Primary Contact – Type of Number associated with Phone field 4
Primary Contact Phone 5	Job Primary Contact – Phone Number in Phone field 5
Primary Contact Phone 5 Type	Job Primary Contact – Type of Number associated with Phone field 5
Primary Contact State Code	Job Primary Contact – 2 Digit State Code
Primary Contact State Name	Job Primary Contact – 2 Digit State Code
Primary Contact Title	Job Primary Contact Title
Primary Contact Zip	Job Primary Contact Zip Code
Red Flag	Job Red Flag Notes
Secondary Contact First Name	Secondary Job Contact – First Name
Secondary Contact Full Name	Secondary Job Contact – Full Name
Secondary Contact Initials	Secondary Job Contact – Initials
Secondary Contact Last Name	Secondary Job Contact – Last Name
Secondary Contact Logon Name	Secondary Job Contact – Job Portal Logon Details
Secondary Contact Middle Initial	Secondary Job Contact – Middle Initial
Secondary Contact Phone 1	Secondary Job Contact - Phone Number in Phone field 1

Work Order Titles – How to Add

Job Merge Fields - continued

Secondary Contact Phone 1 Type	Secondary Job Contact - Type of Number associated with Phone field 1
Secondary Contact Phone 2	Secondary Job Contact - Phone Number in Phone field 2
Secondary Contact Phone 2 Type1	Secondary Job Contact - Type of Number associated with Phone field 2
Secondary Contact Title	Secondary Job Contact - Title
Staff Email	Typically the Warr Rep - Email Address
Staff First Name	Typically the Warr Rep – First Name
Staff Full Name	Typically the Warr Rep – Full Name
Staff Initials	Typically the Warr Rep - Initials
Staff Last Name	Typically the Warr Rep – Last Name
Staff MI	Typically the Warr Rep – Middle Initial
Staff Phone 1	Typically the Warr Rep - Phone Number in Phone field 1
Staff Phone 1 Type	Typically the Warr Rep - Type of Number associated with Phone field 1
Staff Phone 2	Typically the Warr Rep - Phone Number in Phone field 2
Staff Phone 2 Type	Typically the Warr Rep - Type of Number associated with Phone field 2
Staff Phone 3	Typically the Warr Rep - Phone Number in Phone field 3
Staff Phone 3 Type	Typically the Warr Rep - Type of Number associated with Phone field 3
Staff Phone 4	Typically the Warr Rep - Phone Number in Phone field 4
Staff Phone 4 Type	Typically the Warr Rep - Type of Number associated with Phone field 4
Staff Phone 5	Typically the Warr Rep - Phone Number in Phone field 5
Staff Phone 5 Type	Typically the Warr Rep - Type of Number associated with Phone field 5
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
Super Last Name	Typically the Proj Mgr/Super – Last Name
Super MI	Typically the Proj Mgr/Super – Middle Initial
Super Phone 1	Typically the Proj Mgr/Super – Phone Number in Phone field 1
Super Phone 1 Type	Typically the Proj Mgr/Super – Type of Number associated with Phone field 1
Super Phone 2	Typically the Proj Mgr/Super – Phone Number in Phone field 2
Super Phone 2 Type	Typically the Proj Mgr/Super – Type of Number associated with Phone field 2
Super Phone 3	Typically the Proj Mgr/Super – Phone Number in Phone field 3
Super Phone 3 Type	Typically the Proj Mgr/Super – Type of Number associated with Phone field 3
Super Phone 4	Typically the Proj Mgr/Super – Phone Number in Phone field 4
Super Phone 4 Type	Typically the Proj Mgr/Super – Type of Number associated with Phone field 4
Super Phone 5	Typically the Proj Mgr/Super – Phone Number in Phone field 5
Super Phone 5 Type	Typically the Proj Mgr/Super – Type of Number associated with Phone field 5

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

Merge Field	Definition
Builder Address Line 1	Address
Builder Address Line 2	Address 2
Builder Full Address	Full Address
City	City
City State Zip	City, State & Zip
Current Date	Current Date
Name	Business Name
Owner Web Site	Job Contact Website
Phone 1	Phone Number
Phone 1 Type	Field Not Available

Business Merge Fields - continued

Phone 2	Fax Number
Phone 2 Type	<i>Field Not Available</i>
Phone 3	<i>Field Not Available</i>

Work Order Titles – How to Add

Phone 3 Type	<i>Field Not Available</i>
Phone 4	<i>Field Not Available</i>
Phone 4 Type	<i>Field Not Available</i>
Phone 5	<i>Field Not Available</i>
Phone 5 Type	<i>Field Not Available</i>
State	State Code
State Name	State Name
Vendor Web Site	Sub/Tech Website
Web Site	Business Website
Zip	Zip

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

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

Work Order Titles – How to Add

Project Merge Fields - continued

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