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.
- Instructions added to a concern when the work order is created show on that concern on the visits page, and can be edited on the project's Concerns tab.

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

Scheduling a Tune-Up

Find Units Due for a Tune-Up

- Open the **Tune Up Search** report. It tracks tune-up status for each piece of equipment, not each customer.
- Use the search box and the Status, Coverage, Type, and Refine filters to build a call list.
- Use **Mark as Called**, **Email Customer**, or **Schedule** on each row.
- A unit's last tune-up date updates only from visits labeled **Tune-Up**. Label every tune-up visit so the report stays accurate.
- A service plan counts as tune-up coverage when its template has **Includes Tune-Up** turned on.

Schedule a Tune-Up

- Go to **Systems**, click the gear icon, and schedule an AC or Heating tune-up
- Add the concern
- Add the project and select the applicable concern
- Click the **Visits** tab and click on the ticket number

Checking Availability

- In another tab, open the service board to see technician availability for the day

Scheduling the Visit

1. Go to the customer's account
2. Click **Service**. The Service tab shows each project as one timeline, from the first concern to the final invoice.
3. Click **Add Concern**. If the concern is already open, attach it to the project instead of adding it again.
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. Use the **Tune-Up** label on tune-up visits.
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. Posting the service invoice finishes any visit it bills that is still open, so visits do not need to be moved to Checked by hand.

Using the Service Tab

- **Add Concern**, **New Project**, **Create Work Order**, and **New Proposal** stay at the top of the Service tab on every sub-tab.
- Concerns not yet attached to a project appear in a banner at the top of the Projects view, with options to edit the concern or start a proposal from it.
- Use the bulk concerns dialog to resolve, cancel, or reopen several open concerns at once.
- Hover a concern to see its ID and last update. Hover a visit to see the technician, status, and job duration.
- Find projects with the search box and the status tabs, which show live counts.
- Every service needs a start date. A new service defaults to today.

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
- The project's **Visits** tab shows every visit expanded by default.
- Cancelling a work order also cancels its open visits. Completed visits are left alone, and reopening the project brings the cancelled visits back.

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
- Clock-in and clock-out times on each visit drive labor billing. Every billable visit must be clocked out.
- Technicians can add a concern from the app, with a proposed solution and the equipment it applies to, and pick flat-rate jobs from a searchable catalog.
- Parts used in the field come off the technician's van stock. A technician can also request a part from the job's parts tab.
- The equipment card shows the unit's service plan, its status, and its dates, so the technician can confirm coverage on site.

Billing

- Click into **Future Work**, then **Financials**, to see the amount of work performed
- Note whether the work is billable and generate the invoice
- Labor lines are built from each billable visit's clocked time. A session that starts between 5:00 PM and 7:00 AM bills at the overtime rate.
- If a billable visit is still clocked in, or its times are out of order, invoice generation stops and names the visit. Correct the visit, then generate again.
- Add any additional parts or an emergency visit fee to the invoice
- Materials can be itemized on the invoice or grouped into one Materials row. An invoice built from a signed quote keeps the quote's line layout.
- Plan member discounts lower the tax on the discounted lines.
- Once ready to bill, mark as **Checked** and post the bill. Posting refuses an invoice dated after today.
- 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. Marking an invoice as mailed records it in the invoice's send history.

Quoting a Job

1. From the customer's Service tab, click **New Proposal**.

2. Add each scope of work. To give the customer a choice, put two or more scopes in the same choice group. The customer signs for exactly one option in each group. Scopes outside a group are required, or add-ons when marked optional.
3. Review the totals. Total investment is the required work plus the lowest-priced option in each group. The with-all-options figure uses the highest-priced option in each group.
4. Send the proposal. The customer signs in the Customer Portal, or staff record the signature in the office.

> **Note:** The proposal prints with your letterhead, lettered option cards, an investment summary, and issue and valid-until dates. For a service agreement or delivery authorization tied to a customer's service, use the **Agreement** proposal type.

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