

Unscheduled Service Calls - Service Orders

Last Modified on 06/09/2022 12:48 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#
BARE MFG	25349	1
BARKWELL ELIZABETH	16379	1
BARKER BETTY	25384	1
BARKMAN A E	25404	1
BARKMAN DARREN	25406	1
BARNANEW BED & BREAKFAST	116318	1
BARNETTE ANDY	25471	1
BARNEY KERRY M	25473	1
BARR IZETTA	25495	1
BARRETT MABEL	40379	1
BARRETT ROBERT OR JEAN	25552	1
BARTEL TIM	40654	1
BARTHOLEMEW YONG	29632	1
BARTHOLOMEW E L	116388	1
BARTLETT KEVIN T	104317	1
BARTON DEREK J	104451	1
BASHAM H M D	25715	1
BASHAW DAVID A	25710	1

Phone: (307)245-3312 Terms: CHARGE

Work Phone: () - Safety Info Date: 00/00/00

Credit Limit: \$500.00

Current: \$299.11

30 Day: \$0.00

60 Day: \$0.00

90 Day: \$0.00

Total: \$299.11

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
10700002	02/12/2020	03:58 PM		519375	4_304 TRINITY COX	1	1	4	1	00/00/0000	00:00 AM

Service Order Status: SCHEDULED Service Order Type: TANK REPAIR

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
3	RANDY WEIMER	SERVICE TECH	00/00/00	00:00 AM	01:00 AM	01:00

Calendar: February 2020

Fuel Order: Show All, 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.

20 Scheduled: 6	21 Scheduled: 1	22 Scheduled: 5	23 Scheduled: 6
27 Scheduled: 3	28 Scheduled: 3	29 Scheduled: 2	30 Scheduled: 2

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.

Seq	Name	Technician Type
1	STEVE KESY	SERVICE/INSTALLATION TECH
2	DAVE BARRETT	SERVICE/INSTALLATION TECH
3	GEORGE TAYLOR	SERVICE/INSTALLATION TECH
4	MIKE LOWRY	SERVICE/INSTALLATION TECH
5	JOHN ROSE	SERVICE/INSTALLATION TECH
6	CHRIS MCDONNELL	SERVICE/INSTALLATION TECH
7	MAINTENANCE	SERVICE/INSTALLATION TECH
8	TYLOR HANZLIK	SERVICE/INSTALLATION TECH
9	ROGER BRELSFORD	SERVICE/INSTALLATION TECH

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.