

# Service

- [Quick Start / Questions to Ask When Making a Service Ticket](#)
- [Service Board Overview](#)
- [Inventory: Parts](#)
- [Managing Projects / Non-Associated Concerns](#)
- [Shift Schedule](#)
- [Scheduling the Visit / invoicing ticket](#)

# Quick Start / Questions to Ask When Making a Service Ticket

## Quick-Start Overview

| When you need to...         | Start here                                                           |
|-----------------------------|----------------------------------------------------------------------|
| Schedule a tune-up          | Systems tab, gear icon, then the Visits tab on the resulting ticket. |
| Make a service ticket       | The customer's account, or the Work Order button on the board.       |
| Set up a shift or schedule  | Admin, then Settings > Shifts, or Admin > Shift Schedules.           |
| Review the service board    | Hamburger menu, then Board.                                          |
| Add or update a part        | Service, then Parts.                                                 |
| Manage or resolve a project | Hamburger menu, Service, then All Projects.                          |

**CORE HABIT:** Confirm the customer, the concern, and the correct project before scheduling or dispatching a visit.

## 1. Questions to Ask Companies (Service Training)

| Question          | What to confirm                                                                |
|-------------------|--------------------------------------------------------------------------------|
| True hourly rates | Confirm whether the company bills a flat hourly rate for labor.                |
| Rate by brand     | Check if labor or service rates differ across the brands the company services. |

|                           |                                                                                                                               |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------|
| Rate by plan or emergency | Confirm whether plan members get a different rate than non-plan customers, and whether emergency calls carry a separate rate. |
| Rate by technician        | Check whether rates vary by technician.                                                                                       |
| Departments               | Confirm which trade departments exist: plumbing, HVAC, electrical, appliance, and vents/metal.                                |
| Kits vs. hourly billing   | If the company doesn't bill hourly, confirm whether it bills using kits. Kits must be set up in the system before use.        |

**NOTE:** Labor rates cannot be used if kits are in use. Invoice codes should mirror the kit in the pricebook.

# Service Board Overview

## Accessing the Board

- Click the hamburger menu, then click **Board**.

## Table View

- This is the default view.
- Shows the technician's name and job order.

## Calendar View

- Use this to add daily activities and work orders.
- Example: an emergency job comes in and needs to be scheduled:
  - Choose the customer.
  - Choose the date.
  - Type in the concern.
  - Add labels as needed (e.g., "No Hot Water").
- **All Techs vs. Scheduled Today** toggle: view all technicians, or only those scheduled for that day.
- **Calendar button**: selects the date.

## Projects View

- Shows the list of projects technicians are working on.
- Filter by **Brand** and by **Status** (Completed, In Progress, Future Work: anything not yet completed).

## Changing the Layout

- Click the horizontal arrows on the left to switch to vertical view, with technicians listed across the top.

# Reassigning or Rescheduling a Job

If an appointment runs long and the next job needs a different tech:

- Click the ticket for the other job.
- Change the technician and date as needed.

# Inventory: Parts

## Navigating to Parts

- Go to **Service**.
- Go to **Parts**.
- Existing parts from the migration may already be on the list.

## Adding a New Part

- Click **Add New Part**.
- Write in the part name.
- Write in the supplier.
- Write in the shelf location in the parts room.
- Add any additional description.
- Write in the sell price and buy price.
- Add inventory info to make ordering easier (optional; no issues if skipped).

## Updating a Part

- Click the edit pencil button and update.

# Managing Projects / Non-Associated Concerns

1. Click the hamburger menu, select **Service**, then click **All Projects**.
2. Use the brand dropdown to switch between brands.
3. Use the status dropdown to view projects by status:

| Status      | Meaning                                                                                                              |
|-------------|----------------------------------------------------------------------------------------------------------------------|
| All         | See all projects                                                                                                     |
| Completed   | See completed projects                                                                                               |
| Future Work | Projects that aren't completed; a technician has done work, but the issue isn't fixed and requires a follow-up visit |
| In Progress | Projects currently being worked with a technician on-site                                                            |

4. After selecting a status, adjust the date range to the dates you're looking for.
5. Use **Columns** to select which filter information displays. Click **Reset** to restore default filters.
6. Click the expand arrow icon to open a project.
7. To get an invoice, or to merge, split, or cancel a project, use the corresponding button next to **Resolve**.
8. To add another concern to the project, click **Concerns**, then **Add New Concern**.
9. Click the green **Resolve** button to close out a project.

# Managing Non-Associated Concerns

- Toggle over from **Projects** to **Non-Associated Concerns** in the **All Projects** tab.
- These are concerns that do not have a project attached.
- If a customer makes a service request on the customer portal, this is where it will live.
- Once you create a project for the concern, it will leave this list.

# Shift Schedule

## Creating Shifts

1. Click the hamburger menu, then **Admin**, then **Settings**.
2. In Settings, go to **Shifts**.
3. Add shifts based on: name, type (Typical, Vacation, Sick, Holiday, etc.), department, start time (including incentive hours, if applicable), and season.
4. Mark the shift as **Active**.

“ **REMINDER:** Repeat this for each start time, even if they're only 15 minutes apart.

## Creating Shift Schedules

1. Go back to the hamburger menu, then **Admin**, then **Shift Schedules**.
2. Add shifts for each employee, using **Add Typical Shift** for a recurring, constant shift, **New Shift** for a one-time shift, or **Edit Shifts** to edit existing shifts.
3. Change the employee using the dropdown menu.

Once employees are added, they'll be available to add to the board for service and deliveries.

# Scheduling the Visit / invoicing ticket

## Making a Ticket

### From the Office

- Two ways: from the customer's account, or from the **Work Order** button on the board. Work Orders are only handy if you know the technician, the date, and time.
- **Best practice:** create it from the **customer's account**. This shows visit history and any open projects.

### From the Field (On-Call Technician, via the App)

- Search for the customer.
  - Tap **Create Emergency Ticket**.
  - Add the concern and submit.
  - The ticket appears on the technician's board/job list.
1. Go to the customer's account.
  2. Click **Service**.
  3. Click **Add Concern**.
  4. Add a project on the same concern.
  5. Click **Visits**, then click the service ticket number.
  6. Schedule the date and arrival window.
  7. Add labels.
  8. Add notes.
  9. Add parts, if applicable.
  10. Set the status to **Ready for Dispatch**.



**STATUS FLOW:** As the technician works the job, status updates automatically:  
**In Progress → Completed → Checked.**

## Managing Visits Within a Project

- To add multiple visits to one project, click **New Visit** in the open project
- You can merge or split a project.
- Add the part and quantity as needed.
- The **Financials** tab is where the system automatically processes billing information.

## While the Technician Is On-Site

- The technician has access to the ticket and records all information here.
- They update the status from **In Progress** to **Work Performed** to **Complete**.
- To resolve a ticket, go to **Overview** and click the green **Resolve** button to close it out.

## Billing

- Click into **Future Work**, then **Financials**, to see the amount of work performed.
- Note whether the work is billable and generate the invoice.
- Add any additional parts or an emergency visit fee to the invoice.
- Once ready to bill, mark as **Checked** and post the bill.
- If the customer is on auto-billing, their card or ACH will be charged automatically.
- If you need to mail the invoice instead, click **View Bill** and mail it.