



INDITION COMMERCE

# Service & Repair

Frequently Asked Questions — for intake staff, technicians, service managers, and admins

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These are the questions intake staff, technicians, service managers, and administrators ask most often about the Indition Service & Repair module. Questions are grouped by topic. If you can't find an answer here, most behaviors are adjustable by your administrator on the Service & Repair **Settings** page, the **Slip Designer** (printing) and the catalog admin pages (Statuses, Priorities, Warranty Terms, and so on).

## Getting Started

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### What is the Service & Repair module?

It's a full repair-shop workflow built into your Indition platform: take an item in, diagnose it, quote it, get customer approval, track parts and labor, take payment, and hand it back. Every repair is a **work order** worked at a physical **Service Location**, which maps to a Shop store behind the scenes so tax, payments, inventory, and reporting flow through the same store records the rest of the business already uses. Customers can follow their repair through the same login they use for orders, or through a public tracking link.

### Where do staff work in the module?

In the admin backend under **Service & Repair**. The menu opens on the module Dashboard and includes Work Orders, Tech Dashboard, Calendar, Reports, the Slip Designer (printing), and the catalog pages (Statuses, Priorities, Dispositions, Flat Rates, Warranty Terms, Vendors, Loaner Pool, Service Locations, Technician Rates) plus Settings. Until an admin turns the module on and saves, the sidebar shows only *Settings*.

### Do I need any other modules installed?

Shop and Customer are required — every work order belongs to a Customer record. Messaging is needed to deliver email. The rest are optional integrations you switch on only if you use them: Inventory (parts stock), POS (in-store card payment), In-Store Pickup (multiple repair locations), VertexTax (address-based tax), and an SMS provider.

# Intake & Drafts

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## How do I take in a new repair?

Open **Work Orders → New Intake**. The form has labelled sections: Service Location & Customer, Item Being Serviced, Scheduling & Location, Billing, Issue & Condition, and Intake Photos. The intake now opens with a **Service Location** picker (defaulting to your "Working at" location) in place of the old Store picker; the mapped store is derived from the location you choose. A customer is required — search for an existing one (the picker returns name, email, phone, and default address) or add a new one inline. On save, the work order gets its number from the mapped store (e.g. **SR-01042** ) and a public tracking token, and the intake email/SMS fires if configured.

## How do I record the accessories a customer left?

In the **Accessories Included** section of the intake, tap each one on the **Checklist** and type anything else under **Anything else**. Both print on the drop-off receipt, work sheet and pickup receipt as tick boxes. The checklist itself is your shop's own list, kept under **Settings → Accessories Checklist**.

## Can I change the reported issue, condition or accessories after the work order is created?

Yes. On the work order's Overview tab, choose **Edit** on the item in **Items Being Serviced** to change its reported issue and condition, or on the **Accessories Included** row to change the accessories. Changes save as you go. A work order that is completed and paid in full is locked.

## Can we make a serial number compulsory?

Yes: switch on **Require Serial Number on Intake** in **Settings → Work Order Defaults**. Every item on a new work order then needs a serial number, in the back office and at every register, including the Indition POS tablet app. Items added to a work order later need one too, and an entered serial can't be removed. Work orders taken in before you switched it on are not affected.

## An item came from one of the customer's previous orders. Where do I put its serial and the problem?

Right on the **From an existing order** tab: **+ Add** on the order line opens its serial number, reported issue and condition. If the order was placed under another account, search it on the **Order lookup** tab by its full order number.

## I got interrupted mid-intake. Do I lose everything?

No. Use **Save Draft**. A draft stores the whole intake form as-is *without validation*, so you can save a half-finished intake and come back to it. Drafts appear on the Drafts list (reachable from the Work Orders screen); open one to resume — the form re-populates from the saved draft and, when you finally submit it as a real work order, the draft is cleared.

## Can a cashier take a repair in at the till, without a back-office login?

Yes, once **Work Order Intake at the Register** is switched on. At the register the cashier presses **F10** and chooses **Create Work Order**, then works through the same intake — customer, items, reported issue, condition, accessories, priority, promised date, photos and signature. The result is an ordinary work order in the store's own numbering sequence and appears on the Work Orders screen immediately. The customer and product searches they already use apply what they pick to the work order rather than to a sale.

## Does counter intake work on the touch registers as well?

Yes. On a touch register it is **Repairs → + Take an item in**, presented as one scrolling screen instead of the desktop panel, and it produces exactly the same work order — same numbering, same details, nothing recording which till took it. Drop-off photos, signatures, drafts and amending a work order after creation are done on the desktop register.

## The register says **Service & Repair is not enabled for this store. Both switches are on.**

The register works out which repair location to use from the store the till transacts as, so that store needs a **Service Location** mapped to it. Add one under Settings and the message goes away. This is the usual cause when the module is installed, POS Integration and Work Order Intake at the Register are both on, and creating a work order still fails.

## Can a deposit be taken at the counter?

Yes, and it follows the deposit rule you have set. A **fixed** deposit is named on the button and filled in for the cashier. A **percentage** deposit shows no amount, because there is no quote yet to take a percentage of — it falls due when the quote is approved, as it always has. If you require no deposit, the button is not shown at all. Part payment is fine; the shortfall stays visible on the work order.

## A cashier mistyped a serial. Can they fix it?

Yes, while the customer is still at the counter — **Edit work order** on the confirmation screen reopens it, and items can be added, corrected or removed. Once the work order has moved on (a technician has started, or a quote has gone out) the register stops offering it and changes are made in the back office, so that nobody's work is overwritten by a till that does not know about it.

## Do old drafts pile up forever?

No. Drafts older than the configured window — the **Draft Expiry (days)** setting, default 30 days — are deleted automatically each day. Setting that to 0 disables auto-purge. You can also delete drafts by hand, individually or in bulk, from the Drafts list.

## Can I look up whether we've serviced this unit before?

Yes. As you tab out of the serial field on the intake form, a prior-repair lookup surfaces up to 10 matching past work orders for that serial inline, so you can see the item's history before you start.

# Work Order Lifecycle

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## What are statuses and how do they move?

Each work order sits in a status (Intake, Diagnosing, Quote Pending, Awaiting Approval, Approved, Awaiting Parts, In Progress, On Hold, QA, Ready for Pickup, Closed, plus side rails like Declined, Cancelled, Sent to Vendor, Back from Vendor, Warranty Claim). Sixteen statuses and their allowed transitions ship by default. You move a work order using the status selector on its detail page; a transition can require a note before it's allowed, and entering a status flagged *notify customer* sends a status-change message.

## Can we rename statuses or add our own?

Yes, under **Service & Repair → Statuses**. You can rename a status, set its pill color, edit the customer-visible label separately from the internal name, add new statuses, and control which statuses may transition into which. A status that already has work orders attached can't be deleted — mark it inactive instead.

## What are priorities and surcharges?

Priorities (Normal, Rush, Emergency by default) each carry a surcharge percentage that's added to the quote — defaults are 0 / 15 / 35%. You can add bespoke priorities (e.g. "VIP", "Insurance Claim") with their own color and surcharge under **Priorities**.

## Who is a "technician", and how do I assign work?

A technician is any admin (staff) user flagged with the *Technician* toggle. Only flagged technicians appear in the *Assigned To* dropdowns on work orders, on the Tech Dashboard, and on the Technician Rates page. Assign a repair from its detail page; the WO grid also supports bulk technician reassignment with a disposition reason.

## What is overdue / the SLA?

Each intake captures its own SLA due date from the Default SLA (days) setting. Work orders past that date are flagged *overdue* on the Work Orders grid and the Dashboard. Changing the default SLA later only affects new intakes — existing repairs keep the due date they were stamped with.

# Work Orders List & Reporting

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## How do I change status on many work orders at once?

Tick the work orders you want on the Work Orders (or My Queue / Drafts) grid. A **selection dock** pins to the screen showing how many are selected and offers bulk **Change Status** and **Reassign Technician**. Change Status only lists the statuses that *all* the selected orders are allowed to move to, so you can't drive part of the batch into an invalid state. Your ticks persist as you page and filter — **cross-page selection** means select-all accumulates across every page — and the dock, bulk actions, and exports all work off that running selection. If a bulk action can't be applied to one of the orders, the failure message names the **work order number**, never an internal id.

## How do I find the right work orders quickly?

Every grid has **in-grid column filters**: type-as-you-go text boxes; **Status / Priority / Service Location** multi-select dropdowns; from/to **date-range** pickers on date columns; and min/max **money-range** boxes on money columns. A universal search box and an **Overdue** toggle sit alongside and filter without a full reload. Columns are sortable, there's a pager above and below each grid, and you can set the page size to **100 / 250 / 500 / All** (remembered for your session). The Drafts grid also adds a **Created By** column and filter so you can see which staff member started each draft.

## Can I export the work-order list and the reports?

Yes — to both **Excel** and **PDF**. On the grids, the export follows your selection: if you've ticked rows it exports just those, otherwise it exports the current filtered set, and the button tells you which it will do ("Export 3 selected" / "Export filtered"). The exported Service Location column shows the location name. In **Reports**, every report exports to Excel and to PDF (wide reports print landscape), honouring the filters you have applied. Summable numeric columns carry a **grand-totals row** computed over the whole result set — shown on screen, in the Excel export, and in the PDF — with aging and vendor-performance totals using weighted averages rather than a naive average. There's also a new **Revenue by Service Location** report.

# Scheduling & Locations

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## How does scheduling work?

A work order can carry an *Expected Start Date*, set on the intake form or the WO meta panel. The **Calendar** (month / week / day / list views) shows scheduled and in-process repairs; drag-to-reschedule shifts the expected start and due dates together and logs the change. The Dashboard also has an "Upcoming This Week" panel.

## We have more than one shop. How do repair locations work?

When In-Store Pickup is installed, you register your benches/sites under **Service Locations**, then map each technician to one or more locations with a default. Intake pre-fills the location from the current user's default mapping. Single-location shops can skip this — the location columns hide when there's only one Service Location. The Service Location also drives which store's payment account and tax address a repair uses.

## What is a Service Location, and how is it different from a store?

A **Service Location** is the physical bench or site where a repair is actually worked, and it is now the primary concept staff and customers see everywhere — on intake, the Work Orders grid, the calendar, reports, and exports. A *store* is the underlying Shop/sales-channel record that handles invoicing and work-order numbering. When a Service Location is enabled in Settings it **requires a mapped store**: choosing the location on intake derives the store automatically, so the store still drives numbering and invoicing while everyone sees the friendly Service Location name. In short, staff and customers think in Service Locations; the store is the accounting record behind it.

# Quotes, Parts & Labor

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## How do I build a quote?

On the work order's Quote tab, add line items (part / labor / flat / fee / discount) with quantity, unit cost, unit price, and a taxable flag. You can pick a **flat-rate** row to auto-fill a common repair at a fixed price, or search the catalog to pull a part (which fills description, price, and the product link). Totals recalculate on every change, and the priority surcharge is applied to the subtotal before tax. Use **Print Quote PDF** and **Send Quote to Customer** (fires the quote-ready message) from the same tab.

## How does parts stock work?

With the Inventory integration on, parts lines reserve from tracked stock, consume it when work proceeds, and restock on cancellation, and the picker shows real on-hand counts. With Inventory off, parts are free-text with no stock movement.

## How is labor tracked?

Each technician can start/stop a timer on the work order (one open timer per tech), or add a manual time entry with a reason. Time is valued at that technician's hourly rate at the moment it's recorded, so historical costing stays stable even if you change rates later. A per-tech rollup shows total, billable minutes, and billable cost; long-running and idle timers are flagged for review.

## What happens when the customer approves or declines?

Staff can approve on the customer's behalf, or the customer can approve/decline in their portal. Approval stamps the approval time, bumps the quote revision counter, and (if the deposit policy requires it) sets the required deposit. A decline records a reason.

# Payments

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## What ways can a customer pay for a repair?

Three rails: **online** (the customer pays by card themselves, card-not-present), **in-store / POS** (a card taken on the register at the counter), and **manual** (an admin records a cash, check, or external payment). Every payment is recorded against the work order ledger and the balance recalculates automatically.

## How does online payment work?

You send the customer a tokenized pay link. The link opens a dedicated, minimal pay page where the **single-use, expiring token is the authorization** — no login needed. They enter their card (Stripe Elements) and submit. The charge captures immediately (it's a counter payment, not an authorize-now/capture-later e-commerce checkout). If the bank asks for 3-D Secure, the page completes the challenge and the charge is finalized. On success the customer is offered a receipt and the tracking link.

## Does the money go to the right store's account?

Yes. Online, POS, and Terminal card payments all resolve the store from the repair's location (falling back to the work order's own store) and route through that store's payment account — its **Stripe Connect** connected account when the store is mapped to one, otherwise the store's own per-store Stripe keys. Service & Repair uses the exact same store payment setup as the online store, POS card, and Terminal reader, so funds settle to the correct store. If a store has a connected account that isn't accepting payments yet, the charge is blocked rather than routed to the wrong account.

## Is the card's ZIP / address checked (AVS)?

Yes. The online pay page collects billing details, which Stripe uses for address verification (AVS) on the charge. On a successful charge the billing address is written back to the customer's address book, and — if the customer opted in — the card can be saved as a reusable payment method for next time.

## How do I refund an online card payment?

Refund it from the work order's payment history. It issues a Stripe refund against the original charge on the same account it was taken on (the connected account under Connect, or the store keys), records a matching refund line so the balance reconciles, and is capped to the not-yet-refunded portion of that charge. Reasons are duplicate / fraudulent / requested-by-customer. Only online card payments refund to the card here; use a manual refund for cash/check.

## Why can't I just key a card into the manual payment form?

By design. The manual payment form records cash, check, or external-ledger payments only. Card and online payments must go through the POS register or the online charge flow so real money actually moves through the processor — the module refuses to record an un-charged card as a "manual" payment.

## What is the card fee line?

If card-processing fee recovery is enabled, a fee (a percentage plus a fixed amount) is added on top of card payments. The customer is charged base + fee, but only the *base* reduces the repair balance — the fee is recorded on its own so your ledger stays clean. On a refund, base and fee are returned proportionally.

## How do deposits work?

Your deposit policy (None / Percent of quote / Fixed amount) sets the required deposit at approval. When a deposit payment fully covers what's required, a work order sitting in "Awaiting Deposit" auto-advances to "Deposit Received" so the customer's tracking page updates. Staff can override the deposit amount on an individual quote.

## Can a cashier charge a repair at the POS register?

Yes. From the register the cashier looks a work order up by invoice number, work-order or claim number, or customer name/email/phone; the lookup returns the balance due and the correct store to charge through. The card payment is then recorded back against the work order.

# Warranty

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## How does warranty eligibility get decided?

With Warranty Handling on, and when a work order links to a prior Shop order, the system finds the most specific warranty term (product → category → global → the Default Warranty (months) setting), reads the order's purchase date, computes the expiry, and flags the repair eligible if it's still in date. Repair type can be customer-paid, warranty (manufacturer), warranty (store), or goodwill.

## What happens to the totals on a warranty or goodwill repair?

Warranty and goodwill repairs auto-zero the customer-facing totals (final total, tax, and required deposit) while keeping the underlying line totals intact for cost accounting. There's also a deny-with-reason flow and a warranty claim packet PDF.

## How do I record a warranty reimbursement?

Once a manufacturer or store warranty claim has been paid out, open the work order's **Warranty** tab and record the **reimbursement received**. Enter the amount received and save — the module writes the amount against the claim and **closes/settles it** (marked approved/paid). This completes the warranty loop from claim to approval to reimbursement recorded, so your warranty accounting reconciles.

# Loaners & Vendor Repairs

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## How do loaners work?

With the Loaner Pool on, register each loaner unit (asset tag, make/model, serial, condition). Check one out against a work order with a deposit, ID reference, expected return, and condition photos; the unit flips to "out" and a deposit payment is recorded. Check-in records the return condition, any damage charge, and releases the deposit. An overdue scan can batch-notify customers past their return time.

## How do outsourced vendor repairs work?

With Outsourced Vendor Repairs on, keep a vendor directory (contact, turnaround SLA, markup). The send-to-vendor flow captures outbound tracking, expected-back date, and vendor cost (hidden from the customer), and auto-transitions the status; receiving it back captures inbound tracking. A vendor performance report tracks turnaround, cost, and job counts.

# Notifications

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## What emails does the customer get?

Whichever events you enable: intake confirmation, quote ready, quote approved, status changed, parts arrived, ready for pickup, loaner overdue, and quote expiring. Email is delivered through the Messaging module, and the wording/branding lives in Messaging admin so it matches your other shop emails. A payment receipt email is also sent after a successful online payment. Customer email tokens include `{service_location_name}`, and `{store_name}` now resolves to the physical Service Location (falling back to the channel name only when a location isn't mapped).

## Do staff get notified about repairs?

Yes. As well as the customer emails, the module now emails **staff**. Notifications go to the **assigned technician(s)** plus a **configurable list of managers**, and fire when a work order is **assigned / reassigned**, when a **customer replies**, and when a quote is **approved** or **declined**. There's also a **daily overdue-work-order digest** — an SLA reminder sent on a schedule so nothing slips. All of this is switched on and configured under **Settings**, in a Staff notifications section with per-event YES/NO toggles and the manager recipient list.

## Can the customer get text messages too?

Yes, if SMS is enabled. Pick a provider (Twilio, AWS SNS, or a generic webhook), set the from-number/sender ID and credentials, and choose which events also send SMS. All **10 SMS events have their own individual template**, so each moment can be worded independently in Settings. Templates use tokens like `{customer_first_name}`, `{work_order_no}`, `{status_name}`, and `{tracking_url}`. Most shops send fewer SMS than emails — usually the moments that matter (Quote Ready, Ready for Pickup, Loaner Overdue).

## Where do customers see their repairs?

Signed-in customers now have a **My Repairs** page inside their **My Account** area at `/account/my-repairs`, sitting right beside **My Orders** with the same account navigation and storefront look. It lists all their current and past repairs — work order number, item, status pill, total, and submitted date — newest first, each with a **View** link to that repair's tracking page. The page is added **automatically** (no page building needed) and appears only while Service & Repair is enabled.

## How does the customer track their repair?

From **My Repairs** (see above), signed-in customers open a detail/tracking page with a status timeline, quote approve/decline, a message thread, and photo/document upload — and, when a deposit is requested, they can now **pay it online** right there, the same way the emailed payment link works. Customers without an account use a public tracking link emailed at intake — that page is gated by a two-of-three identity check (zip, phone, email) so the URL alone doesn't reveal the repair. A "My Repairs" widget is also available for CMS pages.

# Slips & Printing

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## Where are the printing settings?

On the **Slip Designer** page (**Service & Repair** → **Slip Designer**), in the **Printing** panel at the top: **Print Work Order Documents On**, **Receipt Paper Width**, **Item Tags** and **Show Prices on the Shop Copy**, saved with **Save printing settings**. They used to be on the Settings page. These set the admin's printing; each POS register is set in **POS** → **Stations** (the **Work Order Printing** column).

## Can we change what a slip prints?

Yes. Every slip (drop-off receipt, pickup receipt, pickup release, work sheet, item tag and payment receipt) has a built-in **Indition basic** layout that prints what your shop has always printed. **Duplicate** it, then drag the pieces into the order you want, take off the ones you don't need, change their wording, size, bold and upper case, add your own text, and **Save layout**. Make the new layout the default to print it.

## Why can't I edit the Indition basic layout?

It is built in, so it always prints exactly what your shop has always printed. Only its paper, inner margin and printer alignment can be set (**Save paper, margin and alignment**). To change anything else, **Duplicate** it and change the copy.

## I saved a new layout, but the old one still prints.

Only the slip's **default** layout prints. Choose **Make default** on it in the Slip Designer list, or set **Use this layout by default** to Yes in the designer. The drop-off receipt, the work sheet and the pickup receipt have two defaults, one for the receipt printer and one for Letter: a Letter layout prints only on a full page, and a roll layout only on the receipt printer.

## Can I try a layout without changing what prints?

Yes. **Test print** in the designer prints the slip exactly as the preview shows it and saves nothing. **Preview with work order** lets you check it against a particular work order by typing its number.

## What prints when we print on a full page?

The document's **Letter default**. Out of the box that is the built-in *Indition basic drop-off receipt (Letter)*, *Indition basic work order sheet (Letter)* or *Indition basic pickup receipt (Letter)*, the full pages exactly as before. To design your own, duplicate one: the copy lays the document's pieces out across the page with larger type. Only these three documents print on Letter; item tags, the pickup release and the payment receipt print on the receipt printer only.

## What paper sizes can the slips print on?

58mm, 76mm, 80mm and 112mm rolls, and Letter for the three full-page documents. A receipt printer's head prints less than the paper's width (48mm, 64mm, 72mm and 104mm), so the slips are laid out at that width and nothing is cut off at the right. Set **Receipt Paper Width** (and each station's paper) to the roll actually in the printer.

## The slip prints off-center, or text touches the edge.

First check the paper width is set to the roll in the printer, in the Printing panel for the admin and in **POS** → **Stations** for a register. If the printer still puts everything slightly off, print one slip, measure how far out it is, and set **Printer alignment** on the slip's layout (**Move right** / **Move down**, in mm). If text touches one edge, give that side more **Inner**

**margin.** Both can be set on the built-in layouts too. For printer driver settings, see the separate **Receipt Printing** documentation pack.

### Why is there a tiny mark at the end of every slip?

It is the end mark: a 1mm mark 12mm below the last line of every roll slip. Printer drivers trim the blank paper off the end of a receipt, and the mark makes the printer feed the slip past its cutter first, so the cut never goes through the bar code or the last lines.

### How do we put our logo on the slips?

Choose **Manage Logos** on the breadcrumb bar of the Slip Designer and drop your logo on the drop area. An **SVG** in solid black on a white or transparent background prints best, as sharp as the text; a **PNG** works too, ideally at least 1,000 pixels wide. JPG isn't accepted, and files are limited to 2 MB. Changes save at once. Without a receipt printer logo, the slips print the shop name.

### Why not just use our website logo on the slips?

A receipt printer prints black dots only, so a color or gray logo comes out speckled, and a picture is resampled to the printer's resolution and blurs. A black SVG prints cleanly. The website logo is still used where it looks right: Letter pages, PDFs, emails and the customer's pages.

### Can each store location have its own logo on its slips?

Yes. With more than one store location, set **Set different logos for each location** to Yes in Manage Logos and give each location its own. A slip prints the logo of its work order's repair location, or the shared logo when that location has none.

### Do POS and Service & Repair need separate logos?

No. With both installed, Manage Logos shows **Use the same logos in Service & Repair and POS**, Yes to start. While it is Yes, one set of receipt printer logos serves both: a change in either designer changes the other. Set it to No to keep them separate.

### What does the payment receipt show on a repair with two invoices?

The register's payment receipt prints the invoice the payment was taken against: that invoice's number, its total, what has been paid on it and its balance. A payment that names no invoice is measured against the whole work order. Placeholder email addresses given to walk-in customers never print.

### Can the payment receipt carry our logo?

The built-in *Indition basic payment receipt* is the register's own receipt, the same look as a POS sale receipt, and prints no logo. The *Standard payment receipt* prints the Logo piece: make it the default, or duplicate either layout and add the Logo piece.

## Troubleshooting

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### The Service & Repair menu only shows "Settings".

The module master switch is off (or it was just installed). Open **Settings**, turn *Service & Repair Module Enabled* on, pick or create a store, and save. The full menu appears after you save and refresh. If "Service & Repair" isn't in the

menu at all, contact Indition support to add the module.

### **The online pay page says card payments aren't configured for this store.**

The store the repair resolves to has no usable Stripe setup — either no per-store keys, or a Connect connected account that isn't accepting payments yet. Fix the store's payment configuration; the module deliberately blocks rather than charge the wrong account.

### **I can't assign a technician to a work order.**

No staff user is flagged as a technician yet. Flip the *Technician* toggle on the relevant users (on the User Service Locations / Technician Rates pages). Only flagged technicians show in the Assigned To dropdown.

### **My draft disappeared.**

Drafts auto-purge after the **Draft Expiry (days)** setting (default 30 days), and submitting a draft as a real work order clears it. If you resumed a draft and submitted the work order, look for it in Work Orders, not Drafts.

### **Tax looks wrong on a quote.**

If VertexTax is installed and configured, tax is calculated from the repair's address (the service-location address for pickup, or the customer's shipping address for return shipping). Non-taxable lines and exempt tax classes skip tax. Without Vertex, the flat Tax Rate (%) setting is used. If it still looks off, check the line's taxable flag and tax class.

### **A refund won't go to the card.**

Card refunds only work on payments taken via the *online* channel and that still have a refundable balance on the original charge. For a payment taken as cash, check, or on the POS register, record a manual refund (or refund it on the register) instead.