Service Orders and Maintenance Orders

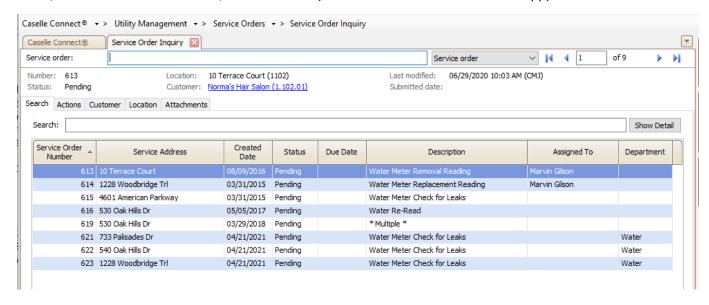
Service Orders vs Maintenance Orders

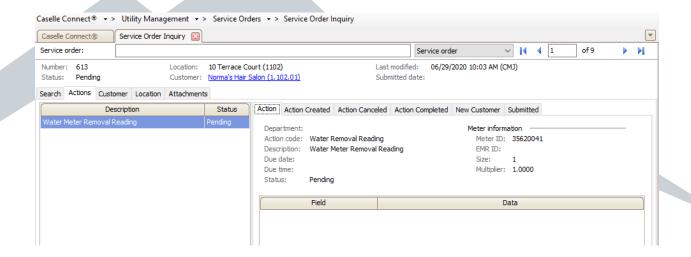
Service Orders	Maintenance Orders	
Designed to organize and track work requests	Designed to organize and track work requests	
that are associated with a customer in Utility	that are NOT associated with a customer in Utility	
Management	Management	
Organize personnel and action codes by	Organize personnel and action codes by	
department	department	
Customize functionality by action code	Customize functionality by action code	
Interface with Utility Management to update	Combine multiple tasks into one maintenance	
service and billing information	order	
Create billings when completing a service order	Track work requests, assignments and completion	
Combine multiple tasks into one service order		
Streamline the new customer process		

Service Order Inquiry

Utility Management > Service Orders > Service Order Inquiry

Allows you to view all details about the Service Order including information from Create New Service Order, New Customer Information, and Submitted (information sent from the mobile app)

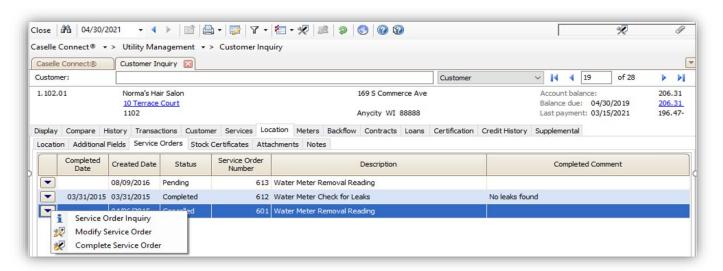




Customer Inquiry

Utility Management > Customer Inquiry

In Customer Inquiry, there is an icon in the top right corner if there is a Service Order on this customer. Service Orders are attached to the LOCATION, so they will appear in the Location > Service Orders tab in Customer Inquiry.



There is a shortcut icon in the top menu that will take you directly to Create New Service Orders, this pulls the customer information into the form (looks like a wrench crossed with a shield).

To go to Service Order Inquiry from Customer Inquiry, double click on the service order you want to see or click the down arrow next to it and select Service Order Inquiry. Reminder: Service Order Inquiry. ALWAYS opens with the filter for Pending status service orders; click on the filter icon to turn it off if you are wanting to look at a Completed/Cancelled status service order

This will also take you to Modify Service Order or Complete Service Order tabs



Organization – Action Codes

Utility Management > Organization > Action Codes

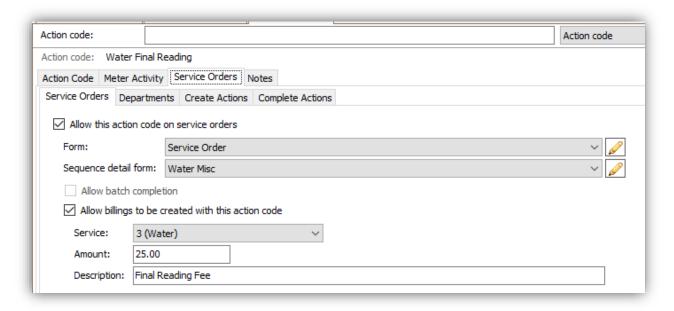
At their most basic level, Action Codes are the foundation of Utility Management and allow for multiple actions to occur in Connect: meter changeouts, period meter readings, meter disconnects/reconnects, etc.

Some action codes are only meant to used in the background (such as Period Meter Reading and New Connect) and cannot be used as Service Orders.

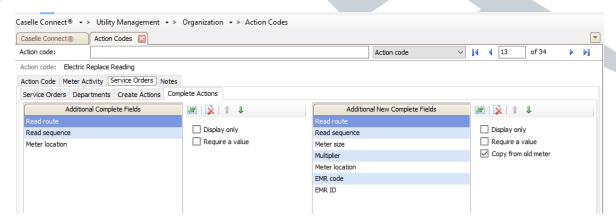
To incorporate an action code as a service order, under the Service Order tab, check the "Allow this action code on service orders" box and set your form options. There are 5 main action codes for each metered service that are used in Service Orders. Install Meter, Remove Meter, Replace Meter, Final Reading, Other. Each type of action code may require different information on the printed Service Order form, so different Sequence detail forms are setup and assigned to each action code.

If using Mobile Service Orders, there is the option to Allow Batch Completion for service orders that do not affect meters or billing.

If you have charges associated with service orders, they can be set up to be created when a service order is completed



When Creating, Assigning, or Completing a service order, additional system-defined or user defined fields can be set up to appear. User Defined fields are configured under Utility Management > Organization > Organization. Assign the fields by highlighting the field on the left and choosing Select. The Complete Actions fields should match the fields selected on the Meter Activity tab of the Action Code including any Copy from old meter options.

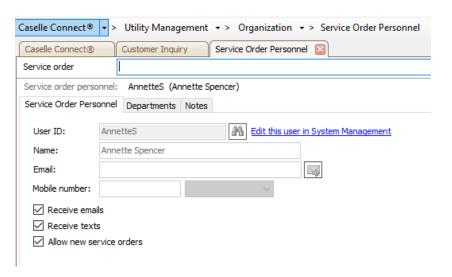


Setup

Utility Management > Organization > Service Order Personnel

Personnel

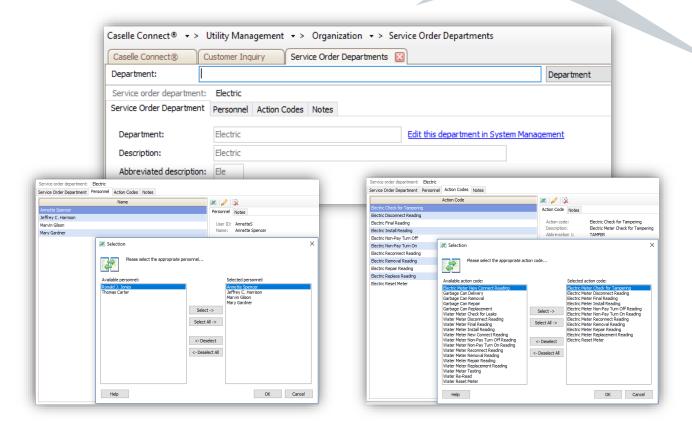
- a. Configure the personnel for assigning and completing service orders. Any personnel that will be using Service Order must be set up in System Management and then selected in Service Order Personnel.
- b. If using the mobile app, they can choose to receive email and/or text when something is assigned to them (the Email and Mobile Number fields also come from System Management)



Utility Management > Organization > Service Order Departments

Departments

- a. Configure the departments for assigning and completing service orders. Any department that will be using Service Orders must be set up in System Management.
- b. Select the Personnel that may be assigned the service orders in that department and select the action codes that may be assigned to that department.



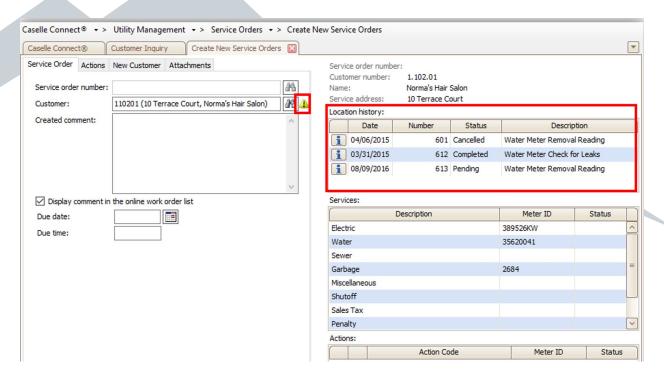
Create Service Orders

Utility Management > Service Orders > Create Service Order

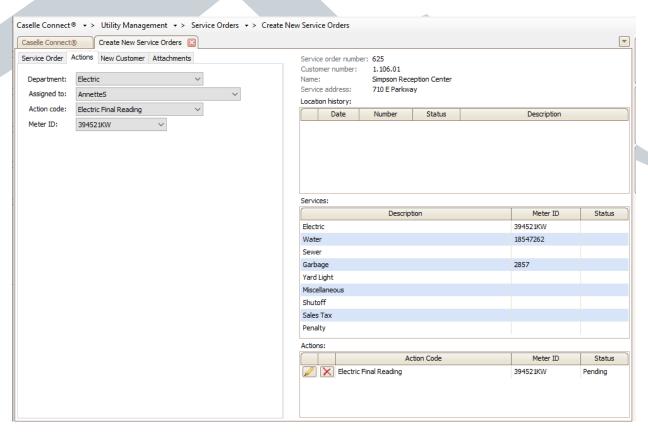
1. There are several ways to get to Create Service Orders. If Customer Inquiry or Service Order Inquiry is open, click on the Create Service Order icon or use the link on the Checklist.



- 2. Enter the Customer Number if needed if using the icon from an Inquiry screen, the system will already have the customer pulled in
 - a. If the customer already has pending service orders, there will be a warning next to the customer field
 - b. All service orders associated with this location will be listed under Location history
 - c. Clicking on the in front of a service order in history will open Service Order Inquiry for that Service Order
 - d. Complete fields Created Comment, Due Date, Due Time if needed
 - e. If using mobile service orders, make sure that the Display comment in the online work order list box is checked



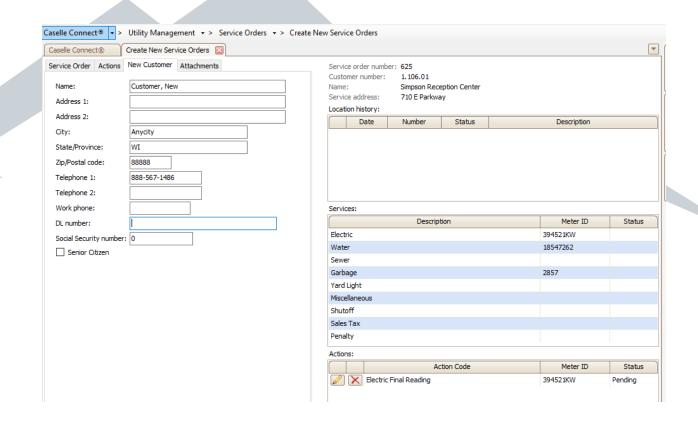
- 3. Enter through or click over to the Actions tab
 - a. Allows you to add an Action Code to the service order (or multiple Action Codes to one service order)
 - b. Choose the department and personnel to assign the action to (if needed)
 - c. Choose the appropriate action code
 - d. Enter through to populate the meter information (if multiple meters are on the service, you can drop down to choose which one needs the action applied)
 - e. The billing services are visible on the right side
 - Each action added will appear at the bottom of the screen
 - g. If you need to modify an action, click on the pencil, or click the X to delete/abort that action
 - h. The system will assume you want to add another action, if you are finished, you can either click Enter again to Save or move onto the New Customer tab (for Final Reading action codes only)



4. New Customer tab

- a. For Final Reading action codes, the New Customer information tab will activate so any information about the new customer can be added at this point
- b. This screen can have the same fields as Setup New Customer
- c. Any information added here will flow through to Setup New Customer when the service order and subsequent final is completed
- d. Once this is complete, a pop up for the Modify Mailing Address will allow the old customer's forwarding information to be updated at this time
- e. These options prevent the need to enter information multiple times
- f. If you do not have all the information for the new customer, you can fill out partial information here and add to it later
- Remember: Address 1 and Address 2 fields are the mailing address, no need to fill it out here if it's the same as the Service Address
- h. Caution: If using the CoSigner/Owner Account trigger on Setup New Customer, you do NOT want to set it up at this point. On this screen, simply type Landlord/Cosigner/etc in the Name field as a reminder to check the Owner Account box when you get to Setup New Customer

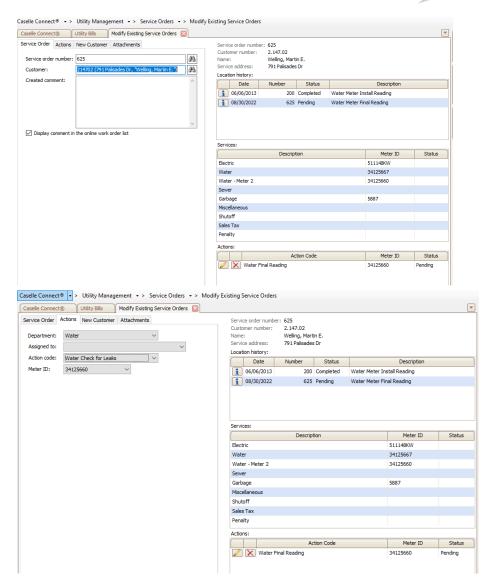


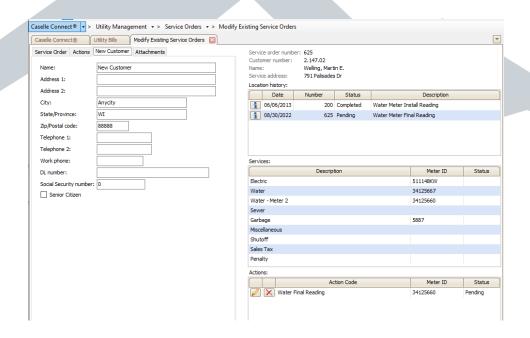


Modify Service Orders

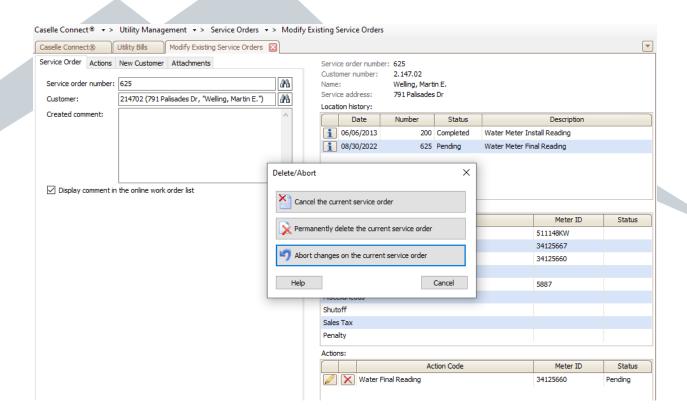
Utility Management > Service Orders > Modify Existing Service Order

- 1. Any open/pending service orders can be modified through Modify Existing Service Order
- 2. Information can be modified on the Service Order, Action Codes or New Information tabs
 - a. Can include adding an additional action code to the existing service order (for example: Water Final Reading and then Check Meter for Leak)



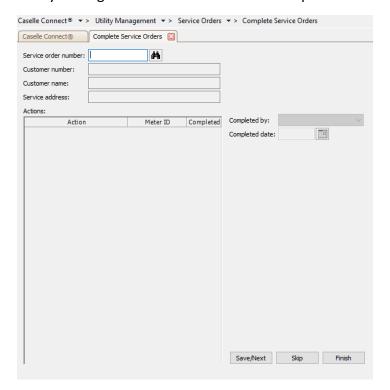


- 3. Cancelling a Service Order in Modify Existing Service Order
 - a. In Modify Existing Service Order, enter the service order number and hit enter
 - b. With the service order pulled up this way, you can click on the Delete icon
 - Cancel the current service order
 - i. Can be cancelled if customer cancelled the request (such as a property sale no longer going through, final reading no longer needed)
 - ii. Will ask for a cancellation note to be made for record purposes; note the date and information about the cancellation
 - iii. If multiple action codes on service order, one action can be cancelled while the other remains pending
 - iv. Location will keep record that service order was made and cancelled
 - d. Permanently delete the current service order
 - i. Used only if there should be NO RECORD of the service order existing ie entering the service order on the wrong account, training purposes
 - e. Abort changes on the current service order
 - Undo button for any changes made, reverts back to saved service order

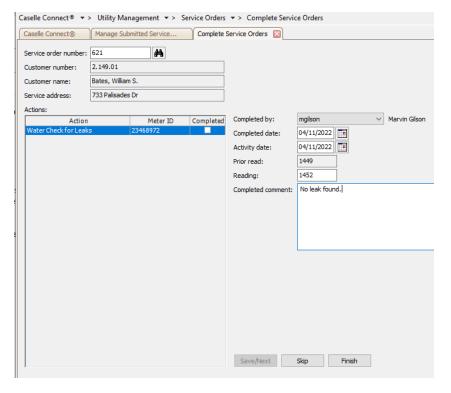


Completing Service Orders

Utility Management > Service Orders > Complete Service Order



- 1. Completing service orders does multiple things in the system
 - a. Completes the service order for all action codes included
 - b. If a meter install, remove, or replacement it creates the meter activity record for the meter change
 - c. If a final reading, completing will lead you through the Final Bill Process
- 2. HINT: The Enter key is crucial in this screen
- 3. Enter (or search for) the service order number you wish to complete
- 4. Hit Enter key to populate the service order
- 5. Complete the fields as necessary (remember that each action code may have different fields to complete based on choices set up on the action code)



If using the mobile app:

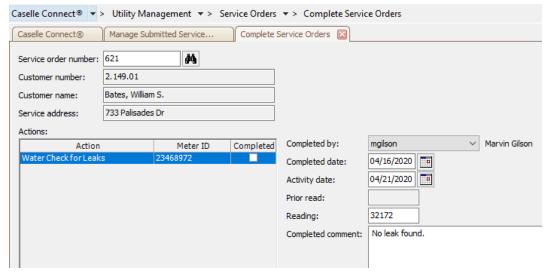
Utility Management > Service Orders > Manage Submitted Service Orders

- By starting at Manage Submitted Service Orders you can choose to complete via batch or single mode (this is an option set on the action code)
- 2. Next to each service order is a dropdown arrow that will allow you to Display Submitted information or Delete Submitted information
 - a. Use this to see the information entered into the app directly
 - b. Deleting submitted information allows you to then modify a service if need be and have a technician submit the information again
- 3. For the Batch mode simply click on the box next to the service orders you want to complete and click the GO button in the menu





4. For Single mode, click on the pencil next to the service order to open Complete Service Order



- 5. Submitted information will populate automatically (as you ENTER through the fields)
- 6. If necessary, enter additional information manually
- 7. Continue to Complete Service Order Section same as non-app users

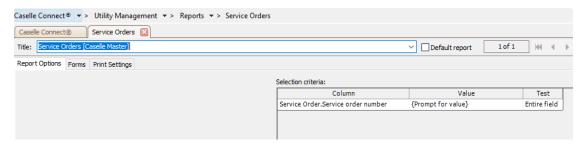
Printing Service Orders

Utility Management > Reports > Service Order

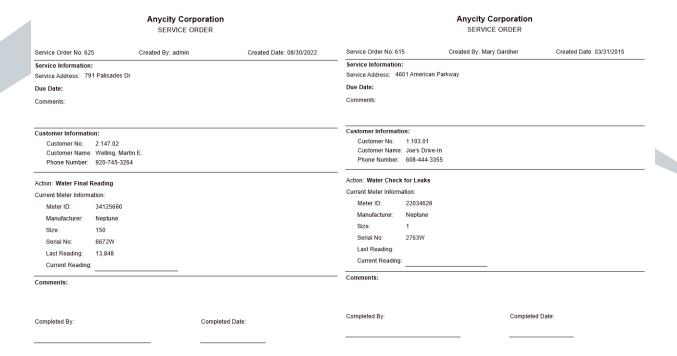
Utility Management > Reports > Service Order List

Service orders can be printed upon creation or by Utility Management > Reports > Service Orders

Forms will look different for various service orders based on setup of the Form Sequence chosen on the Action Code in Organization

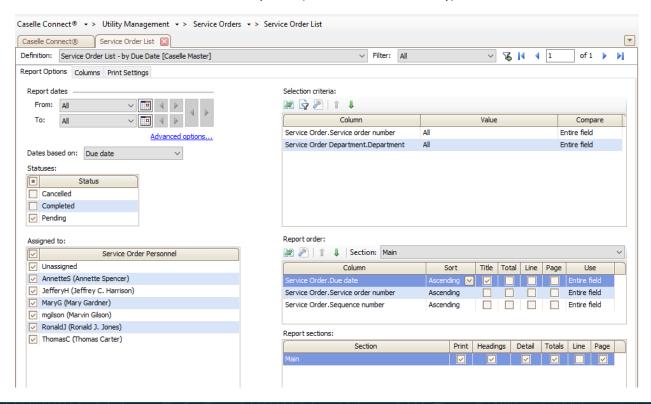






Utility Management > Reports > Service Order List

The best way to pull a list of pending/outstanding service orders – recommended to print on a regular basis to ensure all service orders are completed (or cancelled if necessary)





Anycity Corporation Service Order List Sep 13, 2016 03:32PM

Report Criteria:

Include: Cancelled, Completed, Pending, Partial

ervice Order	Sequence			Customer	Created	Completed
Number	Number	Description	Service Address	Number	Date	Date
200	1	Water Meter Install Reading	791 Palisades Dr	2.147.01	06/06/2012	06/08/2012
400	1	Garbage Can Repair	667 E Parkway	1.105.01	06/01/2013	06/15/2013
401	1	Garbage Can Delivery	667 E Parkway	1.105.01	07/16/2013	07/19/2013
402	1	Garbage Can Delivery	115 S Commerce Ave	1.103.01	07/21/2013	07/31/2013
600	1	Water Meter Check for Leaks	60 N Commerce Ave	1.108.01	02/26/2014	
601	1	Water Meter Removal Reading	169 S Commerce Ave	1.102.01	04/06/2014	
602	1	Water Meter Replacement Reading	115 S Commerce Ave	1.103.01	03/06/2014	
603	1	Water Meter Check for Leaks	667 E Parkway	1.105.01	03/16/2014	
604	1	Water Meter Check for Leaks	180 S Commerce Ave	1.101.01	03/11/2014	
605	1	Water Meter Replacement Reading	667 E Parkway	1.105.01	03/16/2014	
607	1	Electric Meter Replacement Reading	665 E Parkway	1.104.01	03/29/2014	
608	1	Water Meter Check for Leaks	530 Oak Hills Dr	2.153.01	03/26/2014	
609	1	Water Meter Replacement Meter	180 S Commerce Ave	1,101.01	09/13/2016	09/13/2016

