

# How to Make Work Orders Visible in Customer Portal

06/20/2024 5:33 pm EDT

AlarmBillr gives the ability for the dealers to give their customers visibility to their work orders in the customer portal, on top of everything that comes default enabled.

By default, customers logged into the customer portal for AlarmBillr have access to the invoices, proposals, payment history, CC/eChecks, documents and the accounts section where they can link multiple accounts under one set of credentials. Customers can also enable auto pay (auto payment draft) option using the customer portal.

ABC Company

Home

Sughi

Logout

ABC Company

Just ATest - 1367

41777  
Canton, MI 48187  
essteckel@gmail.com

Edit

Auto Pay

Balance Due: (\$100.00)

Open Proposals: 0

Auto Pay:

Salesperson: jan conrad

My Time Zone: Eastern Standard Time

Invoices

Proposals

Payment History

CC/eChecks

Documents 0

Accounts

Invoices

Show Paid Invoices

| Invoice # | Invoice Date | Due Date   | Total Amount | Amount Due |  |
|-----------|--------------|------------|--------------|------------|--|
| 7195      | 02/24/2021   | 02/24/2021 | \$0.00       | \$0.00     |  |
| 7265      | 04/01/2021   | 04/01/2021 | \$0.00       | \$0.00     |  |
| 7348      | 05/01/2021   | 05/01/2021 | \$0.00       | \$0.00     |  |
| 7429      | 06/01/2021   | 06/01/2021 | \$0.00       | \$0.00     |  |

Work orders can be enabled and become visible on the customer portal for the customers. This option is available and can be turned on or off from Setup -> Preferences -> Customer Portal.

Disabled:

Customers Invoices Payments RMR Work Orders Proposals Calendar GL Reports Setup Accounting ▾

**Preferences** Save

Logos Site Settings **Customer Portal** Late Fee Locks GL Account Inventory

Allow Portal: ☒

**Enable Work Orders:** ☐

Portal Title:

Hide Logo: ☒ ?

Enabled:

Customers Invoices Payments RMR Work Orders Proposals Calendar GL Reports Setup Accounting ▾

**Preferences** Save

Logos Site Settings **Customer Portal** Late Fee Locks GL Account Inventory

Allow Portal: ☒

**Enable Work Orders:** ☒

Portal Title:

Hide Logo: ☒ ?

AlarmBiller customer portal will display the work orders:

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41777  
Canton, MI 48187  
essteckel@gmail.com

Edit

Auto Pay

Balance Due: (\$100.00)

Open Work Orders: 2

Open Proposals: 0

Auto Pay:

Salesperson: jan conrad

My Time Zone: Eastern Standard Time

Invoices

Work Orders

Proposals

Payment History

CC/eChecks

Documents 0

Accounts

## Work Orders

☐ On Site ☐ Dispatched ☐ Scheduled ☐ Completed

New Work Order

☐ Show Closed Work Orders

| WO # | Site               | System | Type                      | Status | Last Activity     |
|------|--------------------|--------|---------------------------|--------|-------------------|
| 2141 | Just ATest - 41777 |        | Access Control Install... | New    | 9/27/2021 1:00 PM |
| 2142 | Just ATest - 41777 |        | Access Control Install... | New    | 9/27/2021 5:00 PM |

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