

SERVICE PROVIDER



NAVIGATION

QUICK START GUIDE FOR



VIEW OVERVIEW PAGE



STATUS OF SERVICE ORDERS
RETRIEVE



PLANNED DATE
UPDATE



PROCESSING OF SOLUTION
AND REASON CODES

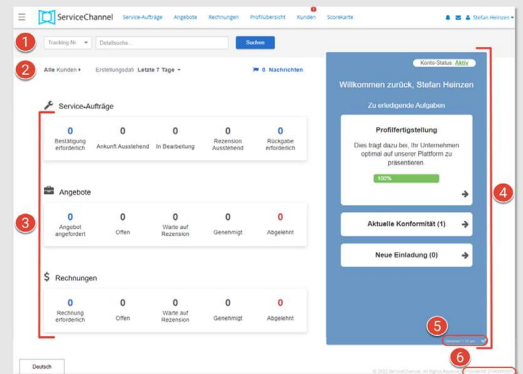
LOG IN TO SERVICECHANNEL

Log in to ServiceChannel via your ALDI account.



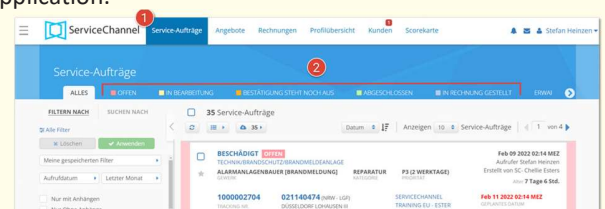
CREATE AN INVOICE

- 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.

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**.