Completing a Service Order

Last Modified on 08/12/2022 12:17 pm EDT

the calendar.

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

5 0 / I I & F & A				
Service Order# Order Date Order Time Invoice# Custome	r # Service Loc# Name	Division Ty	/p Status Sched	Date Sched. Time *
1007 02/16/2015 8:48 am 929	07 24,208 4 PAW INC	1	4 4 2/16/	2015 2:00 pm
882 12/10/2014 12:19 pm 929	07 24,208 4 PAW INC	1	1 3 12/11/	2014 8:00 am
845 12/02/2014 10:26 am 929	07 24,208 4 PAW INC		1 3 12/05/	2014 9:00 am
				-
K				
Service Order Status CLOSED	Service Order Type REGULATOR UPDATE		Febru	uary 2015 💌
			SMT	WTFS
Customer Info Service Order Service Requested Technicians			1 2 3	4 5 6 7
	Tech Circ Cont		8 9 10	11 12 13 14
Select Tank Co. Owns? N Tank Type P PRO	PANE Tank Size 500.0	0	15 16 17	18 19 20 21
Tank S/N PCA TANK			22 23 24	25 26 27 28
TAIK ON PCA TANK				
Location 3				
	_	_		
Meter Type 0	Meter S/N	6	Show All	
			SHOW AN	•
Projected Close Date 00/00/00 Close D	ate 02/16/15		Create	Modify
			Drint CO	
Close Reason 1 COMPLETED	Hours on Job 2:00 ar		Print SO	Save
		(Create and	Open Proposal
Call Back?				
			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 Req	uested	Annu	al visual inspectio	n and pressure test on regulator
Service Per	formed	Visua	al 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.

					Date	Invoice#
YOICE	Service Name / Address		0		02/10/2020	249
tomer# 6423055	Service Name / Address Service Location# 8158	Q	Comments			
0423055	Service Location# 0150	~			at issue and est and replac	ced
TE & V HELPHERY	123-ADDVINE DE DT		regulate	or.		
	ADPER IN ADVICE					
CLA, MD BIRD-BIRD						
rvice Order Type 1 Q TANK LEVEL	Sales Re	P 0 Q				
stomer Message						
Warehs. Name Storage Desc. Item	Description	Quantity	Cost	Markup	Amount	Total Amount
OIL WAREHOU OIL WAREH(909127	Leak Test Service	1.00	\$0.00	0.00%	\$75.00	\$75.00
5 DODGE SERVI SERVICE TR LV4403TR9	6 1st Stage Regulator	1.00	\$35.83	22.52%	\$43.90	\$43.90
5 OIL WAREHOU OIL WAREH(909120	Labor/Service Charge	1.00	\$0.00	0.00%	\$75.00	\$75.00
d Line Remove Line						
	Sign				Sub	Total \$193.9
		Tax Exempt:				Tax \$2.3
		activated by: d Date/Time: 00/00		00:00		Total \$196.2

- 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*.

Warehouse Name Loc Storage Item Dept# Description Category Sale Price Other 137 FORD SERVICE TRK 1005 SERVICE TRUCK 909116 909116 Out of Gas Charge FEES/CHGS 75.00 0.00 137 FORD SERVICE TRK 1005 OIL WAREHOUSE 909116 909116 909116 Out of Gas Charge FEES/CHGS 75.00 0.00 17 OIL WAREHOUSE LA 1009 OIL WAREHOUSE 909116 909116 Out of Gas Charge FEES/CHGS 75.00 0.00 17 6 DDDGE SERVICE TR 1010 SERVICE TRUCK 909116 909116 Out of Gas Charge FEES/CHGS 75.00 0.00 17 6 DDDGE SERVICE TR 1010 SERVICE TRUCK 909116 909116 Out of Gas Charge FEES/CHGS 75.00 0.00 137 FORD SERVICE TRK 1005 SERVICE TRUCK 909118 909118 Delivery Charge Same [FEES/CHGS 75.00 0.00 137 OIL WAREHOUSE LA 1009 OIL WAREHOUSE 909118 909118 Delivery Charge Same [FEES/CHGS 75.00 0.00 137 OIL WAREHOUSE LA<	i se	ect Invento	ryitem								
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Division Warehouse Name Location# Storage Item Description Category Sale Price 75.00 0.00 ☑ 76 OIL WAREHOUSE LC 1011 OIL WAREHOUSE 909120 909120 Labor/Service Charge FEES/CHGS 75.00 0.00 ☑ 76 OIL WAREHOUSE LC 1011 OIL WAREHOUSE 909120 909120 Labor/Service Charge FEES/CHGS 75.00 0.00 Division Warehouse Name Location# Storage Item Description Category Sale Price Price ☑ 76 OIL WAREHOUSE LOC 1.011 OIL WAREHOUSE 909120 Labor/Service Charge FEES/CHGS 75.00 0 ☑ 76 DOLGE SERVICE TRK 1.010 SERVICE TRUCK LV4403TR96 1st Stage Regulator REGULATORS 43.90	1 1	37 OIL WA	REHOUSE CA	1006 OIL	WAREHOUSE	909120	909120	Labor/Service Charge	FEES/CHGS	75.00	0.00
76 OIL WAREHOUSE LC 1011 OIL WAREHOUSE 909120 909120 Labor/Service Charge FEES/CHGS 75.00 0.00 Selected Items Division Warehouse Name Location# Storage Item Description Category Sale Price 1011 OIL WAREHOUSE 909120 Labor/Service Charge FEES/CHGS 75.00 0.00 Image: Transmission Warehouse Name Location# Storage Item Description Category Sale Price 1011 OIL WAREHOUSE 909120 Labor/Service Charge FEES/CHGS 75.00 1011 OIL WAREHOUSE 909120 Labor/Service Charge FEES/CHGS 43.90 Image: Transmission Transmission Transmission Transmission Transmission 43.90] 7	77 OIL WA	REHOUSE JA	1009 OIL	WAREHOUSE	909120	909120	Labor/Service Charge	FEES/CHGS	75.00	0.00
Selected Items Category Sale Price Division Warehouse Name Location# Storage Item Description Category Sale Price Image: Transmission 76 OIL WAREHOUSE LOC 1,011 OIL WAREHOUSE 909120 Labor/Service Charge FEES/CHGS 75.00 Image: Transmission 76 DODGE SERVICE TRK 1,010 SERVICE TRUCK LV4403TR96 1st Stage Regulator REGULATORS 43.90	1	76 DODGE	SERVICE TR	1010 SER	VICE TRUCK	909120	909120	Labor/Service Charge	FEES/CHGS	75.00	0.00
Division Warehouse Name Location# Storage Item Description Category Sale Price Image: Trip in the storage 76 OIL WAREHOUSE LOC 1.011 OIL WAREHOUSE 909120 Labor/Service Charge FEES/CHGS 75.00 Image: Trip in the storage 76 DODGE SERVICE TRK 1.010 SERVICE TRUCK LV4403TR96 1st Stage Regulator REGULATORS 43.90	9 1	76 OIL WA	REHOUSE LC	1011 OIL	WAREHOUSE	909120	909120	Labor/Service Charge	FEES/CHGS	75.00	0.00
☑ 76 OIL WAREHOUSE LOC 1.011 OIL WAREHOUSE 909120 Labor/Service Charge FEES/CHGS 75.00 ☑ 76 DODGE SERVICE TRK 1.010 SERVICE TRUCK LV4403TR96 1st Stage Regulator REGULATORS 43.90							Selected It	ems			
☑ 76 DODGE SERVICE TRK 1,010 SERVICE TRUCK LV4403TR96 1st Stage Regulator REGULATORS 43.90		Division	Warehouse Nar	ne	Location# Stora	ige	Item	Description	Category	Sale Price	^
		2 76	OIL WAREHO	USE LOC	1,011 OIL 1	WAREHOUSE	909120	Labor/Service Charge	FEES/CHGS	75.00	
☑ 76 OIL WAREHOUSE LOC 1,011 OIL WAREHOUSE 909127 Leak Test Service FEES/CHGS 75.00		2 76	DODGE SER	VICE TRK	1,010 SER	VICE TRUCK	LV4403TR96	1st Stage Regulator	REGULATORS	43.90	
		2 76	OIL WAREHO	USE LOC	1,011 OIL	NAREHOUSE	909127	Leak Test Service	FEES/CHGS	75.00	

- 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.

Service Order# Order Date Order Time	Invoice#	Customer # S	ervice Loc# Name	
14 02/05/2020 04:35 PM	249	6423055	8,158 2 GIRLS & A GARAG	E