Work Order Guide

TacticalPay POS | Sales & Service

PART ONE · CREATING A WORK ORDER

1 Work Orders Overview

The **Work Orders** module (Sidebar → Sales → Work Orders) tracks repair, gunsmithing, and service jobs from intake through completion. Each work order links a customer, a status, one or more line items (inventory, serialized firearms, or services), and a payment history — so you always know what's promised, what's owed, and when it's due.

> **Important — firearms recordkeeping:** A work order is a sales and service record, not a bound-book entry. Adding a serialized firearm as a line item does not create or replace the A&D acquisition or disposition — record those in FFL Boss (or your bound book) as you normally would. Confirm your specific recordkeeping obligations with your ATF IOI.

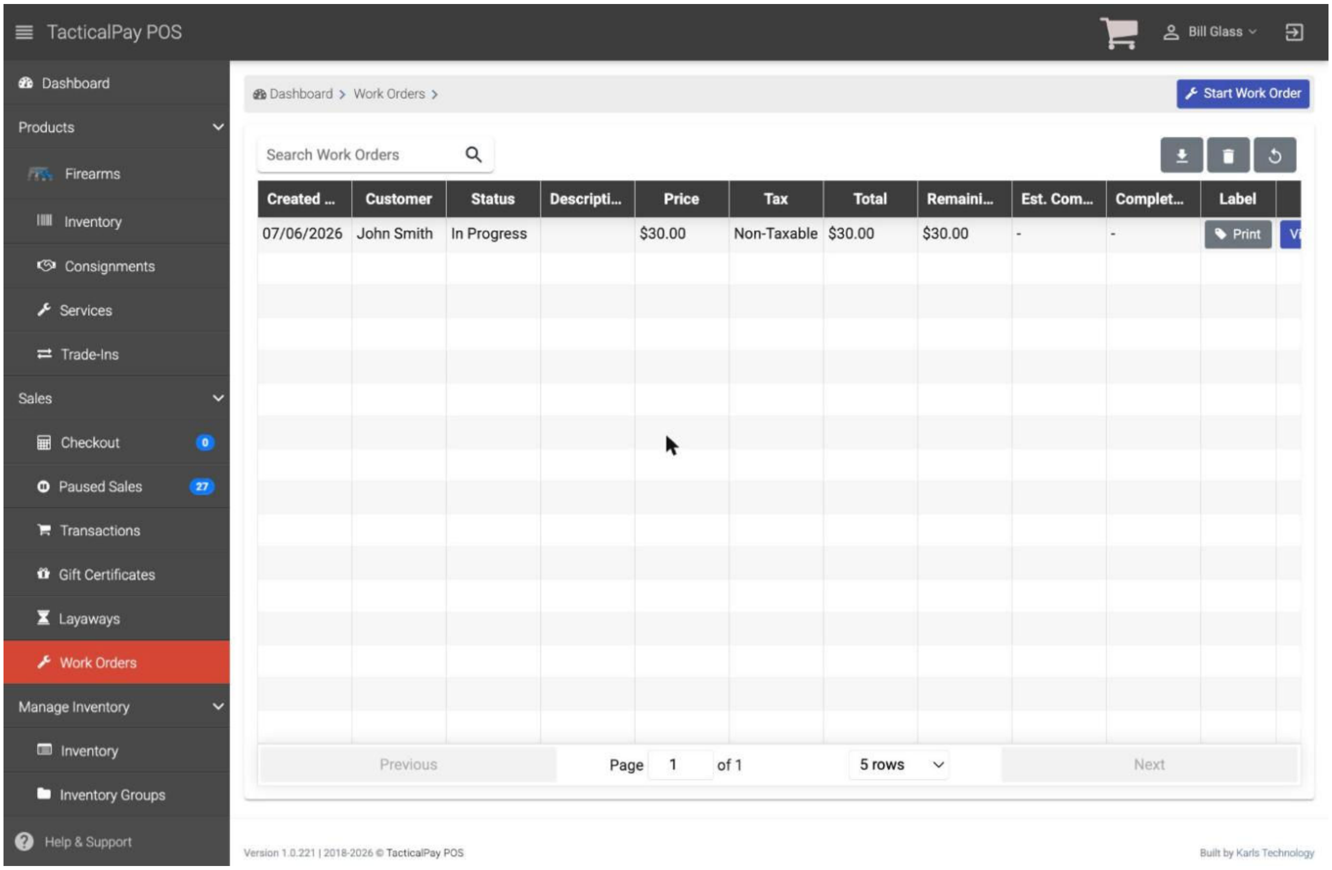


Fig. 1 — Work Orders list view: columns include Created, Customer, Status, Description, Price, Tax, Total, Remaining, Est. Completion, and per-row Print / View actions.

Contents

2 Starting a New Work Order

Click **Start Work Order** in the top-right of the list to open the creation form. Work Order Details sit on the left; the Work Order Items panel is on the right.

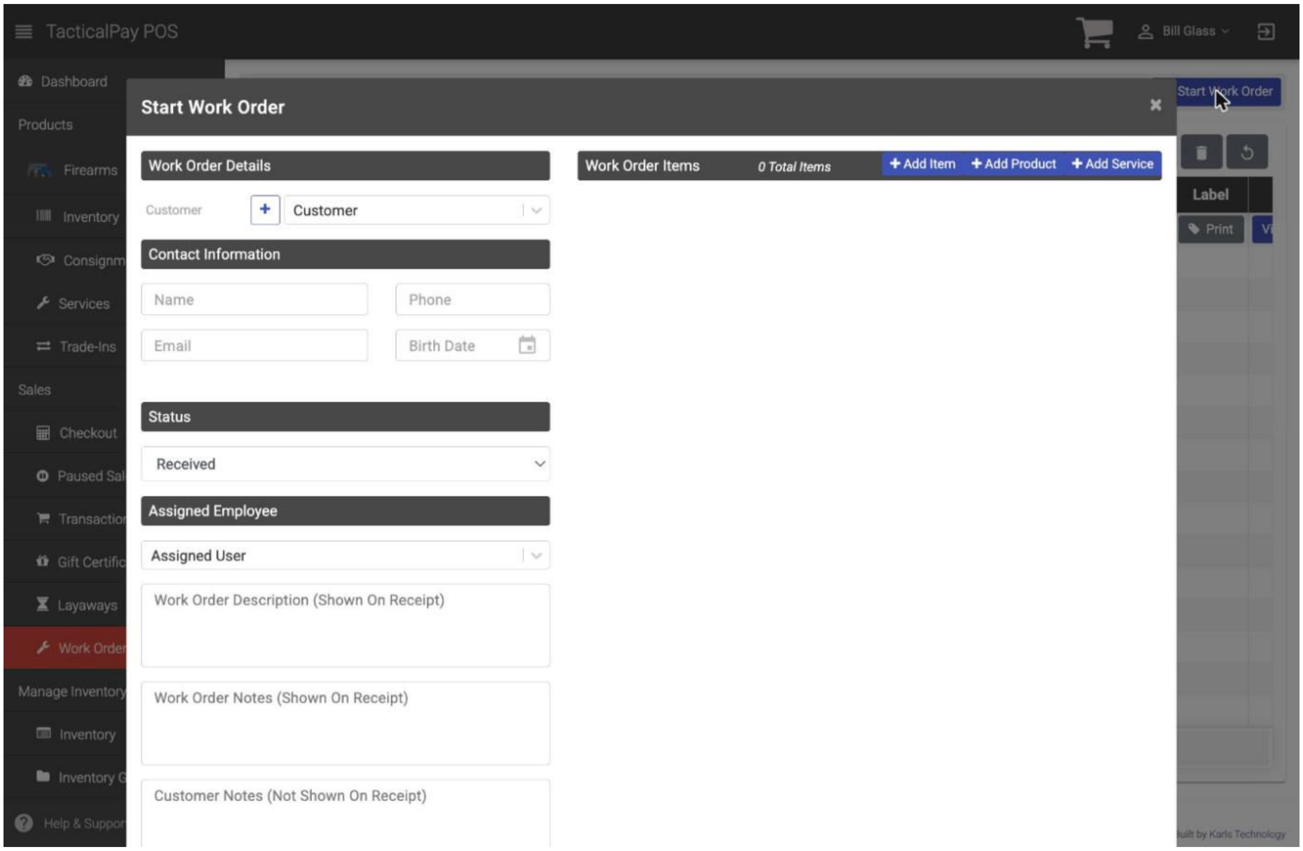


Fig. 2 — The blank Start Work Order form: details on the left, the Work Order Items panel on the right.

Selecting the Customer

1. Click the **Customer** field and start typing to search, or pick from the dropdown.
2. Selecting an existing customer auto-fills Name, Phone, Email, and Birth Date.
3. Use the three quick-action icons beside the field as needed: **+** adds a new customer, the **pencil** opens an editable Update Customer modal, and the **ID card** opens the customer's full profile.

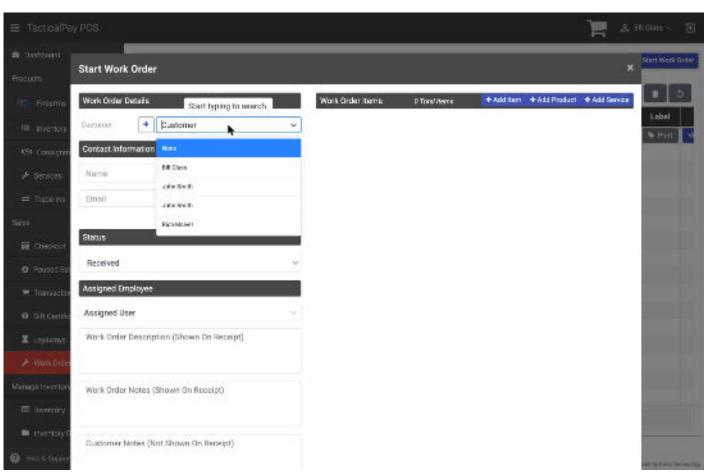


Fig. 3 — Customer search: start typing to filter the dropdown to matching names.

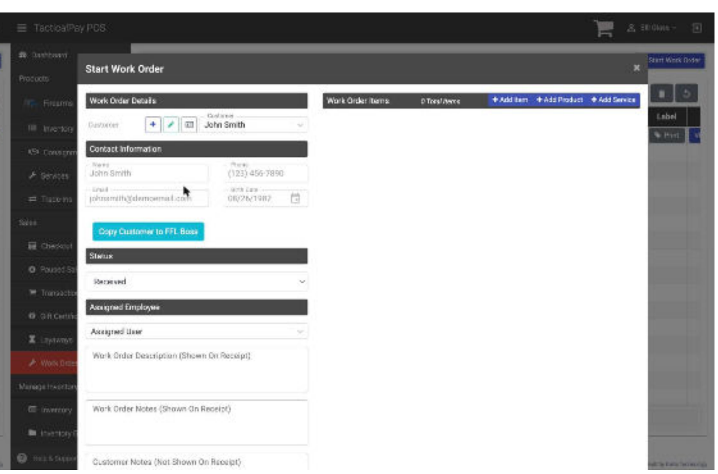


Fig. 4 — Customer selected: contact info auto-fills and a Copy Customer to FFL Boss button appears.

Status, Employee & Description

1. Choose a **Status**: Received, Awaiting Parts, In Progress, Ready, On Hold, or Completed.
2. Optionally assign an **Employee** from the Assigned Employee dropdown.
3. Fill in the **Work Order Description** (shown on the customer's receipt). Optionally add **Work Order Notes** (also on the receipt) and **Customer Notes** (internal only, never on the receipt).

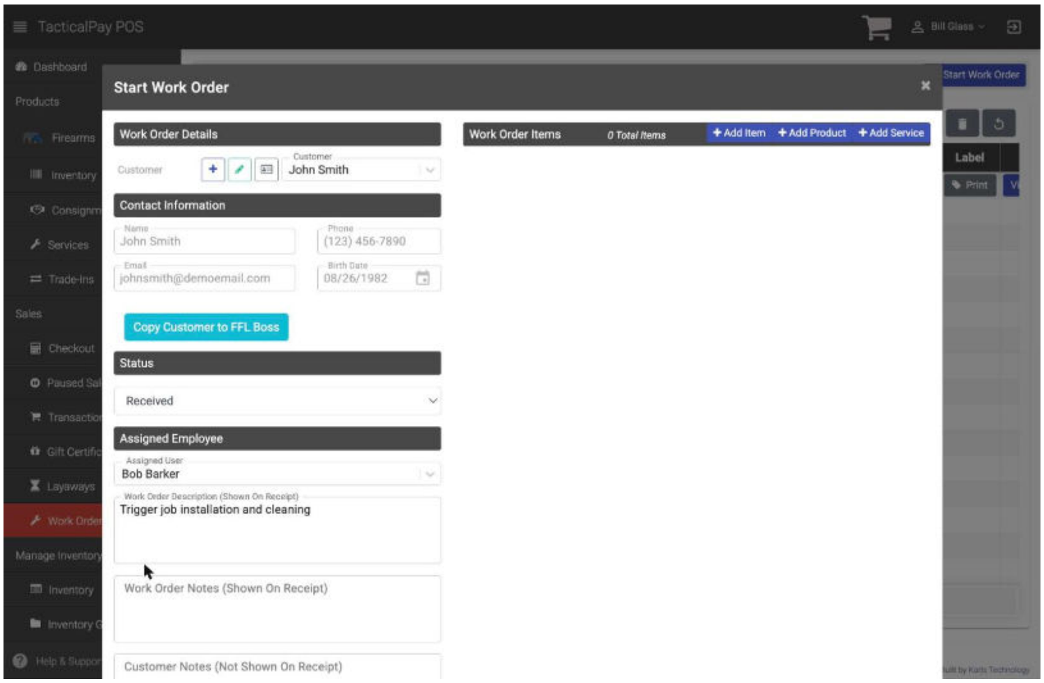


*Fig. 5 — **Status, Assigned Employee, and Description** filled in.*

Setting the Estimated Completion Date

> **Required field:** The Estimated Completion Date is required. Always set this date before submitting.

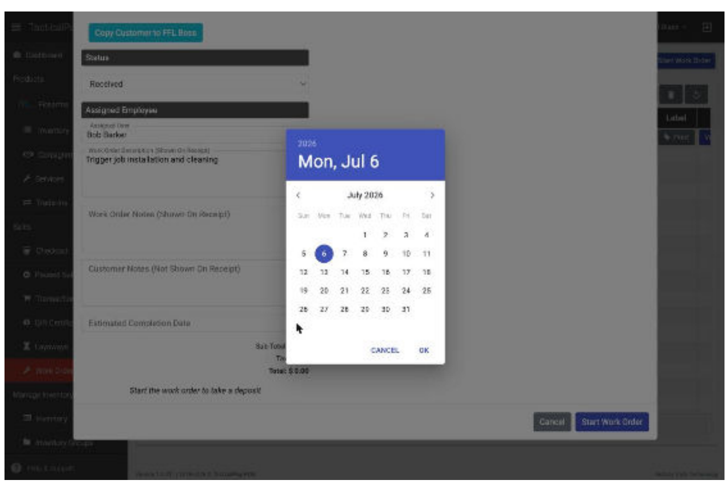


*Fig. 6 — **The Estimated Completion Date** calendar picker.*

Adding Items, Products & Services

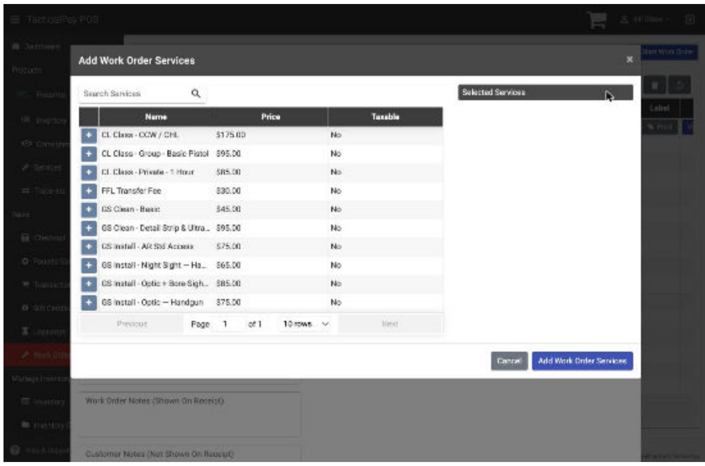
Work Order Items has three add options, each opening its own modal:

- **Add Item** — general inventory (name, SKU, inventory group, price, quantity).
- **Add Product** — serialized firearms (type, manufacturer, model, caliber, serial number).

• **Add Service** — labor / services catalog (name, price, taxable status).

1. Click the **+** next to each item you want — it moves into the Selected panel on the right.
2. Click the modal's confirm button (e.g., **Add Work Order Services**) to commit your selections back to the order.

> **Don't skip the confirm button:** selecting items with **+** alone is not enough — closing the modal without clicking the confirm button discards your selections.



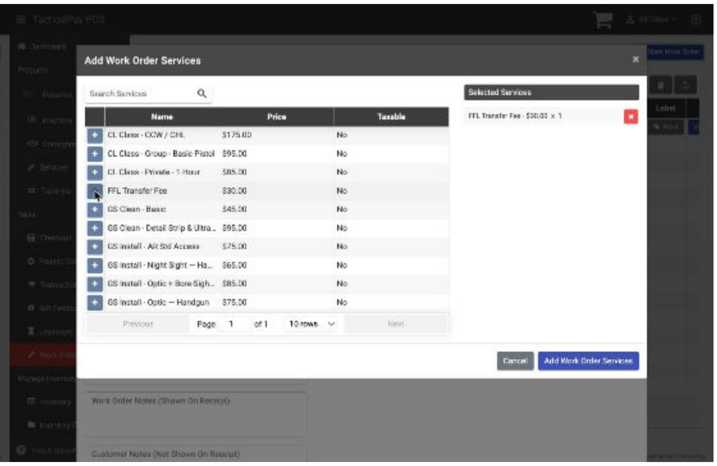


*Fig. 7 — **Add Work Order Services modal:** the services catalog, searchable.*

*Fig. 8 — **A service selected,** shown in the Selected Services panel.*

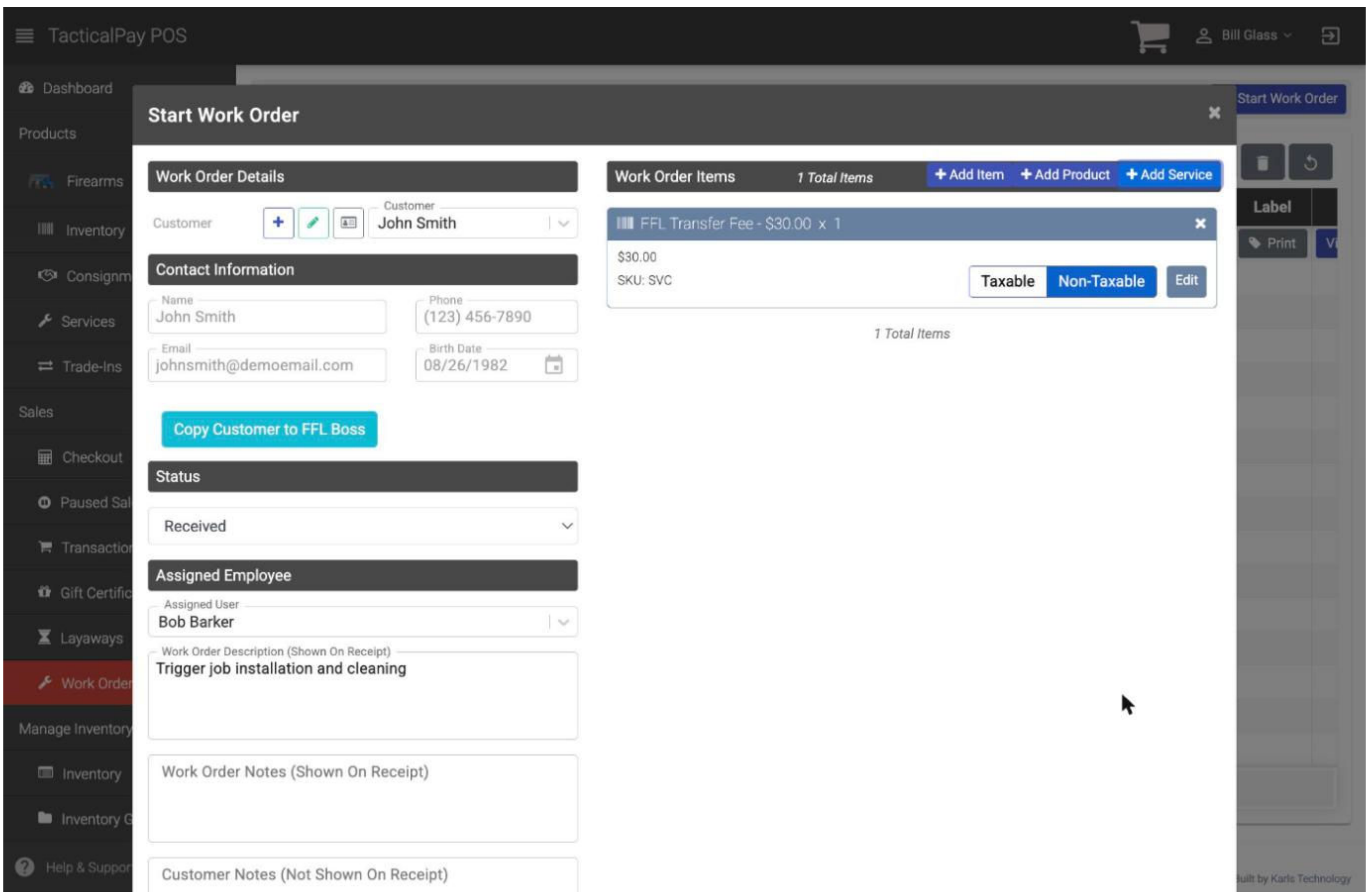


*Fig. 9 — **Work Order Items after confirming:** the added line with its Taxable toggle and Edit button, plus updated Sub Total / Tax / Total.*

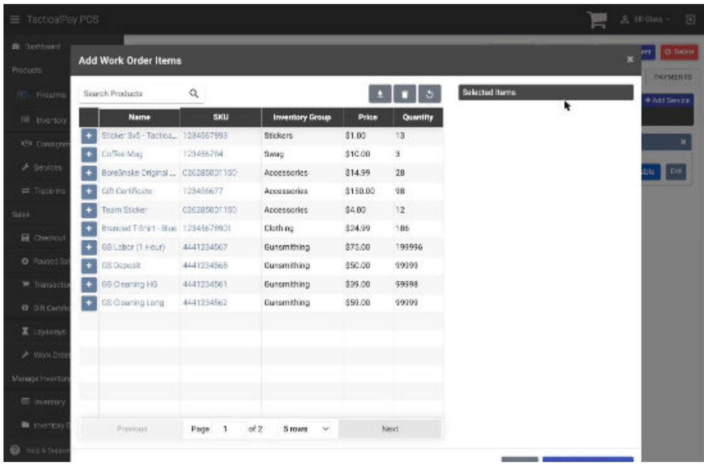


*Fig. 17 — **Add Item modal** (general inventory catalog).*

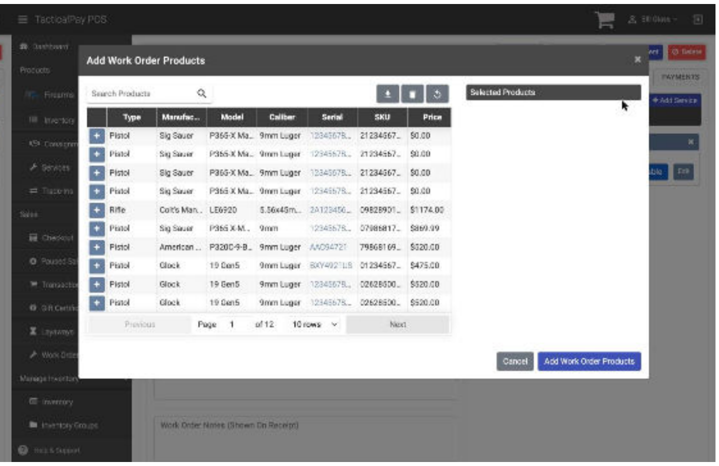


*Fig. 18 — **Add Product modal** (serialized firearms catalog).*

3 Saving the Work Order

1. Review the **Sub Total**, **Tax**, and **Total** at the bottom of the form.
2. Click **Start Work Order** to save.

> **Tip:** A confirmation toast reading "Saved" confirms the order was created. It now appears at the top of the Work Orders list.

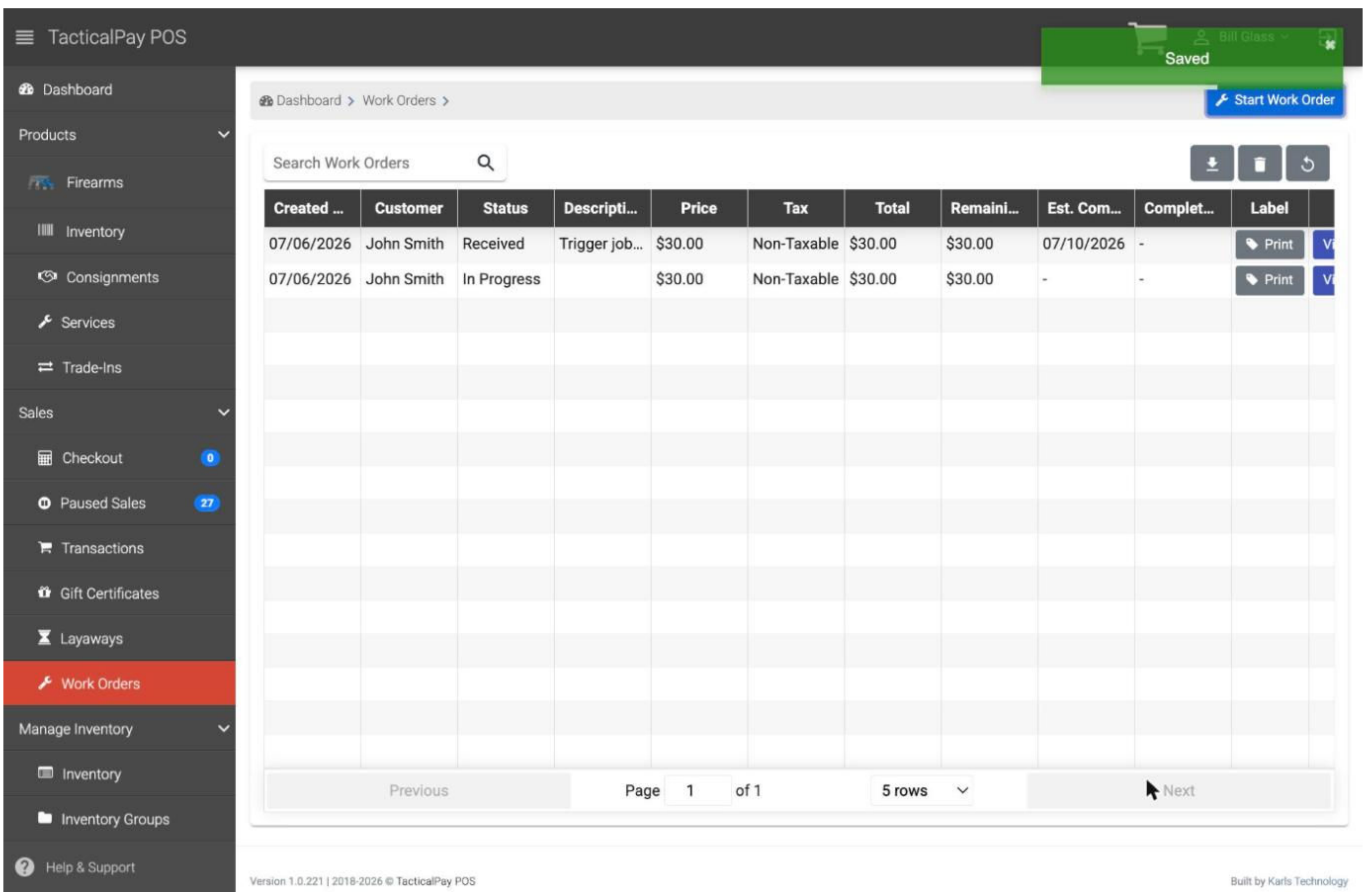


*Fig. 10 — **Saved confirmation toast** and the Work Orders list showing the new record.*

PART TWO · MANAGING A WORK ORDER

4 The Work Order Detail Page

Click **View** on any list row to open the full detail page. It has two tabs — **WORK ORDER** and **PAYMENTS** — and top-level actions: Print Receipt, Email Receipt, Add Payment, and Delete.

1. Edit any field (Status, Employee, Description, dates, and so on) directly on this page.
2. Click **Save** to persist your changes.

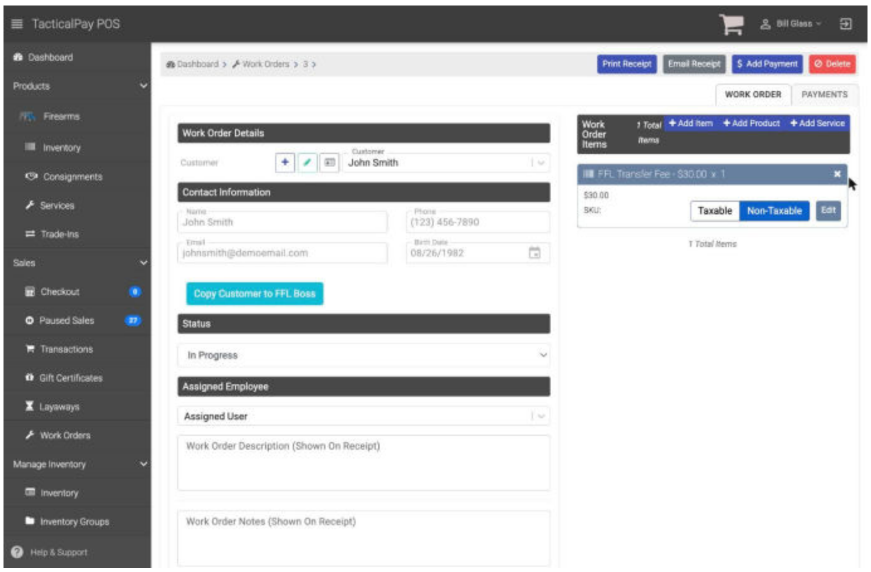


*Fig. 11 — **The Work Order detail page,** WORK ORDER tab.*

5 Editing Line Items

1. Click **Edit** on a line item to open its Update modal.
2. Adjust Name, Serial Number, SKU, Price, Discount Amount, or Quantity.
3. Click **Save** to apply, or **Close** to discard.

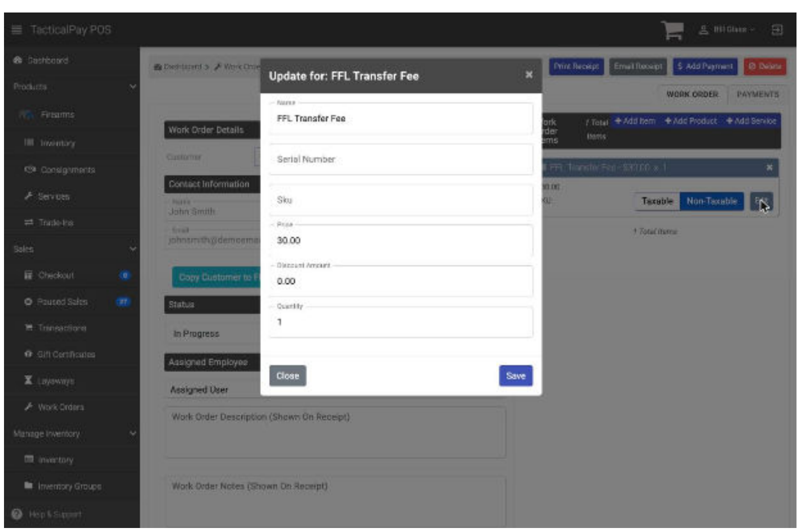


*Fig. 16 — **The line-item Edit modal:** adjust price, quantity, discount, and identifiers.*

6 Managing the Customer on a Work Order

The same three quick-action icons from the creation form are available here: **+** to add a new customer, the **pencil** to edit contact info and manage customer barcodes, and the **ID card** to open the full customer profile (Customer / Membership / Change Log tabs).

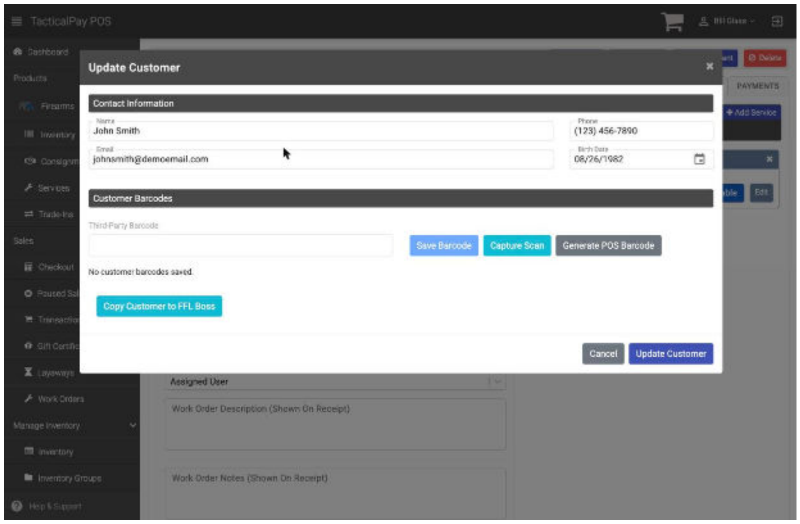


*Fig. 15 — **The Update Customer modal,** including the Customer Barcodes section.*

7 Taking a Payment

1. Click **Add Payment** to route to Checkout with a Work Order Payment line pre-loaded, showing the customer name and remaining balance.
2. Enter a **Payment Amount** and choose **Cash**, **Check**, or **Credit Card** to collect it.

Completed payments appear on the work order's **PAYMENTS** tab with Date, Total, Cash, Check, Card, CC Fee, Register, and Description columns.

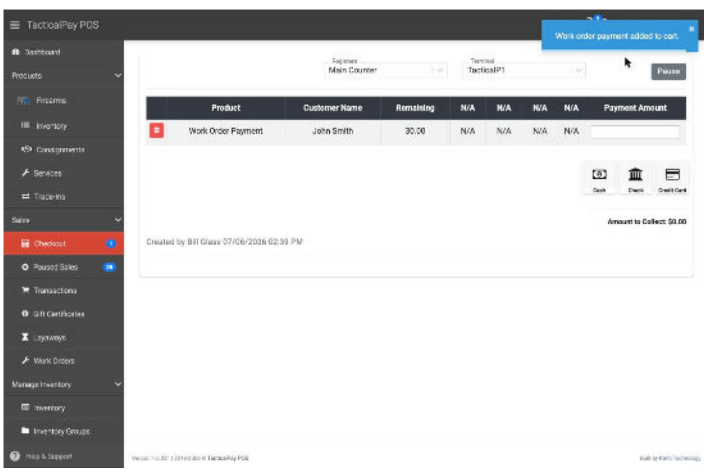


*Fig. 12 — **Checkout:** the Work Order Payment line with Cash / Check / Credit Card buttons.*

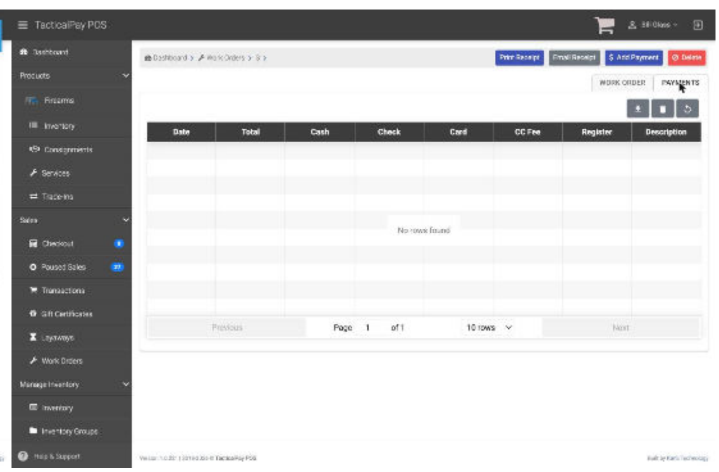


*Fig. 13 — **The PAYMENTS tab** (empty state, before any payment is collected).*

8 Printing & Emailing Receipts

1. Click **Print Receipt** to preview a formatted receipt (shop branding, itemized services, totals, payments made, warranty / returns info, and customer info) before printing.
2. Click **Email Receipt** to send it to the customer's email on file.

> **Email sends immediately:** there is no confirmation dialog. Double-check the customer's email on file before clicking.

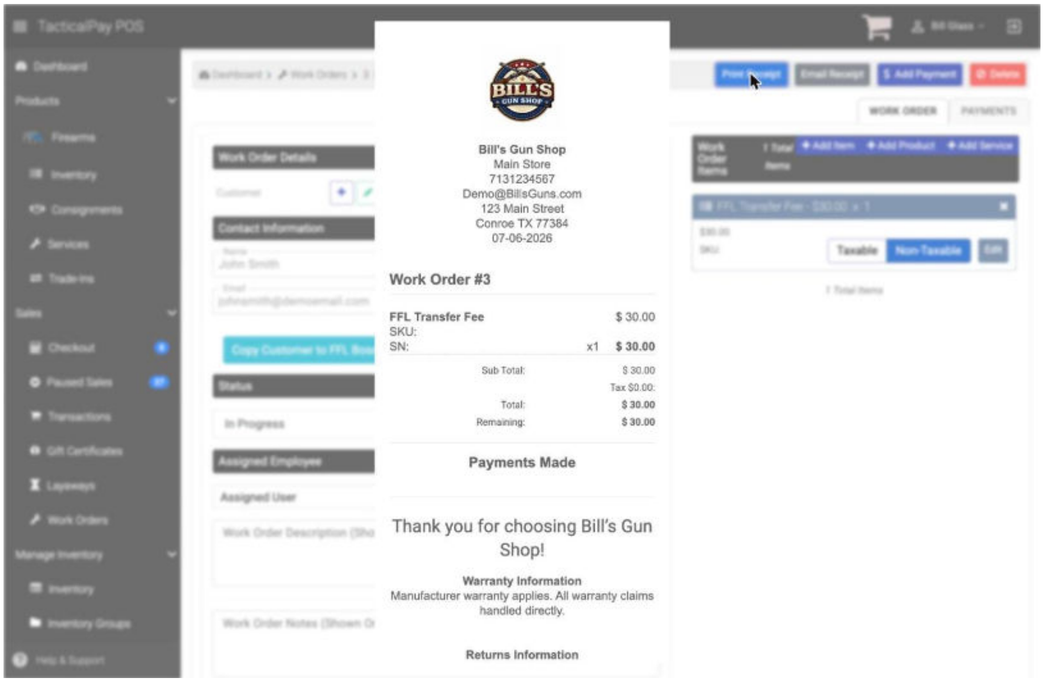


Fig. 14 — The Print Receipt preview modal: shop branding, itemized lines, totals, payments made, and warranty / returns info.

9 Searching & Filtering Work Orders

1. Type a customer name or keyword into the **Search Work Orders** box on the list page.
2. Press **Enter** to filter the list to matching results.

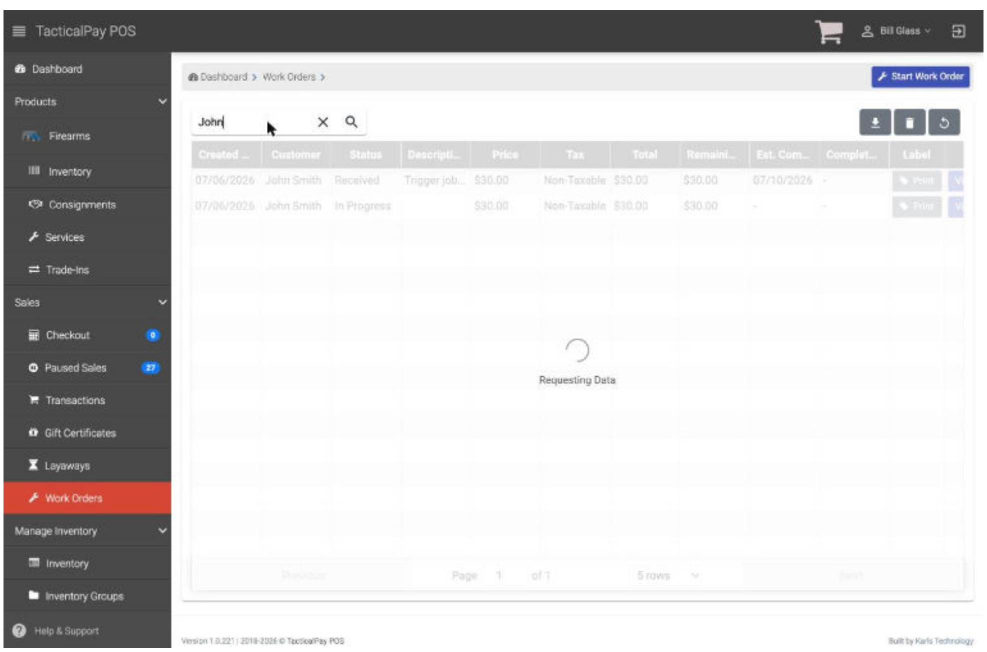


Fig. 19 — The Work Orders list filtered by a search term.

Need help? More guides are at `tacticalpay.com/knowledge-base`. For questions on this workflow, email `POS@TacticalPay.com` — our in-house, Texas-based team will get back to you.