

Unscheduled Service Calls - Service Orders

Last Modified on 06/23/2026 5:48 pm EDT

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.

Name	Customer#	Division#
SCHUSTER,JEFF	116200	1
ABERNATHY,JAYSON	117300	1
ABBOTT,ARNOLD	119212	1
WINDLER,JUDE	120640	1
ULLRICH,AUDREY	121120	1
STARK,MOGENE	121121	1
WARD,ELLIOT	121130	1
ABBOTT,LURA	124610	1
ABBOTT,JEROMY	126360	1
ABBOTT,LINDA	127300	1
ARMSTRONG,BEVERLY	127840	1
ABSHIRE,DONNA	129280	1

Phone: (244)733-6405 Terms: Due the 15th

Work Phone: (907)213-0041 Safety Info Date: 00/00/00

Credit Limit: \$1,000.00

Current: \$605.55
 30 Day: \$836.33
 60 Day: \$0.00
 90 Day: \$1,002.53
 Total: \$2,444.41

Buttons: Add Comments, Service Orders, Service Locations, Proposals, Invoices, Tanks, Payment, Back

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.

Service Order#	Order Date	Order Time	Invoice#	Customer #	Service Loc#	Name	Division	Zone	Type	Status	Sched. Date	Sched. Time
107000003	06/23/2026	05:41 PM		126260	26	JEROMY ABBOTT	1	1	4	1	06/24/2026	00:00 AM

Service Order Status: SCHEDULED Service Order Type: TANK REPAIR

Customer Info: Service Address 987 MAIN STREET, City AVON, State SD, First Name JEROMY, Last Name ABBOTT, Requested By, Mail Address 1 634 SCHIMMEL OVAL, Address 2 APT. 581, City2 SOUTH HOLDENBOROUGH, State NC, Zipcode 08271, Home Phone (244)733-6405, Work Phone (907)213-0041, Cell Phone () -, Order taken by ESTech, Service Zone 1 AVON/DANVILLE

Calendar: June 2026 (S M T W T F S)

Buttons: Inv Sel, Create, Modify, Print SO, Save, Create and Open Proposal, Open Inv., Exit

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.

Sunday	Monday	Tuesday	Wednesday	Thursday
31	1	2	3 Scheduled: 2	4
7	8	9 Scheduled: 2	10	11

- Enter the *Sched. Time*.
- Select the *Service Order* tab in the lower section of the screen.
- If servicing a specific tank at the service location, choose **Select Tank** to indicate the appropriate tank.

The screenshot shows a software interface with tabs: Customer Info, Service Order, Service Requested, and Technicians. The 'Service Order' tab is active. A 'Select Tank' button is highlighted with a red box. Below it are fields for Tank S/N (M0746957), Location (0), Meter Type (0), Projected Close Date (00/00/00), and Close Reason (0). A 'Call Back?' checkbox is at the bottom left. A calendar is visible in the top right. An 'Open Invc.' button is at the bottom right. A 'Select Tank' dialog box is open, displaying a table of tanks:

Tank Serial Number	Tank Name	Tank Type
M0746957		P
M1229073		P
M1525469		P
M1871798		P
RRN3476		P

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

The 'Select Technician' dialog box is shown with a table of technicians:

Seq	Name	Technician Type
1	PEYTON MANNING	SERVICE TECHNICIAN
2	JOE BURROW	INSTALLATION TECHNICIAN
3	BROCK PURDY	APPRENTICE TECHNICIAN
4	PATRICK MAHOMMES	DELIVERY DRIVER

Buttons for 'Select' and 'Cancel' are at the bottom.

- 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.

