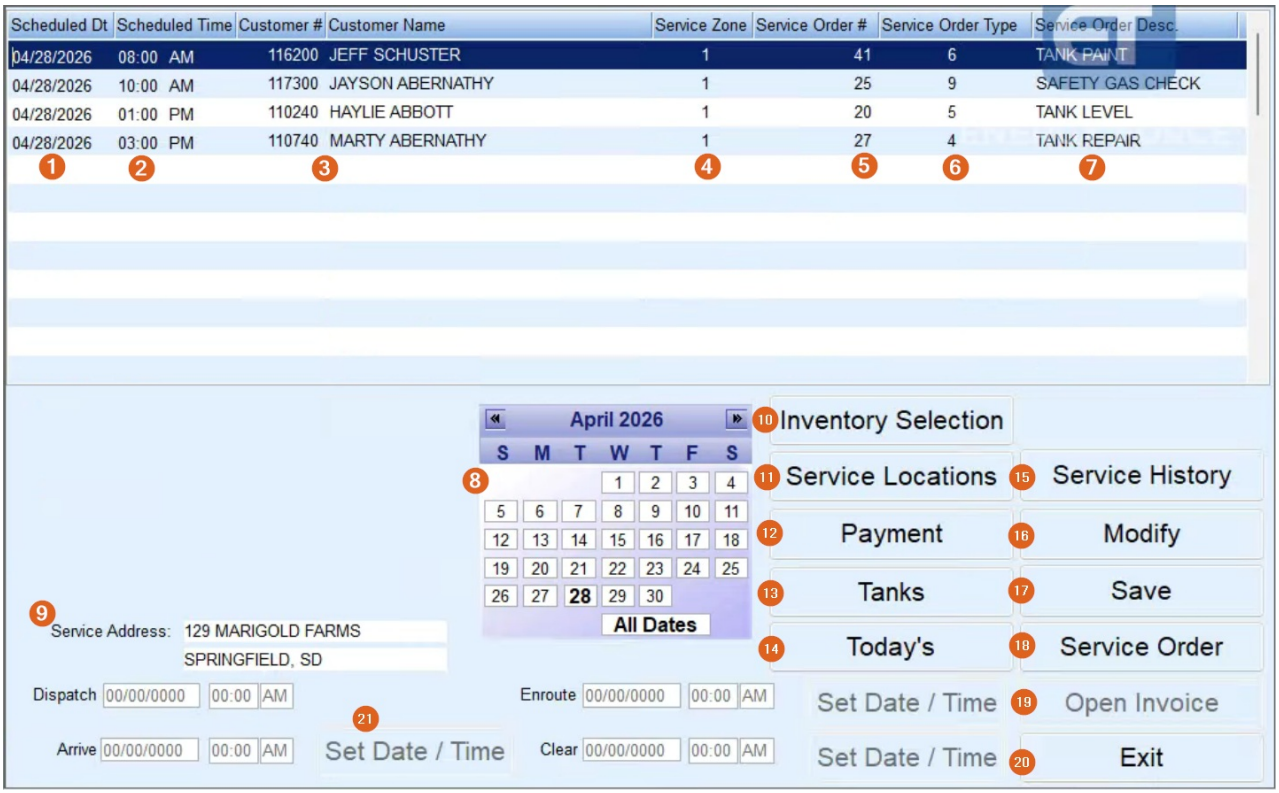
Scheduled Service Calls Overview

Last Modified on 06/23/2026 4:16 pm EDT



1. Scheduled Date
2. Scheduled Time
3. Customer Name and Number
4. Service zone assigned to the service location\customer – similar to an assigned route code
5. Service Order Number
6. Service order Type
7. S.O. Type Description
8. Service Calendar - Click on specific date (in bold) to view SO's
9. Service location address
10. Inventory Selection – Allows technician to review the item cost prior to installation
11. Service Locations – All of the service locations assigned to the customer
12. Payment – Allows tech to receive payment from customer
13. Tanks – tanks assigned to the customer
14. Today's – This is a toggle. Displays service orders for the current service technician initially.
    1. If this button pressed, it will display all service orders for the current day for all technicians
    2. Press a second time to return to the current technician
15. Service History – displays previous SOs, Invoices, Proposals
16. Modify the service order
17. Save the service order

18. Review service order details
19. Create an invoice that is linked to the service order
20. Exit scheduled service calls
21. Dispatched Scheduled Call information.