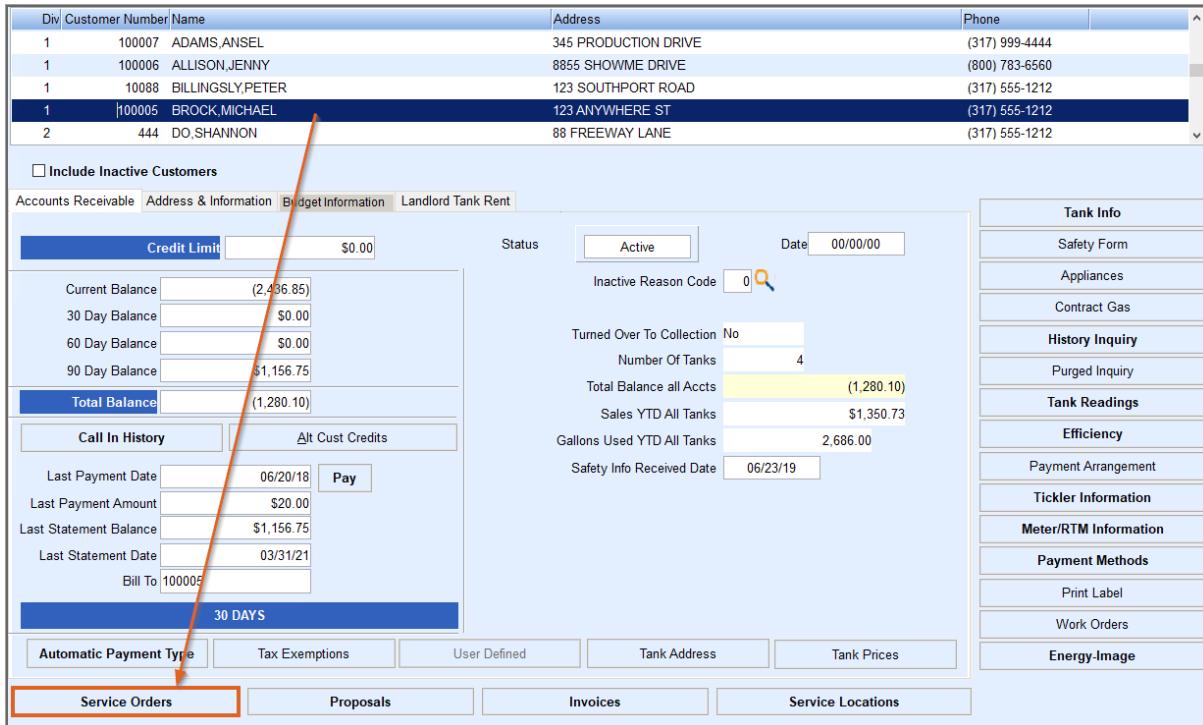


Creating a Service Order

Last Modified on 02/04/2026 12:42 pm EST

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



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	10088	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

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 | Pay

Last Payment Amount: \$20.00

Last Statement Balance: \$1,156.75

Last Statement Date: 03/31/21

Bill To: 100005

30 DAYS

Status: Active | Date: 00/00/00

Inactive Reason Code: 0

Turned Over To Collection: No

Number Of Tanks: 4

Total Balance all Accts: (1,280.10)

Sales YTD All Tanks: \$1,350.73

Gallons Used YTD All Tanks: 2,686.00

Safety Info Received Date: 06/23/19

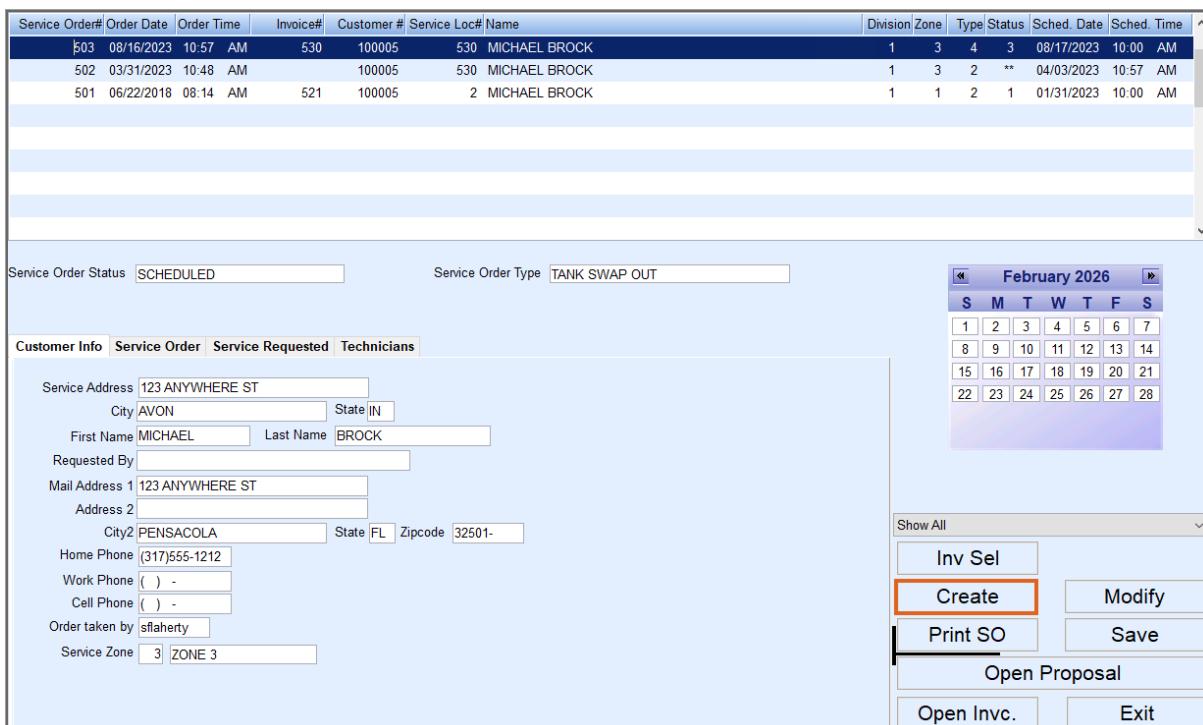
Tank Info

- 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**

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

Service Orders | Proposals | Invoices | Service Locations

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



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

February 2026

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

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:

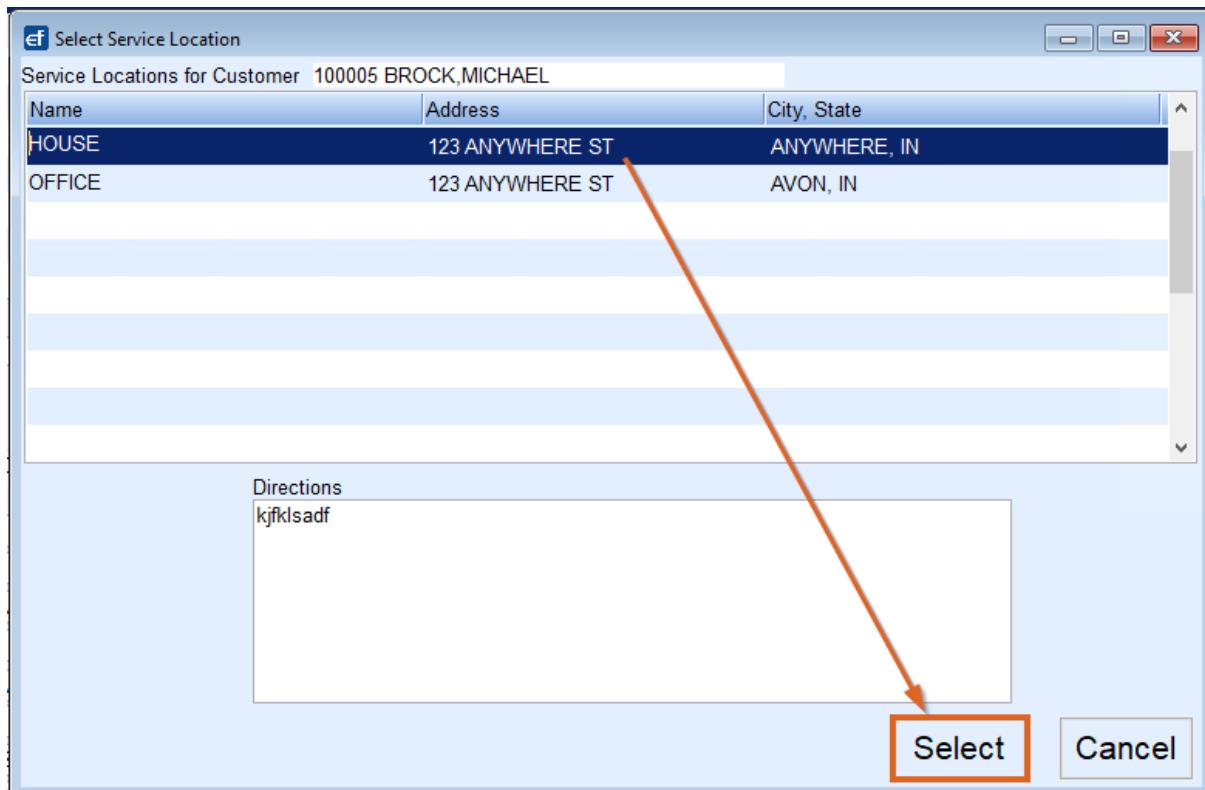
City2: PENSACOLA | State: FL | Zipcode: 32501- | Home Phone: (317)555-1212 | Work Phone: () - | Cell Phone: () -

Order taken by: sflaherty | Service Zone: 3 | ZONE 3

Create | Modify | Print SO | Save | 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.



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**.



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 [redacted]

Mail Address 1 123 ANYWHERE ST
Address 2 [redacted]

City2 PENSACOLA State FL Zipcode 32501- [redacted]

Home Phone (317)555-1212
Work Phone () -
Cell Phone () -
Order taken by [redacted]

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 [redacted]

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

Close Reason 0 Hours on Job 00:00

Call Back?

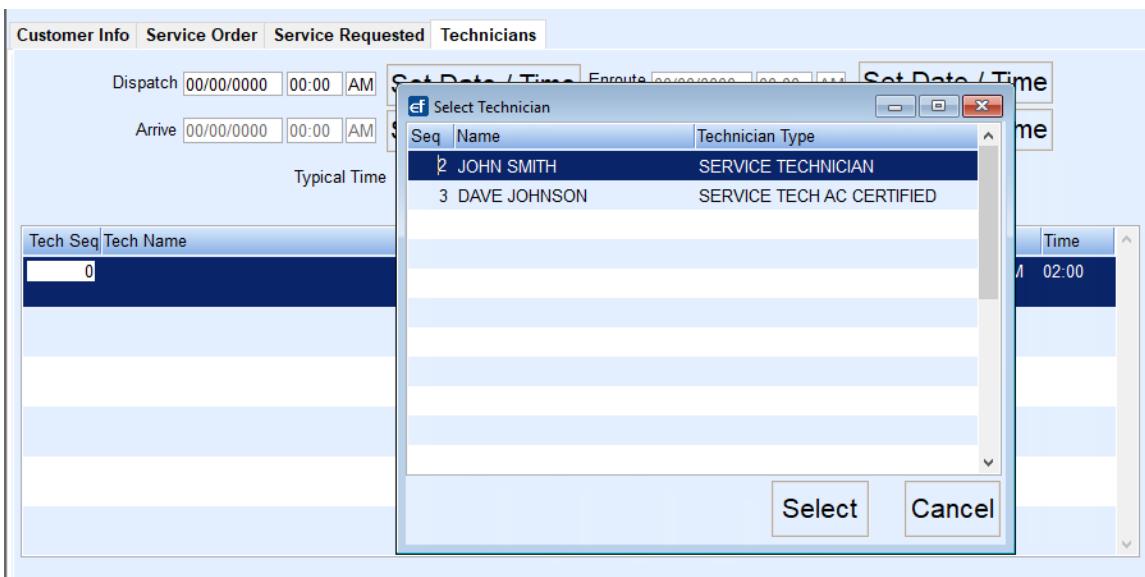
1. If *Co. Owns?* is set to *No*, input the information manually.
13. If servicing a Meter, enter the Meter information.
14. Optionally enter a *Projected Close Date*.
15. The *Close Date*, *Close Reason*, and *Hours on Job* will be entered once the job has been completed.
16. Select the *Service Requested* tab.
17. Enter the *Service Requested* and any special instructions for the technician as necessary.

Customer Info Service Order Service Requested Technicians

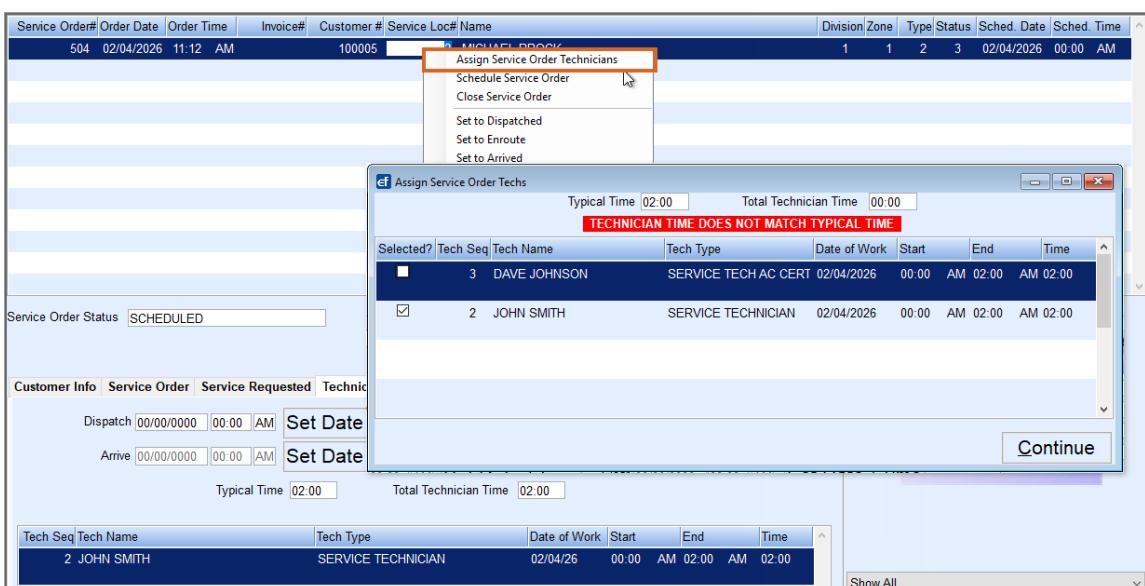
Service Requested Annual visual inspection and pressure test on regulator

Service Performed

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



- 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**.



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