Scheduled Service Calls Overview

Last Modified on 06/09/2022 9:43 am EDT

1. Scheduled Date

2. Scheduled Time

3. Customer Name and Number

4. Service zone assigned to the service location\customer – similar to an assigned route code

5. Service Order Number

6. Service order Type

7. S.O. Type Description

8. Service Calendar - Click on specific date (in bold) to view SO's

9. Service location address

10. Inventory Selection – Allows technician to review the item cost prior to installation

11. Service Locations – All of the service locations assigned to the customer

12. Payment – Allows tech to receive payment from customer

13. Tanks – tanks assigned to the customer

14. Today's – This is a toggle. Displays service orders for the current service technician initially.

    1. If this button pressed, it will display all service orders for the current day for all technicians

    2. Press a second time to return to the current technician

15. Service History – displays previous SOs, Invoices, Proposals

16. Modify the service order

17. Save the service order

18. Review service order details

19. Create an invoice that is linked to the service order

20. Exit scheduled service calls

21. Dispatched Scheduled Call information.