Completing a Service Order

The system is designed so that it will automatically set the Service Order status to *Completed* once the *Cleared* entry has been made with regard to the *Technicians* tab on the SO. The system will also set the *Closed Reason* code.

SSI will assist in assigning the proper codes during the initial setup phase.

In the event that the *Status* or *Closed Reason* codes need to be modified or an invoice completed, do the following:

1. Select the Service Order and choose **Modify**.

2. In the *Status* field of the Service Order, press **F5** and change the status to *Closed*.

3. Select the *Service Order* tab located in the bottom half of the screen.

4. Enter the *Closed Date*. Manually enter this information or double-click in the field and select the date from the calendar.

5. Press **F5** in the *Closed Reason* field and select the appropriate status.

6. Enter the number of *Hours on Job* if applicable.

7. Select the *Service Requested* tab and enter the *Service Performed* if desired.

| Customer Info | Service Order | Service Requested | Technicians |

Service Requested | Annual visual inspection and pressure test on regulator

Service Performed | Visual inspection and pressure test performed as required

8. Select **Save** when finished. The service order is now closed.

9. On the *Technicians* tab, verify that *Arrived*, *Enroute*, and *Cleared* times have been completed.

10. Select **Save**.

11. If an invoice is required for the customer, select **Open Invc**.

12. Select **Create New Invoice**.

13. The *Service Order Type* will populate automatically.

14. Select the *Sales Rep*.

15. Optionally enter a *Customer Message*. This message will print on the customer invoice.

16. Enter the *Item* number manually or press **F5** to choose from the list.

17. All Inventory items assigned to the warehouses will display. Search for an item using the *Search For* field.

    Search by *Description*, *Item*, *Dept#*, or *Category*.

18. Select each line item to be invoiced and choose **Save Selections**. This will return to the invoice.

19. Enter the quantity of items being invoiced and press **Tab**. This will automatically calculate the total amount for the line item.

20. To add another line item, press the **Down Arrow** on the keyboard to create a new line or select **Add Line** on the *Invoice* screen. Press **F5** to display the items and then enter the quantity once selected.

21. Once all items have been entered and the invoice verified, select **Save and Close** if there are other items to be added or **Post** to finalize the invoice and create a Sales Journal.

22. If **Post** is chosen, indicate how many copies to print.

23. The Invoice will print and the line items listed will post to the Customer History and posting journals. Additionally, the *Service Order* screen will now reflect an invoice number on the Service Order line.

Service Order#	Order Date	Order Time	Invoice#	Customer #	Service Loc#	Name
504	02/04/2026	11:12 AM	536	100005	2	MICHAEL BROCK
503	08/16/2023	10:57 AM	530	100005	530	MICHAEL BROCK