

Creating a Service Order

Last Modified on 11/02/2023 2:14 pm EDT

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

The screenshot shows a customer account page for customer 876139, BOB BROWN. The 'Service Orders' button at the bottom is highlighted with a red box. A red arrow points from the 'Service Orders' button to the 'Create' button in the next screenshot.

Div	Customer Number	Bill To Name	Address	Phone
1	876139	876139 BROWN,BOB	5250 E US HWY 36	(800) 783-6560

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

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

Current Balance: \$0.00 | Inactive Reason Code: 0

30 Day Balance: \$0.00 | Turned Over To Collection: No

60 Day Balance: \$0.00 | Number Of Tanks: 1

90 Day Balance: \$0.00 | Total Balance all Accts: \$0.00

Total Balance: \$0.00 | Sales YTD All Tanks: \$0.00

Gallons Used YTD All Tanks: 0.00

Safety Info Received Date: 00/00/00

Call In History

Last Payment Date: 00/00/00

Last Payment Amount: \$0.00

Last Statement Balance: \$0.00

Last Statement Date: 11/30/19

Alternate ID #

COD

Online Access | Tax Exemptions | User Defined | Tank Address | Tank Prices

Service Orders | Proposals | Invoices | Service Locations

Tank Info

- Credit Information
- Appliances
- Contract Gas
- History Inquiry
- Purged Inquiry
- Tank Readings
- Efficiency
- Payment Arrangement
- Tickler Information
- Meter/RTM Information
- Print Information
- 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 screen. The 'Create' button in the right-hand menu is highlighted with a red box. A red arrow points from the 'Create' button to the 'Select' button in the next screenshot.

Service Order#	Order Date	Order Time	Invoice#	Customer #	Service Loc#	Name	Division	Zone	Type	Status	Sched. Date	Sched. Time
16	02/06/2020	01:35 PM		876139	8,163	BOB BROWN	1	3	1	1	02/07/2020	02:00 PM

Service Order Status: SCHEDULED | Service Order Type: TANK LEVEL

Customer Info | Service Order | Service Requested | Technicians

Service Address: 123 ANYWEHRE STREET
City: CARTHAGE | State: MO

First Name: BOB | Last Name: BROWN

Requested By:

Mail Address 1: 5250 E US HWY 36
Address 2:
City: CARTHAGE | State: MO | Zipcode: 64836

Home Phone: (800)783-6560
Work Phone: () -
Cell Phone: () -
Order taken by: sfaherty
Service Zone: 3 | CARTHAGE

February 2020

S M T W T F S

1

2 3 4 5 6 7 8

9 10 11 12 13 14 15

16 17 18 19 20 21 22

23 24 25 26 27 28 29

Show All

Inv Sel | **Create** | Modify

Print SO | Save

Create and Open Proposal

Open Invc. | 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.

The screenshot shows the 'Select Service Location' dialog. The 'Select' button at the bottom is highlighted with a red box. A red arrow points from the 'Select' button to the 'Select' button in the next screenshot.

Order Time	Invoice#	Customer #	Service Loc#	Name	Division	Zone	Type	Status	Sched. Date	Sched. Time
01:43 PM		876139	0	BOB BROWN	1	0	0	0	00/00/0000	00:00

Select Service Location

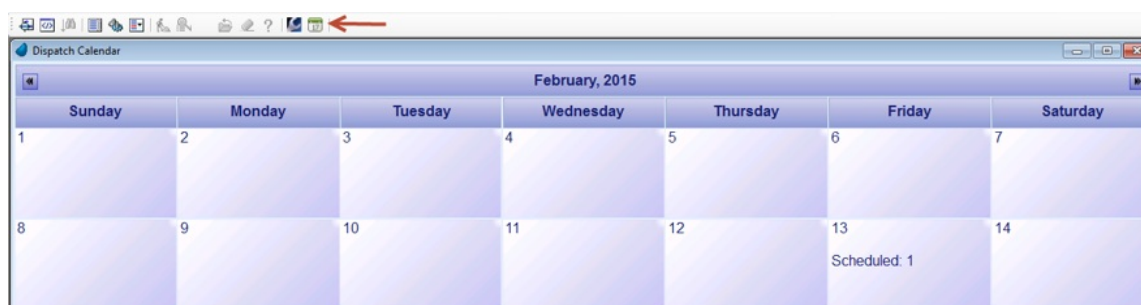
Service Locations for Customer 876139 BROWN,BOB

Name	Address	City, State
SHOP - WATER HEATER	123 ANYWEHRE STREET	CARTHAGE, MO
TANK/FIREPLACE AT HOUSE	5250 E US HWY 36	CARTHAGE, MO

Directions
BC-001192358

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.
 - o 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.
 - o If uncertain of the date, leave it blank and modify later.
 - o 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**.



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.

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

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.

Service Order Status: OPEN Service Order Type: REGULATOR UPDATE

Customer Info | Service Order | Service Requested | Technicians

Service Requested: Annual visual inspection and pressure test on regulator

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.

Service Order Status: OPEN Service Order Type: REGULATOR UPDATE

Customer Info | Service Order | Service Requested | Technicians

Dispatch: 00/00/0000 12:00 am Set Date / Time
 Arrive: 00/00/0000 12:00 am Set Date / Time
 Typical Time: 02:00 Total Technician Time: 00:00

Tech Seq Tech Name Tech Type

0

Double Click in Tech Seq to select technicians individually

Select Technician Dialog:

Seq	Name	Technician Type
1	STEVE KESY	SERVICE/INSTALLATION TECH
2	DAVE BARRETT	SERVICE/INSTALLATION TECH
3	GEORGE TAYLOR	SERVICE/INSTALLATION TECH
4	MIKE LOWRY	SERVICE/INSTALLATION TECH
5	JOHN ROSE	SERVICE/INSTALLATION TECH
6	CHRIS MCDONNELL	SERVICE/INSTALLATION TECH
7	MAINTENANCE	SERVICE/INSTALLATION TECH
8	TYLOR HANZLIK	SERVICE/INSTALLATION TECH
9	ROGER BRELSFORD	SERVICE/INSTALLATION TECH

Select Cancel

- 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**.

1007 02/16/2015 8:48 am 92907 24,208 4 PAW INC 1 4 1 02/16/2015 2:00 pm
 882 12/10/2014 12:19 pm 92907 24,208 4 PAW INC 1 1 3 12/11/2014 8:00 am
 845 12/02/2014 10:26 am 92907 24,208 4 PAW INC 1 1 3 12/05/2014 9:00 am

Right click on Service Order line to perform multi select of technicians

Assign Service Order Techs Dialog:

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 checked="" type="checkbox"/>	6	CHRIS MCDONNELL	SERVICE/INSTALLATION	02/16/2015	2:00 pm	4:00 pm	02:00
<input type="checkbox"/>	2	DAVE BARRETT	SERVICE/INSTALLATION	02/16/2015	2:00 pm	4:00 pm	02:00
<input checked="" type="checkbox"/>	3	GEORGE TAYLOR	SERVICE/INSTALLATION	02/16/2015	2:00 pm	4:00 pm	02:00
<input type="checkbox"/>	5	JOHN ROSE	SERVICE/INSTALLATION	02/16/2015	2:00 pm	4:00 pm	02:00
<input type="checkbox"/>	7	MAINTENANCE	SERVICE/INSTALLATION	02/16/2015	2:00 pm	4:00 pm	02:00
<input type="checkbox"/>	4	MIKE LOWRY	SERVICE/INSTALLATION	02/16/2015	2:00 pm	4:00 pm	02:00
<input type="checkbox"/>	9	ROGER BRELSFORD	SERVICE/INSTALLATION	02/16/2015	2:00 pm	4:00 pm	02:00

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