

# Creating a Service Order

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1. Navigate to *Main Menu / Customer Menu / Customer Maintenance*.
2. Select the customer who requested service and choose **Service Orders**.

The screenshot shows the 'Customer Maintenance' interface. At the top, a table lists customers. The customer 'BROCK, MICHAEL' is selected. Below the table, there are tabs for 'Accounts Receivable', 'Address & Information', 'Budget Information', and 'Landlord Tank Rent'. The 'Accounts Receivable' tab is active, showing fields for 'Credit Limit', 'Status', 'Date', 'Current Balance', '30 Day Balance', '60 Day Balance', '90 Day Balance', 'Total Balance', 'Call In History', 'Last Payment Date', 'Last Payment Amount', 'Last Statement Balance', 'Last Statement Date', 'Bill To', 'Automatic Payment Type', 'Tax Exemptions', 'User Defined', 'Tank Address', and 'Tank Prices'. The 'Service Orders' button is highlighted with a red box. On the right side, there is a vertical menu with options like 'Tank Info', 'Safety Form', 'Appliances', 'Contract Gas', 'History Inquiry', 'Purged Inquiry', 'Tank Readings', 'Efficiency', 'Payment Arrangement', 'Tickler Information', 'Meter/RTM Information', 'Payment Methods', 'Print Label', 'Work Orders', and 'Energy Image'.

Div	Customer Number	Name	Address	Phone
1	100007	ADAMS, ANSEL	345 PRODUCTION DRIVE	(317) 999-4444
1	100006	ALLISON, JENNY	8855 SHOWME DRIVE	(800) 783-6560
1	100088	BILLINGSLEY, PETER	123 SOUTHPORT ROAD	(317) 555-1212
1	100005	BROCK, MICHAEL	123 ANYWHERE ST	(317) 555-1212
2	444	DO, SHANNON	88 FREEWAY LANE	(317) 555-1212

☐ Include Inactive Customers

Accounts Receivable | Address & Information | Budget Information | Landlord Tank Rent

Credit Limit: \$0.00 | Status: Active | Date: 00/00/00

Current Balance: (2,436.85) | 30 Day Balance: \$0.00 | 60 Day Balance: \$0.00 | 90 Day Balance: \$1,156.75 | Total Balance: (1,280.10)

Call In History | Alt Cust Credits

Last Payment Date: 06/20/18 | Last Payment Amount: \$20.00 | Last Statement Balance: \$1,156.75 | Last Statement Date: 03/31/21 | Bill To: 100005

Automatic Payment Type | Tax Exemptions | User Defined | Tank Address | Tank Prices

**Service Orders** | Proposals | Invoices | Service Locations

Tank Info: Safety Form, Appliances, Contract Gas, History Inquiry, Purged Inquiry, Tank Readings, Efficiency, Payment Arrangement, Tickler Information, Meter/RTM Information, Payment Methods, Print Label, Work Orders, Energy Image

3. Choose **Create** located on the menu on the right side of the screen.

The screenshot shows the 'Service Order' creation interface. At the top, a table lists service orders. The 'Service Order' tab is active, showing fields for 'Service Order Status', 'Service Order Type', 'Customer Info', 'Service Order', 'Service Requested', and 'Technicians'. The 'Create' button is highlighted with a red box. On the right side, there is a calendar for February 2026 and a 'Show All' dropdown menu.

Service Order#	Order Date	Order Time	Invoice#	Customer #	Service Loc#	Name	Division	Zone	Type	Status	Sched. Date	Sched. Time
503	08/16/2023	10:57 AM	530	100005	530	MICHAEL BROCK	1	3	4	3	08/17/2023	10:00 AM
502	03/31/2023	10:48 AM		100005	530	MICHAEL BROCK	1	3	2	**	04/03/2023	10:57 AM
501	06/22/2018	08:14 AM	521	100005	2	MICHAEL BROCK	1	1	2	1	01/31/2023	10:00 AM

Service Order Status: SCHEDULED | Service Order Type: TANK SWAP OUT

Customer Info | Service Order | Service Requested | Technicians

Service Address: 123 ANYWHERE ST | City: AVON | State: IN | First Name: MICHAEL | Last Name: BROCK | Requested By: | Mail Address 1: 123 ANYWHERE ST | Address 2: | City2: PENSACOLA | State: FL | Zipcode: 32501- | Home Phone: (317)555-1212 | Work Phone: ( ) - | Cell Phone: ( ) - | Order taken by: slaherty | Service Zone: 3 | ZONE 3

February 2026

Show All

Inv Sel | **Create** | Modify | Print SO | Save | Open Proposal | Open Inv. | Exit

4. The **Service Order#** automatically generates and the **Order Date** populates to the current date. The **Order Time** and **Customer #** automatically populate as well. The **Order Date** and **Order Time** fields can be modified if necessary.

5. In the *Service Location#* field press **F5** and select the location from the list.

Select Service Location

Service Locations for Customer 100005 BROCK, MICHAEL

Name	Address	City, State
HOUSE	123 ANYWHERE ST	ANYWHERE, IN
OFFICE	123 ANYWHERE ST	AVON, IN

Directions  
kjfklsadf

Select Cancel

6. The *Division* and *Zone* fields will automatically populate based on the Service Location chosen.

7. Press **F5** in the *Type* field and select the type of work to be performed.

8. Press **F5** in the *Status* field and select the current status (scheduled, pending, etc.).

9. Enter service *Scheduled Date*. Input the date manually or double-click in the *Scheduled Date* field to display the Dispatch calendar.

- The calendar will display the number of items scheduled for a particular date. To insert the date from the calendar, double-click on the date and it will insert into the *Scheduled Date* field.
- If uncertain of the date, leave it blank and modify later.
- The Dispatch calendar can be viewed at any time by selecting the **Calendar** icon at the top of the Energy Force menu or by pressing **Alt+D**.

Dispatch Calendar

February, 2026

Sunday	Monday	Tuesday	Wednesday	Thursday
1	2	3	4	5
8	9	10	11	12

10. In the *Requested By* field located on the *Customer Info* tab, enter who requested the Service Order. The *Service Address* and other information can be modified as necessary.

Customer Info Service Order Service Requested Technicians

Service Address 123 ANYWHERE ST

City ANYWHERE State IN

First Name MICHAEL Last Name BROCK

Requested By

Mail Address 1 123 ANYWHERE ST

Address 2

City2 PENSACOLA State FL Zipcode 32501-

Home Phone (317)555-1212

Work Phone ( ) -

Cell Phone ( ) -

Order taken by

Service Zone 1 ZONE 1

11. Select the *Service Order* tab.

12. If the work to be performed is on an existing tank, choose **Select Tank**.

Customer Info Service Order Service Requested Technicians

Select Tank

Co. Owns? N Tank Type P PROPANE Tank Size 500.00

Tank S/N PCA TANK

Location 1

Meter Type 0 Meter S/N

Projected Close Date 00/00/00 Close Date 00/00/00

Close Reason 0 Hours on Job 00:00

Call Back? ☐

1. If *Co. Owns?* is set to *No*, input the information manually.

13. If servicing a Meter, enter the Meter information.

14. Optionally enter a *Projected Close Date*.

15. The *Close Date*, *Close Reason*, and *Hours on Job* will be entered once the job has been completed.

16. Select the *Service Requested* tab.

17. Enter the *Service Requested* and any special instructions for the technician as necessary.

Customer Info Service Order Service Requested Technicians

Service Requested Annual visual inspection and pressure test on regulator

Service Performed

18. Select the *Technicians* tab. Assigning a Technician or Technicians to a job can be accomplished in a number of different methods.

- In the *Technician Seq* field, press **F5** and select the Technician to assign to the job. If more than one Technician is assigned to the job, arrow down and press **F5** to select again.

Customer Info Service Order Service Requested Technicians

Dispatch 00/00/0000 00:00 AM Set Date / Time Enroute 00/00/0000 00:00 AM Set Date / Time

Arrive 00/00/0000 00:00 AM

Typical Time

Tech Seq	Tech Name
0	

Select Technician

Seq	Name	Technician Type
2	JOHN SMITH	SERVICE TECHNICIAN
3	DAVE JOHNSON	SERVICE TECH AC CERTIFIED

Select Cancel

- o To assign multiple technicians by a group, right-click on the Location Number at the top of the screen and select **Assign Service Order Technician**. Checkmark all who apply and select **Continue**.

Service Order#	Order Date	Order Time	Invoice#	Customer #	Service Loc#	Name	Division	Zone	Type	Status	Sched. Date	Sched. Time
504	02/04/2026	11:12 AM		100005		MICHAEL BROOK	1	1	2	3	02/04/2026	00:00 AM

Assign Service Order Technicians

Schedule Service Order

Close Service Order

Set to Dispatched

Set to Enroute

Set to Arrived

Assign Service Order Techs

Typical Time 02:00 Total Technician Time 00:00

**TECHNICIAN TIME DOES NOT MATCH TYPICAL TIME**

Selected?	Tech Seq	Tech Name	Tech Type	Date of Work	Start	End	Time
<input type="checkbox"/>	3	DAVE JOHNSON	SERVICE TECH AC CERT	02/04/2026	00:00	AM	02:00 AM 02:00
<input checked="" type="checkbox"/>	2	JOHN SMITH	SERVICE TECHNICIAN	02/04/2026	00:00	AM	02:00 AM 02:00

Continue

Service Order Status SCHEDULED

Customer Info Service Order Service Requested Technicians

Dispatch 00/00/0000 00:00 AM Set Date

Arrive 00/00/0000 00:00 AM Set Date

Typical Time 02:00 Total Technician Time 02:00

Tech Seq	Tech Name	Tech Type	Date of Work	Start	End	Time
2	JOHN SMITH	SERVICE TECHNICIAN	02/04/26	00:00	AM	02:00 AM 02:00

Show All

19. Choose **Save** when all technicians have been assigned to commit the Service Order to the customer account.