

EnergyService Service Orders

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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
2	TANK SET	1	02:00	5	TANK INSTALLER	1
3	TANK PICK UP	8	01:00	2	SERVICE TECHNICIAN	1
4	TANK SWAP OUT	5	01:00	5	TANK INSTALLER	1
5	APPLIANCE INSTALLATION	4	02:00	1	HVAC 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, enter 2.
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.

Close Code	Description
2	WORK COMPLETED
3	CUSTOMER CANCELLED
4	OFFICE CANCELLED

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.

Seq	Service Zone
1	ZONE 1
2	ZONE 2
3	ZONE 3

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.

Seq	Service Order Status
1	PENDING FOR CREDIT
2	PENDING FOR PARTS
3	SCHEDULED
501	WORK COMPLETE

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.