Start the recording .................................

Ascente
Service Dispatch
Service Order Workflow Register

Presenter: Mark Allman
June 2019

www.compusource.com

http://www.servicecontractorsoftware.com/
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Overview

The Service Order Workflow Register is intended to be used by companies that have multiple people on staff involved in the entry, verification of Service Orders through the service invoicing processing cycle before they are finalized and invoiced using Prebill Register program.

The Service Order Workflow Register provides a systematic method to assure that workflow steps are not missed before the invoice is finalized.

This can be especially useful for those companies using the Mobile Pro product.
Ascente – Service Dispatch
Service Order Workflow Register

Overview

Using this tool, you can generate a report used for review and verification that shows the Service Order information and optionally the following additional information:

• Original Quote that was used to create the Service Order. 
  *(Compare actuals to the quoted details)*

• Payment Details

• Technician Log Summary Totals. *(Auditing Labor Hours)*

When a workflow is being used, after the Service Orders and associated Work Orders have been reviewed and approved for a workflow step, the [Update] button can be used to change the Service Order or Work Order Status to indicate they are ready advance the processing to the next step in the workflow.
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Service Order Workflow Register

Service Processing Cycle Requirements
Ascente using two status codes when processing service orders and work orders. These status codes are:

Service Order Status
Starts with a Category of Open and must be Closed to be selected to invoice using the Prebill Register Program. These are the minimum required:

• Open
• Dispatched
• Closed
Service Processing Cycle Requirements

Work Order Status

- Open
- Closed

Work Orders start with a category of Open and must be manually set to Closed to indicate that the Work Order is ready to be invoiced using the Prebill Register Program.

When both the Service Order and Work Order statuses have a closed category and a few other requirements have been met, the service order and work order considered ready to be finalized using the Prebill Register and invoiced and updated.

The Service Order Workflow Register basically just uses additional service order status codes for each processing workflow step after the Closed service order status code.
Service Processing Cycle Assumptions

Service Order invoice processing in Ascente requires that the following must be entered and verified before the service order and associated work orders are finalized and invoiced using the Prebill Register:

• Timecards
• Purchase Orders applied and processed
• All parts with correct costs and sales
• Work Order Restock Register Processing
• All commissions must me entered and verified
• The work order description should be entered
• All payments should be received and processed

All these steps can be addressed systematically by using the Service Order Workflow Register.
Processing Cycle Requirements Planning

You will need to determine what your companies processing cycle requirements are and develop the required workflow for your required processing before invoicing your service orders.
Processing Workflow Example

1. Jill verifies that payments are received.
2. Bill verifies that the timecards have been processed.
3. Jerry verifies that all PO’s have been entered, received and optionally invoiced by the AP department.
4. Mary verifies that pricing is correct, and all parts have been entered and prints a Prebill Register for a manager to review.
5. Greg does the manager review and approves the service orders ready to be invoiced and sends back the ones that are not ready.
6. Jennifer invoices the service orders approved by Greg.
Service Invoice Processing Workflow

Single Operator

This is a typical processing cycle after the service order has been serviced and ‘Closed’ when one operator is handling the entry and verification for your workflow. Hopefully, no steps are missed.
Service Invoice Processing Workflow

Multiple Operators

This is a typical processing cycle after the service order has been serviced and ‘Closed’ when multiple operators are handling the entry and verification for your workflow. Hopefully, no steps are missed.
Service Invoice Processing Workflow
Multiple Operators w/ Workflow SO Status Codes

This is a typical processing cycle when multiple operators are handling the entry and verification of their individual step in your workflow utilizing the Service Order Workflow Register. Note the assigned SO Status Code.
<table>
<thead>
<tr>
<th>Status</th>
<th>Category</th>
<th>Mobile - Download Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Closed</td>
<td>Closed</td>
<td>True</td>
</tr>
<tr>
<td>Closed-1-PMT Review</td>
<td>Closed</td>
<td>False</td>
</tr>
<tr>
<td>Closed-2-TC Review</td>
<td>Closed</td>
<td>False</td>
</tr>
<tr>
<td>Closed-3-PO Review</td>
<td>Closed</td>
<td>False</td>
</tr>
<tr>
<td>Closed-4-Price Check</td>
<td>Closed</td>
<td>False</td>
</tr>
<tr>
<td>Closed-5-MGR Review</td>
<td>Closed</td>
<td>False</td>
</tr>
<tr>
<td>Closed-6-Ready Bill</td>
<td>Closed</td>
<td>False</td>
</tr>
</tbody>
</table>
## Ascente – Service Dispatch

Service Order Workflow Register

### Processing – SO Status Code Sequence

<table>
<thead>
<tr>
<th>Service Order Status Code</th>
<th>Action</th>
<th>Work Order Status Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️ Closed</td>
<td>Verify Payments Receipts</td>
<td>Open</td>
</tr>
<tr>
<td>✔️ Closed-1-PMT Review</td>
<td>Timecard Verification</td>
<td>Open</td>
</tr>
<tr>
<td>✔️ Closed-2-TC Review</td>
<td>PO Verification</td>
<td>Open</td>
</tr>
<tr>
<td>✔️ Closed-3-PO Review</td>
<td>Pricing Verification</td>
<td>Open</td>
</tr>
<tr>
<td>✔️ Closed-4-Price Check</td>
<td>Manager Review</td>
<td>Open</td>
</tr>
<tr>
<td>✔️ Closed-5-MGR Review</td>
<td>Ready to be Invoiced</td>
<td>Open</td>
</tr>
<tr>
<td>✔️ <strong>Closed-6-Ready Bill</strong></td>
<td>Prebill &amp; Final Update</td>
<td><strong>Closed</strong></td>
</tr>
</tbody>
</table>
Ascente – Service Dispatch
Service Order Workflow Register

Workflow Processing Cycle

Print SOWF Report for 1st SO Status in Workflow
Closed

Perform Entry & Verification for Workflow Step
Closed

Update SO Status to the Next SO Status in Workflow
Closed-1-PMT-Review

Print SOWF Report for 2nd SO Status in Workflow
Closed-1-PMT-Closed

Perform Entry & Verification for Workflow Step
Closed-1-PMT-Closed

Update SO Status to the Next SO Status in Workflow
Closed-2-TC-Review

Print SOWF Report for Next Workflow Processing Step
Closed-2-TC-Review

Complete the SOWF Processing steps as detailed above until completed and then set WO Status to Closed
Report

The report will always include the following information that prints on the Prebill Register plus the following information:

• Payroll timecard summary total (Unposted or Posted)
• Work Order Detail records (parts and other work order lines)
• Problem and Work Order Description information
The report will optionally print the following information based on the runtime options selected:

- Quote Details
- Payments Collected
- Technician Log Summary Totals

<table>
<thead>
<tr>
<th>Quote</th>
<th>ACC-020</th>
<th>2.0 TON 13 SEER A/C CONDENSER ONLY GSX13024 GOODMAN 2.0T 13 SEER A/C R-410A PSCP24242 2x24x24 Condenser Pad Labor</th>
</tr>
</thead>
<tbody>
<tr>
<td>FR Task</td>
<td>GSX130241</td>
<td>1.00</td>
</tr>
<tr>
<td>Material</td>
<td>R410A</td>
<td>12.00</td>
</tr>
<tr>
<td>FR Task</td>
<td>18935</td>
<td>1.00</td>
</tr>
<tr>
<td>Labor</td>
<td>L</td>
<td>6.50</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Payments</th>
<th>Check</th>
<th>Pmt: Check 5,000.00</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Tech Log</th>
<th>Mark A</th>
<th>5/10/2019 1:45:00 PM</th>
<th>Wrk: 4 Drv: 0.25 Idle: 0.25</th>
</tr>
</thead>
</table>
## Operations: Service Order Workflow Register

### Service Order Workflow Register

<table>
<thead>
<tr>
<th>Field Selections</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile Line Date</td>
<td>□</td>
</tr>
<tr>
<td>Quote</td>
<td>□</td>
</tr>
<tr>
<td>Payments</td>
<td>□</td>
</tr>
<tr>
<td>Tech Log Information</td>
<td>□</td>
</tr>
</tbody>
</table>

- **Mobile Line Date**: Enter the range of Mobile Line Dates to be selected. Use this to review entries from previous dates. This is the date that the mobile line from the Mobile Pro software in the field was posted to the server.

- **Service Order Status**: Enter the Service Order Status code range to be selected. The Service Order Status code will reference a workflow cycle step to be reviewed.

- **Quote**: Display the Quote approved for this service order to compare the actuals against the work order to the quote.

- **Payments**: Display payments collected at the time of service. Use this to manage payment receipt deposits.

- **Tech Log Information**: Display summary drive and work time spent on this service order for auditing timecard entries.
**Ascente – Service Dispatch**

**Service Order Workflow Register**

**Operations: Service Order Workflow Register**

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**Work Date:** Enter starting and ending Work Date to report. This is the Work Date assigned that the mobile line from the Mobile Pro software in the field was posted to the server.

**Update:** This will allow you to change all *Service Order* and/or *Work Order Statuses* for the records selected. This would be used to update the *Service Order Status* to the next *Service Order Status* for your workflow.

---

<table>
<thead>
<tr>
<th>Field</th>
<th>Sort by</th>
<th>Beginning</th>
<th>Ending</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervisor</td>
<td>(Beginning)</td>
<td>(Beginning)</td>
<td>(Ending)</td>
</tr>
<tr>
<td>Tech</td>
<td>(Beginning)</td>
<td>(Beginning)</td>
<td>(Ending)</td>
</tr>
<tr>
<td>Service Order</td>
<td>CA1800133</td>
<td>CA1800133</td>
<td></td>
</tr>
<tr>
<td>Service Order Status</td>
<td>Closed-1-PMT Review</td>
<td>sed-1-PMT Review</td>
<td></td>
</tr>
<tr>
<td>Work Order Status</td>
<td>(Beginning)</td>
<td>(Ending)</td>
<td></td>
</tr>
<tr>
<td>Mobile Line Date</td>
<td>(Beginning)</td>
<td>(Beginning)</td>
<td></td>
</tr>
<tr>
<td>Work Date</td>
<td>(Beginning)</td>
<td>(Beginning)</td>
<td></td>
</tr>
<tr>
<td>Jobsite</td>
<td>(Beginning)</td>
<td>(Beginning)</td>
<td></td>
</tr>
</tbody>
</table>

---

**Register**

**Update**
Ascente – Service Dispatch
Service Order Workflow Register

Operations: Service Order Workflow Register

Update: This will allow you to change all Service Order and/or Work Order Statuses for the records selected. This would be used to update the Service Order Status to the next Service Order Status for your workflow.

Update: Select the new Service Order Status code and/or Work Order Status code to be assigned for the records selected on the Service Order Workflow Register. Use this to advance the workflow progress.
### Service Order Workflow Register

**Tech:** Mark A  
**Service Order:** CA1800133  
**Status:** Closed-1-PMT.Rev.

<table>
<thead>
<tr>
<th>Work Order</th>
<th>BT/Time Location</th>
<th>Item</th>
<th>Description</th>
<th>Status</th>
<th>Open</th>
<th>Remove and install new 5 ton unit ACC-020</th>
<th>Test Mark A</th>
<th>Tax</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Payments**
- Check: Pmt: Check 5,000.00

**Payroll (Unposted)**
- Labor: REG Mark A
  - 6/10/2019: 4.00 hours, 20.00 rate, 80.00 total

**Quote**
- FRT Task: ACC-020, 2.0 TON 13 SEER A/C CONDENSER ONLY GSX13024 GOODMAN 2.0 T 13 SEER AC
  - 1.00 units, 620.00 cost, 620.00 total
- Material: R410A, R-410A
  - 12.00 units, 144.00 cost, 144.00 total
- FRT Task: 18935
  - PSCP2422 2x24x24 Condenser Pad
  - 1.00 units, 15.00 cost, 15.00 total

**Tech Log**
- Mark A: 6/10/2019 1:45 PM, Work: 4, Drw: 0.25, Idle: 0.25

**Problem**
- Complaint: CA03102 approved on 6/10/2019
  - Replace AC Unit on the first floor.

**WO Desc**
- WO CA1800133: Remove and install new 5 ton unit ACC-020
  - Total: $6,200.
  - Replaced AC unit on the first floor along with filters.

**Recommended maintenance contract**

**Work Order**
- NonStock: 1 Califr. ACC-020
  - Complaint: CA03102
  - 1.00 units, 620.00 cost, 620.00 total
- Material: 1 Califr. GSX13024
  - 1.00 units, 620.00 cost, 620.00 total
- Material: 1 Califr. R410A
  - 12.00 units, 144.00 cost, 144.00 total
- FRT Task: 1 Califr. 18935
  - PSCP2422 2x24x24 Condenser Pad
  - 1.00 units, 15.00 cost, 15.00 total
- Material: 204 Lin PF25X18X1
  - 1.00 units, 2.50 cost, 2.50 total

**Problem**
- Complaint: CA03102 approved on 6/10/2019
  - Replace AC Unit on the first floor.

**WO Desc**
- WO CA1800133: Remove and install new 5 ton unit ACC-020
  - Total: $6,200.
  - Replaced AC unit on the first floor along with filters.
Conclusions

The Service Order Workflow Register process I have detailed is beneficial when your service invoicing process involves many operators and processes.

You need to review the workflow and make sure that there is no processing or verification that is being skipped. You do not want to have to create credit memos to reverse service invoicing errors.

Most companies have a daily or weekly schedule that they try to maintain for the processing of the workflow processes.

All operators responsible for their processing in the workflow, need to understand what is expected.

If the process is followed, you should have a better control of the processing cycle for the invoicing of your service invoices.
Thank You!

We thank you for attending this webinar or watching this video and for choosing Ascente. Please let us know if you have any questions or world like a follow-up call to discuss this in more detail.

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