

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.

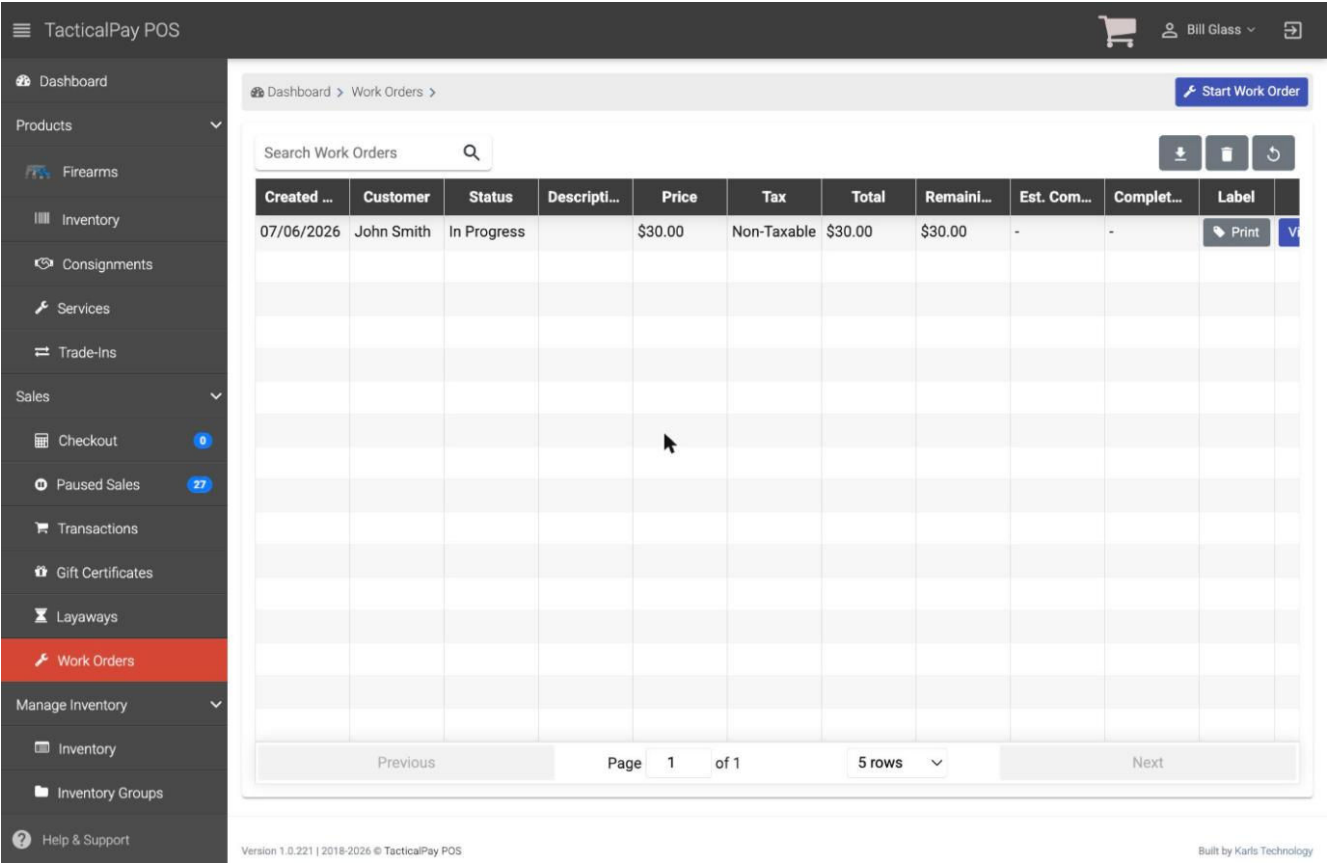


Fig. 1 — Work Orders list view: columns include Created, Customer, Status, Description, Price, Tax, Total, Remaining, Est. Completion, and per-row Print / View actions.

Contents

PART ONE · CREATING		PART TWO · MANAGING	
Work Orders Overview	Page 1	The Work Order Detail Page	Page 6
Starting a New Work Order	Page 2	Editing Line Items	Page 6
Saving the Work Order	Page 5	Managing the Customer	Page 7
		Taking a Payment	Page 7
		Printing & Emailing Receipts	Page 7
		Searching & Filtering	Page 8

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 Box 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).

The screenshot shows the 'Start Work Order' modal in the TacticalPay POS interface. The form is divided into several sections: 'Work Order Details' (Customer: John Smith), 'Contact Information' (Name, Phone, Email, Birth Date), 'Status' (Received), 'Assigned Employee' (Bob Barker), 'Work Order Description' (Trigger job installation and cleaning), 'Work Order Notes' (empty), and 'Customer Notes' (empty). A 'Copy Customer to FFL Boos' button is also visible.

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.

The screenshot shows the 'Start Work Order' modal with a calendar picker open for the 'Estimated Completion Date' field. The calendar displays July 2026, with the 6th of July selected. The background form shows the same information as Figure 5, but the 'Status' is now 'Received' and the 'Assigned Employee' is 'Bob Barker'.

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.

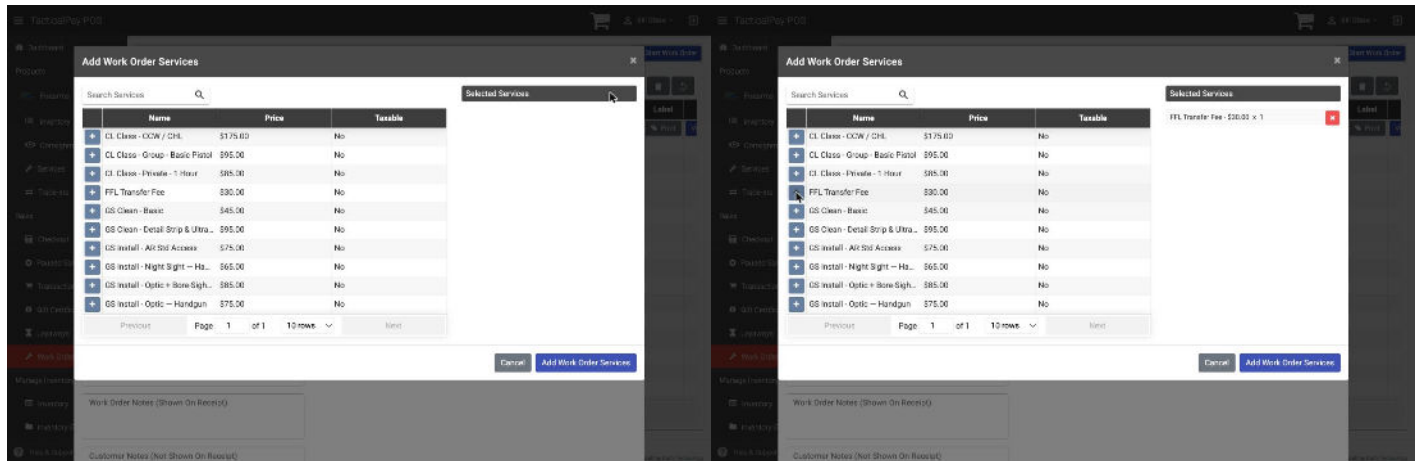


Fig. 7 — **Add Work Order Services** modal: the services catalog, searchable.

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

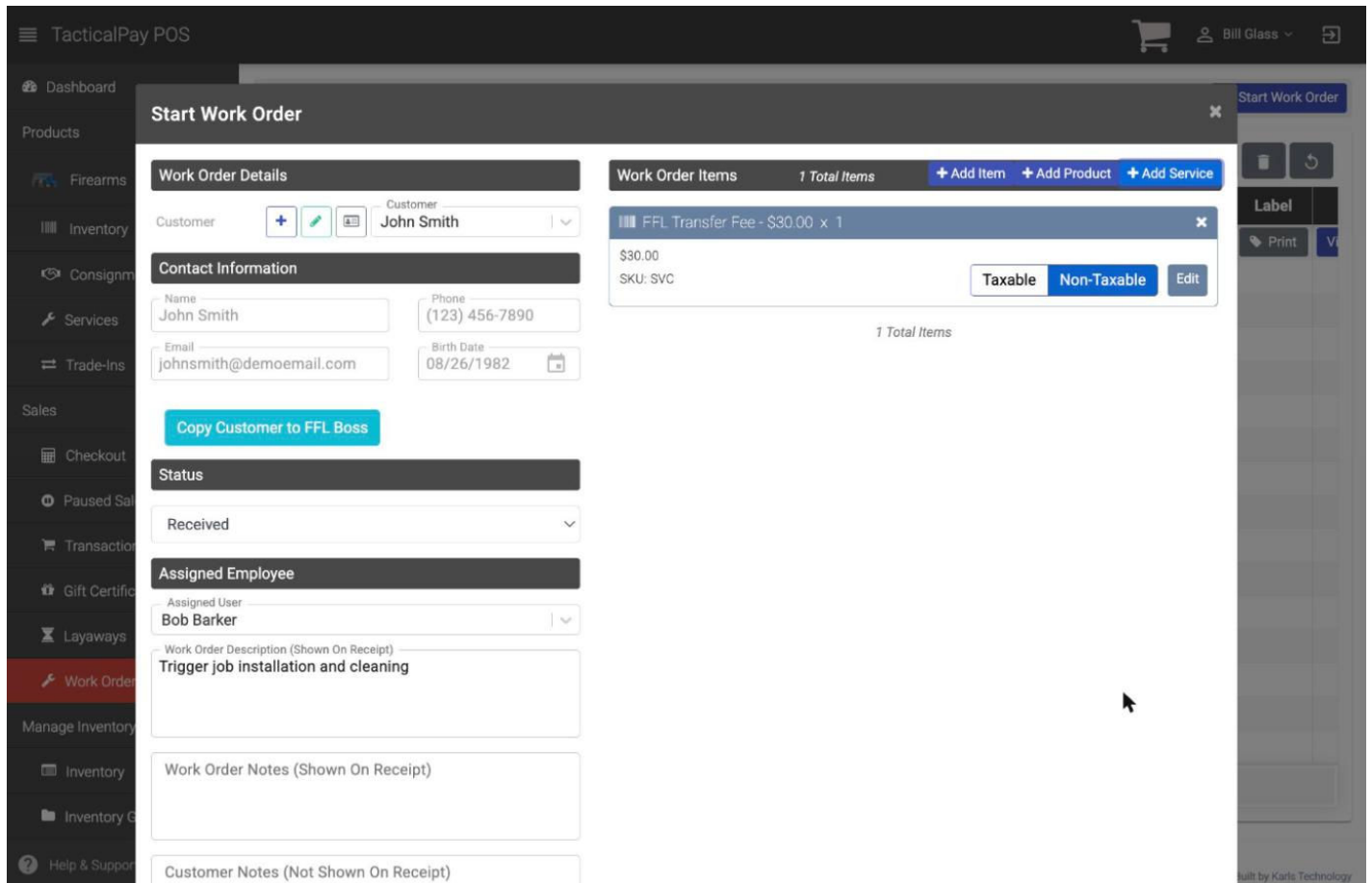


Fig. 9 — **Work Order Items after confirming:** the added line with its Taxable toggle and Edit button, plus updated Sub Total / Tax / Total.

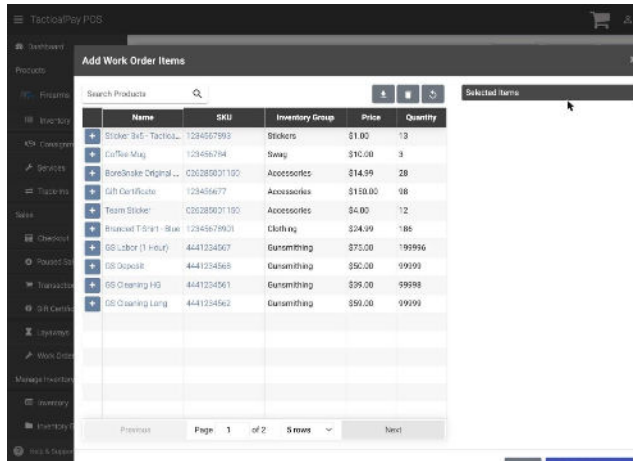


Fig. 17 — Add Item modal (general inventory catalog).

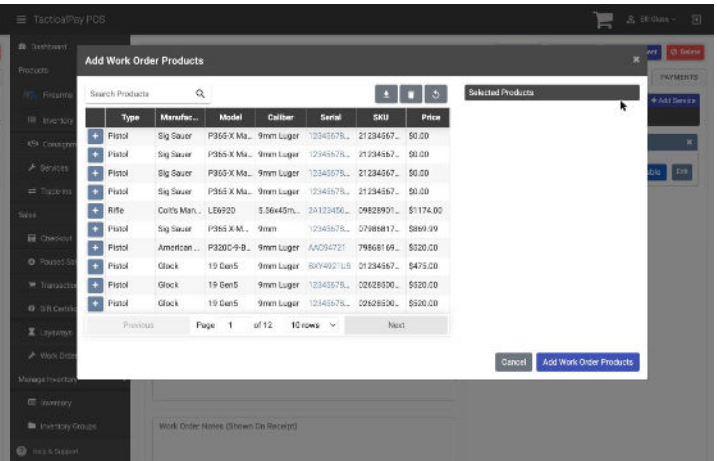


Fig. 18 — Add Product modal (serialized firearms catalog).

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.

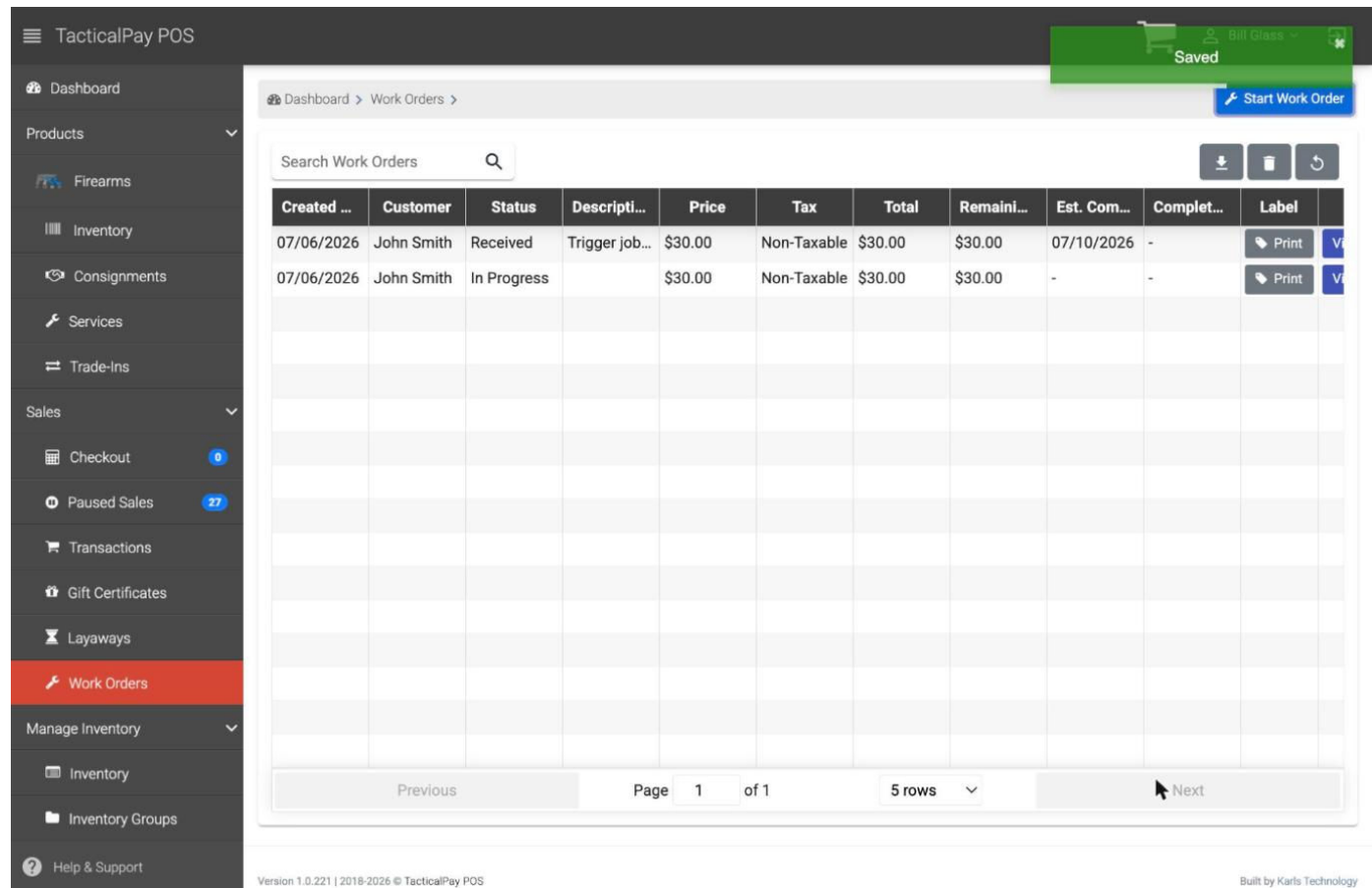


Fig. 10 — Saved confirmation toast and the Work Orders list showing the new record.

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.

The screenshot shows the 'TacticalPay POS' interface. On the left is a sidebar menu with options like Dashboard, Products, Firearms, Inventory, Consignments, Services, Trade-ins, Sales, Checkout, Paused Sales, Transactions, Gift Certificates, Layaways, Work Orders, Manage Inventory, and Help & Support. The main area displays the 'Work Order Details' for a customer named John Smith. It includes contact information (Name, Phone, Email, Birth Date), a 'Copy Customer to FFL Box' button, a 'Status' dropdown set to 'In Progress', an 'Assigned Employee' dropdown, and fields for 'Work Order Description (Shown On Receipt)' and 'Work Order Notes (Shown On Receipt)'. On the right, there's a 'Work Order Items' section with a table showing one item: 'FFL Transfer Fee - \$30.00 x 1'. Below the table are buttons for 'Taxable', 'Non-Taxable', and 'Edit'. At the top right of the main area are buttons for 'Print Receipt', 'Email Receipt', '\$ Add Payment', and 'Delete'.

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.

The screenshot shows the 'Update for: FFL Transfer Fee' modal window. It has fields for 'Name' (FFL Transfer Fee), 'Serial Number', 'SKU', 'Price' (30.00), 'Discount Amount' (0.00), and 'Quantity' (1). At the bottom are 'Close' and 'Save' buttons. The modal is overlaid on the same 'Work Order Detail' page as in Fig. 11, which is dimmed in the background.

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).

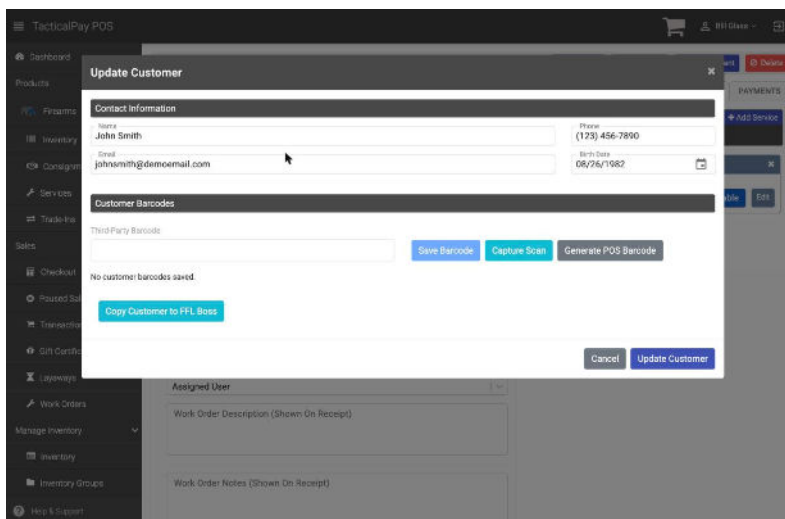


Fig. 15 — The Update Customer modal, including the Customer Barcodes section.

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.

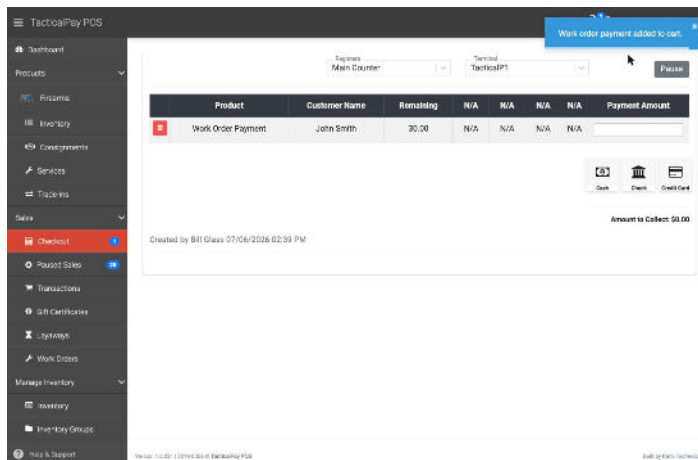


Fig. 12 — Checkout: the Work Order Payment line with Cash / Check / Credit Card buttons.

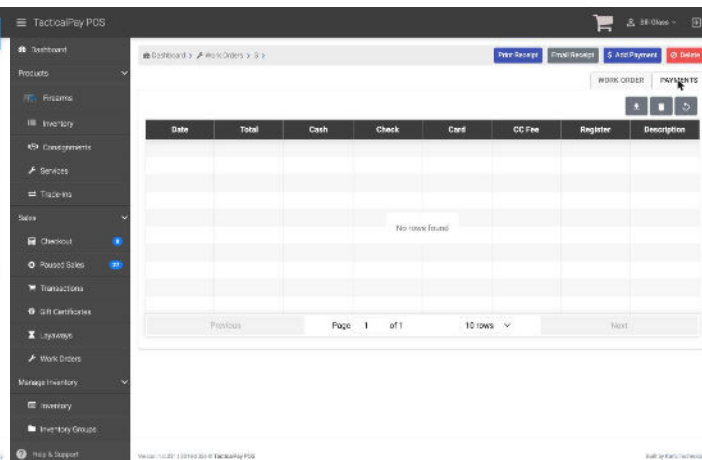


Fig. 13 — The PAYMENTS tab (empty state, before any payment is collected).

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.

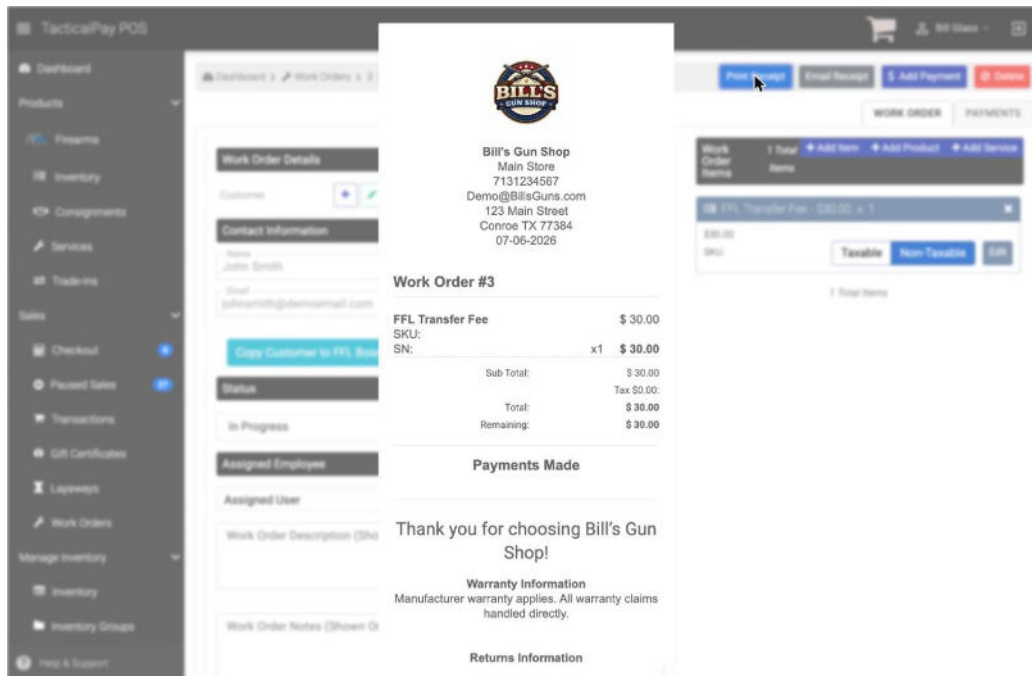


Fig. 14 — The Print Receipt preview modal: shop branding, itemized lines, totals, payments made, and warranty / returns info.

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.

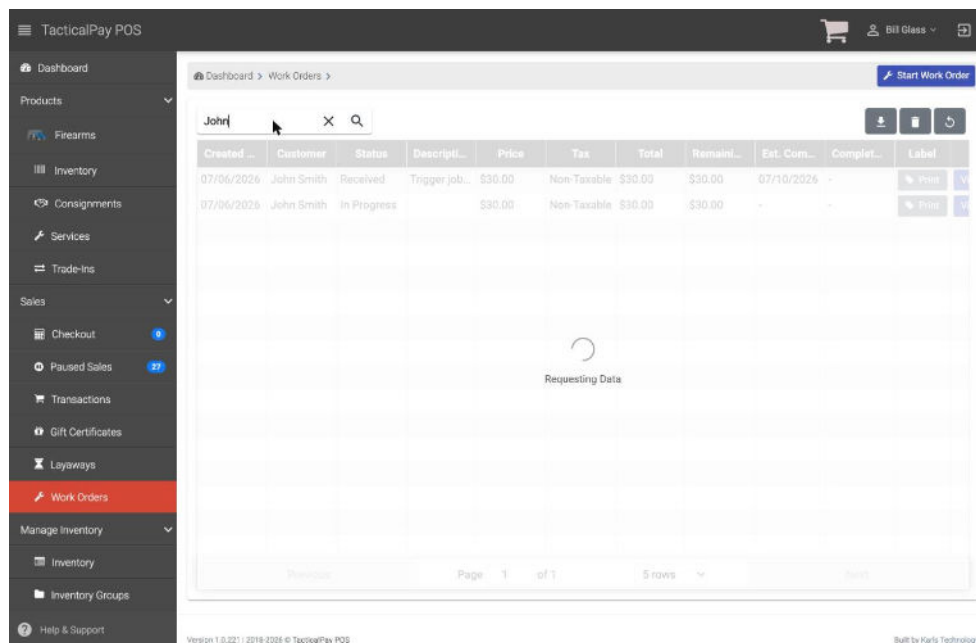


Fig. 19 — The Work Orders list filtered by a search term.

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