



Built For You!

Digital Work Orders

ProjectsForce Digital Work Order forms allow for the work order form to be completed digitally via a mobile device such as a smartphone or tablet.

Customer and store data will automatically populate from the work order in the system. So you will not need to manually enter that data each time a work order is created.

The specific data related to the work order will need to be entered by your office or field staff as needed.

Work Orders > Add Work Order

⚙ Settings ▶ Reports & Charts Save & close Cancel 🔍 Customize this Form

Lowe's Rep Creating Work Order	<input type="text"/>	Date Installer Contacted	11-08-2018 📅	Store Number	
Customer Name		Home Phone		Mobile Phone	
Customer Address		City		State	Zip
Original Installer	<input type="text"/>	Assigned Installer			
Description Of Customer Issue					
Old Model #	<input type="text"/>	Old Serial #	<input type="text"/>		
New Model #	<input type="text"/>	New Serial #	<input type="text"/>		
Type	<input type="text"/>	Approving Manager	<input type="text"/>	Billing Code	<input type="text"/>
Type	<input type="text"/>	Original PO#	<input type="text"/>	Original Date	mm-dd-yyyy 📅
Description of additional materials and labor to be provided	<input type="text"/>				

Once the needed data has been updated click "Save and Close"

Initials	Customer Initials	<input type="text"/>
Customer Signature	Signature FA	<input type="button" value="Choose File"/> No file chosen
Create Work Order	Work Order FA	<input type="button" value="Choose File"/> No file chosen

At this point, you will want to hit the “Customer Signature” button and capture the signature of the customer is needed.

If not needed, you will need to have the client press the “Initials” button in order to add their initials to the form indicating that the work completed satisfies their concerns.

Once you have obtained their initials, signature, or both, press the “Create Work Order” button which will generate the PDF to be transferred to Lowe’s via email, fax, or IMS.

Steps to follow in order:

- Edit work order to enter any needed or supporting information
- Save and close
- Capture customer signature (if needed)
- Capture Initials
- Create work order

Once the work order has been created, the system will react to the changes based off of how your company has requested.