

- 1 Search for service orders. Option to search for service orders, according to various criteria.
- 2 Filters allow you to sort service orders, quotes, and invoices by customer and creation date on the overview page.
- 3. Numbers show the last service orders, quotes and invoices broken down by status.
- 4. The **profile overview** asks you to complete the tasks that will help you attract new customers and meet their requirements.
- 5. **Refresh time of the data** on the overview page. The time when the information on the overview page was last updated. The check mark indicates that all data is up to date.
- 6. Vendor ID. Your company's identifier in ServiceChannel.



- 1 Click Service Orders in the top navigation bar of the Service Provider application.
- 2 Navigate between the status types by clicking on the following tabs:
- **Open**: A service order has been created but not yet accepted by you.
- In Progress: Your employees are working on this service order.
- Confirmation is pending: You have completed the work, but a facility manager still has to give feedback on your work done.
- **Completed**: You've completed the work and can create an invoice.
- Billed: You have submitted the invoice for payment.



By updating the scheduled date , you let the customer know when they can expect you on site.

- 1 In the desired service order, click Add Note.
- 2 Enter a **note** explaining why you're postponing the appointment.
- 3. Select a new date from Scheduled Date and enter a new time.
- 4. Select the appropriate **reason for replanning**.
- 5. Click **Save note and send**. The **note** is updated for the selected service order.

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A **solution code** refers to an action that your employee takes to fix a problem. A **reason code** is the reason why the problem occurred.

- 1 Click the Additional Views Service Orders button above the list of service orders and select Process Solution Codes.
- 2 Select 1-3 options from the drop-down list **Solution codes**.
- 3. Select 1 option in the Reason Codes list.
- 4. Click **Submit** to apply the added solution and reason codes to the service order.



A service order can be invoiced once it has a status of Completed. The total amount of the invoice must not exceed the amount of the upper limit (OG).

- 1 Select the service order and click **Create Invoice**.
- 2 Enter a unique invoice number, change the invoice date if necessary, and click **Confirm**.
- 3. On the **Summary** tab, provide a complete description of the work done and the tax percentage next to the respective invoice amount.
- 4. Complete **labor**, **travel**, materials, or **other** costs by clicking on the appropriate tabs.
- 5. At the bottom of the page, click **Send invoice**.

