

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.

Revision #2

Created 2026-09-08 18:42:11 UTC by Kozy Operations

Updated 2026-09-08 20:46:12 UTC by Kozy Operations