



INDITION COMMERCE

Service & Repair

Configuration Guide — a step-by-step setup walkthrough: every setting, its use case, whether it is required, and whether it can be changed later

Indition Service & Repair · Configuration Guide · September 2026



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A step-by-step setup walkthrough for a shop that has just installed the Service & Repair module. Every setting is explained: its use case, whether it is required, and whether it can be changed safely after the shop has started taking real work orders.

Document Type	Configuration Guide
Module	Service & Repair
Audience	Shop owner, store admin, IT setup tech
Estimated setup time	45–90 minutes (first pass)
Prerequisite	Shop module installed and at least one store configured
Optional integrations	Inventory, POS, Customer, Messaging, In-Store Pickup, VertexTax

How to read this guide

Work through **Part 1: First-Run Setup** top-to-bottom on installation day. The order matters because later steps depend on earlier ones. After the shop is live, **Part 2: Catalog Setup** covers the lookup lists you build out as you learn how your shop actually runs. **Part 3: Settings Reference** is a one-page table for "I just need to look something up." Pills used throughout the guide:

- REQUIRED

Module won't function without it.
- OPTIONAL

Safe to leave at the default.
- CONDITIONAL

Required only when a related feature is enabled.

Service & Repair Module — Configuration Guide.

Part 1 — First-Run Setup

Everything in Part 1 except printing lives on a single screen: **Service & Repair → Settings**. Printing (Step 12) has its own page, the **Slip Designer**. You'll work down the Settings page top-to-bottom. The page hides sections you don't need (e.g. SMS templates only appear when SMS is turned on), so the form gets shorter as you opt out of features.

The key concept: Service Location

The **Service Location** — the physical bench or site where a repair is actually worked — is the primary concept across the whole module. It is what staff and customers see on intake, on the Work Orders grid, in exports, on the calendar, and in notifications. Every repair location you enable is **mapped to a Shop store**, and that mapped store is what quietly drives **invoicing and work-order numbering** behind the scenes. So you configure two things that work together: the *store* (the ledger/numbering backbone the rest of the business already uses) and the *Service Location* (the named place your people and your customers actually refer to). Where earlier releases spoke of a "store" or "sales channel" on customer-facing screens, you will now see **Service Location**.

STEP 1 Open the Settings page

From the admin sidebar pick **Service & Repair → Settings**. If the module has just been installed, the sidebar shows only the *Settings* entry. Once you complete Step 2 and save, the full menu (Dashboard, Work Orders, Tech Dashboard, Calendar, Reports, etc.) appears.

If you don't see "Service & Repair" in the menu at all

Contact Indition support to add the Service & Repair module.

STEP 2 Turn the module on **REQUIRED**

SERVICE & REPAIR MODULE ENABLED

Use case: the master switch. While OFF the entire backend (everything except this Settings page), every public portal URL, and every notification is dormant. Customers visiting a tracking link see a friendly "not available" page.

Changeable later: Yes — you can turn the whole module off temporarily (for maintenance, a seasonal closure, etc.) without losing any data. Existing work orders, settings, catalog entries, photos, and signatures stay where they are.

STEP 3 Map Service Locations to stores **REQUIRED**

Every repair belongs to a **Service Location**, and each Service Location is **mapped to a Shop store**. The store is the ledger the rest of the business already uses, so reports, sales tax, payments, and inventory all flow through it — but staff and customers only ever see the Service Location name. This step wires up the store (or stores) behind your locations; the locations themselves are flagged and named in Part 2 → Service Locations.

A repair location now requires a mapped store

When you enable a repair location in Settings, it **must** have a mapped store. That mapping is not optional: the store is what supplies invoicing and the work-order number sequence for every repair worked at that location. A location with no mapped store cannot be enabled, and the Settings page will not let you save until each enabled location resolves to a store.

STORE SOURCE

Use case: tell the module which store (or stores) sit behind your Service Locations. Two modes:

- **Use an existing store** — best for a single-location shop or a chain that wants repairs to appear under one of its existing storefronts.
- **Create a new store** — best when you want repairs isolated from retail sales (separate ledger, separate work-order numbers, a different name on receipts). Optionally seed the new store with all products and settings from an existing store by toggling *Copy products and settings from an existing store?* to YES and picking a source.

Changeable later: Yes for adding more stores. Removing a store after work orders have been written against it is technically possible but reporting becomes ambiguous; only disable a store, don't delete it, once it has history.

ENABLED SERVICE LOCATIONS

Use case: a multi-location shop chooses which repair locations can take intakes. Each enabled location resolves to its mapped store, and each store gets its own work-order number sequence — so numbering and invoicing stay separated per location while staff and customers see only the location name.

Changeable later: Yes — enable more locations at any time (each still needs a mapped store). Disabling a location with open work orders just hides intake there; existing work orders continue to live and progress normally.

STEP 4 Set the work-order numbering scheme

WORK ORDER NUMBER PREFIX OPTIONAL

Use case: the prefix prepended to every new work order number — e.g. `SR-` produces `SR-1001` , `SR-1002` , etc. Customer-facing, so pick something short and recognisable.

Changeable later: Yes, but only new work orders pick up the change. Numbers already issued keep their original prefix.

WORK ORDER STARTING NUMBER OPTIONAL

Use case: the integer used for the first work order each newly enabled store issues. Default `1000` avoids the optics of "WO #1" on day one. Set it higher (e.g. `5000`) if you migrated from another system and want continuity.

Changeable later: Yes for stores you haven't enabled yet. Changing it after a store has already started numbering does *not* renumber existing work orders.

STEP 5 Enable optional integrations

INVENTORY INTEGRATION OPTIONAL

Use case: when the Inventory module is installed and ON, turning this YES reserves parts from tracked stock when a quote line is added, consumes them when work starts, restocks them on cancellation, and shows real on-hand counts in the parts picker.

Changeable later: Yes. Turning it off makes parts free-text (no stock movement); existing reservations and consumption history stay in Inventory.

POS INTEGRATION OPTIONAL

Use case: when the POS module is installed, deposits at quote approval and final payments at pickup are taken through the POS register. Repair money then flows the same way as in-store retail.

Changeable later: Yes. With POS off, repair payments are recorded as standalone payment records on the work order for manual reconciliation against your processor.

WORK ORDER INTAKE AT THE REGISTER OPTIONAL

Use case: lets a cashier open a work order and run the whole intake from the POS register — customer, items, condition, accessories, priority, promised date, photos, signature, deposit and drop-off paperwork — without a back-office login. Useful wherever the person who greets the customer is standing at a till rather than at a service desk.

Depends on: POS Integration. The switch is greyed out until that is on, and clears if you turn it off — the register withdraws the feature at the same moment, without waiting for a save.

Changeable later: Yes, and it takes effect on registers that are already open. Work orders already created from a till are ordinary work orders and are unaffected.

Also required: a Service Location on the register's store

Counter intake resolves the repair location from the till's own store. If that store has no Service Location mapped to it, the register reports that Service & Repair is not enabled for it — even though the module is installed and both switches are on. If you see that message, this is the first thing to check.

WARRANTY HANDLING OPTIONAL

Use case: turn this on if you ever do warranty work. It auto-flags warranty-eligible repairs that link to a prior Shop order, splits billing between warranty and customer-paid paths, exposes the deny-with-reason flow, and produces the warranty claim packet PDF.

Changeable later: Yes. Turning off doesn't strip the flag from existing warranty work orders; it just hides the warranty UI from the menus.

OUTSOURCED VENDOR REPAIRS OPTIONAL

Use case: turn on if you ever send units to a third-party for repair (factory authorised service, board-level repair, etc.). Adds the Vendors menu, send-to-vendor workflow with outbound and inbound tracking, vendor-cost vs. customer-price margin tracking, and the vendor performance report.

Changeable later: Yes.

LOANER POOL OPTIONAL

Use case: turn on if you lend customers a temporary unit while theirs is being repaired. Exposes the loaner pool, check-out / check-in with condition photos, deposit handling, and overdue alerts.

Changeable later: Yes.

STEP 6 Set work-order defaults

Tax Rate (%) CONDITIONAL

Required only when VertexTax is NOT installed.

Use case: the flat percentage applied to taxable line items on a quote. Lines flagged non-taxable, or whose tax class is exempt, skip tax entirely. **Note:** if the VertexTax module is installed *and* configured, Service & Repair routes tax through Vertex (real address-based rate) and this flat value is used only as a fallback.

Changeable later: Yes. New rate applies to future quotes; previously approved quotes keep the tax they were approved with.

Default Priority OPTIONAL

Use case: the priority assigned to a new work order when intake staff don't change it. Pick from *Normal*, *Rush*, *Emergency*.

Changeable later: Yes. Only affects new intakes.

Rush Surcharge (%) OPTIONAL

Use case: percentage added to the quote total when priority is *Rush*. Default 15%.

Changeable later: Yes. New rate applies to future quote rebuilds.

Emergency Surcharge (%) OPTIONAL

Use case: percentage added when priority is *Emergency*. Default 35%.

Changeable later: Yes.

Default SLA (days) OPTIONAL

Use case: target turnaround in calendar days. Work orders past this many days from intake are flagged *overdue* on the admin grid and the dashboard.

Changeable later: Yes. Each new work order captures its own SLA due date at intake time, so changing the default doesn't move the goalposts on existing repairs.

Quote Expiry (days) OPTIONAL

Use case: a quote auto-declines if the customer hasn't approved it within this many days. Default 14. The auto-decline happens automatically overnight.

Changeable later: Yes.

Default Warranty (months) **CONDITIONAL**

Used only when Warranty Handling is ON.

Use case: the fallback warranty length when no per-product or per-category warranty term is configured. Default 12.

Changeable later: Yes. Future intake eligibility lookups use the new value; previously-flagged warranty work orders keep their existing eligibility.

STEP 7 Set the deposit policy

Required Deposit Type **OPTIONAL**

Use case: what you ask the customer to pay at quote approval. Three modes:

- **None** — no deposit; the customer pays at pickup.
- **Percent of quote** — e.g. 25% of the final total.
- **Fixed amount** — e.g. \$50 regardless of quote size.

Deposit Value **CONDITIONAL**

Required when type is Percent or Fixed; ignored when type is None.

Use case: the percent (e.g. 25 for 25%) or the dollar amount (e.g. 50.00) depending on the type you picked above.

Changeable later: Yes. New deposits use the new policy; existing work orders keep whatever deposit they already captured.

STEP 8 Set upload caps

The Settings page also shows the **upload limit** — the largest file accepted in one upload. The sizes you set below cannot go above that limit.

Max Photo Size (MB) **OPTIONAL**

Use case: cap on each photo uploaded via the intake form, Work Order Photos tab, loaner check-in/out, and the customer portal. Default 10. Higher numbers let staff snap full-resolution iPhone shots; lower numbers force compression and save storage space.

Changeable later: Yes. Doesn't affect existing photos.

Max Document Size (MB) **OPTIONAL**

Use case: cap on each document (PDF, Word, Excel, CSV, TXT) uploaded via the Work Order Documents tab and the customer portal. Default 25.

Changeable later: Yes.

STEP 9 Decide on the public tracking link

Public Tracking Link **OPTIONAL**

Use case: when YES, customers who do *not* have a Customer account can still track their repair via a tokenized URL we email at intake. The page is gated by a two-of-three identity check (zip, phone, email) so the URL alone isn't enough to reveal repair details. When NO, only signed-in Customer accounts can view repair status.

Changeable later: Yes. Turning it off makes existing tracking URLs return "not available."

STEP 10 Enable customer & staff notifications

CUSTOMER EMAIL EVENTS

Pick which of the following events send a transactional email to the customer. Templates themselves are managed in the **Messaging** admin so your wording, branding, and signatures stay consistent with other shop emails.

- **Intake confirmation** — emailed at drop-off with the tracking link.
- **Quote ready** — emailed when the repair team builds a quote.
- **Quote approved** — confirmation back to the customer after they approve.
- **Status changed** — generic status-transition notice.
- **Parts arrived** — when the work order leaves *Awaiting Parts*.
- **Ready for pickup** — final-stage notice.
- **Loaner overdue** — sent when a loaner passes its expected return.
- **Quote expiring** — proactive reminder N days before auto-decline.

Required: none individually; at minimum we recommend Intake, Quote Ready, and Ready for Pickup.

Changeable later: Yes for every event.

STAFF NOTIFICATIONS

The module also keeps your **staff** in the loop, not just customers. In the **Staff notifications** section of Settings you decide who is notified and on which events. Each notification goes to the work order's **assigned technician(s)** plus a **configurable list of managers**.

Manager recipient list **OPTIONAL**

Use case: the managers who should receive staff notifications alongside the assigned technician(s). Enter one or more manager email addresses; leave it empty to notify only the assigned technician(s).

Changeable later: Yes — add or remove managers at any time.

Per-event toggles **OPTIONAL**

Use case: a YES/NO switch for each staff-notification event, so you send only what your team wants. The events are:

- **Work order assigned / reassigned** — the technician who now owns the repair (and the managers) is told.
- **Customer replied** — a customer has responded on the work order.
- **Quote approved** — the customer approved the quote.
- **Quote declined** — the customer declined the quote.

Changeable later: Yes for every toggle.

Daily overdue-work-order digest **OPTIONAL**

Use case: a once-a-day summary email of work orders that have passed their SLA (see *Default SLA (days)* in Step 6). It is sent once a day to the manager recipient list, giving the team a single overdue-reminder sweep each morning rather than piecemeal alerts.

Changeable later: Yes — toggle the digest on or off in the Staff notifications section.

STEP 11 Optionally enable SMS notifications

Enable SMS **OPTIONAL**

Use case: off by default. Turn ON if you've signed up with an SMS provider (Twilio, AWS SNS, or a generic webhook to whatever you use). When ON, the selected events also send SMS to the customer's phone number.

When SMS is on, configure:

SMS Provider **CONDITIONAL**

Use case: pick the provider. Each one needs its own credentials.

- **Twilio** — needs From Number, Account SID, Auth Token.
- **AWS SNS** — needs Access Key ID, Secret Access Key, AWS Region.
- **Generic Webhook** — needs a webhook URL. The system sends each message to that URL with the recipient, sender, message text, event and work order number.

Changeable later: Yes. You can swap providers without rewriting templates.

From Number / Sender ID **CONDITIONAL**

Required for Twilio and AWS SNS; optional for Generic Webhook.

Use case: the phone number or alphanumeric sender ID shown to the customer.

SMS Templates **OPTIONAL**

Use case: short message bodies, one per event. Each of the **10 SMS events has its own dedicated template**, so every event can be worded independently. Tokens available in every template:

`{customer_first_name}`, `{customer_full_name}`, `{work_order_no}`, `{status_name}`,
`{item_name}`, `{service_location_name}`, `{store_name}`, `{tracking_url}`, `{quote_total}`,
`{loaner_asset_tag}`, `{expected_return_at}`. `{service_location_name}` resolves to the physical Service Location; `{store_name}` also resolves to that Service Location, falling back to the mapped store/channel name only where a location is unmapped. Sensible defaults are provided for all 10 events — only customise if you want your brand voice in the message.

Changeable later: Yes for every template.

SMS Events **OPTIONAL**

Use case: pick which events send SMS in addition to email. Most shops send fewer SMS than emails — pick the moments that genuinely need attention (Quote Ready, Ready for Pickup, Loaner Overdue).

STEP 12 Set up printing in the Slip Designer

Printing has its own page: **Service & Repair → Slip Designer**, granted to the Service & Repair admin role. It holds the **Printing** settings, the layout of every slip the shop prints, and the receipt printer logo. The work sheet & tags, drop-off receipt and pickup receipt print either on a receipt printer (58mm, 76mm, 80mm or 112mm rolls) or as a full Letter page. The admin is set in the Printing panel; each POS register is set separately in **POS → Stations**. Quotes, invoices, payment receipts and warranty packets are always PDFs.

Save the Settings page first

The Slip Designer is a separate page with its own save buttons. Save the Settings page (**Save Settings**, Step 13) before you open it, so nothing you set in Steps 1–11 is lost. The Slip Designer appears in the menu once the module is on.

THE PRINTING PANEL

At the top of the Slip Designer. Set the four fields and choose **Save printing settings**; every other Service & Repair setting keeps its value.

Print Work Order Documents On **OPTIONAL**

Use case: how those three documents print from the admin work order screens. **Receipt printer** (default) for a desk with a thermal printer, **Full page (PDF)** for an office printer, **Ask each time** for a desk with both. Full page downloads the drop-off receipt, work order sheet and pickup receipt as Letter PDFs, each printed with its default Letter layout (below).

Changeable later: Yes, takes effect on the next print. Does not change how POS registers print.

Receipt Paper Width **OPTIONAL**

Use case: the roll in the admin's receipt printer: **58mm**, **76mm**, **80mm** (default) or **112mm**. Slips are laid out at the width the printer's head actually prints (48mm, 64mm, 72mm and 104mm), so nothing is cut off at the right. On 58mm paper, a long work order number prints with barcode bars too thin for some scanners; test a scan before relying on it. A new slip layout starts on this width.

Item Tags **OPTIONAL**

Use case: tags print after the shop copy for taping to the machine; their barcode opens the work order when scanned with F10 at the register. **One per item** (default), **One per work order**, or **Don't print tags**. Applies in the admin and at every register.

Show Prices on the Shop Copy **OPTIONAL**

Use case: NO (default) lists the quote's parts with quantity and description only. YES lists every quote line with its price, plus the job total, for teams that quote from the ticket.

RECEIPT PRINTER LOGO (MANAGE LOGOS)

A thermal printer prints black dots only, so the website's color logo comes out speckled on a slip. The slips print a receipt printer logo of their own instead. Choose **Manage Logos** on the breadcrumb bar of the Slip Designer to open the **Receipt printer logos** dialog. Every change in it saves at once; **Done** closes it.

Receipt printer logo **OPTIONAL**

Use case: the logo at the top of the receipt-printer slips (the **Logo** piece; the built-in drop-off and pickup receipts print it). Drag a file onto the drop area, or click it to choose one. Best is an **SVG** in solid black on a white or transparent background; a **PNG** is accepted too, ideally at least 1,000 pixels wide (under 300 pixels wide is refused). **JPG** is not accepted; up to 2 MB. An SVG is cleaned of scripts and outside links on upload. Without a logo, the slips print the shop name.

Changeable later: Yes. Drop a new file to replace it, or **Remove** it. Letter pages, PDFs, emails and the customer's pages keep the website logo whatever is set here.

Set different logos for each location **OPTIONAL**

Shown only when the site has more than one store location (In-Store Pickup dealers in Store Management).

Use case: YES lists each store location with a drop area of its own, and the first drop area becomes the **Shared logo - for any location without its own**. A slip prints the logo of its work order's repair location, or the shared logo when that location has none. NO (default) prints one logo for every location.

Use the same logos in Service & Repair and POS **CONDITIONAL**

Shown only when the POS module is installed with its receipt logos.

Use case: YES (the starting value) keeps one set of receipt printer logos for both modules: a logo uploaded or removed here is uploaded or removed in POS's Receipt Designer too, and the reverse, so the register's sale receipts and the repair slips carry the same logo. Turning it on copies these logos to POS. NO leaves each module with the logos it has, to change separately.

SLIP LAYOUTS AND THE DEFAULT LAYOUT PER SLIP AND PAPER

Below the Printing panel, each slip has its own list of layouts: *Drop-off receipt*, *Pickup receipt*, *Pickup release (shop copy)*, *Work sheet (shop copy)*, *Item tag* and *Payment receipt*. Every slip comes with a built-in **Indition basic** layout that prints exactly what the shop has always printed, and it is the default, so nothing needs to be done here to start printing. To change a slip, **Duplicate** its built-in layout, change the copy, and **Make default**.

- Only the **default** layout of a slip prints, in the admin and at every POS register.
- The drop-off receipt, the work sheet and the pickup receipt have **one default per paper**: a receipt-printer default and a Letter default. The other slips have one default each.
- A built-in layout can't be changed or deleted, but its paper, inner margin and printer alignment can be set (**Save paper, margin and alignment**).
- The payment receipt also comes with the **Standard payment receipt**, a slip-style receipt with the logo and the invoice's totals; make it the default if you prefer it to the register's own receipt.

Changeable later: Yes. Changing the default changes what prints from the next print. **Test print** in the designer prints a layout without saving it, so a change can be tried first.

LETTER / FULL PAGE PRINTING

The drop-off receipt, the work order sheet and the pickup receipt also print as full Letter pages. Full page printing (the admin's PDF and any POS station set to **Full page**) prints each document's **Letter default**. The

built-in Letter layouts, *Indition basic drop-off receipt (Letter)*, *Indition basic work order sheet (Letter)* and *Indition basic pickup receipt (Letter)*, are the defaults and print the full pages exactly as before. To design your own, duplicate one and make the copy the Letter default. A Letter page prints the repair location's website logo (set on its page in Store Management), not the receipt printer logo. Item tags, the pickup release and the payment receipt print on the receipt printer only.

EACH POS REGISTER

With **POS Integration** on, **POS → Stations** shows a **Work Order Printing** column. Click a register's value (for example *Receipt printer · 80mm*) to open **Work order printing: Print work orders on (Receipt printer, Full page or Ask each time)** and **Receipt paper width** (58mm, 76mm, 80mm or 112mm), then **Save**. New registers start at Receipt printer, 80mm. A register set to Full page prints the Letter defaults. Changing a register needs the POS Admin role.

The register's payment receipt for a repair prints on the paper set for that station's sale receipts, in the **Receipt Printing** column (**Paper this register prints on**); a station set to Letter there prints it on its work order receipt paper width.

Printer and cash drawer setup

Slips print through the browser's print dialog, like POS sale receipts, so there is nothing to install in Service & Repair. Make the receipt printer the default printer, set its paper to the roll size, and turn on the driver's cut option if it has one. On a register, allow pop-ups for the POS site. For step-by-step receipt printer and cash drawer setup, see the separate **Receipt Printing** documentation pack.

STEP 13 Save and validate **REQUIRED**

Click **Save Settings** at the bottom of the Settings page (the printing settings are saved on the Slip Designer, with **Save printing settings**). The system saves every value, refreshes the menu, and (if you created a new store) sets up its work-order numbering. After saving, refresh the page once and confirm:

- [] The Service & Repair sidebar now shows Dashboard, Work Orders, Tech Dashboard, Calendar, Reports, etc.
- [] Opening **Service & Repair → Dashboard** loads without errors.
- [] Opening **Work Orders → New Intake** shows the intake form with your enabled Service Location(s) in the dropdown (defaulting to the user's "Working at" location).

Part 2 — Catalog Setup

The Settings page handles policy. The catalog pages below handle the lookup lists you'll be picking from on every repair: statuses, priorities, dispositions, flat-rate pricing, warranty terms, vendors, loaner units, and technicians. These can be built out over the first week or two — none are blocking on day one, because every list ships with sensible defaults.

Statuses & transitions

Where: Service & Repair → Statuses.

What ships: 16 default statuses (Intake → Diagnosing → Quote Pending → Awaiting Approval → Approved → Awaiting Parts → In Progress → On Hold → QA → Ready for Pickup → Closed, plus side rails: Declined, Cancelled, Sent to Vendor, Back from Vendor, Warranty Claim). 32 default transitions wire them together.

What to customise: rename a status to match your team's vocabulary (e.g. "QA" → "Final Check"), pick a color for the timeline pill, and edit the customer-visible label separately from the internal name. Add new statuses (e.g. "Awaiting Customer Decision") and decide which existing statuses are allowed to transition into them.

Required: No — defaults work. **Changeable later:** Yes, freely.

Priorities

Where: Service & Repair → Priorities.

What ships: Normal, Rush, Emergency.

What to customise: add bespoke priorities (e.g. "VIP", "Insurance Claim") with their own color. Each priority has a surcharge percentage; the defaults are 0 / 15 / 35.

Required: No. **Changeable later:** Yes.

Dispositions

Where: Service & Repair → Dispositions.

Use case: the reason you record when reassigning a repair to a different technician, putting it on hold, or escalating. Examples ship: "Workload", "Specialist needed", "Waiting on customer".

Sort prefs: at the top of the page you can pick auto-sort (by Code / Name / Category, with a primary and secondary key) or flip on manual sort to order them by hand. Auto-sort is the default.

Required: No. **Changeable later:** Yes.

Flat-rate catalog

Where: Service & Repair → Flat Rates.

Use case: a price-list of common repairs at a fixed total ("Screen replacement — \$129", "Annual service — \$89"). When a tech builds a quote they can pick a flat-rate row instead of typing labor + parts lines by hand.

Required: No — only relevant if your shop uses flat-rate pricing for some repairs. Time-and-materials and per-incident custom quotes still work without any flat-rate rows.

Changeable later: Yes. Existing approved quotes keep the price they were approved at; updating a catalog row only affects future quote builds.

Warranty terms

Where: Service & Repair → Warranty Terms.

Use case: per-product, per-category, or global warranty length in months. When a work order links to a prior Shop order, the system finds the most specific matching term (product → category → global → the *Default Warranty (months)* setting), reads the order's purchase date, works out the expiry (purchase date + months), and marks the repair warranty-eligible if today is before the expiry.

Required: Only if you turned on Warranty Handling in Step 5 and want anything more granular than the global default.

Changeable later: Yes. Eligibility is recomputed at intake; existing work orders keep whatever flag they were stamped with.

Vendors

Where: Service & Repair → Vendors. Visible only when *Outsourced Vendor Repairs* is ON.

Use case: directory of third-party repair partners — name, contact, turnaround SLA, default markup. The send-to-vendor flow on a work order picks from this list and captures outbound + inbound tracking, vendor cost, and the price you charge the customer.

Required: Only if you actually outsource repairs. **Changeable later:** Yes.

Loaner pool

Where: Service & Repair → Loaner Pool. Visible only when *Loaner Pool* is ON.

Use case: register each loaner unit (asset tag, make/model, serial, condition) so it can be checked out against a work order with a deposit and check-in photos.

Required: Only if you actually lend loaners. **Changeable later:** Yes — add and retire units freely.

Service Locations & user mapping

Where: Service & Repair → Service Locations (and Service & Repair → User Mapping under it). Visible only when In-Store Pickup is installed.

Use case: this is where you flag which places are repair **Service Locations** — the bench or site where work is actually done — and give each one the **mapped store** that drives its invoicing and work-order numbering. You then map each technician to one or more locations with a default "Working at" location, which is what the intake form pre-selects. The Service Location name (not the store/channel) is what staff and customers see everywhere: intake, the Work Orders grid, exports, the calendar, and notifications.

Required mapped store: a Service Location cannot be *enabled* without a mapped store. Enabling a location with no store is blocked, because the store is the source of its invoice ledger and its work-order number sequence. Set the mapped store here before you enable the location in Settings.

Single-location shops: the page hides the location columns when there is only one repair location — but that single location still resolves to a store for numbering and invoicing under the hood.

Required: Configure at least one Service Location with a mapped store; the multi-location columns only matter with 2+ physical locations. **Changeable later:** Yes.

Technicians & hourly rates

Where: Service & Repair → User Service Locations *and* Service & Repair → Technician Rates.

Use case (Technicians): flip the *Technician* toggle on any admin user who performs repair work. Only flagged technicians appear in the Assigned To dropdowns on work orders, the Tech Dashboard, and the Technician Rates page.

Use case (Rates): set a single Default rate for all technicians. For anyone paid differently, toggle *Override default rate* to YES and enter their personal hourly rate. Labor time captured against a work order is valued at the technician's rate at time of entry.

Required: at least one technician must be flagged before staff can be assigned to a work order. A default rate of \$0 is allowed (e.g. when all labor is captured as flat-rate line items instead).

Changeable later: Yes. Rate changes take effect on new labor entries; existing labor entries keep the rate that was active when they were recorded, so historical costing is stable.

Accessories checklist

Where: Service & Repair → Settings → Catalogs & Configuration → **Accessories Checklist**.

Use case: the things customers usually leave with a machine — power cord, foot pedal, carrying case, extension table, presser feet, bobbins. Staff tap them at intake and on the work order, next to a free-text box for anything else, and the drop-off receipt, work sheet and pickup receipt list them as tick boxes so everything goes back to the customer.

Required: no. The list starts with those six; add your own, rename them, set the order with *Sort Order*, and switch off any you don't use with *Active*. A name can only be used once.

Changeable later: Yes. A work order keeps the accessories it was given, so renaming or switching one off never changes an existing work order.

Part 3 — Settings Reference

One-line summary of every Settings-page field, plus the Slip Designer's printing settings and logos (marked *Slip Designer*). Cross-reference for "what is this for?" and "can I change it?"

Setting	Required?	Changeable later?	Notes
Module Enabled	Yes (master switch)	Yes	OFF hides the entire module except this page.
Store Source mode	Yes	Yes	Existing or New. New mode can copy from an existing store. The store backs invoicing + numbering behind each Service Location.
Enabled Service Locations	Yes (at least one, each with a mapped store)	Yes	A location can't be enabled without a mapped store; each store gets its own work-order number sequence. Staff/customers see the location name.
Work Order Number Prefix	Optional	Yes	Only affects new numbers.
Work Order Starting Number	Optional	Only before a store starts numbering	Cannot renumber existing work orders.
Inventory Integration	Optional	Yes	Requires Inventory module.
POS Integration	Optional	Yes	Requires POS module. Without it, payments are standalone records. Also the prerequisite for Work Order Intake at the Register.

Setting	Required?	Changeable later?	Notes
Require Serial Number on Intake	Optional (off by default)	Yes	On: every item on a new work order needs a serial number, in the back office and at every register (desktop, touch and the Indition POS tablet app). Items added later need one, and an entered serial can't be removed. Items saved before it was switched on stay editable.
Work Order Intake at the Register	Optional	Yes	Cashier can create a work order and run intake at the register. Needs POS Integration on, plus a Service Location mapped to the register's store.
Print Work Order Documents On (Slip Designer)	Optional	Yes	Receipt printer (default) / Full page (PDF) / Ask each time, for the work sheet, drop-off and pickup receipts in the admin. Full page prints each document's Letter default. Registers are set per station in POS → Stations.
Receipt Paper Width (Slip Designer)	Optional	Yes	58mm, 76mm, 80mm (default) or 112mm, for admin slips.
Item Tags (Slip Designer)	Optional	Yes	One per item (default) / one per work order / none. Admin and every register.
Show Prices on the Shop Copy (Slip Designer)	Optional	Yes	NO by default.
Receipt printer logo (Slip Designer → Manage Logos)	Optional	Yes	SVG (best) or PNG, up to 2 MB; no JPG. Without one, slips print the shop name. Receipt-printer slips only.
Set different logos for each location (Manage Logos)	Optional (NO by default)	Yes	Only with more than one store location. YES: one logo per location, plus a shared one.
Use the same logos in Service & Repair and POS (Manage Logos)	Optional (YES to start)	Yes	Only with POS installed. Keeps one set of receipt printer logos for both modules.
Default slip layouts (Slip Designer)	Optional (built-in Indition basic layouts are the defaults)	Yes	One default per slip; the drop-off receipt, work sheet and pickup receipt have a receipt-printer default and a Letter default.
Warranty Handling	Optional	Yes	Controls Warranty Terms, Warranty tab, claim packet PDF.
Outsourced Vendor Repairs	Optional	Yes	Controls Vendors menu + send-to-vendor flow.

Setting	Required?	Changeable later?	Notes
Loaner Pool	Optional	Yes	Controls Loaner Pool menu + check-out / check-in.
Tax Rate (%)	Required when VertexTax is not installed	Yes	Applies to future quotes only.
Default Priority	Optional	Yes	Default for new intakes.
Rush Surcharge (%)	Optional	Yes	Applied to Rush quotes.
Emergency Surcharge (%)	Optional	Yes	Applied to Emergency quotes.
Default SLA (days)	Optional	Yes	New intakes only.
Quote Expiry (days)	Optional	Yes	Quotes auto-decline after this many days.
Default Warranty (months)	Only with Warranty ON	Yes	Fallback when no per-product term matches.
Required Deposit Type	Optional	Yes	None / Percent / Fixed.
Deposit Value	Required when type is Percent or Fixed	Yes	Existing deposits keep their original amount.
Max Photo Size (MB)	Optional	Yes	Clamped to the server upload limit.
Max Document Size (MB)	Optional	Yes	Clamped to the server upload limit.
Public Tracking Link	Optional	Yes	OFF disables tokenized URLs for non-account customers.
Email Events	Optional (recommend Intake + Quote Ready + Ready for Pickup minimum)	Yes	Templates live in Messaging admin.
Staff notifications — manager recipient list	Optional	Yes	Managers notified alongside the assigned technician(s). Also the recipients of the daily overdue digest.
Staff notifications — per-event toggles	Optional	Yes	YES/NO per event: assigned/reassigned, customer replied, quote approved, quote declined.

Setting	Required?	Changeable later?	Notes
Daily overdue-work-order digest	Optional	Yes	Once-a-day summary of SLA-overdue work orders, sent on a schedule to the manager list.
Enable SMS	Optional	Yes	Off by default.
SMS Provider	Required when SMS is ON	Yes	Twilio, AWS SNS, or Generic Webhook.
SMS Credentials (From Number, SID, Token, Region, Webhook URL)	Required by chosen provider	Yes	Stored encrypted.
SMS Events	Optional	Yes	Subset of email events that also send SMS.
SMS Templates	Optional (defaults provided)	Yes	One dedicated template per event — 10 events, 10 templates. Token-substituted at send time; <code>{store_name}</code> / <code>{service_location_name}</code> resolve to the Service Location.

Validation Checklist

Run through this before letting staff take a real customer through intake.

- ☐ Module is ON and at least one Service Location is enabled, each with a mapped store.
- ☐ Opening **Work Orders** → **New Intake** shows the intake form with your Service Location(s).
- ☐ At least one admin user has been flagged as a technician (User Service Locations → Technician toggle).
- ☐ A default technician hourly rate is set (or per-tech overrides are configured for everyone who'll log labor).
- ☐ If using Inventory: the Inventory module is ON for the same enabled store(s).
- ☐ If using POS: a test deposit posts cleanly through the POS register.
- ☐ If using Warranty: at least one warranty term exists (global fallback is fine), and the default warranty months matches what you actually offer.
- ☐ If using Loaners: at least one loaner unit is registered.
- ☐ If using Vendors: at least one vendor is registered.
- ☐ Trigger an Intake Confirmation email to yourself by creating a test work order — confirm it arrives and looks right.
- ☐ If SMS is on: send a test Intake SMS — confirm it arrives at your provider's logs and on a real phone.
- ☐ If you print on receipt printers: upload a receipt printer logo (Slip Designer → Manage Logos), and use **Test print** on a slip layout to check the paper width and the logo.
- ☐ Print a test drop-off receipt and work sheet & tags the way each desk and register is set — confirm the Service Location name and brand look correct, and that an item tag's barcode opens the work order with F10 at the register.
- ☐ Print a test Quote PDF — confirm the subtotal on the table equals the sum of the line items.

- [] Visit a tokenized tracking URL in an incognito window — confirm the identity-verification form appears and rejects bad inputs.

FAQ

I changed a setting but the menu didn't update.

The form refreshes the menu automatically when you toggle the master switch on or off. For other changes you may need one hard refresh of the browser. If the menu still looks stale, visit **Admin → Cache** and clear it.

Can I run Service & Repair without the Customer module?

No — every work order belongs to a Customer record so the customer can self-serve via the same login they use for orders. Contact Indition support to set up the Customer module if your site does not have it.

Can I run it without Messaging?

You can turn off all email events, but the Messaging module needs to be installed to deliver any email you do enable. Templates are managed in Messaging admin.

What happens if I disable the module after I have live work orders?

The backend pages, public portal, and notifications all stop. Work order data, photos, signatures, and history all stay intact and become visible again the moment you re-enable.

Where did the printing settings go?

To **Service & Repair → Slip Designer**. The **Printing** panel at the top holds Print Work Order Documents On, Receipt Paper Width, Item Tags and Show Prices on the Shop Copy, saved with **Save printing settings**. The same page lays out every slip and holds the receipt printer logo (**Manage Logos**).

Can POS and Service & Repair share one receipt printer logo?

Yes. With both modules installed, **Manage Logos** in either designer shows **Use the same logos in ...** (YES to start). While it is YES, a logo uploaded or removed in one module is uploaded or removed in the other.

Can I delete a status that's already been used?

The Statuses admin won't let you delete a status with work orders attached. Mark it *inactive* instead — existing work orders keep showing the status name and color, but new intakes can't transition into it.

Can I have different deposit policies per Service Location?

Not in the Settings panel — the deposit policy is global. Per-customer overrides are available on the work order itself (staff can override the deposit amount on a specific quote).

How do I move from one tax engine to another (flat → Vertex)?

Contact Indition support to set up the VertexTax module. Service & Repair then starts routing tax through Vertex automatically on its next quote rebuild. The flat-rate setting stays in place as a fallback if Vertex is ever removed or unconfigured.