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. To find units that are due, use the Tune Up Search report.
Make a service ticket	The customer's Service tab, or the Work Order button on the board.
Quote a job	The customer's Service tab, then New Proposal.
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, or the project timeline on the customer's Service tab.

> **Core Habit:** Confirm the customer, the concern, and the correct project before scheduling or dispatching a visit.

Questions to Ask Companies (Service Training)

By the end of training, you should know the following about the company:

Question	What to confirm

True hourly rates	Confirm the hourly labor rate. Labor-rate jobs bill per hour once a job reaches its breakpoint.
Rate by brand	Labor rates are set per brand. A brand with no rates of its own uses the default brand's rates.
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.
Overtime rate	Confirm the overtime rate. Visits clocked in between 5:00 PM and 7:00 AM bill at that rate, or at the regular rate if none is set.
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 with flat-rate jobs and kits. Jobs, kits, and templates must be set up in the price book catalog before use.
Materials	For each job, confirm whether materials are included in the price or billed in addition, and how quotes should show them: every part itemized, one Materials line, or one combined line.
Quoted or actual time	For labor-rate jobs, confirm whether the company bills the hours on the quote or the hours the visit actually took.
Plan discounts and promotions	Confirm parts discounts for plan members and any tune-up promotions. Service promotions can be limited to invoice types and a date window.

> **Note:** Each catalog job is either flat-rate or labor-rate. Invoice codes should mirror the job or kit in the price book. A provider's price book can be imported into the catalog instead of entered by hand.

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