

Completing a Service Order

Last Modified on 02/04/2026 1:00 pm EST

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.

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	2	MICHAEL BROCK	1	1	2	**	02/04/2026	00:00 AM
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 Service Order Type

Customer Info Service Order Service Requested Technicians

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

Tank S/N

Location

Meter Type Meter S/N

Projected Close Date Close Date

Close Reason Hours on Job

Call Back?

February 2026

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

Show All

Inv Sel Create Modify Print SO Save Create and Open Proposal Open Invc. Exit

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.

Div	Warehs. Name	Storage Desc.	Item	Description	Quantity	Amount	Total Amount
			LABOR	LABOR	1.00	\$150.00	\$150.00
			00-5407	1000 GAL SKID TANK SINGLE WALL	1.00	\$5,410.80	\$5,410.80

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*.

ef Select Inventory Item							
Category <input checked="" type="checkbox"/> ALL		Item/Dept <input type="checkbox"/> Start with <input type="checkbox"/> Search for TANK		Search		Clear	
Div	Warehouse Name	Loc	Storage	Item	Dept#	Description	Category
<input checked="" type="checkbox"/>				00-5407	999	1000 GAL SKID TANK SINGLE WAL	TANK INSTALL PARTS
<input type="checkbox"/>				00-5406	999	1000 GAL SKID TANK SINGLE WAL	TANK INSTALL PARTS
<input type="checkbox"/>				00-1178	999	500 GAL OIL TANK DOUBLE WALL	TANK INSTALL PARTS
<input type="checkbox"/>				00-1178	999	500 GAL OIL TANK DOUBLE WALL	TANK INSTALL PARTS
<input type="checkbox"/>				00-5423	999	500 GAL SKID TANK DOUBLE WAL	TANK INSTALL PARTS
<input type="checkbox"/>				00-5422	999	500 GAL SKID TANK LIGHT DUTY	TANK INSTALL PARTS
<input type="checkbox"/>				00-5403	999	500 GAL SKID TANK SINGLE WALL	TANK INSTALL PARTS
<input type="checkbox"/>				00-5403	999	500 GAL SKID TANK SINGLE WALL	TANK INSTALL PARTS

Selected Items						
Division	Warehouse Name	Location#	Storage	Item	Description	Category
				00-5407	1000 GAL SKID TANK SINGL TANK INSTALL PARTS	5410.80
				LABOR	LABOR	TANK INSTALL PARTS 150.00

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.

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