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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

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Contents

> 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 15–23 are reference: warranty, notes, communications, the customer's screens, documents, 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 organised

Service & Repair turns your repair desk into one organised 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 labour, 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.

It connects to the rest of your shop

Repairs aren't an island. Each work order belongs to a **store**, so its sales tax, payments, and reporting flow through 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 21 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, and run reports. Cannot change global module settings.
Service Repair Technician	Bench technician	Work the bench: view assigned work orders, log labour, 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 labour 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.

> 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**, 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 coloured **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.
- **Tabs** — Overview, Quote & Parts, Labour, 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).

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; **condition notes** (existing damage, missing parts); and **accessories** received (charger, case) so you return everything.
4. **Service location & priority.** On a multi-location shop, choose the repair location (defaults to your "Working at" location). Set the priority — *Normal*, *Rush*, or *Emergency* — which can carry a surcharge.
5. **Photos.** Take drop-off photos so the item's arrival condition is on record.
6. **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.

> 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 store's own sequence (e.g. `SR-1001`).

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, labour, flat rates, fees, discounts; totals, tax, deposit (Section 7).
Labour	Live timer + manual time entry, costed at the technician's rate (Section 9).
Loaner	Lend a temporary unit and take it back (Section 11).
Payment	Record/charge payments, send payment links, generate the invoice, complete & hand over (Section 12).
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.

6. Statuses & the repair workflow

A status says where a repair is. The system ships with a full set; your manager can rename them, recolour 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).
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).

7. Building & sending a quote

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

Line types

- **+ Part** — type it, or use **catalogue search** to find a real product by name/SKU (pulls price and, with Inventory on, stock on hand).
- **+ Labour** — at the shop's standard rate.
- **+ Tech Labour** — 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.

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 21). *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, and the repair is ready to proceed (a deposit is requested if required).

> **Modify an approved quote: Modify Quote** re-opens it and moves the repair back to *Awaiting Approval*. Higher total → customer must re-approve; same/lower → just send the update.

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.

- **Banner** — when a deposit is owed, a banner on every tab shows the amount and a **Take deposit** button (jumps to Payment, pre-filled).
- **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.
- **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 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.

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** — type a duration for a technician with an optional note (for time not tracked live). Manual time can be recorded even after a repair is completed.

Parts & stock

With Inventory connected, adding a catalogue 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.

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. The top shows the **financial summary** — Invoice #, Final total, Paid, Balance due. A row of buttons opens one panel at a time:

Invoice · Record a payment · Charge a card · Send payment link · Complete & hand over

> **Paying never closes a repair, and closing never requires payment.** Customers can prepay early without closing the job, and you can hand a repair over with a balance owing (a warning shows, but it won't stop you).

Where the money goes (store routing)

Each payment is recorded against the store your repair's location maps to (its "mapped store"), so it lands in the right ledger. 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 (cash, cheque)

For money taken by hand: pick the type (deposit/final), method (e.g. cash), amount, and save. It appears in Payment History and updates totals; 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 (email & text)

The easiest way to collect: send a secure link the customer pays from their own phone. **Send payment link** shows exactly who it goes to.

- **Request deposit** — the outstanding deposit.
- **Request full balance** — prepay everything owed.
- **Request a custom amount** — any amount; you must enter **what it's for** and may add a **message**, both shown in the request.

The link sends without a page reload; the button is replaced by a confirmation naming the exact channel and recipient (e.g. *"Deposit request for $50.00 sent via email to jordan@example.com"*), and a row is added to History. The customer lands on a **minimal, secure pay page** — greeting, the **locked** amount, what it's for, your message, and a card form (with the same billing/AVS + save-card options). They pay, see "$X paid — thank you," get a link to track their repair, and are emailed a **receipt**. Each link is **unique, single-use, and expires** after a set number of days (set in Settings).

> **Texting payment links (SMS) — being finalised.** With text messaging switched on, the same link can be texted to the customer's mobile (in addition to or instead of email) — they tap it and reach the same pay page. Needs your SMS provider connected and the customer opted in with a mobile on file. This is still being finalised; until then links go by **email**, which is fully working.

Taking payment at the POS register

> **POS register integration — being finalised.** For shops on the in-store POS register you'll take repair payments at the till like a retail sale, so all money flows through one system. Planned: at the register press **F10** (or **Work Orders**) to open the lookup; search by invoice #, work-order #, or customer, or **scan the work-order tag** (barcode/QR); pick it (balance pre-filled); press **Charge Card** and follow the reader. Still being finalised — until then use Record a payment, Charge a card, or a payment link.

Refunds & receipts

Refunds are recorded against the work order and show in Payment History as a refund. Every successful online payment emails the customer a payment receipt automatically.

13. Invoicing

Generate an invoice from the Payment tab when you're ready to bill formally. It assigns an invoice number, produces the printable **Invoice PDF**, and can be emailed to the customer. The invoice total reflects the approved quote plus any agreed changes; payments reduce the balance shown on it.

14. Completing & handing over

When the repair is done, move it to *Ready for Pickup*. Then:

- **Mark Complete** — closes the repair.
- **Complete & hand over** — records the hand-over to the customer and closes it. If a balance is owing or no invoice exists, you get a warning with shortcuts (generate invoice / take a payment) but can still proceed.

> **A completed repair is locked.** Once completed (or cancelled/declined) you can no longer add quote lines, start a timer, or check out a loaner, and the quick-note button is hidden — so a finished job can't be changed by accident. The quote, payments, and history stay fully visible, and you **can** still record manual time and **check a loaner back in**. To edit again, re-open it by choosing an earlier status from the status chip.

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.

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

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 colour, 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) · 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}`. Payment receipts use a dedicated "Payment received" template.

SMS (being finalised)

> Text messaging for the same events — including payment links — is available 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. SMS templates support the same tokens. This integration is being finalised; this section will be updated as it's completed.

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 any balance.

The customer account (My Repairs)

Customers with a storefront account see a **My Repairs** area beside their order history to view repairs and pay balances after signing in.

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.

19. Documents & printing

Document	When you use it
Drop-Off Receipt	At intake — proof of what was left and when.
Quote	The itemised estimate to give/email the customer.
Invoice	The bill, once an invoice number is generated.
Work Sheet	The technician's internal job sheet.
Warranty Claim Packet	For warranty jobs sent to a manufacturer.

All PDFs show the repair location and store branding. You can also upload outside files (a manufacturer estimate, a customer photo) to keep everything together.

20. 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 location.
- **Reports** — turnaround time, revenue, deposits collected, vendor performance, loaner utilisation, and more.

21. 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	Take repair payments at the register and route them through the same transaction system as retail (being finalised — Section 12).
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.
InStorePickup	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.

22. 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). Summary of every option:

Setting	What it controls
Module Enabled	Master on/off. Off hides the whole module except Settings; data is preserved.
Store Source / Enabled Stores	Which store(s) handle repairs; each gets its own work-order number sequence.
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, 21).
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.
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.
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 (clamped to the server limit).
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.
SMS Enable / Provider / Credentials / Events / Templates	Text-messaging setup (being finalised — Section 17).
Restrict work to technician's location / Cross-location labour	Technician location gating (Section 2).

23. 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 (link) or 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.

Click the status chip and pick an earlier status to re-open it. Nothing is lost.

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 via Record a payment / Charge a card.

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.

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.
Balance due	What's still owed after payments so far.
Channel	How a payment was taken: manual, card-present (POS), or online.
Mapped store	The store a repair location's money flows 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.

Sections on SMS payment links (12, 17) and POS register payments (12) describe features still being finalised and will be updated as they're completed. For one-time setup of every option, see the **Configuration Guide**.