Unscheduled Service Calls - Service Orders

1. From the main *EnergyService* menu, select **Unscheduled Service Orders**.

2. Tap in the *Name* column and begin typing the last name of the customer or, enter the customer account number in the *Customer#* column.

3. Select the account. From this screen, various information pertaining to the customer displays.

4. Select **Service Orders**. A message will appear to indicate if a customer does not have any active Service Orders. Select **OK**.

5. Choose **Create**.

6. Double tap in the *Service Loc#*, *Type*, and *Status* fields to make the appropriate selections.

7. Double tap in *Sched. Date* field. When the calendar opens, it will display the number of scheduled and unassigned Service Orders that are pending per day.

8. Select the date the work will be performed by double tapping the date.

9. Enter the *Sched. Time.*

10. Select the *Service Order* tab in the lower section of the screen.

11. If servicing a specific tank at the service location, choose **Select Tank** to indicate the appropriate tank.

12. Select the *Technicians* tab. Double-click in the *Tech* column and select the Technician(s) assigned to the job.

13. Choose **Save**. The Service Order has now been saved and will be visible under *Scheduled Service Orders* and can also be accessed under *Unscheduled* as well. Refer to Scheduled Service Orders for details on how to complete the Service Order and create an Invoice.