

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.

The screenshot shows a software interface for managing service orders. At the top, there is a table with columns: Service Order#, Order Date, Order Time, Invoice#, Customer #, Service Loc# Name, Division, Zone, Type, Status, Sched. Date, and Sched. Time. The first row contains: 2, 02/04/2020, 04:30 PM, 55770831, 3,762, 32ND ST SURGERY, 1, 1, 6, 1, 02/04/2020, 12:00 PM.

Below the table, the 'Service Order Status' is 'SCHEDULED' and 'Service Order Type' is 'TANK PICKUP'. There are tabs for 'Customer Info', 'Service Order', 'Service Requested', and 'Technicians'. The 'Customer Info' tab is active, showing fields for Service Address (1531 E 32ND ST), City (JOPLIN), State (MO), First Name, Last Name, Requested By, Mail Address 1 (1531 E 32ND ST), Address 2, City2 (JOPLIN), State (MO), Zipcode (64804-2911), Home Phone ((417)627-9699), Work Phone, Cell Phone, Order taken by (sfaherty), and Service Zone (1 JASPER). On the right side, there are buttons for 'Fuel Order', 'All Dates', 'Inv Sel', 'Create', 'Modify', 'Print SO', 'Save', 'Create and Open Proposal', 'Open Inv.', and 'Exit'. A 'Service History' button is also present.

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

The screenshot shows the 'Service Requested' tab selected. The text description reads: 'Pick up the tank off of the customers back lot by the red barn.'

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

The screenshot shows the 'Technicians' tab selected. It displays a table with columns: Tech Seq, Tech Name, Tech Type, Date of Work, Start, End, and Time. The first row shows: 2, DAVID FREUND, SERVICE TECH, 02/04/20, 12:00 PM, 02:00 PM, 02:00.

At the top of the technicians section, there are time tracking fields: Dispatch (00:00:0000), Enroute (00:00:0000), Arrive (00:00:0000), and Clear (00:00:0000). Each field has a 'Set Date / Time' button. Below these are 'Typical Time' (02:00) and 'Total Technician Time' (02:00) fields.

On the right side, there are buttons for 'Fuel Order', 'All Dates', 'Inv Sel', 'Create', 'Modify', 'Print SO', 'Save', 'Create and Open Proposal', 'Open Inv.', and 'Exit'. The 'Modify' button is highlighted with a red box.

- 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.

The screenshot shows the 'Invoice' screen with two main sections: 'Bill To Name / Address' and 'Service Name / Address'. Both sections contain the same information: Customer# 55770831, 32ND ST SURGERY, 1531 E 32ND ST, and JOPLIN, MO 64804-2911. The 'Service Name / Address' section also includes a 'Service Location#' field with the value 3762.

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

The screenshot shows the 'Inventory Selection' screen with a table. A red arrow points to the 'Item' column header. Below the table, there is a red text box that says 'Double tap with stylus or mouse click'.

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

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.

The screenshot shows the 'Invoice' screen with the 'Selected Items' table and the 'Comments' field. The 'Comments' field contains the text: 'Pumped out propane from the tank and performed pick up.' The 'Selected Items' table has two rows: one for 'Labor/Service Charge' with a quantity of 2.00 and a total amount of \$150.00, and one for 'Pump out' with a quantity of 1.00 and a total amount of \$100.00. A red arrow points from the 'Pump out' row to the 'Finalize & Print' button at the bottom of the screen.

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

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**.

Confir...	Serv Loc#	Division#	Customer# Name
<input checked="" type="checkbox"/>	3,762	1	56770831 32ND ST SURGERY

Is all the information Correct?

Active or Inactive

Price Level

Service Zone

County

Township

School District

Address

City State Zip Rural

Location Code

Directions

BC: 8/23/19 FILL GENERATOR SHARON

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.