

# Completing a Service Order

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

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	Typ	Status	Sched. Date	Sched. Time
1007	02/16/2015	8:48 am		92907	24.208 4 PAW INC	1	4	4	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

Service Order Status: **CLOSED**      Service Order Type: REGULATOR UPDATE

Co. Owns?  N      Tank Type:  P      PROpane      Tank Size: 500.00

Tank S/N: PCA TANK

Location:  3

Meter Type:  0      Meter S/N:

Projected Close Date: 00/00/00      Close Date: **02/16/15**

Close Reason: **1 COMPLETED**      Hours on Job: 2:00 am

Call Back?

February 2015

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

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.

Previous Next Save Print Preview E-mail Find

Finalized?

### Invoice

Bill To Name / Address	Service Name / Address	Date	Invoice#
Customer# 6423055	Service Location# 8158	02/10/2020	249
Comments			
Leveled tank without issue and performed a leak test and replaced regulator.			

Service Order Type 1 TANK LEVEL Sales Rep 0

Customer Message

Div	Warehs. Name	Storage Desc.	Item	Description	Quantity	Cost	Markup	Amount	Total Amount
76	OIL WAREHOU	OIL WAREHC	09127	Leak Test Service	1.00	\$0.00	0.00%	\$75.00	\$75.00
76	DODGE SERVII	SERVICE TR	LV4403TR96	1st Stage Regulator	1.00	\$35.83	22.52%	\$43.90	\$43.90
76	OIL WAREHOU	OIL WAREHC	909120	Labor/Service Charge	1.00	\$0.00	0.00%	\$75.00	\$75.00

Add Line Remove Line

Sign

Tax Exempt:

Inactivated by:

Inactivated Date/Time: 00/00/0000 00:00:00

Sub Total	\$193.90
Tax	\$2.39
Total	\$196.29

Undo Clear Search Create Modify Save & Close Post

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*.

Previous Next Save Print Preview E-mail Find

Finalized?

Select Inventory Item

Category  ALL Item/Dept  Start with  Search for REGULATOR Search Clear

Div	Warehouse Name	Loc	Storage	Item	Dept#	Description	Category	Sale Price	Qty
<input checked="" type="checkbox"/>	137 FORD SERVICE TRK	1005	SERVICE TRUCK	909116	909116	Out of Gas Charge	FEES/CHGS	75.00	0.00
<input type="checkbox"/>	137 OIL WAREHOUSE CA	1006	OIL WAREHOUSE	909116	909116	Out of Gas Charge	FEES/CHGS	75.00	0.00
<input type="checkbox"/>	77 OIL WAREHOUSE JA	1009	OIL WAREHOUSE	909116	909116	Out of Gas Charge	FEES/CHGS	75.00	0.00
<input type="checkbox"/>	76 DODGE SERVICE TR	1010	SERVICE TRUCK	909116	909116	Out of Gas Charge	FEES/CHGS	75.00	0.00
<input type="checkbox"/>	76 OIL WAREHOUSE LC	1011	OIL WAREHOUSE	909116	909116	Out of Gas Charge	FEES/CHGS	75.00	0.00
<input type="checkbox"/>	137 FORD SERVICE TRK	1005	SERVICE TRUCK	909118	909118	Delivery Charge Same [	FEES/CHGS	75.00	-1.00
<input type="checkbox"/>	137 OIL WAREHOUSE CA	1006	OIL WAREHOUSE	909118	909118	Delivery Charge Same [	FEES/CHGS	75.00	0.00
<input type="checkbox"/>	77 OIL WAREHOUSE JA	1009	OIL WAREHOUSE	909118	909118	Delivery Charge Same [	FEES/CHGS	75.00	0.00
<input type="checkbox"/>	76 DODGE SERVICE TR	1010	SERVICE TRUCK	909118	909118	Delivery Charge Same [	FEES/CHGS	75.00	0.00
<input type="checkbox"/>	76 OIL WAREHOUSE LC	1011	OIL WAREHOUSE	909118	909118	Delivery Charge Same [	FEES/CHGS	75.00	80.00
<input type="checkbox"/>	76 PARTS WRHOUSE LC	1012	PARTS ROOM	909118	909118	Delivery Charge Same [	FEES/CHGS	75.00	145.00
<input type="checkbox"/>	137 FORD SERVICE TRK	1005	SERVICE TRUCK	909120	909120	Labor/Service Charge	FEES/CHGS	75.00	0.00
<input type="checkbox"/>	137 OIL WAREHOUSE CA	1006	OIL WAREHOUSE	909120	909120	Labor/Service Charge	FEES/CHGS	75.00	0.00
<input type="checkbox"/>	77 OIL WAREHOUSE JA	1009	OIL WAREHOUSE	909120	909120	Labor/Service Charge	FEES/CHGS	75.00	0.00
<input type="checkbox"/>	76 DODGE SERVICE TR	1010	SERVICE TRUCK	909120	909120	Labor/Service Charge	FEES/CHGS	75.00	0.00
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	76	OIL WAREHOUSE LOC	1,011	OIL WAREHOUSE	909120	Labor/Service Charge	75.00
<input checked="" type="checkbox"/>	76	DODGE SERVICE TRK	1,010	SERVICE TRUCK	LV4403TR96	1st Stage Regulator	43.90
<input checked="" type="checkbox"/>	76	OIL WAREHOUSE LOC	1,011	OIL WAREHOUSE	909127	Leak Test Service	75.00

Save Selections Cancel

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
14	02/05/2020	04:35 PM	249	6423055	8,158	2 GIRLS & A GARAGE

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