

Scheduled Service Calls - Service Orders

Last Modified on 06/23/2026 5:00 pm EDT

1. Highlight the Service Call in the upper section of the *Scheduled Call In* screen.
2. Select **Service Order**. The Service Order will display.

Service Order#	Order Date	Order Time	Invoice#	Customer #	Service Loc# Name	Division	Zone	Type	Status	Sched. Date	Sched. Time
25	06/17/2025	08:18 AM	62	117300	38 JAYSON ABERNATHY	1	1	9	1	06/23/2026	10:00 AM

Service Order Status: Service Order Type:

Customer Info Service Order Service Requested Technicians

Service Address: 123 AVON TOWN HALL ST
 City: AVON State: IN
 First Name: JAYSON Last Name: ABERNATHY
 Requested By:
 Mail Address 1: 0339 PEYTON PORT
 Address 2: APT. 026
 City 2: WEST HIPOLITO State ID: Zipcode: 24910-
 Home Phone: (346)588-1384
 Work Phone: (206)770-6297
 Cell Phone: () -
 Order taken by: ESTECH
 Service Zone: 1 AVON/DANVILLE

Fuel Order All Dates
 Show All
 Inv Sel
 Create Modify
 Print SO Save
 Create and Open Proposal
 Open Invc. Exit

3. Service Order Status and Service Order Types are listed in the center of the screen. Select the *Service Requested* tab for work details.

Customer Info Service Order **Service Requested** Technicians

Service Requested: They have a cook stove in the house. They want the gas line checked for it to make sure it is safe.

4. The *Technicians* tab indicates the technician assigned to perform the Work Order. Select **Modify** and make the following settings as work is performed:

Customer Info Service Order Service Requested **Technicians**

Dispatch: 00/00/0000 00:00 AM Set Date / Time Enroute: 00/00/0000 00:00 AM Set Date / Time
 Arrive: 00/00/0000 00:00 AM Set Date / Time Clear: 00/00/0000 00:00 AM Set Date / Time
 Typical Time: 01:00 Total Technician Time: 01:00

Tech Seq	Tech Name	Tech Type	Date of Work	Start	End	Time
4	PATRICK MAHOMMES	DELIVERY DRIVER	04/28/26	10:00 AM	11:00 AM	01:00

Fuel Order All Dates
 Show All
 Inv Sel
 Create **Modify**
 Print SO Save
 Create and Open Proposal
 Open Invc. Exit

- a. **Dispatch** – This is typically set by an office staff member and not the service technician.
- b. **Enroute** – While in *Modify* mode, select **Set Date / Time** when beginning to drive to the service location.
- c. **Arrive** – While in *Modify* mode, select **Set Date / Time** upon arriving at the service location.
- d. **Clear** – While in *Modify* mode, select **Set Date / Time** once the job has been completed.
- e. **Total Technician Time** will auto populate based on *Arrive* and *Clear* times and is an indicator of the number of hours on-site, which can be used to bill labor.

5. Once the work has been performed, update the *Service Requested* tab to indicate the service performed.
6. Select **Save** when finished.
7. If the customer is to be invoiced for parts and labor, select the **Open Invc.** button and choose **Create**.

- The upper section of the *Invoice* screen will be populated with the *Bill To Name/Address* and *Service Name/Address* information.

Invoice

Bill To Name / Address	Service Name / Address
Customer# 55770831	Service Location# 3762
32ND ST SURGERY	32ND ST SURGERY
1531 E 32ND ST	1531 E 32ND ST
JOPLIN, MO 64804-2911	JOPLIN, MO 64804-2911

- Double tap in the *Item* field. The *Inventory Selection* screen will appear.

Div	Warehs. Name	Storage Desc.	Item	Description	Quantity	Amount	Total Amount

Double tap with stylus or mouse click

- Search for the items to be billed and check items as they are to be billed.
 - Items will display in lower section under *Selected Items* in descending order so the technician can always see the last few items added.
- Choose **Save Selections**. This will navigate back to the *Invoice* screen.
- Selected items will appear on the Invoice in the order they were chosen. Modify the *Quantity* and/or *Amounts* as necessary.

Invoice

Bill To Name / Address	Service Name / Address	Date	Invoice#
Customer# 55770831	Service Location# 3762	02/12/2020	107,000,007
32ND ST SURGERY	32ND ST SURGERY		
1531 E 32ND ST	1531 E 32ND ST		
JOPLIN, MO 64804-2911	JOPLIN, MO 64804-2911		

Comments: Pumped out propane from the tank and performed pick up.

Div	Warehs. Name	Storage Desc.	Item	Description	Quantity	Amount	Total Amount
137	FORD SERVICE SERVICE TR	909120	Labor/Service Charge	Labor/Service Charge	2.00	\$75.00	\$150.00
137	FORD SERVICE SERVICE TR	909129	Pump out	Pump out	1.00	\$100.00	\$100.00

Sub Total \$250.00
Tax \$0.00
Total \$250.00

Finalize & Print

- Add any *Comments* if desired. This will print on the customer Invoice.
- Select **Finalize & Print** when finished. This will finalize the Invoice and bill the customer.
 - Select **Exit** to not bill the customer.
 - The Invoice will communicate to the office allowing an office staff member to finalize the billing as necessary.
- Select **Yes** to close and print the Invoice.
- Checkmark the *Confirmation* column to confirm the Service Location and select **Continue**.

Confir.	Serv. Loc#	Division#	Customer# Name
<input checked="" type="checkbox"/>	3,762	1	55770831 32ND ST SURGERY

Is all the information Correct?

Active or Inactive Active Inactive

Price Level

Service Zone JASPER

County JASPER COUNTY, MO

Township UNKNOWN

School District UNKNOWN

Address

City State Zip Rural

Location Code JASPER

Directions

BC: 8/23/19 FILL GENERATOR SHARON

Continue Cancel

17. Choose the number of Invoices to print. If the customer requires a signature be present on the Invoice, enter the signature on the tablet and select **Continue** to print the Invoice.
18. Select the *Technician* tab on the *Service Order* screen and select **Set Date/Time** next to the *Clear* field. Choose **Yes** to clear the Service Order.
19. Confirm the Service Location and select **Continue**. The Service Order will close and the list of Scheduled Service Calls will display. Repeat steps as necessary to complete all scheduled service work.