Service Dispatch
Service Order Management

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Overview: Service Order Management

A successful service business receives many service requests. In Ascente these service requests are also referred to those service requests as *service orders*, *SO's* and *calls*. It is important to understand from a system prospective, that service orders are temporary transactions used to log the service request and then utilized to get the service done and finally to create an invoice for the accounting purposes. This documents purpose is to impress you on the importance on getting *all* of your service orders *serviced* and *invoiced* in as short a period as possible.

Service Order Counts

When service orders are added, the service order count increases and when those calls are invoiced or cancelled and processed, the service order count will be reduced. A business should process generally process as many service calls as they invoice in a month so that general the total will vary, but should remain about the same.

Service Order Processing Cycle

Without exception and hopefully within a reasonable amount of time, every service order should be serviced and then in Ascente be either:

1) Processed through the Prebill Cycle so the service order turned it into an invoice and the accounting and sales analysis records are created.
2) Cancelled and processed using the Ascente – Cancelled Service Calls program. Hopefully this does not have to be done much.

Both options will result in the service order transaction being removed and a service order history record being created.

There is one other bad option

3) *Doing Nothing*

	Service Order Count	Service Order History	Accounting
Service Call Added *Call Taking*	+		
Service Order Invoiced *Prebill Register*	-	+	+
Service Order Cancelled *Cancelled Service Calls*	-	+	

Why is doing nothing bad?

I assume that most everything I will mention here should seem obvious, and I hope it does.

System Perspective

If you do nothing…

When your service orders are not invoiced or cancelled and purged, the service order count will keep increasing. You will notice system performance lags when the service order count gets real large.

The Call Inquiry & Dispatch Program selects the service order – schedule records and factors in the total selected technicians. The larger both factors are will tax the system and impede system performance. This is not a major issue for most companies, but it you have hundreds of technicians and thousands of service orders spanning many years, you surely know what I am talking about. I mention this so you do what is necessary to see that you do not get this backed-up.

An analogy I use is that service orders are like rocks in your backpack when you are hiking. A few are not a big deal, but if you keep adding rocks and have a lot of rocks in your backpack, hiking is a lot more work and you are not going to move as fast.

Business Perspective

If you do nothing…

- Are you verifying that the service call was serviced?
    - o Yes: Then close and invoice the service order.
    - o No: Do what is necessary to get this scheduled and serviced or cancelled.
        - Do you think these calls are feeling ignored and unimportant if they have not been serviced?
        - Do you think they will call you again?
        - Do you do follow-up calls?
- Is your business paying for labor, parts, trucks and all of the other associated costs of running a business and not invoicing the customer for your service and parts?
    - o Yes: Do you see a problem here?
                       You may want to review this to your business owner.
- If the service was performed and not invoiced, are there payments received by your technicians that you have not deposited? Do they ever receive cash payments?

Accounting Perspective

If you do nothing…

- Your financials will not be current or correct.
- How can your accounts receivable collections be done correctly if billing is way behind?
- If someone calls for service and you do provide service, why would you not be processing the service invoices in a timely manner after the service was performed?
- Have you received the payments the technicians collected?
- Cash Flow, anything you can do to get invoiced processed and payments received and deposited faster is only a good thing. If you give your customers 30 days to pay and you don't invoice them until 30 days later, they are giving them terms of 60 days.
- Your accounting reports, sales analysis, commissions and sales tax reports are as current as your service invoicing is. If your invoicing is months behind, then your financials and sales analysis reporting will also be months behind.

How did this happen?

It is every service businesses responsibility to review their existing service requests and determine what needs to be done so that the service can be performed and invoiced. There is usually a service manager or lead dispatcher that takes this responsibility. Typical issues that need to be addressed are:

- The Call Inquiry Board is not being kept current by the operators
  - o Is the Call Inquiry reviewed and updated daily with the progress made?
  - o Are the technicians communicating to the dispatcher the status of the calls they worked on or were assumed to have worked on at the end of the day?
  - o When the service calls are completed or at least at the end of the day?
  - o Are you waiting for the paper work to be turned in by the technicians before you will close the service orders?
  - o Every service order should have notes added that indicate when special conditions regarding getting the call serviced such as:
    - ▪ Waiting on parts
    - ▪ Waiting for owner approval
    - ▪ Waiting for key
- Calls that are not going to be services are not being cancelled.
  - o Note in the *SO–Problem* field why the service order was cancelled. The call will be saved to history.
- Are their old maintenance service orders that were never scheduled or serviced for whatever reason?
  - o If so, then contact, schedule and service these maintenance service orders.
  - o Cancel these service orders at some point if they will never be serviced and invoiced. Remember that cancelled service orders are saved in service history. You should note on the service order why the call was cancelled if you will ever need to explain why it was cancelled as opposed to servicing and invoicing.
- Service orders need to be scheduled with the customer
- Technician availability
- Calls are waiting on parts
- Waiting on permit or inspector
- Are you adding service orders for estimates that you are waiting on a customer approval for?
  - o If so, you should consider using the Quotes Module.
- Anything you can do to help the dispatcher keep the system current will be very beneficial.

Recommended Best Practices

Operations

Keep Your Call Inquiry Current
1) Your service manager or dispatcher should review all existing service calls daily to verify that the service orders statuses are current. Verify that the *Open, Dispatched, Closed, Parts Hold* statuses are current. This requires communicating with the technicians. This should be reviewed and updated at least daily.
   - Why would you want calls scheduled that have been previously completed? You can't manage this if you do not have the information.
   - Anyone should be confident that the Call Inquiry is current. You do not want this all dependent on one person's memory.
   - Do you give your technicians more than one call at a time? Do they call after every call or at least at the end of the day to update the status of the calls that you assumed they worked on?
2) Don't just ignore old service orders that have scheduled dated in the past.
   - Verify that all calls that need to be rescheduled are rescheduled. If you promised that you would provide the service today and were unable to, typically you should call and reschedule the service.

Call Inquiry & Dispatch Program
You can filter your technicians and service orders based on technicians, zones, schedule date, service order type and status to reduce the total records selected and calculated by the Ascente – Call Inquiry & Dispatch program. This will improve the performance and speed in the Call Inquiry & Dispatch program.
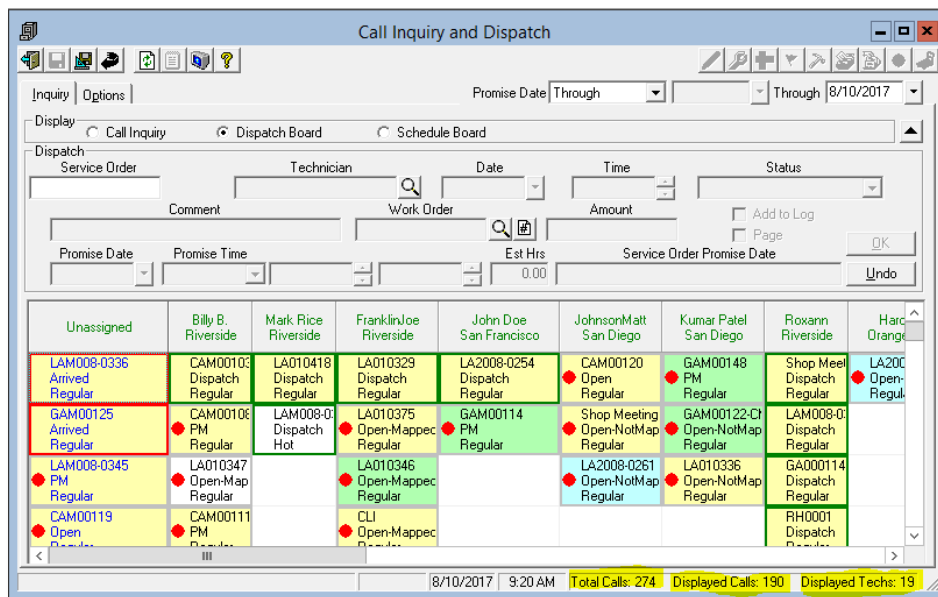

Figure 1: Note the Call totals at the bottom-right of the Call Inquiry/Dispatch Board.

## No Charge Invoice Processing

There are accounting concerns even for no charge services orders when you are inventorying your material or labor costs. In cases where the service order has not been invoiced, the GL postings for the transfer of inventory to the cost of goods sold posting will not happen. Consider this if you have service tickets for a previous fiscal year. For this reason, we always recommend invoicing every service order that has costs, even if there are no sales as opposed to cancelling service orders with costs, we refer to these as *Zero Invoices*. I recommend that you review these recommendations with your accounting department.

Cancelled Service Calls

Run the Ascente / Service Dispatch / Journals Cancelled Service Calls program at lease weekly so that these X-Canceled calls do not clutter the system. These cannot have costs applied to do this. If there are costs, then zero invoice them as opposed to cancelling them.

Figure 2: Service Dispatch /

Figure 3: Cancelled Service Calls - This will purge these service orders and create service history records for them.

3) When reviewing the Call Inquiry and Dispatch Board, do not use the 'Only' option, use the 'Through' or 'Date Range' option to filter the calls. If you have service orders that are not Closed or Cancelled for previous days, you should:
   o Determine what needs to be done to get this service scheduled, completed and invoiced.
   o If that is not possible, the call should be X-Cancelled or zero invoiced.
     ▪ You can only cancel service orders using the Ascente – Cancelled Service Calls program that do not have costs or sales associated.
     ▪ Any service order that has costs applied against it cannot be cancelled, you must zero invoice it.
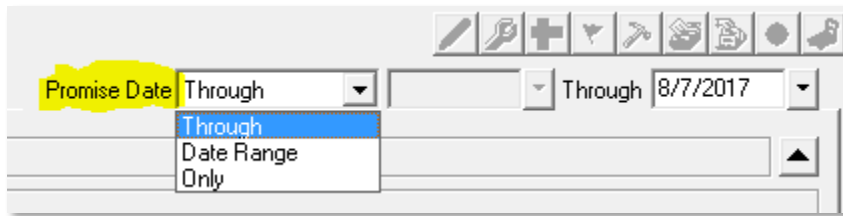
Figure 4: Call Inquiry & Dispatch - Promise Date Filter at the top-right corner

4) You may want to consider using the Ascente Mobile Pro module so your technicians can update their status from the field and prevent your dispatcher from having to do that.

Management Reports

Service Order Report
Run the Ascente / Service Dispatch / Reports / Service Order Report at least weekly to review the backlog of service calls.

- Use this to filter out the 'Parts Hold' service orders
  o Have the parts been ordered and/or provided?
- *'Closed'* service orders
  o *Why have these not been invoiced?*
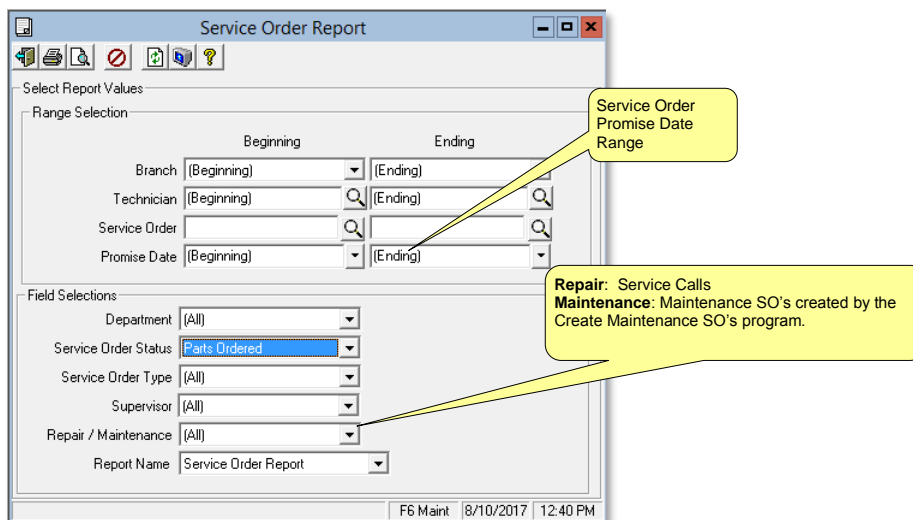
Figure 5: Service Order Report is used to select service orders based on many different criteria.

Service Order	Promise Date	Tech	Zone	CustID	Customer Name	SO Status	SO Type	Department
Branch	**California**		**Attn: Mary**					
CA000111	2/22/17	Mark A	Los Angeles	(Default)	Tom Vargas	X-Cancel	Maintenance	Maintenance
CA000112	2/19/17	Mark Rice	Los Angeles	(Default)	Abe Johnson	Closed	Maintenance	Maintenance
CA000115	2/20/17	John Doe	Los Angeles	(Default)	Jennifer Yang	Closed	Air Conditioning	Service
CA000116	3/16/17	Billy B.	Los Angeles	(Default)	Default Customer	Closed	Heating	Service
CA000117	3/16/17	Kenny W	Los Angeles	(Default)	Default Customer	X-Cancel	Air Conditioning	Service
CA000118-CM	3/10/17		Los Angeles	(Default)	Default Customer	Open-Mapped	Air Conditioning	Service
CA000123	6/6/17	Matt Melv	Los Angeles	(Default)	Default Customer	Closed	Air Conditioning	Service
CA000124	12/29/17		Los Angeles	(Default)	Default Customer	Open-NotMapp	Air Conditioning	Service
CA000125	1/30/17	John Con	Los Angeles	Colombia	Colombia Counter Sales	Open-NotMapp	Air Conditioning	Service
CA000126	2/3/17	Mark Rice	Los Angeles	(Default)	Default Customer	Closed	Air Conditioning	Service

Figure 6: Example of the field displayed on the Service Order Report

Invoicing Cycle (Prebill Register)

Run the Ascente / Service Dispatch / Journals / Prebill Register at least weekly to finalize all the service orders that are ready to be invoiced and sent to accounting. This will only include service orders and their associated work orders that are *'Ready to Bill'*. When updated, this will reduce the service order count in the system.
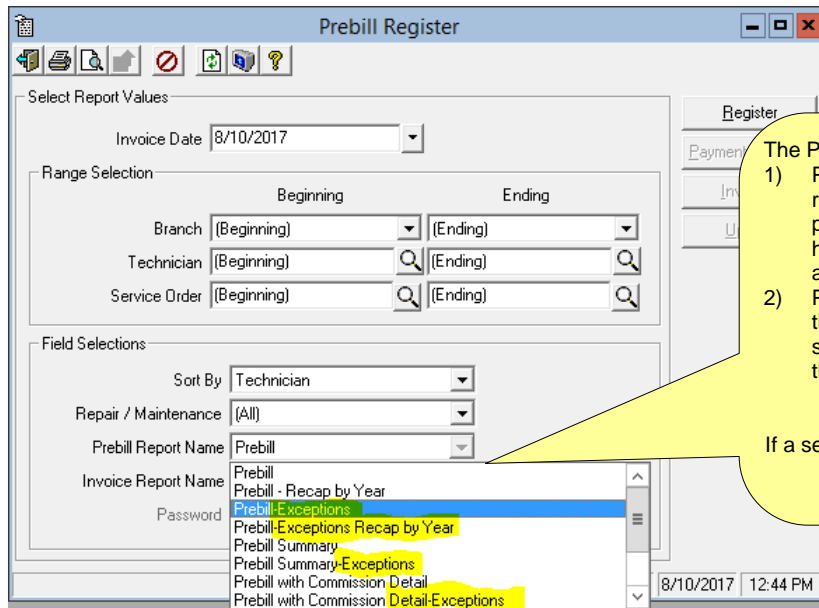
The Prebill Register has two primary purposes:
1) PREBILL REPORTS(S): Determine the service orders that are ready to be invoiced and updated to accounting along with printing the service invoices and creating the service order history records and then finally deleting the service orders and associated work orders.
2) PREBILL EXCEPTION REPORT(S): This is used to determine the service orders that have not ready to be invoiced and should be used to determine what needs to be done to get these invoiced.

If a service order has been invoiced, it would have been deleted and therefore, will never print on either of these reports.

Journals / Prebill Register – Exceptions

I consider this the best management tool you can use to stay on top of your service invoicing in Ascente. I recommend reviewing this at least monthly not weekly and then taking actions to get these invoiced. There is not a good reason to not do this. Many companies will have a service manager review this weekly with the goal being to determine what needs to be done to get all of the listed service orders invoiced.

This is a management report used to determine the service orders that have not been invoiced using the Prebill Register Cycle. You should review the service orders on the report and determine what needs to be done to get these invoiced. If you determine that these will never be invoiced, then either:

1) Cancel and run the Ascente – Cancelled Service Calls program
2) Zero Invoice these Service Orders

These *Prebill-Exception Reports* will allow you to print a summary or detailed report listing all service orders and associated work orders and all the applied costs and sales. If you are running this report and it is very long, then you really need to do whatever is necessary to get these service orders invoiced or X-cancelled if there are no costs or sales.

- This report can be run in summary, detail, with GL accounts or Commission Totals.
- Just know that this report selects all service orders that ate not ready to print on the Prebill Register. If there are 100 service orders, 10 are ready for the Prebill Register, then 90 will print on the Prebill Register – Exceptions Report.

Prebill - Exceptions

Prebill Exceptions Recap by Year

This report is used to determine summary totals when you have service orders that are months or years old that need to be addressed.

8/10/17 12:51 pm	Test Company On New Server Prebill Register - Summary Recap Invoice Date: 8/10/2017	EXCEPTIONS	Page 1 of 5

ASSUMPTIONS FOR THIS REPORT
- The year and months are based on the service order promise dates, not the promise dates of the schedule records or the service order input date.
- All years and months are calender as opposed to fiscal periods.
- The service orders by technician is based on the technician assigned to the service order, not the technician on the schedule records.
- The Technician on the Labor Hour Recap are based on the work order line records. It is possible that the technician on the service order is not the technician on the work order line.
- Service orders are determined to be maintenance if the service order was created using the "Create Maintenance Service Orders' program, otherwise they are repair.

Service Orders by Branch by Year and Month

Branch / Year / Month			Maintenance				Repair				Total			
			SO's	Costs	Sales	Pmts/	SO's	Costs	Sales	Pmts/	SO's	Cost	Sales	Pmts
California	2016	12	1		100.00						1		100.00	
		Total	1		100.00		0				1		100.00	
	2017	1	1		100.00		11	82,526.00	2,150.00		12	82,526.00	2,250.00	
		2	1		100.00		24	75,333.62	82,896.00		25	75,333.62	82,996.00	
		3	4	30.12	400.72		9	32,672.24	30,460.98		13	32,702.36	30,861.70	
		4	5	620.00	500.00						5		500.00	
		6	2		1,000.00		14	22,699.80	21,506.00			22,699.80	22,506.00	
		9	12	37,449.81	30,79							9.81	30,797.25	
		10	1		10								100.00	
		11	2		10								100.00	
		12	3		25								255.00	

> These are summary totals based on the service order's promise date's month and year. I hope you are never this behind in your processing.

Ascente Mobile Pro (AMP)

The Ascente Mobile Pro Module (AMP) adds another level of control for you by offloading some of the work that is done in the office to the field techs. The dispatchers will allocate the calls to the technicians and the technicians can then on their devices:

- Let the office know when they are driving or working on a service call
- Enter in their timecards themselves
- Enter their purchase orders from the field
- Do their own parts entry
- Enter in their payments
- Enter in a description of the work down.
- Close the service order so the office knows the work has been completed.

I mention AMP because without AMP, it is assumed that someone in the office is keeping the system current on a daily basis and verifying that all service orders are being serviced, processed or rescheduled in a timely manner.