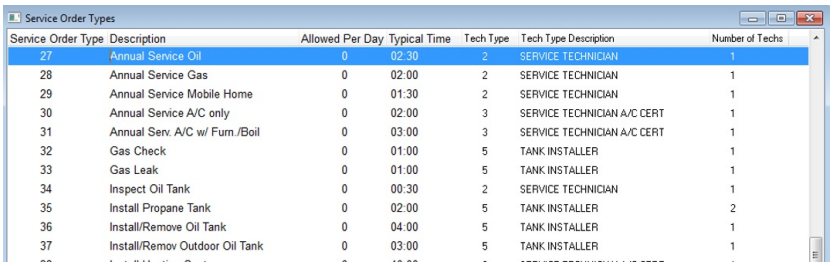
EnergyService Service Orders

Last Modified on 06/09/2022 2:07 pm EDT

Service Order Types

This section will cross-reference Service Types (tank sets, Gas Checks, Appliance Installs) with the Technician.

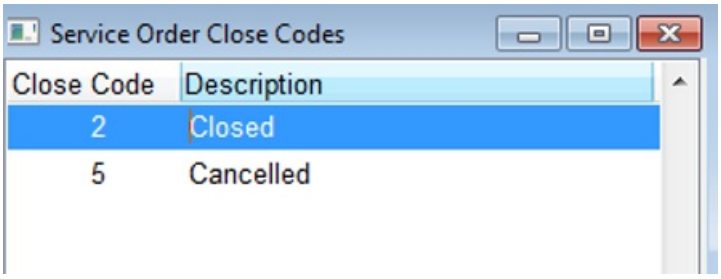


Service Order Type	Description	Allowed Per Day	Typical Time	Tech Type	Tech Type Description	Number of Techs
27	Annual Service Oil	0	02:30	2	SERVICE TECHNICIAN	1
28	Annual Service Gas	0	02:00	2	SERVICE TECHNICIAN	1
29	Annual Service Mobile Home	0	01:30	2	SERVICE TECHNICIAN	1
30	Annual Service A/C only	0	02:00	3	SERVICE TECHNICIAN A/C CERT	1
31	Annual Serv. A/C w/ Furn./Boil	0	03:00	3	SERVICE TECHNICIAN A/C CERT	1
32	Gas Check	0	01:00	5	TANK INSTALLER	1
33	Gas Leak	0	01:00	5	TANK INSTALLER	1
34	Inspect Oil Tank	0	00:30	2	SERVICE TECHNICIAN	1
35	Install Propane Tank	0	02:00	5	TANK INSTALLER	2
36	Install/Remove Oil Tank	0	04:00	5	TANK INSTALLER	1
37	Install/Remov Outdoor Oil Tank	0	03:00	5	TANK INSTALLER	1

1. From the *EnergyService* menu, select **Service Orders**.
2. Choose **Service Order Types** and press **Ctrl+C** to create.
3. The *Service Order Type* will be assigned automatically once saved.
4. Enter the *Description* of the Service Order Type.
5. Enter the number *Allowed Per Day*. For example, if only two tank sets can be completed in one day, enter2.
6. Enter the *Typical Time* it takes for the service.
7. Press **F5** and select the *Tech Type*.
8. Enter the *Number of Techs* it will take to complete this type of service.
9. Press **F4** to create a new line or **Ctrl+Q** to save.

Service Order Close Codes

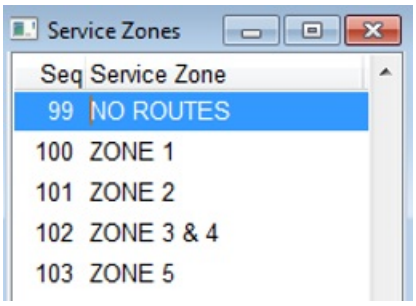
These codes will be used to determine how the Service Orders are closed.



1. From the *EnergyService* menu, select **Service Orders**.
2. Choose **Service Order Close Codes**.
3. Press **Ctrl+C** to create.
4. Enter a *Description*. The *Close Code* will automatically be assigned once saved.
5. Press the **Down Arrow** or **F4** to enter new Close Code.
6. Press **Ctrl+Q** to save.

Service Zones

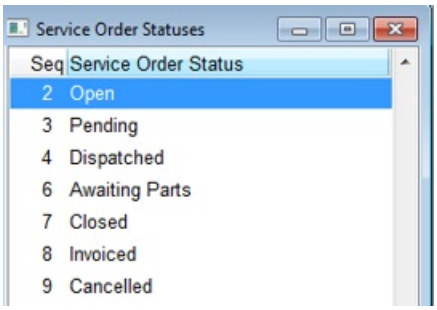
Service Zones are used to determine the area in which a technician is assigned.



1. From the *EnergyService* menu, select **Service Orders**.
2. Choose **Service Zones** and press **Ctrl+C** to create.
3. *Seq* will automatically be assigned once saved.
4. Enter a *Description* of the Service Zone.
5. Press the **Down Arrow** or **F4** to enter new Service Zone.
6. Press **Ctrl+Q** to save.

Service Order Statuses

These codes are used to indicate the status of a Service Order.



1. From the *EnergyService* menu, select **Service Orders**.
2. Select **Service Order Status** and press **Ctrl+C** to create.
3. *Seq* will automatically be assigned once saved.
4. Enter a *Description* then press **F4** or the **Down Arrow** to enter another Service Order Status.
5. Press **Ctrl+Q** to save.

Service Plans

This is an enhancement that will be available in a future release.