Scheduled Service Calls - Service Orders

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1. Highlight the Service Call in the upper section of the *Scheduled Call In* screen.

2. Select **Service Order**. The Service Order will display.

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

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

   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**.

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

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

10. 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.

11. Choose **Save Selections**. This will navigate back to the *Invoice* screen.

12. Selected items will appear on the Invoice in the order they were chosen. Modify the *Quantity* and/or *Amounts* as necessary.

13. Add any *Comments* if desired. This will print on the customer Invoice.

14. Select **Finalize & Print** when finished. This will finalize the Invoice and bill the customer.

   1. Select **Exit** to not bill the customer.

2. The Invoice will communicate to the office allowing an office staff member to finalize the billing as necessary.

15. Select **Yes** to close and print the Invoice.

16. Checkmark the *Confirmation* column to confirm the Service Location and select **Continue**.

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.