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INDITION COMMERCE

Service & Repair

User Manual — running repairs end-to-end: taking an item in, quoting it, collecting a deposit, doing the work, getting paid, and handing it back

Indition Service & Repair · User Manual · September 2026

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> Sections 1–3 orient you. Sections 4–14 follow one repair from drop-off to hand-over — read them in order the first time. Sections 15–24 are reference: warranty, notes, communications, the customer's screens, documents, the Slip Designer, reports, integrations, the full settings list, and an FAQ/glossary. Words in **bold** are buttons, tabs, or links you click on screen.

1. Welcome & how the system is organized

Service & Repair turns your repair desk into one organized system. Everything about a repair lives in a single record called a **work order** — the customer, the item, what's wrong, the quote, photos and signatures, the labor, every payment, and a full dated history of who did what. Nothing lives on sticky notes or in someone's head.

The shape of a repair

A repair moves through a few clear stages: **take it in** → **diagnose & quote** → **get the customer's approval (and deposit)** → **do the work** → **get paid** → **hand it back**. The system guides you through that path and keeps the customer informed automatically along the way.

Service Locations — where a repair is worked

Every repair is worked at a **Service Location** — the bench or site where the item actually sits. The Service Location is the primary place-concept staff and customers see throughout the module. When a location is enabled in Settings it is

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mapped to a store, and that mapped store is what quietly drives **invoicing and work-order numbering** behind the scenes — but on screen, in lists, on documents and in emails, people see the **Service Location name**, not the store or sales-channel name.

It connects to the rest of your shop

Repairs aren't an island. Each work order's sales tax, payments, and reporting flow through the store its Service Location maps to, the same store the rest of your business uses. When you have the matching modules turned on, repairs also tie into your **inventory** (parts), your **POS register** (payments), your **customer accounts** (self-service), and your **messaging** (email/SMS). Section 22 covers each integration.

> You can't break anything by exploring. The system only changes something when you press a clearly-labelled button (Save, Add, Send, Charge, Complete). Every change is recorded in History with the person and time.

2. User roles — who can do what

Not everyone needs (or should have) the same powers. The module ships with a set of roles your administrator assigns to staff. What you can see and do depends on your role.

Role	Typical person	Can do
Service Repair Admin	Shop owner / system admin	Everything: settings, catalogs, roles, all work-order actions, reports, overrides.
Service Repair Manager	Service manager / lead	All day-to-day work-order actions plus manager-only powers: override a deposit hold, complete & hand over, reassign across technicians, **reopen a completed, paid-in-full work order**, and run reports. Cannot change global module settings.
Service Repair Technician	Bench technician	Work the bench: view assigned work orders, log labor, add quote lines and notes, change status within the normal flow. Cannot override deposit holds or change settings.
Service Repair Calendar	Scheduler / front desk	See the calendar and events (read scheduling); a focused role for staff who only need the schedule.

Technician location gating (multi-location shops)

If your shop turns on "restrict work to a technician's repair location," a technician can only perform work on repairs at the location(s) they're mapped to. On a work order at another location they can look but not act; managers and admins are never gated this way. An optional cross-location labor setting lets a technician log time on a repair at another location while still being blocked from other changes.

The "Working at" picker

A technician mapped to several locations sees a **Working at:** picker in the top bar to say where they are today; new intakes default to that location, and they can set a default. Staff at a single location never see it.

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> If a button or tab described in this manual isn't visible to you, it's usually because your role doesn't include that action, or the related feature isn't enabled. Ask your manager.

3. Getting around: menu, dashboards & the work order screen

The menu

In the admin sidebar, **Service & Repair** holds: **Dashboard**, **Work Orders**, **Tech Dashboard**, **Calendar**, **Reports**, **Slip Designer** (how work order documents print, Section 20), and — depending on what's enabled — **Statuses**, **Priorities**, **Dispositions**, **Flat Rates**, **Warranty Terms**, **Vendors**, **Loaner Pool**, **Service Locations**, **Technician Rates**, and **Settings**.

Dashboards

- **Dashboard** — the shop's pulse: open repairs, overdue jobs, what's waiting on a deposit or approval, and recent activity.
- **Tech Dashboard** — a technician's personal queue of assigned work, ordered so they know what to pick up next.
- **Calendar** — repairs by date/due date, filterable by service location.

The work order screen

Every work order looks the same:

- **Header** — work order number, customer, item, and a colored **status chip**. Click the chip to see and choose every status you're allowed to move to.
- **Next-step button** — one big green button for the single most likely next move (e.g. ▶ **Begin Work**). It always points *forward* through the workflow; side moves live in the chip.
- **Deposit banner** — when a deposit is owed it sits above the tabs on every tab, with the amount and a **Take deposit** button. It stops appearing once the first invoice is issued (Section 8).
- **Locked bar** — a green bar, "**Locked.** This work order is completed and paid in full.", with **Reopen work order** for managers (Section 14).
- **Tabs** — Overview, Quote & Parts, Labor, Orders, Loaner, Payment, Photos & Signatures, Documents, Notes, Messages (Section 5).
- **Quick-note button** — the floating ✎ **pencil** in the bottom-right for instant internal notes (Section 16).

Working with the Work Orders list

The **Work Orders** grid — and the **My Queue** and **Drafts** grids, which behave the same way — is a full working list, not just a table. Every column is sortable (click the header), and a universal search box plus an **Overdue** toggle sit above it. Overdue work orders carry a red **OVERDUE** marker, and the status and priority pills automatically pick legible **contrast text** so labels stay readable on any configured color.

FILTERING IN THE GRID

- **Type-as-you-go text filters** on text columns — start typing and the list narrows without a full page reload.
- **Multi-select dropdowns** for **Status**, **Priority**, and **Service Location** — tick any combination.

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- **Date-range** (from / to) pickers on date columns, and a **min / max money range** on money columns.
- The universal search and the Overdue toggle apply alongside the column filters.

SELECTING ROWS & BULK ACTIONS

Tick the checkbox on any rows and a fixed **selection dock** appears, showing how many work orders are selected. From the dock you can:

- **Change Status** — the menu offers only the statuses *every* selected order is allowed to move to, so you can't make an illegal move in bulk.
- **Reassign Technician** — move the whole selection to one technician.

Your ticks **persist across paging and filtering** — select rows on page one, page forward, tick more, and they all stay selected and counted (select-all accumulates across pages). If a bulk action can't apply to one of the orders, the message names the **work order number**, never an internal id.

EXPORTING THE GRID

The **Export** button produces an **Excel** or **PDF** file. It exports the *ticked* rows first; if nothing is ticked it exports whatever your current filters show — and the button tells you which it will do (e.g. *"Export 3 selected"* vs *"Export filtered"*). The **Store** column is shown as the **Service Location** name in the export.

PAGING & PAGE SIZE

A pager sits **above and below** each grid. Choose a page size of **100 / 250 / 500 / All**; your choice is remembered for the session.

DRAFTS

The **Drafts** grid (half-finished intakes) adds a **Created By** column and filter, so you can see and narrow to the staff member who started each draft.

4. Taking an item in (intake)

Creating a work order when a customer arrives is called **intake**.

1. **Start.** Service & Repair → Work Orders → **Create Work Order**. Half-finished intakes can be saved as a **draft** and resumed.
2. **Customer.** Search by name/email/phone, or add a new customer on the spot. Confirm **email** and **mobile** — these drive every notification, the tracking link, and payment requests.
3. **Item & problem.** Make / Model / Serial; the **reported issue** in the customer's words; and **condition notes** (existing damage, missing parts). If your shop has switched on **Require Serial Number on Intake**, the serial is marked with an asterisk and an item cannot be added without one.
4. **Accessories.** Tap each accessory the customer left from the **Checklist** (power cord, foot pedal, case… — your shop's own list), and type anything else under **Anything else**, so you return everything.
5. **Service Location & priority.** Choose the **Service Location** from the picker — it defaults to your "Working at" location. The location is the only place-choice you make; the store that handles invoicing and numbering is **derived automatically** from it. Set the priority — *Normal*, *Rush*, or *Emergency* — which can carry a surcharge.
6. **Photos.** Take drop-off photos so the item's arrival condition is on record.

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7. **Signature & receipt.** Capture the customer's drop-off signature if used, save, and print the **Drop-Off Receipt** (Section 19) with the work order number and tracking link/QR.

Items the customer bought from you

On the **From an existing order** tab, open one of the customer's orders and choose **+ Add** on the item they brought in. Its **Serial Number(s)**, **Reported Issue** and **Condition on Intake** open right there under the order line; fill them in and choose **Add item**. If the item was bought under a different account, use the **Order lookup** tab and type the full order number as it is printed on the receipt or invoice.

> On save, the customer gets an **intake confirmation** email with their tracking link (if that event is enabled). A work order number is assigned from the sequence of the store the chosen Service Location maps to (e.g. `SR-1001`).

Taking an item in at the POS register

A cashier can open a work order and run the whole intake from the till, without signing in to the back office. It is the same work order, in the same numbering sequence, visible immediately on the Work Orders screen — only the way it was created differs.

This has to be switched on first: see **Work Order Intake at the Register** in the settings reference. If it is off, the register shows no sign of it.

It works on **both** kinds of register. The steps below describe the desktop one; on a **touch** register it is **Repairs → + Take an item in** and everything is on one scrolling screen. The work order that results is the same either way — same numbering, same information — though drop-off photos, signatures, drafts and amending a work order afterwards are currently desktop-only.

1. **Open it.** Press **F10** at the register and choose **Create Work Order**. (The same dialog still finds an existing work order — type a number or a name and press Enter.)
2. **Customer.** Use the register's own *Customer* tab on the right to search, or add a new customer. While the intake form is open, whoever you pick goes on to the **work order**, not on to a sale — the panel shows a reminder saying so.
3. **Items.** Type make, model and the reported issue, or add an item from the *Products* tab to link it to something you actually sell. If the customer has bought from you before, **Look up their previous orders** lets you pick the exact item they purchased, which is what allows the system to work out warranty cover on its own.
4. **Serial numbers.** Every item offers a serial box. Items that are sold as serialized are marked **SERIALIZED** and highlighted until a serial is entered. If your shop requires a serial on every item, the box says so and the register will not add an item, or create the work order, without one. If the serial has been in before, a **Seen before** note appears with the previous repairs — useful before the customer has to explain the history.
5. **The rest of the intake.** Condition notes, accessories, priority, promised date and where the item is being stored, exactly as in the back office.
6. **Finish.** The confirmation screen lists what is being left — make, model, serial and condition for each item, not just a count — so you can read it back to the customer before they go.

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From that confirmation screen you can:

- **Print** the drop-off receipt, and the work sheet with a tag for each item. The tags carry the barcode that F10 scans back later. Each register prints on its receipt printer or as a full page, as it is set in **POS → Stations** (Section 19).
- **Email the receipt**, or **text a link** where the customer has agreed to texts and SMS is switched on. Buttons that cannot work are not shown.
- **Take a deposit** — see below.
- **Add photos** of the item as it arrived.
- **Edit the work order**, for the inevitable "actually, the foot pedal is in the car". See *Correcting a counter intake* below.

> **Half-finished intakes.** If the next customer is waiting, press **Save as draft** and come back to it. Drafts saved at a register are listed when the intake screen opens, and belong to that store.

Taking a deposit at the counter

What the register offers depends on the deposit rule set for the shop:

- **No deposit required** — no deposit button appears at all.
- **A fixed amount** — the button names it ("Take deposit ($50.00)"), the amount is filled in for you, and the confirmation keeps showing what is still to collect until it is paid.
- **A percentage** — no amount is suggested, because there is no quote yet to take a percentage of. The deposit becomes due when the quote is approved, and the screen says so.

Deposits are taken on the same screen used to settle a work order from F10, with whichever tenders the shop has enabled. A customer who can only leave part of it today is fine — the shortfall stays on the work order and is chased later.

Correcting a counter intake

Edit work order reopens the form with everything that was saved, so a mistyped serial or a forgotten accessory can be fixed while the customer is still at the counter. Items can be added, corrected or removed, and the work order keeps its number.

> This is for the minutes after drop-off. Once the work order moves on — a technician has started diagnosing, or a quote has gone out — the register stops offering it, and changes are made in the back office instead. That protects work someone has already done on the repair from being overwritten by a till that does not know about it.

5. The work order screen, tab by tab

Tab	What it's for
Overview	Summary of customer, item, status and dates; a line-item snapshot; shortcuts to the next action.
Quote & Parts	Build the priced quote — parts, labor, flat rates, fees, discounts; totals, tax, deposit (Section 7).
Labor	Live timer + manual time entry, costed at the technician's rate and logged against the order's labor line — this is the time that gets billed (Section 9).

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Tab	What it's for
Orders	Appears once a quote is approved: each order, whether it is invoiced, its parts sourcing, and **Invoice this order** / **Take payment** / **Invoice PDF** / **Email invoice + pay link** (Section 13).
Loaner	Lend a temporary unit and take it back (Section 11).
Payment	All the money: the summary, the **Invoices** grid, a **Not yet invoiced** panel per open order, **Take a payment** (charge a card, send a payment link, record a payment), Payment History, and complete & hand over (Sections 12–14).
Photos & Signatures	Every photo (drop-off, in-progress, pickup) and captured signatures.
Documents	Upload related files; open the printable PDFs (Section 19).
Notes	Internal (staff-only) and customer-facing notes (Section 16).
Messages	Two-way customer messaging by email/SMS (Section 17).

A **History** view logs every status move, payment, and note — with who and when — and is your audit trail if anything is ever questioned.

Correcting what was taken in

The Overview tab's **Items Being Serviced** panel lists each item. Choose **Edit** on an item to change its make, model, serial, description, **Reported Issue** and **Condition on Intake**; each change saves as you leave the field, and "Saved ✓" confirms it. The **Accessories Included** row underneath works the same way: choose **Edit**, tick or untick from the checklist, or change the free text. The accessories summary at the top of the Overview updates straight away.

> If your shop requires serial numbers, a serial that has been entered cannot be cleared, and **+ Add item** needs one. Items saved before the setting was switched on can still be edited without one. Once a work order is completed and paid in full it is locked, and these buttons are hidden.

6. Statuses & the repair workflow

A status says where a repair is. The system ships with a full set; your manager can rename them, recolor them, set a separate customer-facing label, and add your own.

Status	Meaning
Intake / Received	Just dropped off.
Diagnosing	Being assessed.
Quote Pending / Awaiting Approval	A quote is being prepared / sent and waiting on the customer.
Approved	Customer approved the quote.
Awaiting Deposit / Deposit Received	Waiting for the deposit / deposit paid in full (Section 8).

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Status	Meaning
Awaiting Parts	Waiting on a part to arrive.
In Progress	Work is happening.
On Hold	Paused (waiting on customer, etc.).
Sent to Vendor / Back from Vendor	Out to an outside repairer / returned (Section 10).
QA	Final quality check.
Ready for Pickup	Done and ready to collect.
Closed / Completed	Handed back and finished.
Declined / Cancelled	Customer declined the quote / repair cancelled.
Warranty Claim	A warranty job in progress (Section 15).

Moving forward vs sideways

The green **next-step button** always shows the single best *forward* step (e.g. from *In Progress* it offers *Send to QA*, never back to a previous step). To go anywhere else — On Hold, back a step for rework, Cancel, Sent to Vendor — **click the status chip**, which lists every allowed move from where you are.

The deposit gate

If a deposit is required, the system won't let a repair enter "work" statuses (In Progress, etc.) until it's paid — a manager can override the hold with a reason (Section 8). Once the first invoice has been issued there is no deposit hold at all.

Completing and locking

A repair can't be completed while money is owed, and once it is *Closed* and paid in full it locks. Only a manager can reopen it (Section 14).

7. Building & sending a quote

The quote is the price for the repair, built on **Quote & Parts**.

Line types

- **+ Part** — type it, or use **catalog search** to find a real product by name/SKU (pulls price and, with Inventory on, stock on hand).
- **+ Labor** — at the shop's standard rate.
- **+ Tech Labor** — at a specific technician's hourly rate.
- **+ Flat-Rate** — a pre-priced job from your flat-rate list.
- **+ Fee** — diagnostic fee, shop supplies, etc.
- **+ Discount** — goodwill or promotion.

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Edit quantity, price, and description inline; totals (subtotal, tax, deposit) update live. Tax is a flat percentage by default, or — if VertexTax is connected — an accurate address-based rate (Section 22). *Rush* and *Emergency* priorities can add a surcharge.

Sending & approval

1. **Print / email / send for approval.** The customer reviews online and approves or declines.
2. **On approval** the quote **locks** so the price can't drift, an **order** is created from it (e.g. `SR-11220-1`), and the repair is ready to proceed (a deposit is requested if required). The order's labor starts at **0 hours** and grows as technicians log time.

> **The quote is an estimate.** Approving it is the customer's go-ahead to begin work. The invoice bills the hours actually logged — so the final bill can be lower or higher than the quote. There is no cap at the quoted amount and no warning when it runs over, so talk to the customer if a job is running well past the estimate.

> **Modify an approved quote: Modify Quote** re-opens it and moves the repair back to *Awaiting Approval*; add the lines and click **Finalize Modified Quote**. Higher total → the customer must re-approve (or use **Approve on Behalf of Customer** with a reason); same/lower → just send the update. Once approved, only the **new** lines are added — and if the order has already been invoiced, they go on a **follow-on order** and the next invoice (Section 13).

Multiple quotes

A work order can carry more than one quote (e.g. a diagnosis quote and a repair quote, or good/better/best options). Use **+ New quote** on the Create Quote header to branch; the customer sees the quotes they're meant to.

8. Deposits

A deposit is paid up front, before work starts. Your manager sets the policy: **None**, a **percentage** of the quote, or a **fixed amount** — and optionally treats it as a *minimum* a technician can raise per job.

> **A deposit comes off the final bill.** It is money received and held as a **credit on the work order** — not a separate charge. When an invoice is generated the held deposit is applied to it, and the invoice shows it as **Deposit applied** (the Invoice PDF has a **Less deposit applied** line).

Collecting it

- **After approval** — approving a quote takes you to the **Payment** tab with a callout: "**Quote approved.** Collect the $X deposit now … It comes off the final bill."
- **Banner** — while a deposit is owed, a banner on every tab shows the amount and a **Take deposit** button (jumps to Payment with the deposit selected).
- **Take a payment** with **For** set to the deposit — **Charge a card**, **Send payment link** (**Request the deposit**), or **Record a payment** for money already taken (Section 12).
- **Gate** — the repair can't move into work statuses until the deposit is paid; a friendly message shows the shortfall. A **manager override** (with a reason) lifts the hold; **Reinstate hold** reverses it.

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- **Deposit Received** — paying the deposit in full while the repair waits for it automatically advances it to *Deposit Received* (the customer sees that on their tracking page).
- **Ad-hoc request** — even with no global policy, **Request / adjust deposit** asks for a deposit on one repair: set the amount, add a note to the customer, and the repair moves to *Awaiting Deposit* with a notification to pay.

Held, then applied

The Payment tab summary shows **Deposit received** and **Deposit held**, with a line underneath: "The deposit is taken off the bill: $X applied to invoices so far, $Y held for the next invoice." When you generate an invoice, all of the held deposit is applied by default, up to what that invoice owes. You can apply **less** and hold the rest for charges still to come — for example when a replacement part is still on order — but you must say why (Section 13). Whatever is still held goes on the next invoice by default.

The deposit stage ends at the first invoice

Once any invoice has been issued on the work order, the system never asks for a deposit again on its own: no deposit banner, no *Awaiting Deposit* hold, no automatic deposit request, and a bigger re-approved quote does not raise the deposit. **Request / adjust deposit** is no longer shown. If you need money up front after that, send a payment link with **Or a different amount** (Section 12).

9. Doing the work: assignment, timers & parts

Assigning

Set who's working with **Assign to** / **Assign to Me**. Only staff flagged as technicians appear, and (when location gating is on) only those at the repair's location.

Time

- **Timer** — **Start Timer for Me** / **Stop Timer**; elapsed time is costed at the technician's rate.
- **Manual Time Entry** — for time not tracked live: Technician, Date, Hours, Minutes, Billable, Edit reason, **Log against (order · labor line)** and an optional Note, then **Record Manual Time**.

> **Logged time is what the customer is billed. Log against** defaults to the order's labor line (e.g. "SR-11220-1 · Labor - bench time") — leave it there. Each entry adds to the order straight away: 1 h 30 m at $90/h adds $135.00 to **Not yet invoiced** on the Payment tab. Time logged against "— work order (no order) —" is recorded but **never billed**.

You can keep working after an invoice has been generated. The labor line then shows "(goes on the next invoice)", and time logged against it lands on a follow-on order automatically (Section 13). Once a repair is completed and paid in full it is locked, and no more time can be logged (Section 14).

Parts & stock

With Inventory connected, adding a catalog part **reserves it from stock**, consumes it when work starts, and restocks it on cancellation; the picker shows live on-hand counts. If a part is out of stock, the repair can sit in *Awaiting Parts* until it arrives.

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10. Outsourced (vendor) repairs

When you send a unit to a third party (factory service, board-level work), the **send-to-vendor** flow handles it — available when your shop turns on outsourced repairs and has at least one vendor configured.

1. Pick the **vendor** from your directory.
2. Record the **outbound tracking**, the **vendor cost**, and the **price you charge the customer** (the difference is your margin).
3. The status moves to *Sent to Vendor*; the customer can be notified.
4. When it returns, log the **inbound tracking**, move it to *Back from Vendor*, and carry on.

The vendor performance report tracks turnaround and margin across vendors.

11. Loaners

If you lend customers a temporary unit, register each loaner in the **Loaner Pool** (asset tag, make/model, serial, condition). On a work order's **Loaner** tab:

- **Check out** — pick an available loaner, set an expected return date, take a deposit if required, note the condition, and add check-out photos.
- **Check in** — from the Loaner Pool, record the returned condition and release the deposit (or charge for damage). Check-in works regardless of the repair's status.

Loaners past their expected return are flagged, and an overdue notification can be sent.

12. Getting paid (payments in depth)

All money lives on the **Payment** tab. Once a quote has been approved and an order exists, the tab is built from four parts, top to bottom:

Part	What it shows
Summary	**Invoiced** and **Left to pay on invoices** (once there is an invoice), **Not yet invoiced**, **Deposit received** and **Deposit held**, with a line explaining how much deposit has been applied and how much is held.
Invoices	Every invoice generated so far (Section 13).
Not yet invoiced — $X	One panel per open order: the charges no invoice covers yet, and the buttons to invoice them (Section 13).
Take a payment	Charge a card, send a payment link, or record money already taken — and at pickup, **Complete & hand over**.

Underneath, **Payment History** lists every payment: Date, Type, Amount, Method, Reference. A work order with no orders (for example, a deposit taken before any quote was approved) shows the simpler summary instead — Invoice #,

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Final total, Paid, Balance due — and an **Invoice** action of its own.

> **Paying never closes a repair.** Customers can prepay early without closing the job. But closing does need the money in: a repair can't be completed while anything is owed (Section 14).

Take a payment: For, then three choices

Start by choosing in **For** what the money is for. It lists each open invoice with its balance, and the deposit while one is due. Then pick one of:

- **Charge a card** — "Charge the customer's card now". A card-not-present payment (e.g. over the phone) with the billing address; the amount is prefilled with that invoice's balance.
- **Send payment link** — "Emails the customer a link to pay online".
- **Record a payment** — "Money already taken — charges nothing". For cash, a check, a card run on another terminal, and so on.

At pickup, **Complete & hand over** appears beside them (Section 14).

Where the money goes (Service Location routing)

Each payment is recorded against the store your repair's **Service Location** maps to (its "mapped store"), so it lands in the right ledger — while staff and customers continue to see the Service Location name. If a location has no mapped store, it falls back to the work order's own store. Every payment is stamped with a **channel** — *manual*, *card-present* (POS), or *online* — so reporting is clean.

Record a payment (money already taken)

Enter the **Amount** and pick the **Method** — Cash, Check, Card on another terminal, Gift card, Store credit, or Other… (which asks what). Add a **Reference** (check number, receipt) and a **Note**, then **Record payment**. It appears in Payment History and updates the totals; the status is unchanged.

Charge a card at the counter (virtual terminal)

Key a card in yourself (e.g. a phone payment). The secure card field shows immediately with card-type icons. Fill the **billing address** — verified against the cardholder's bank (AVS), so it must match their statement. Tick **Save this card for future payments** to store it for next time. Click **Pay**.

Saving a card creates a stored payment method and writes the billing address to the customer's record, so it shows on the customer's **Payment Methods** and **Billing Addresses** — the same way the storefront checkout does it.

Send a payment link

The easiest way to collect: send a secure link the customer pays from their own phone. The panel shows the **Email** and **Text (SMS)** it will go to.

- **Ask for** — **Request invoice INV-1001 ($X)** asks for that invoice's balance; for the deposit, **Request the deposit**.

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- **Or a different amount** — enter the **Amount**, **What is this for?** (required for a custom amount) and an optional **Message to customer**, then **Request this amount**. A link for an invoice can never ask for more than that invoice owes.

The link sends without a page reload; a confirmation names the exact channel and recipient (e.g. *"Deposit request for $50.00 sent via email to jordan@example.com"*), and a row is added to History. The customer gets a text such as "Payment request for #SR-11220: $25.00 (invoice INV-1001). Pay online: <link>" and an email showing the amount due, what it is for, your message and a **View your repair & pay online** button. They land on a **minimal, secure pay page** — the **locked** amount, what it's for, your message, and a card form (with the same billing/AVS + save-card options). They pay, see "$X paid — thank you," and are emailed a **receipt**. Each link is **unique, single-use, and expires** after a set number of days (set in Settings).

Paying for work not yet invoiced

If a final payment — by card, payment link, Record a payment, or at the register — is taken against charges that have not been invoiced yet, the system **raises that invoice first** and then applies the money to it. If two open orders both have uninvoiced charges, it asks you to generate the invoice for the one being paid first.

Taking payment at the POS register

When the POS module is enabled, repair payments you record post through the POS transaction system and are stamped as the *card-present* channel.

Refunds & receipts

An online card payment is refunded back to the card with **Refund** on its row in Payment History; refunds show there marked as a refund. Every payment emails the customer a receipt with the amount paid and the **remaining balance** across all the work order's invoices and uninvoiced charges, after any deposit still held.

13. Invoicing

An invoice bills **one order**. Each is final once generated, and a repair can have several.

Generate an invoice

1. On the **Payment** tab find the order's **Not yet invoiced — $X** panel (**Invoice this order** on the Orders tab brings you here). It reads, for example, "Order SR-11220-1. The total grows as time is logged and parts are added. See the lines." If labor hasn't been logged yet, it warns you.
2. Check **Apply deposit** — "All $X by default. Apply less to hold the rest for charges still to come." If you enter less, fill in **Why hold some back?** (e.g. "more parts on order"); it is required.
3. Click **Generate invoice** — or **Invoice & take payment** to generate it and go straight to **Take a payment** for it.

The invoice gets the next number (e.g. `INV-1001`), and its total and the deposit applied are frozen. The History records it — e.g. "Invoice INV-1001 generated for order SR-11220-1. Deposit applied $10.00, $19.80 held for later charges." You can invoice at any status, including a job that isn't finished.

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The Invoices grid

Columns **Invoice** (with its order underneath), **Date** (with "Emailed" and the date once sent), **Total**, **Deposit applied**, **Paid**, **Left to pay** (a **Paid** pill once settled) and **Actions**: **Take payment**, **Invoice PDF**, and **Email invoice + pay link** (**Email again + pay link** after the first send). The customer receives "Invoice INV-1001 for #SR-11220 is ready. Balance due $X. View: <link>" by email and text, where $X is that invoice's balance; the link pays that invoice only.

An invoice is final — follow-on orders

Under the grid: "An invoice is final once generated. Time and parts added afterwards go on the next invoice." Invoicing does **not** lock the repair — you can keep working and charge again:

- Time logged, parts added or quote lines approved after an invoice go on a **follow-on order** (e.g. `SR-11220-2`, "charges since invoice INV-1001").
- The follow-on order gets its own **Not yet invoiced** panel and later its own invoice (`INV-1002`). Any deposit still held is applied to it by default.
- On the **Orders** tab each order card says whether it is invoiced, **Not yet invoiced**, or a follow-on ("charges after invoice INV-1001"), with **Invoice this order**, **Take payment**, **Invoice PDF** and **Email invoice + pay link**.

> **Worked example.** Quote $298.03 with a 10% deposit of $29.80, recorded as cash. The technician logs 1 h 30 m, and order SR-11220-1 comes to $343.03. The invoice is generated applying only $10.00 of the deposit ("Replacement motor still on order"): INV-1001 is $343.03 with $333.03 left, and $19.80 is held. After the invoice, the technician logs another hour and the quote is modified to add a $120 motor — both land on follow-on order SR-11220-2 ($216.60 with tax). **Invoice & take payment** applies the held $19.80: INV-1002 is $216.60 with $196.80 left.

14. Completing & handing over

When the repair is done, move it to *Ready for Pickup* (this emails the customer). Then:

- **Mark Complete** — closes the repair.
- **Complete & hand over** — records the hand-over to the customer and closes it. It appears beside the payment choices on the Payment tab.

> **Both are refused while money is owed:** "Collect the remaining balance of $429.83 before handing over or closing this work order." The figure is everything still owed — unpaid invoices plus charges not yet invoiced, less any deposit still held. Take the payment first (paying for uninvoiced charges raises their invoice for you), then complete. Warranty and no-charge jobs with nothing owed complete straight away.

Then print the **Pickup receipt** (Section 19): the customer keeps the first slip, and signs the second, the shop copy, after ticking off their items and accessories. At the register, the **Pickup receipt** button is on the done screen after **Complete & hand over**.

Locked: completed and paid in full

Once a repair is Closed and fully paid, a green bar reads "**Locked.** This work order is completed and paid in full." It is now read-only:

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No longer possible	Still available
Starting a timer or entering time by hand; adding, editing or removing items; changing priority, dates or location; changing the quote or adding a quote; requesting a deposit	Viewing everything; Invoice PDFs; emailing invoices; Payment History

A repair that is cancelled or declined also stops taking new work — no quote lines, timers or loaner check-outs, and the quick-note button is hidden — while you can still **check a loaner back in**.

Reopening a locked repair

Only managers — Admins, managers and service & repair managers — can reopen it; everyone else sees "A manager can reopen it."

1. Click **Reopen work order** on the green bar.
2. Enter **Why reopen it?** (required).
3. Click **Reopen work order** (**Cancel** is on the left).

The repair moves to *In Progress* and unlocks, and "Reopened: <reason>" is written to History. The customer is **not** told.

15. Warranty repairs

With warranty handling on, the system helps you run warranty work:

- **Eligibility** — when a repair links to a past purchase, it checks the purchase date against the warranty length (per-product, per-category, or the global default in months) and flags the repair as warranty-eligible.
- **Split billing** — separate what the warranty covers from what the customer pays.
- **Deny with reason** — decline a claim with a recorded reason.
- **Claim packet** — print a warranty claim packet PDF for the manufacturer.
- **Record reimbursement received** — when the manufacturer pays you back, log it (below).

Recording a warranty reimbursement

When the manufacturer settles a claim, open the work order's **Warranty** tab and choose **Record reimbursement received**. Enter the **amount received** and save. Recording it writes the amount against the claim and **closes and settles the claim** — marking it approved / paid — so the warranty loop is complete end to end: *claim* → *approval* → *reimbursement recorded*.

Warranty terms are managed under Service & Repair → Warranty Terms; the most specific matching term wins (product → category → global → default).

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16. Notes & internal collaboration

The quick-note button

The floating ✎ **pencil** (bottom-right, any tab) opens a small editor for an **internal** note — staff-only, never shown to the customer. Format it with **bold**, *italic*, underline, a bullet list, and text/highlight color, then **Save note**. It's filed on the Notes tab and logged in History. Ideal for "customer says it's intermittent" or "waiting on John."

The Notes tab

Keeps two lists: **internal** (staff only) and **customer-facing** notes. Use it for longer entries.

Messages vs notes

Notes are for the team; the **Messages** tab is for talking *to* the customer. Anything the customer must not see goes in Notes.

17. Communications: email & SMS

The system keeps customers informed automatically. Your manager chooses which events send a message.

Events

- Intake confirmation (with tracking link) · Quote ready · Quote approved
- Status changed · Parts arrived · Ready for pickup
- Deposit / payment requests (the payment links) · Invoice ready · Payment receipt
- Loaner overdue · Quote expiring reminder

Email

Fully working. Emails use templates managed centrally so wording and branding stay consistent. The default template carries tokens like `{customer_first_name}`, `{work_order_no}`, `{status_name}`, `{tracking_url}`, `{deposit_due}`, and `{amount_due}`. There is a `{service_location_name}` token for the physical Service Location, and `{store_name}` now resolves to that same **Service Location** (falling back to the sales-channel name only when the location isn't mapped). Payment receipts use a dedicated "Payment received" template.

Money messages show the real amounts owed, not the quote figure: the **Invoice ready** message gives *that invoice's* balance ("Invoice INV-1001 for #SR-11220 is ready. Balance due $X. View: <link>"), a payment link names what it is for ("Payment request for #SR-11220: $25.00 (invoice INV-1001). Pay online: <link>"), and the payment receipt shows the amount paid and the **remaining balance** across all the work order's invoices and uninvoiced charges, after any deposit still held. Status buttons and the status menu say **Emails the customer** on any move that sends a message — for example Ready for Pickup ("Good news! #SR-11220 is ready for pickup at <store>.").

SMS — per-event templates

Text messaging for the same event notifications sends when your shop connects an SMS provider (Twilio, AWS SNS, or a generic webhook) and the customer has a mobile on file and is opted in. Each of the **10 SMS events** now resolves to **its own SMS template**, so every event can be worded independently — you are no longer sharing one template across several events. SMS templates support the same tokens as email. You edit all ten under **Settings** (Section 23).

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Staff notifications

The system also emails your **staff**, not just customers, so a repair never stalls unnoticed. Notifications go to the work order's **assigned technician(s)** plus a **configurable list of managers**. The triggering events are:

- Work order **assigned** or **reassigned**
- **Customer replied** to a message
- Quote **approved**
- Quote **declined**

On top of those, a **daily overdue-work-order digest** is sent on a schedule — an SLA reminder listing repairs that have run past their target so managers can chase them. Each staff event has its own **YES / NO** toggle, and the manager recipient list is set, under **Settings → Staff notifications** (Section 23).

Messaging the customer directly

The Messages tab sends a free-text message to the customer (email, and text where set up) and keeps the conversation in one place.

18. What the customer sees

The tracking page (no account needed)

At intake the customer is emailed a private **tracking link**. Opening it asks for **any two of** zip/postal code, phone, or email (so the link alone isn't enough). Once verified they see the status, a progress timeline (including payments and milestones like "Deposit received"), and a way to pay online — both any outstanding balance and a **requested deposit**, the same secure payment experience they get from an emailed payment link.

The tracking page, the pay page and the repair's page in the customer's account show the logo of the repair location the item is at (set on that location's page in Store Management), or your website logo when the location has none.

The customer account (My Repairs)

Customers with a storefront account get a **My Repairs** page in 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, newest first, each row showing the **work order number**, the **item**, a **status pill**, the **total**, and the **submitted date**, with a **View** link through to that repair's tracking page (where they can also pay a balance).

You don't have to build or place this page — it is added **automatically when the module is installed or upgraded**, and it only appears while the module is enabled.

Paying online

From a payment link, the tracking page, or their account, paying is the same simple secure card form — with an on-screen confirmation and an emailed receipt, and the payment appears in your Payment History within seconds.

On their repair page each invoice is listed with its own balance, its own **Invoice PDF** and its own **Pay invoice …** button. When more than one invoice is outstanding, **Pay all … invoices together** charges each invoice separately with one card entry — if one charge fails, the invoices already paid stay paid.

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19. Documents & printing

Open a work order's **Documents** tab. **Printable Documents** holds everything you can print for it.

Document	When you use it
Work sheet & tags	At intake — the shop copy that stays with the job, plus a tag for each item.
Drop-off receipt	At intake — the customer's proof of what was left and when.
Pickup receipt	At pickup — the customer's record of what went home, plus a shop copy they sign. Appears once the repair is Ready for Pickup.
Quote	The itemised estimate to give/email the customer.
Payment Receipt	Once a payment is taken (a full-page PDF; the register prints its own payment receipt slip, Section 20).
Invoice	The bill for one order, once its invoice is generated — one per invoice, named after its number. Shows the frozen lines and totals, a **Less deposit applied** line where a deposit was used, and payments.
Warranty Claim Packet	For warranty jobs sent to a manufacturer.

Receipt printer or full page

The work sheet, drop-off receipt and pickup receipt print either on a **receipt printer** (58mm, 76mm, 80mm or 112mm rolls) or as a **full page** (a Letter page). The other documents are always PDFs.

- **In the admin**, the **Printing** panel at the top of the **Slip Designer** decides (Section 20): **Receipt printer** shows *Print work sheet & tags*, *Print drop-off receipt* and *Print pickup receipt*; **Full page (PDF)** shows the PDF buttons, each printing that document's default Letter layout; **Ask each time** shows one button per document with both choices. A receipt-printer document opens in a new tab and the print dialog opens by itself; **Print again** prints another copy.
- **At the register**, each station decides for itself, in **POS → Stations** (the **Work Order Printing** column): receipt printer, full page or ask each time, and its receipt paper width. A station set to **Ask each time** shows a small panel with *Receipt printer*, *Full page* and *Cancel*.

What the slips show

What each slip prints, and in what order, is set in the Slip Designer (Section 20). Out of the box the slips print their built-in **Indition basic** layouts:

- **Shop copy:** the work order number in large print, a black RUSH bar with the due date on rush jobs, a barcode, the customer, each item with its serial number, issue and intake condition, accessories as tick boxes, the bin and technician, the parts on the quote, a bench checklist and sign-off lines.
- **Item tags:** one per item (or one per job), with the customer, the item, the due date, the bin and a barcode. Scanning the tag with F10 at the register opens the work order.

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- **Drop-off receipt:** your logo and address, each item with what the customer told you and what you noted, accessories left, any deposit paid, a QR code to the tracking page, the drop-off signature and a barcode for a one-scan pickup.
- **Pickup receipt:** when it went home and who released it, the items and accessories returned, the work done and what was paid. The shop copy has a tick box per item and lines for the customer's signature, the date and your name.

All documents show the repair location and store branding. Receipt-printer slips print your receipt printer logo (**Manage Logos**, Section 20), or the shop name when there is none; full-page documents print the repair location's logo from Store Management, or your website logo. You can also upload outside files (a manufacturer estimate, a customer photo) to keep everything together. The *Work Order Printing* guides and the separate *Receipt Printing* documentation pack cover printer setup in detail.

20. The Slip Designer

The **Slip Designer** decides how work order documents print, and what each receipt-printer slip prints, in what order and how it looks. Open it from **Service & Repair → Slip Designer**; it needs the Service Repair Admin role. The **default** layout of each slip is what prints, from the work order screens here and at every POS station.

The Printing panel

The **Printing** panel at the top of the page holds the four printing settings (they used to be on the Settings page). Change them and choose **Save printing settings**.

Setting	What it does
Print Work Order Documents On	How the work sheet & tags, drop-off receipt and pickup receipt print from the work order screens here. **Receipt printer** (default) prints slips sized for thermal paper. **Full page (PDF)** downloads the drop-off receipt, work order sheet and pickup receipt as Letter PDFs, each with its default Letter layout. **Ask each time** shows one button per document with both choices.
Receipt Paper Width	The roll in this computer's receipt printer: 58mm, 76mm, 80mm (default) or 112mm. On 58mm paper a long work order number prints with very thin bar code bars that some scanners can't read, so test a scan at the register before relying on it.
Item Tags	**One per item** (default), **One per work order** or **Don't print tags**. Tags print after the shop copy, one slip each, to tape to the machine; their bar code opens the work order when scanned at the register. Applies here and at every POS station.
Show Prices on the Shop Copy	**No** (default) prints the quote's parts with quantity and description only. **Yes** prints every quote line with its price, plus the job total.

Quotes, invoices, payment receipts and warranty packets from the work order screens are always full-page PDFs. POS registers are set per station, in **POS → Stations** (Section 19).

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The slips

Below the Printing panel there is one panel per slip, with its layouts and a **+ New ... layout** button.

Slip	What it is	Also on Letter?
Drop-off receipt	The customer's receipt when they leave an item for repair.	Yes
Pickup receipt	The customer's receipt when they collect it.	Yes
Pickup release (shop copy)	The copy the customer signs for what they took home; the shop keeps it. It prints after the pickup receipt.	No
Work sheet (shop copy)	Stays with the job on the bench. The item tags print after it.	Yes (the work order sheet)
Item tag	Taped to the machine; its bar code opens the work order at the register.	No
Payment receipt	The customer's receipt when the register takes a payment on a repair: a deposit or the balance.	No

Each panel lists the slip's layouts with their **Paper**, the **Default** badge, the **Status** (*Active* or *Retired*) and the actions: **Edit** (**View** on a built-in layout), **Duplicate**, **Make default** and **Delete**. Receipt-printer layouts are listed first, then Letter ones, each with its default at the top.

Built-in layouts

Every slip has a built-in **Indition basic** layout (*Indition basic drop-off receipt*, *Indition basic pickup receipt*, and so on): the slip exactly as your shop has always printed it, and its default until you make another layout the default. The drop-off receipt, the work sheet and the pickup receipt also have a built-in Letter layout, the full-page document exactly as it has always printed: **Indition basic drop-off receipt (Letter)**, **Indition basic work order sheet (Letter)** and **Indition basic pickup receipt (Letter)**. The payment receipt also comes with the **Standard payment receipt** (see *The payment receipt* below).

A built-in layout can't be changed or deleted. **View** opens it with its live preview; there you can set only its paper (a built-in Letter layout is always Letter), its inner margin and its printer alignment, and save them with **Save paper, margin and alignment**. To change anything else, **Duplicate** it.

Designing a slip

1. **Start.** Choose **+ New ... layout** on the slip's panel, or **Duplicate** a layout. A new layout starts with the slip's pieces arranged as it has always printed, on your **Receipt Paper Width**.
2. **Layout.** Give it a **Layout name** and, if you like, **What is it for?** (for example "Front counter, 80mm printer"). **Use this layout by default** (Yes/No) makes it the layout that prints. **Available** (Yes/No) retires a layout without deleting it; the default is always available.
3. **1. What goes on the slip.** The slip is a list of rows, each holding one or more pieces. Drag the pieces into the order you want. Each row has move up and move down arrows, a choice of how it is spread across the slip (**Left**, **Center**, **Right**, **Ends**, **Spread**), a rule printed above it (**No line**, **Thin line above**, **Thick line above**, **Dashed line**

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above, **Dotted line above**) and × to remove the row. Two pieces in one row set to **Ends** put one on the left and one on the right. Sections such as **Items** always take a row of their own. **+ Add a row** adds an empty row.

4. **Take pieces off or put them back.** Drag a piece into **Not on the slip**, or choose the × on it. The **+** on a piece in **Not on the slip** adds it back on a new row at the bottom, which is handy on a tablet, where dragging doesn't work.
5. **Piece settings.** Every piece on the slip is listed with what can be set on it: its **Label** or **Heading**, the **Text** of pieces you word yourself, **Size (pt)** (leave it blank to keep the slip's own size), **Bold**, **Upper case**, and the piece's own Yes/No options and choices, such as **Serial numbers**, **Number under the bars** or **Lines between items**.
6. **2. Spacing. Extra space between rows (mm)**, from 0 to 10.
7. **3. Inner margin** and **4. Printer alignment**, if your printer needs them (below).
8. **Save layout.** Leaving the page with unsaved changes asks first. **Cancel** returns to the Slip Designer without saving.

A piece with nothing to print on a work order (no accessories, say) is left out, and so is the rule above its row, so the slip never prints a heading over a gap. The pieces each slip offers:

Slip	Pieces
Drop-off receipt	Logo, Store Address and Phone, Title, Work Order Number, Dropped Off / Ready By, Customer, Items, Accessories, Deposit and Return, Tracking QR Code, Terms and Signature, Closing Line, Bar Code, Custom Text 1, Custom Text 2
Pickup receipt	Logo, Store Name and Phone, Title, Work Order Number, Picked Up / Released By, Customer, Returned Items, Accessories, Work Done, Totals, Invoice Number, Closing Line, Bar Code, Custom Text 1, Custom Text 2
Pickup release (shop copy)	Title, Work Order Number, Customer and Release, Handed Back Checklist, Totals, Received Statement, Signature Lines, Bar Code, Cut Line, Logo, Custom Text 1, Custom Text 2
Work sheet (shop copy)	Shop Name, Title, Work Order Number, Due Date and Priority, Warranty / Goodwill Box, Bar Code, Customer, Items, Accessories Checklist, Bin, Tech, Intake and Return, Quote, Bench Checklist, Tech / QA Lines, Cut Line, Logo, Custom Text 1, Custom Text 2
Item tag	Work Order Number, Item Box, Customer Name, Item, Due Date and Bin, Bar Code, Custom Text 1
Payment receipt	Logo, Store Address and Phone, Title, Work Order Number, Paid Stamp, Invoice, Date and Cashier, Customer, Payment, Totals, Tracking QR Code, Closing Line, Bar Code, Custom Text 1, Custom Text 2

Preview with a work order, and test print

The **Live preview** on the right is a real work order, drawn at the real width of the paper, so what you see is what prints. It redraws as you change things.

- **Zoom**: *Fit to width*, *Actual size*, *125%* or *150%*.
- **Designed for** (**Paper** on a built-in layout): the paper the layout is laid out for (see *Paper and printable width* below).

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- **Preview with work order**: type a work order number to preview that work order. Left blank, the preview uses the most recent one; for the payment receipt, the most recent one with a payment taken (a work order with none shows a sample cash payment). A number that isn't found shows the most recent work order, with a note saying so.
- **Test print** opens the slip as the preview shows it in a new tab, and the print dialog opens by itself. It saves nothing, so trying a change never changes what prints; **Save layout** does that.

Duplicate

Duplicate, on the list or on a built-in layout's page, makes a copy named "… (copy)" and opens it in the designer. A copy is never the default, so duplicating changes nothing that prints. A copy of a built-in layout is an ordinary layout with its pieces set up exactly like the slip, and everything on it can be changed. Two copies start differently: the built-in payment receipt is the register's own receipt and isn't made of pieces, so its copy starts from the Standard payment receipt; and a copy of a built-in Letter layout is a Letter layout made of that document's pieces, laid out across the page.

The default layout

A slip prints with its default layout. Make a layout the default with **Make default** on the list or on a built-in layout's page, or with **Use this layout by default** in the designer.

- The **drop-off receipt**, the **work sheet** and the **pickup receipt** have **two defaults**, one per paper: one for the receipt printer and one for Letter (Full page printing). Making a Letter layout the default changes only the Letter default, and making a roll layout the default changes only the receipt-printer default.
- The pickup release, the item tag and the payment receipt have one default each.
- A layout can't be deleted while it is the default: make another one the default first. A built-in layout can't be deleted at all.

Letter layouts

The drop-off receipt, the work sheet (the work order sheet) and the pickup receipt also print as full Letter pages (8 1/2" x 11") on an ordinary office printer. **Full page printing** prints each document's **Letter default**: the PDF from the work order screens here (**Print Work Order Documents On** set to *Full page (PDF)*, or the full-page choice when it asks), and a POS station set to print work orders on a full page.

- The built-in Letter layouts print the full-page documents exactly as before, and they are the Letter defaults until you make another Letter layout the default.
- To design your own, **Duplicate** a built-in Letter layout. The copy lays the document's pieces out across the page, with larger type than on a roll. A layout you have made of one of these three slips can also be switched to **Letter (8 1/2" x 11")** in **Designed for**.
- On a Letter page the **Logo** piece prints the website logo of the work order's repair location (set on that location's page in Store Management), else the website's own logo, else the shop name. It never prints the receipt printer logo.
- Item tags, the pickup release and the payment receipt print on the receipt printer only.

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Paper and printable width

A receipt printer's print head doesn't reach the edges of its paper. Slips are laid out at the width the head prints, so nothing is cut off at the right, and the preview shows the whole paper with the strips the head can't reach shaded at the sides.

Paper	Printable width	Typical printer
58mm roll (2 1/4")	48mm	Small thermal printers and most mobile printers.
76mm roll (3")	64mm	Impact (ink ribbon) printers and kitchen printers.
80mm roll (3 1/8")	72mm	The standard thermal receipt printer.
112mm roll (4 3/8")	104mm	Wide thermal printers.
Letter (8 1/2" x 11")	The full page	An ordinary office printer (Full page printing). Drop-off receipt, work sheet and pickup receipt only.

Designed for is the paper a layout is laid out for, and the preview and a test print use it. The slips themselves print on the paper in the printer: the **Receipt Paper Width** in the Printing panel for the work order screens here, and each station's own paper at a POS register.

> **The end mark.** Every slip printed on a roll ends with a tiny 1mm mark 12mm below its last line. Printer drivers trim the blank paper off the end of a receipt, and the mark makes the printer feed the slip past its cutter before it cuts, so the cut never goes through the last lines or the bar code. Letter pages have no end mark.

Inner margin

White space kept clear inside the edge of the paper, each side on its own: **Top (mm)**, **Right (mm)**, **Bottom (mm)** and **Left (mm)**, up to 25mm. Thermal printers drift by a fraction of a millimeter, so a little here stops text touching the edge; give the side yours drifts toward more room than the rest. Leave a side blank for the paper's usual margin, shown in gray; on a built-in layout a blank side prints exactly as today. The built-in Letter layouts' usual margins are the ones the full-page documents have always printed with.

Printer alignment

Only needed if your printer puts everything slightly off. Print one slip, measure how far out it is, and nudge by that much: **Move right (mm, negative moves left)** and **Move down (mm, negative moves up)**, up to 20mm either way. It moves what is printed, never the paper size, and anything moved past an edge is lost, as it would be on the printer. Built-in layouts take it too; the slip itself stays exactly as it is.

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Manage Logos: the receipt printer logo

A receipt printer prints black dots only, so a color or gray website logo comes out speckled, and a picture is resampled to the printer's 203 dpi and blurs. The slips therefore print a logo of their own. Upload it with **Manage Logos** on the breadcrumb bar of the Slip Designer (or the **Manage Logos** link in a layout's **Logo** note), which opens the **Receipt printer logos** dialog.

- **One store location:** one drop area, **Your receipt logo**. Drag a file onto it, or click it to choose one.
- **Several store locations:** the drop area is the **Logo for every store location**. Set **Set different logos for each location** to **Yes** to list each location with a drop area of its own; the first one becomes the **Shared logo - for any location without its own**. Store locations are the In-Store Pickup dealers in Store Management. A slip then prints the logo of its work order's repair location, or the shared logo when that location has none.
- **With POS installed too: Use the same logos in Service & Repair and POS** (Yes/No). **Yes** keeps one set of receipt logos for both, so a change here changes POS's too, and turning it on copies these logos to POS. **No** leaves each module the logos it has.
- Every change saves at once, and **Done** closes the dialog; in the designer, the preview redraws with the new logo. To replace a logo, drop a new file on its drop area; **Remove** takes it away.

> **Which file to upload.** Best: an **SVG** of your logo in solid black on a white or transparent background; it prints as sharp as the text. Also accepted: a **PNG**, ideally at least 1,000 pixels wide (one under 300 pixels wide is refused as too small to print sharply). **JPG** is not accepted. Up to 2 MB. A one-color version of your logo prints best. An SVG is cleaned of scripts and outside links when it is uploaded.

The receipt printer logo prints where a slip has the **Logo** piece; the built-in drop-off and pickup receipts print it at the top. Without one, the slip prints the shop name. It prints only on receipt-printer slips: Letter pages, PDFs, emails and the customer's pages keep the website logo. A layout's **Logo** note lists each repair location as *Own receipt logo*, *Receipt logo set* or *No receipt logo*.

The payment receipt

The register prints a payment receipt when it takes a deposit or a payment on a repair. It comes off the same printer as the station's sale receipts, on the paper set for that station's receipts (a station whose receipts are set to Letter prints it on its work order receipt paper width).

- **Indition basic payment receipt** (the default) is the register's own receipt, with the same look as a POS sale receipt: the store and the POS receipt header, the work order, invoice, customer, cashier and date, a PAID badge over what was paid today and how, then the total, the total paid to date and the balance, and the receipt footer. It prints no logo.
- **Standard payment receipt** is a slip like the drop-off and pickup receipts, with the Logo, a PAID stamp, the payment, the totals and the other payment receipt pieces. It is an ordinary layout: edit it like any other, and make it the default to use it.
- A payment taken against one of a repair's two invoices prints that invoice's number, its **Invoice total**, what has been paid on it and its balance, on either receipt. A payment that names no invoice is measured against the work order's job total. A deposit taken before the job is priced prints what has been paid, not a $0.00 job total.
- A card processing fee prints on its own line, with the total charged to the card; it never comes off the balance.
- A placeholder email address, such as the one intake gives a walk-in customer who has no email, never prints.

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21. Dashboards & reports

- **Dashboard** — open repairs, overdue, awaiting deposit/approval, recent activity.
- **Tech Dashboard** — a technician's assigned queue.
- **Calendar** — by date/due date, filterable by Service Location.
- **Reports** — turnaround time, revenue, deposits collected, vendor performance, loaner utilization, the new **Revenue by Service Location** report, and more.

Revenue by Service Location

The **Revenue by Service Location** report breaks takings down by the physical location where the work was done, so you can compare benches and sites at a glance.

Report exports & totals

Every report can be **exported to PDF** (wide reports print landscape) and to **Excel**, and the export always honors the **filters currently on screen** — what you see is what you get.

Reports that have summable numeric columns show a **grand-totals row** computed over the *whole* result set (not just the visible page), on screen and in both the Excel and PDF exports. Where a plain sum would mislead — aging and vendor-performance figures — the total uses a **weighted average** rather than a naive average.

22. Integrations with the rest of the platform

Service & Repair gets more capable as you turn on related modules. Each is optional and can be toggled in Settings.

Module	What it adds to repairs
Inventory	Real stock for parts: reserve on quote, consume on work-start, restock on cancel; live on-hand counts in the picker.
POS	When enabled, recorded repair payments go through the POS and are recorded as in-store card payments (Section 12). With **Work Order Intake at the Register** also on, a cashier can open a work order and run the whole intake from the register (Section 4).
Customer	Required — every work order belongs to a customer so they can self-serve via My Repairs and so notifications reach them.
Messaging	Delivers the emails (and, when set up, texts) the system sends; templates live here.
In-Store Pickup	Enables multi-location features: flag repair locations, map technicians to locations, and the "Working at" picker.
VertexTax	Replaces the flat tax rate with accurate, address-based tax on quotes; the flat rate stays as a fallback.

23. Settings reference (every option)

Settings live at **Service & Repair → Settings** (a one-time setup; see the separate Configuration Guide for a step-by-step walkthrough). The four printing settings are on the **Slip Designer** page instead, in its **Printing** panel (Section 20).

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Summary of every option:

Setting	What it controls
POS Integration	Links Service & Repair to the Point of Sale module, so repair payments post through the register. Required before **Work Order Intake at the Register** can be switched on.
Print Work Order Documents On (Slip Designer → Printing)	How the work sheet, drop-off receipt and pickup receipt print from the admin: Receipt printer (default), Full page (PDF) or Ask each time. Full page prints each document's default Letter layout. Registers are set per station in **POS → Stations**.
Receipt Paper Width (Slip Designer → Printing)	58mm, 76mm, 80mm (default) or 112mm roll, for the admin's receipt printer.
Item Tags (Slip Designer → Printing)	One per item (default), one per work order, or none. Applies in the admin and at every register.
Show Prices on the Shop Copy (Slip Designer → Printing)	No by default: the shop copy lists the quote's parts without prices. Yes: every quote line with its price and the job total.
Work Order Intake at the Register	Lets a cashier create a work order and run the intake from the POS register (Section 4). Only selectable while **POS Integration** is on — switch that off and this clears with it, and the register stops offering it immediately.
Module Enabled	Master on/off. Off hides the whole module except Settings; data is preserved.
Service Locations / mapped store	Which locations are enabled for repairs and, for each, the store it maps to. The mapped store drives invoicing and the work-order number sequence, while staff and customers see the Service Location name.
Work Order Prefix / Starting Number	The customer-facing number format, e.g. `SR–1001`.
Inventory / POS / Warranty / Vendor / Loaner toggles	Turn each optional feature on/off (Sections 9–11, 15, 22).
Tax Rate (%)	Flat tax on taxable lines (unless VertexTax is on).
Default Priority / Rush & Emergency Surcharge (%)	Default priority for new intakes and the surcharge each adds.
Require Serial Number on Intake	Off by default. On: every item on a new work order needs a serial number — in the back office and at every register — items added later need one too, and an entered serial cannot be removed.
Accessories Checklist (Catalogs & Configuration)	The accessories staff tap at intake and on the work order. Add, rename, reorder or switch one off; a work order keeps the accessories it was given even if the list changes later.
Default SLA (days)	Target turnaround; overdue jobs are flagged.
Quote Expiry (days)	A quote auto-declines if not approved in time.
Default Warranty (months)	Fallback warranty length when no specific term matches.

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Setting	What it controls
Deposit Type / Value / Minimum	None / percent / fixed, the amount, and whether it's a raisable minimum.
Payment Link Expiry (days)	How long a sent payment link stays valid before it expires.
Max Photo / Document Size (MB)	Upload caps (cannot go above the upload limit shown on the Settings page).
Public Tracking Link	Whether non-account customers can track via a tokenized URL (identity-gated).
Default Email Template / Receipt Template	The Messaging templates used for repair emails and payment receipts.
Email Events	Which events send an email.
Staff notifications	Email staff on key events: per-event YES/NO toggles (assigned/reassigned, customer replied, quote approved, quote declined) and the manager recipient list. Notifications go to assigned technician(s) plus the named managers (Section 17).
Overdue digest schedule	When the daily overdue-work-order digest (SLA reminder) is sent.
SMS Enable / Provider / Credentials / Events / Templates	Text-messaging setup. Each of the 10 SMS events has its own per-event template to word independently (Section 17).
Restrict work to technician's location / Cross-location labor	Technician location gating (Section 2).

24. Everyday questions (FAQ) & glossary

A customer says they never got the email/text.

Check the customer record has the right email/mobile, then re-send from the Payment tab (**Email again + pay link** on the invoice, or a new payment link) or the Messages tab. History shows what was sent and to whom.

I sent a payment link but need to change the amount.

Send a new link with the right amount — each is independent and the old one expires on its own. The customer can't edit the amount.

Can the customer change the amount on the pay page?

No — it's locked to what you requested.

I completed a repair by mistake.

If it is locked (Closed and paid in full), a manager clicks **Reopen work order** on the green bar and gives a reason; it goes back to In Progress. Nothing is lost, and the customer isn't told.

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I can't add time or items — it says it's locked.

The repair is completed and paid in full. Ask a manager to reopen it.

Time was logged but isn't on the invoice.

Log against was set to "— work order (no order) —", so the time was recorded but not billed. Leave it on the order's labor line — that's the default.

Why is there a second order, or a second invoice?

Something was added after the first invoice — more time, parts, or approved quote lines. An invoice is final, so the new charges went on a follow-on order and are billed on the next invoice.

The invoice is higher than the quote.

Expected when more time was logged than estimated: labor is billed as logged, and there is no cap at the quote.

There's no deposit button after invoicing.

The deposit stage ends at the first invoice. To ask for money by hand, use **Send payment link** → **Or a different amount**.

Mark Complete says to collect the remaining balance.

Money is still owed on an invoice or on charges not yet invoiced. Take the payment on the Payment tab, then complete.

How do I change the reported issue, condition or accessories after intake?

On the Overview tab, choose **Edit** on the item in **Items Being Serviced** for its issue and condition, or on the **Accessories Included** row for accessories. Changes save as you go.

It won't let me add an item — it asks for a serial number.

Your shop has switched on **Require Serial Number on Intake**. Enter the serial (it is usually on a label under or behind the machine). An Admin can switch the requirement off in Settings → Work Order Defaults.

The deposit gate is blocking me but the customer is standing right here.

A manager can override the hold (with a reason) from the deposit banner, or take the deposit now: **Take deposit** → **Record a payment** or **Charge a card**.

The printing settings are no longer on the Settings page.

They moved to **Service & Repair → Slip Designer**, in the **Printing** panel at the top, with its own **Save printing settings** button (Section 20).

I changed a slip layout but the old one still prints.

Only the slip's **default** layout prints. Make your layout the default (**Make default** on the Slip Designer list). For the drop-off receipt, work sheet and pickup receipt, check you changed the right default: a Letter layout only prints on a full page, and a roll layout only on the receipt printer.

The "Status Updated" banner won't go away.

It clears itself after a few seconds. Success messages auto-dismiss; warnings/errors stay until you move on.

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Glossary

Term	Plain meaning
Work order (WO)	The record for one item being repaired.
Intake	Taking an item in and creating its work order.
Status	Where the repair is in the process.
Quote	The price estimate for the repair.
Deposit	Money paid up front, before work starts. Held as credit on the work order and taken off the invoice.
Deposit held	Deposit received but not yet applied to an invoice; it goes on the next invoice by default.
Order	What an approved quote becomes: the lines that get fulfilled, invoiced and paid.
Follow-on order	Charges added after an order was invoiced — time, parts, newly approved lines. Billed on the next invoice.
Invoice	The bill for one order. Final once generated; never revised.
Not yet invoiced	Charges on an open order that no invoice covers yet. Grows as time is logged and parts are added.
Balance due	What's still owed after payments so far — on an invoice, "Left to pay".
Channel	How a payment was taken: manual, card-present (POS), or online.
Service Location	The physical bench or site where a repair is worked — the place-name staff and customers see. Maps to a store for invoicing and numbering.
Mapped store	The store a Service Location's money, invoicing, and work-order numbers flow through.
Payment link	A secure, single-use, expiring web link the customer pays from their device.
Tracking page	The customer's private, identity-gated page to follow their repair.
Loaner	A temporary unit lent while theirs is repaired.
Hand over	Returning the item and closing the work order. Refused while money is owed.
Locked	A work order that is Closed and paid in full: read-only until a manager reopens it.
Slip	One receipt-printer document (the drop-off receipt, the work sheet, an item tag…), laid out in the Slip Designer.
Letter default	The layout that prints a drop-off receipt, work sheet or pickup receipt on a full Letter page (Full page printing).
Receipt printer logo	The black-and-white logo the slips print, uploaded in **Manage Logos**; separate from the website logo.

> For one-time setup of every option — enabling Service Locations and mapping stores, staff notifications, the 10 per-event SMS templates, and the overdue-digest schedule — see the **Configuration Guide**.

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