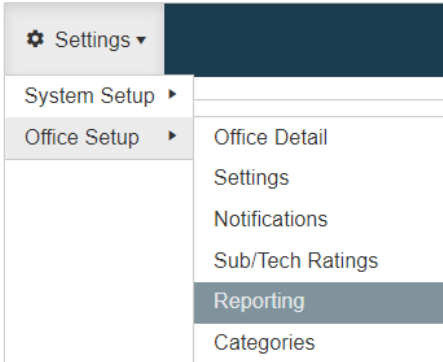
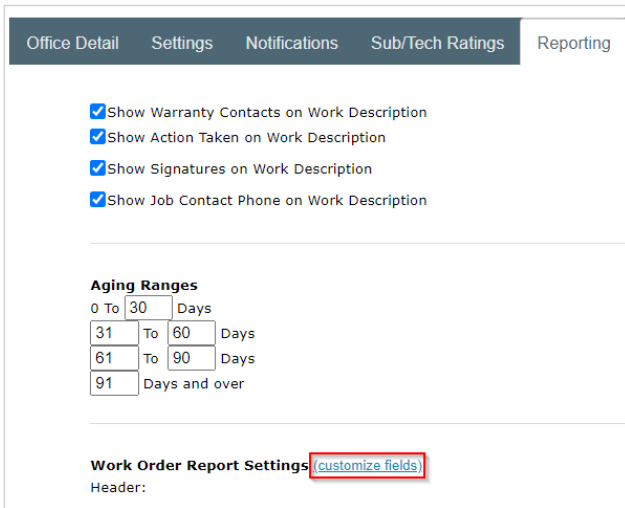


## Work Order Report Settings


Select information that displays on a Printed/Emailed Work Order view can be configured by the Administrator by going to Settings → Office Setup → Reporting























1. Next to **Work order Report Settings** click on [\(customize fields\)](#)



2. Click the edit icon to proceed

Work Order Report Settings (Sunshine Restoration) 

Section	Field	On Default	On Sub/Tech	On Job Contact	
Action Taken		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
Costs		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	 
Determination		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
Line Items	Action	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	 
Line Items	Assemblies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
Line Items	Hours	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
Line Items	Quantity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
Job Contact Info	Job Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 
Job Contact Info	Deductible	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 
Job Contact Info	Survey Received	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	 

Page 1 of 4

1 - 10 of 32 items

## Work Order Report Settings

3. After selecting the Section/Field you would like to edit, you can check the following options.
  - a) **On Default** – *Your view*
  - b) **On Sub/Tech** – *View of the Sub/Tech assigned to perform the work*
  - c) **On Job Contact** – *View of the Primary or Secondary Job Contact*
  - d) Once the selections are complete, Click the **Save** icon (💾)

Edit
×

Section	Job Contact Info
Field	Standing Water
On Default	<input checked="" type="checkbox"/>
On Sub/Tech	<input checked="" type="checkbox"/>
On Job Contact	<input type="checkbox"/>

💾
✕

Once the setup is complete for all Sections/Fields if these settings are applicable the other Offices (Locations, Divisions, etc.) click the Apply to All Offices icon.

**Work Order Report Settings (Sunshine Restoration)**
🔄

Section
Apply To All Offices

### Section/Field – Examples

- Action Taken

Work Order Details
Estimate Line Items
Sign Offs
Notes
Budget\*\*
Pictures
Billing
Request For Bid\*\*
Documents

💾
📄
+
✉
👤?
✉
🖨
🗑

Work Order Details

**Area**  
Kitchen

**Category**  
CAB-Cabinetry

**Sub Category**

**Option**

**Determination**

**Sub/Tech** ⓘ  
 ↑ - Company Sub/Tech  
 ↓ - Job Sub/Tech  
 The Kitchen Speci...

**Work Description:**

🔍  
Install Cabinets, see breakdown for further details.

📅

**Customer Request:** 🔍

**Action Taken:**

🔍

📅


**Action Taken History:** 🔍

Action Taken Notes applied within the Work Order

## Work Order Report Settings

- Costs

Work Order Details Estimate Line Items Sign Offs Notes Budget\*\* Pictures Billing Request For Bid\*\*



### Budget

<b>Responsible Party</b>	<b>Percent Responsible for</b>	<b>PO Number:</b> 1096-001
<input type="checkbox"/> Sub/Tech	0 %    \$0.00	<b>Faulting Work Order:</b>
<input type="checkbox"/> Self	0 %    \$0.00	<b>Faulting Sub/Tech:</b>
<input type="checkbox"/> Job Contact	0 %    \$0.00	

<b>Invoice Number:</b> <input type="text"/>	<b>Invoice Date:</b> <input type="text"/>
---	---


  

#### Budget

Materials		\$7,598.65
Labor	Hours: 1.00    Rate: \$729.24	\$729.24
Sub/Tech		\$0.00
Labor Burden %		\$0.00
Sub/Tech Burden %		\$0.00
Equipment		\$0.00
Mileage	Miles: 0.00    Rate: \$0.00	\$0.00
Other		\$0.00
<b>Total</b>		<b>\$8,327.89</b>

- Determination

Work Order Details Estimate Line Items Sign Offs Notes Budget\*\* Pictures Billing Request For Bid\*\* Documents



### Work Order Details

<p><b>Area</b> Kitchen</p> <p><b>Category</b> CAB-Cabinetry</p> <p><b>Sub Category</b></p> <p><b>Option</b></p> <p><b>Determination</b> No response from the Cust...</p> <p><b>Sub/Tech</b>  <small>↑ - Company Sub/Tech</small>  <small>↓ - Job Sub/Tech</small>          The Kitchen Specialist (600...)</p> <p><b>Employees</b></p> <p>Sub/Tech Acceptance: <span style="background-color: orange; color: white; padding: 2px;">Sent</span></p>	<p><b>Work Description:</b> <input type="text"/></p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 50px;">             Install Cabinets, see breakdown for further details.         </div> <p><b>Customer Request:</b> <input type="text"/></p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 50px;">             (Empty)         </div>
--	--



## Work Order Report Settings

- Line Items – Action

Work Order Details   Estimate Line Items   Sign Offs   Notes   Budget**   Pictures   Billing   Request For Bid**   Documents									
<p>Work Description: Install Cabinets, see breakdown for further details.</p>									
	<input type="checkbox"/>	Level	Room	Cat.	Qty	Hours	Unit	Act	Description
▶	<input type="checkbox"/>	Main Level		CAB	26	4.68	LF	-	Cabinetry - full height unit - Premium grade
▶	<input type="checkbox"/>	Main Level		CAB	26	14.49	LF	+	Cabinetry - full height unit - Premium grade
▶	<input type="checkbox"/>	Main Level		CAB	26	3.9	LF	-	Cabinetry - Lower Level
▶	<input type="checkbox"/>	Main Level		CAB	3	0	EA	+	Add for lazy susan - chrome shelves

- Line Items – Assemblies

Work Order Details   Estimate Line Items   Sign Offs   Notes   Budget**   Pictures   Billing   Request For Bid**   Documents									
<p>Work Description: Install Cabinets, see breakdown for further details.</p>									
	<input type="checkbox"/>	Level	Room	Cat.	Qty	Hours	Unit	Act	Description
▶	<input checked="" type="checkbox"/>	Main Level		CAB	26	4.68	LF	-	Cabinetry - full height unit - Premium grade
▶	<input type="checkbox"/>	Main Level		CAB	26	14.49	LF	+	Cabinetry - full height unit - Premium grade

Budget			
Type	Code	Description	Yield
RLB	CARP-FNC	Carpenter - Finish, Trim/Cabinet	2.45
MAT	CABFH++	Full height cabinetry - Premium grade	1

Page 1 of 1 | 10 items per page | 1 - 2 of 2 items

- Line Items – Hours

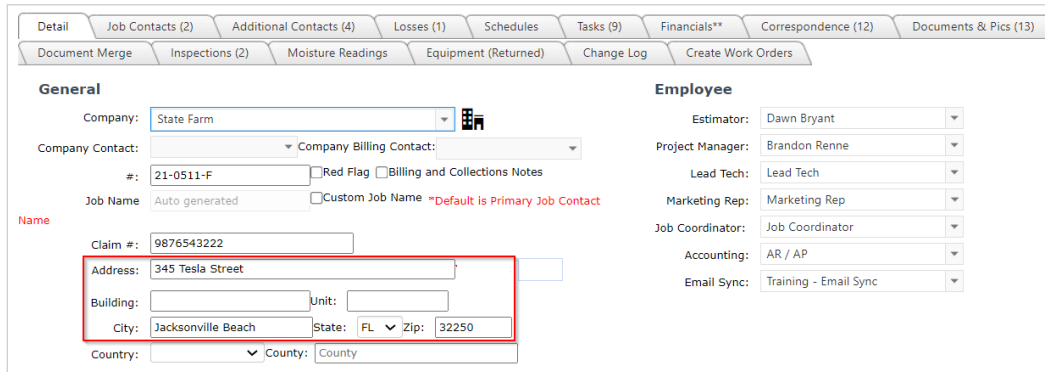
Work Order Details   Estimate Line Items   Sign Offs   Notes   Budget**   Pictures   Billing   Request For Bid**   Documents									
<p>Work Description: Install Cabinets, see breakdown for further details.</p>									
	<input type="checkbox"/>	Level	Room	Cat.	Qty	Hours	Unit	Act	Description
▶	<input type="checkbox"/>	Main Level		CAB	26	4.68	LF	-	Cabinetry - full height unit - Premium grade
▶	<input type="checkbox"/>	Main Level		CAB	26	14.49	LF	+	Cabinetry - full height unit - Premium grade
▶	<input type="checkbox"/>	Main Level		CAB	26	3.9	LF	-	Cabinetry - Lower Level
▶	<input type="checkbox"/>	Main Level		CAB	3	0	EA	+	Add for lazy susan - chrome shelves

- Line Items – Quantity

Work Order Details   Estimate Line Items   Sign Offs   Notes   Budget**   Pictures   Billing   Request For Bid**   Documents									
<p>Work Description: Install Cabinets, see breakdown for further details.</p>									
	<input type="checkbox"/>	Level	Room	Cat.	Qty	Hours	Unit	Act	Description
▶	<input type="checkbox"/>	Main Level		CAB	26	4.68	LF	-	Cabinetry - full height unit - Premium grade
▶	<input type="checkbox"/>	Main Level		CAB	26	14.49	LF	+	Cabinetry - full height unit - Premium grade
▶	<input type="checkbox"/>	Main Level		CAB	26	3.9	LF	-	Cabinetry - Lower Level
▶	<input type="checkbox"/>	Main Level		CAB	3	0	EA	+	Add for lazy susan - chrome shelves

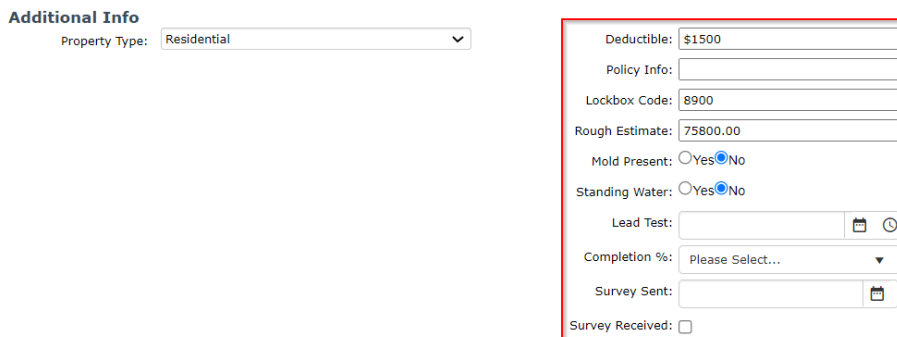
## Work Order Report Settings

- Job Contact Info – Job Address

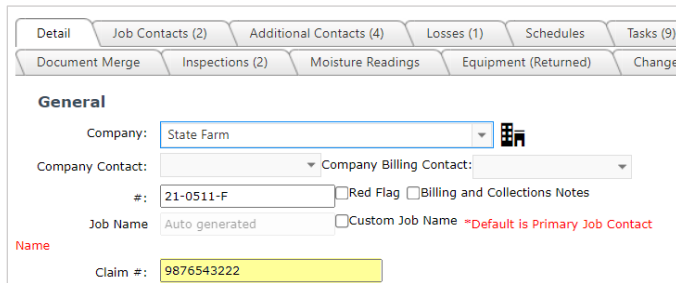


- Job Contact Info – Job Custom Fields 1-20

*Note: Job Custom Field information will vary this is dependent on the setup of your database.*



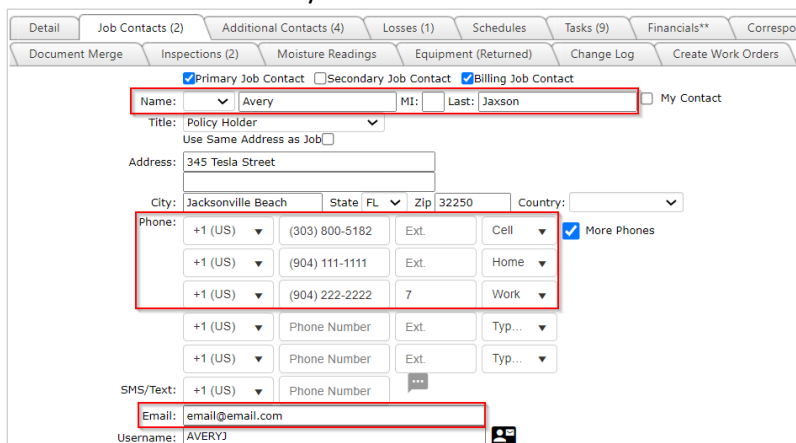
- Job Contact Info – Claim Info



- Job Contact Info – Primary Job Contact Email

- Job Contact Info – Primary Job Contact Full Name

- Job Contact Info – Primary Job Contact Phone 1-3





## Work Order Report Settings

- Job Contact Info – Secondary Job Contact Email
- Job Contact Info – Secondary Job Contact Full Name
- Job Contact Info – Secondary Job Contact Phone 1-3

Primary Job Contact  Secondary Job Contact  Billing Job Contact

Name: Addison MI: Last: Jaxson  My Contact

Title: Spouse  
Use Same Address as Job

Address: 345 Tesla Street

City: Jacksonville Beach State: FL Zip: 32250 Country:

Phone: +1 (US) (904) 333-3333 Ext. Cell  More Phones  
+1 (US) (904) 111-1111 Ext. Home  
+1 (US) (904) 101-1010 10 Work  
+1 (US) Phone Number Ext. Typ...  
+1 (US) Phone Number Ext. Typ...

SMS/Text: +1 (US) Phone Number

Email: spouseemail@email.com

Username:

- Company Info

Detail Job Contacts (2) Additional Contacts (4) Losses (1) Schedules Tasks (9)

Document Merge Inspections (2) Moisture Readings Equipment (Returned) Change Log

**General**

Company: State Farm

Company Contact: Company Billing Contact:

#: 21-0511-F  Red Flag  Billing and Collections Notes

Job Name: Auto generated  Custom Job Name \*Default is Primary Job Contact

Name

Claim #: 9876543222

- Sub/Tech Info

**The Kitchen Specialist**  
Phone: +1 (904) 202-2222 Email: kitchenspecialist@email.com  
Preferred Contact Method: Email  
653 Lake Stone Cir, , Ponte Vedra Beach, FL 32082

Sub/Tech Detail Employees Insurance Billing Tasks Correspondence (1) Documents & Pics (2)

Name: The Kitchen Specialist  Sub/Tech On Call

Short Name: ID: DBA:

Type(s): Drag & drop or use the arrows to add and remove Sub/Tech types.  
The first type in the list on the right will be the primary/default type.

Aluminum Siding Contractor Cabinet/Finish Contractor  
Carpet Cleaning Cabinet Contractor  
Carpet Installer Countertop Contractor  
Carpet Re-installation & Stretching Flooring Contractor  
Company Technician  
Concrete Contractor

Address: 653 Lake Stone Cir

City: Ponte Vedra Beach State: FL Zip: 32082 Country:

Primary Phone: +1 (US) (904) 202-2222 Ext. Cell  
SMS/Text: +1 (US) Phone Number

Email Address: kitchenspecialist@email.com



## Work Order Report Settings

### Default View Example:

Sunshine Restoration  
 7991 Shaffer Parkway, Suite 300  
 St. Petersburg, FL 32250  
 Office: (303) 800-5182



### Work Order - Due on 04/19/2021

To	Job Contact Information	Work Order
The Kitchen Specialist 653 Lake Stone Cir Ponte Vedra Beach, FL 32082 +1 (904) 202-2222 Cell Email: dbryant@verisk.com	Avery Jaxson (Primary) +1 (303) 800-5182 Cell +1 (904) 111-1111 Home beachgirlie@icloud.com Addison Jaxson (Secondary) +1 (904) 333-3333 Cell +1 (904) 111-1111 Home spouseemail@email.com 345 Tesla Street Jacksonville Beach, FL 32250 Claim #: 9876543222 Lockbox Code: 8900 Mold Present: No Standing Water: No	<b>No: 1096-001</b> Type: Fire  Job ID: 21-0511-F
Charges		Company
PO Number: 1096-001 Budget: \$8,327.89		State Farm
		Office
		Sunshine Restoration

Rcvd	SiteAppt	Schedule	Due	Completed	War. Exp
03/19/2021	04/19/2021 09:00 AM - 04/19/2021 10:30 AM	04/19/2021 01:00 PM - 04/19/2021 03:00 PM	04/19/2021		
Area	Category/Sub Category	Estimator	Project		
Kitchen	CAB-Cabinetry -	Dawn Bryant +1 (303) 800-5182	Brandon Renne +1 (303) 625-7814		

**Work Description**  
 Install Cabinets, see breakdown for further details.

Level	Room	Category	Unit	Description	Hours	Action
Main Level		CAB	LF	Cabinetry - full height unit - Premium grade	4.68	Remove
Main Level		CAB	LF	Cabinetry - full height unit - Premium grade	14.49	Replace



## Work Order Report Settings

### Sub/Tech View Example:

Sunshine Restoration  
 7991 Shaffer Parkway, Suite 300  
 St. Petersburg, FL 32250  
 Office: (303) 800-5182



### Work Order - Due on 04/19/2021

<b>To</b> The Kitchen Specialist 653 Lake Stone Cir Ponte Vedra Beach, FL 32082 +1 (904) 202-2222 Cell Email: dbryant@verisk.com	<b>Job Contact Information</b> Avery Jaxson (Primary) +1 (303) 800-5182 Cell +1 (904) 111-1111 Home beachgirl@icloud.com 345 Tesla Street Jacksonville Beach, FL 32250 Lockbox Code: 8900	<b>Work Order</b> <b>No: 1096-001</b> Type: Fire  Job ID: 21-0511-F
<b>Charges</b> PO Number: 1096-001 Budget: \$8,327.89		<b>Office</b> Sunshine Restoration

Rcvd	SiteAppt	Schedule	Due	Completed	War. Exp
03/19/2021	04/19/2021 09:00 AM - 04/19/2021 10:30 AM	04/19/2021 01:00 PM - 04/19/2021 03:00 PM	04/19/2021		
Area	Category/Sub Category	Estimator	Project		
Kitchen	CAB-Cabinetry -	Dawn Bryant +1 (303) 800-5182	Brandon Renne +1 (303) 625-7814		

**Work Description**  
 Install Cabinets, see breakdown for further details.

Level	Room	Category	Unit	Description	Action
Main Level		CAB	LF	Cabinetry - full height unit - Premium grade	Remove





## Work Order Report Settings

### Job Contact View Example:

Sunshine Restoration  
 7991 Shaffer Parkway, Suite 300  
 St. Petersburg, FL 32250  
 Office: (303) 800-5182



### Work Order - Due on 04/19/2021

<b>To</b> The Kitchen Specialist 653 Lake Stone Cir Ponte Vedra Beach, FL 32082 +1 (904) 202-2222 Cell Email: dbryant@verisk.com	<b>Job Contact Information</b> Avery Jaxson (Primary) +1 (303) 800-5182 Cell +1 (904) 111-1111 Home beachgirl@icloud.com Addison Jaxson (Secondary) +1 (904) 333-3333 Cell +1 (904) 111-1111 Home spouseemail@email.com 345 Tesla Street Jacksonville Beach, FL 32250 Claim #: 9876543222	<b>Work Order</b> <b>No: 1096-001</b> Type: Fire  Job ID: 21-0511-F
<b>Charges</b>		<b>Company</b> State Farm
		<b>Office</b> Sunshine Restoration

Rcvd	SiteAppt	Schedule	Due	Completed	War. Exp
03/19/2021	04/19/2021 09:00 AM - 04/19/2021 10:30 AM	04/19/2021 01:00 PM - 04/19/2021 03:00 PM	04/19/2021		
Area	Category/Sub Category	Estimator	Project		
Kitchen	CAB-Cabinetry -	Dawn Bryant +1 (303) 800-5182	Brandon Renne +1 (303) 625-7814		

**Work Description**  
 Install Cabinets, see breakdown for further details.

Level	Room	Category	Unit	Description	Hours	Action
-------	------	----------	------	-------------	-------	--------