

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



# Ascente

## Service Dispatch

### Service Order Workflow Register

Presenter: Mark Allman  
June 2019

[www.compusource.com](http://www.compusource.com)

<http://www.servicecontractorsoftware.com/>



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# Ascente – Service Dispatch Service Order Workflow Register

## 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.



# Ascente – Service Dispatch 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



# Ascente – Service Dispatch Service Order Workflow Register

## 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.



# Ascente – Service Dispatch Service Order Workflow Register

## 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 be 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*.



# Ascente – Service Dispatch 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.





# Ascente – Service Dispatch Service Order Workflow Register

## 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.



# Ascente – Service Dispatch Service Order Workflow Register

## 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.

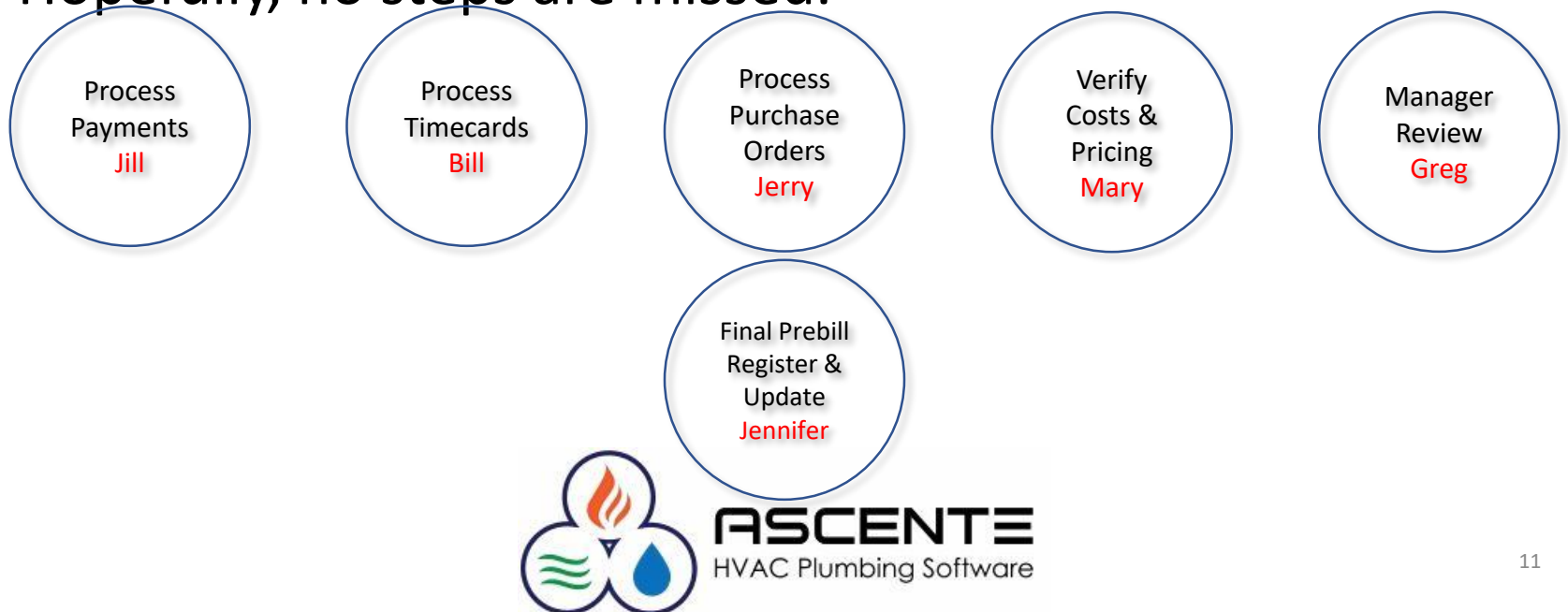


# Ascente – Service Dispatch Service Order Workflow Register

## 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.

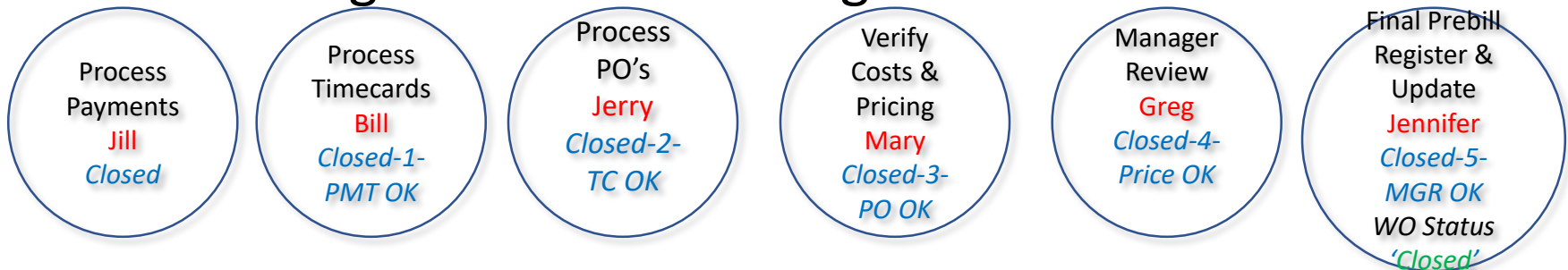


# Ascente – Service Dispatch Service Order Workflow Register

## 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**.



# Ascente – Service Dispatch Service Order Workflow Register

## Required Setup – Service Order Status Codes

Status	Category	Mobile - Download Status
Closed	Closed	True
Closed-1-PMT Review	Closed	False
Closed-2-TC Review	Closed	False
Closed-3-PO Review	Closed	False
Closed-4-Price Check	Closed	False
Closed-5-MGR Review	Closed	False
Closed-6-Ready Bill	Closed	False

# Ascente – Service Dispatch Service Order Workflow Register

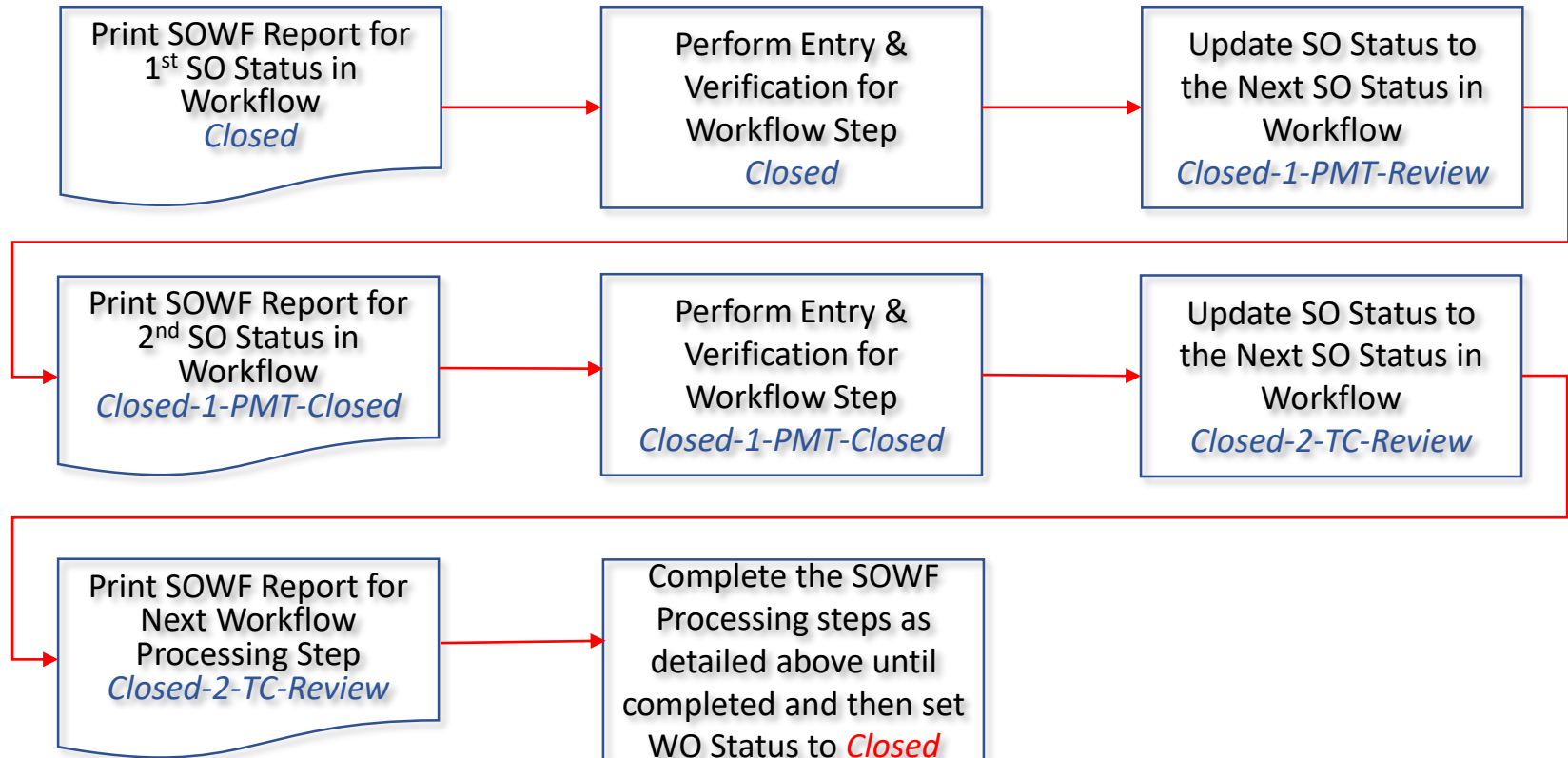
## Processing – SO Status Code Sequence

Service Order Status Code	Action	Work Order Status Code
✓ Closed	Verify Payments Receipts	Open
✓ Closed-1-PMT Review	Timecard Verification	Open
✓ Closed-2-TC Review	PO Verification	Open
✓ Closed-3-PO Review	Pricing Verification	Open
✓ Closed-4-Price Check	Manager Review	Open
✓ Closed-5-MGR Review	Ready to be Invoiced	Open
✓ <b>Closed-6-Ready Bill</b>	<b>Prebill &amp; Final Update</b>	<b>Closed</b>



# Ascente – Service Dispatch Service Order Workflow Register

## Workflow Processing Cycle



# Ascente – Service Dispatch Service Order Workflow Register

## 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*

**Problem** *Complaint: CA00102 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.*

Material	204 Lin	PF25X16X1	Condenser Pad PLEATED FILTER 25 X 16 X 1	1.00	2.50	2.50	10.00	10.00	1	75.0%
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# Ascente – Service Dispatch Service Order Workflow Register

## Report

The report will can optionally print the following information based on the runtime options selected:

- Quote Details
- Payments Collected
- Technician Log Summary Totals

Options

Quotes

Payments

Tech Log Information

Quote								
FR Task	ACC-020	2.0 TON 13 SEER A/C CONDENSER ONLY	1.00		.00	6,200.00	6,200.00	0 100.0%
Material	GSX130241	GSX13024 GOODMAN 2.0T 13 SEER AC	1.00	663.00	663.00		.00	0
Material	R410A	R-410A	12.00	12.00	144.00		.00	0
FR Task	18935	PSCP24242 2x24x24 Condenser Pad	1.00	15.00	15.00		.00	0
Labor	L	Labor	6.50	60.00	390.00		.00	0

Payments								
	Check	Pmt: Check	5,000.00					

Tech Log								
	Mark A	6/10/2019 1:45:00 PM	Wrk: 4	Drv: 0.25	Idle: 0.25			



# Ascente – Service Dispatch Service Order Workflow Register

## Operations: Service Order Workflow Register

	Sort by	Beginning	Ending
Branch	<input type="checkbox"/>	(Beginning)	(Ending)
Department	<input type="checkbox"/>	(Beginning)	(Ending)
Supervisor	<input type="checkbox"/>	(Beginning)	(Ending)
Tech	<input checked="" type="checkbox"/>	(Beginning)	(Ending)
Service Order	<input type="checkbox"/>	CA1800133	CA1800133
Service Order Status	<input type="checkbox"/>	Closed-1-PMT Review	Closed-1-PMT Review
Work Order Status	<input type="checkbox"/>	(Beginning)	(Ending)
Mobile Line Date	<input type="checkbox"/>	(Beginning)	(Ending)

Field Selections

Report Name: Service Order Workflow Register

Options

- Quotes
- Payments
- Tech Log Information

**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.

**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.



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# Ascente – Service Dispatch Service Order Workflow Register

## Operations: Service Order Workflow Register

Select Report Values

Range Selection

	Sort by	Beginning	Ending
Supervisor	<input type="checkbox"/>	(Beginning)	(Ending)
Tech	<input checked="" type="checkbox"/>	(Beginning)	(Ending)
Service Order	<input type="checkbox"/>	CA1800133	CA1800133
Service Order Status	<input type="checkbox"/>	Closed-1-PMT Review	Closed-1-PMT Review
Work Order Status	<input type="checkbox"/>	(Beginning)	(Ending)
Mobile Line Date	<input type="checkbox"/>	(Beginning)	(Ending)
Work Date	<input type="checkbox"/>	(Beginning)	(Ending)
Jobsite	<input type="checkbox"/>	(Beginning)	(Ending)

Field Selection

Field Name: Service Order Workflow Register

Password: [ ]

Options

- Quotes
- Payments
- Tech Log Information

Register

Update

**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.

# Ascente – Service Dispatch Service Order Workflow Register

## Operations: Service Order Workflow Register

Select Report Values

Range Selection

	Sort by	Beginning	Ending
Supervisor	<input type="checkbox"/>	(Beginning)	(Ending)
Tech	<input checked="" type="checkbox"/>	(Beginning)	(Ending)
Service Order	<input type="checkbox"/>	CA1800133	CA1800133
Service Order Status	<input type="checkbox"/>	Closed-1-PMT Review	Closed-1-PMT Review
Work Order Status	<input type="checkbox"/>	(Beginning)	(Ending)
Mobile Line Date	<input type="checkbox"/>	(Beginning)	(Ending)
Work Date	<input type="checkbox"/>	(Beginning)	(Ending)
Jobsite	<input type="checkbox"/>	(Beginning)	(Ending)

Options

- Quotes
- Payments
- Tech Log Information

Service Order Workflow Update

Service Order Status: Closed-2-TC Review

Work Order Status: (Leave unchanged)

OK Cancel

6/11/2019 11:13 AM

Register

Update

**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.

**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.



Tech: Mark A

Service Order **CA1800133**

Status **Closed-1-PMT Revi**

Invoice # CA1800133

JobSite Name Jennifer Yang	Branch California	Tech Mark A	Invoice Method FP - \$6,200.00
JobSite Alpha 135 Ontario Rd.	Department Service	Invoice Print Print Detail	IC Price Level Regular
Customer Austin Cox	Tax Group LA	Summarize No Summary	Maint Pricing Billable
Terms 10	Type Air Conditioning		JPR Status Extra/Emer

Work Order	Status	Tech	Mark A							
Bill Type	Location	Item	Description	Quantity	Unit Cost	Ext Cost	Unit Price	Ext Price	Tax	Profit %

**Payments**

Check			Pmt: Check	5,000.00						
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**Payroll (Unposted)**

Labor	REG	Mark A	6/10/2019	4.00	20.00	80.00		.00	0	
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**Quote**

FR Task		ACC-020	2.0 TON 13 SEER A/C CONDENSER ONLY	1.00		.00	6,200.00	6,200.00	0	100.0%
Material		GSX130241	GSX13024 GOODMAN 2.0T 13 SEER AC	1.00	663.00	663.00		.00	0	
Material		R410A	R-410A	12.00	12.00	144.00		.00	0	
FR Task		18935	PSCP24242 2x24x24 Condenser Pad	1.00	15.00	15.00		.00	0	
Labor		L	Labor	6.50	60.00	390.00		.00	0	

**Tech Log**

Mark A	6/10/2019 1:45:00 PM	Wrk: 4	Drv: 0.25	Idle: 0.25
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**Problem** Complaint: CA00102 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	Status	Open	Remove and install new 5 ton unit /	Tech	Mark A					
Bill Type	Location	Item	Description	Quantity	Unit Cost	Ext Cost	Unit Price	Ext Price	Tax	Profit %
NonStock	1 Califorr		Complaint: CA00102	1.00		.00	6,200.00	6,200.00	0	100.0%
FR Task	1 Califorr	ACC-020	2.0 TON 13 SEER A/C CONDENSER ONLY	1.00		.00		.00	0	
Material	1 Califorr	GSX130241	GSX13024 GOODMAN 2.0T 13 SEER AC	1.00	663.00	663.00		.00	1	
Material	1 Califorr	R410A	R-410A	12.00	12.00	144.00		.00	1	
FR Task	1 Califorr	18935	PSCP24242 2x24x24 Condenser Pad	1.00	15.00	15.00		.00	0	
Material	204 Lin	PF25X16X1	PLEATED FILTER 25 X 16 X 1	1.00	2.50	2.50	10.00	10.00	1	75.0%

**Problem** Complaint: CA00102 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.

<b>Total Service Order</b>	Non Taxable Sales	Taxable Sales	Sales Tax	Use Taxable Sales	Use Tax	Total Cost	Profit %	Payments	Invoice Total
CA1800133	6,200.00	.00	.00	4,047.50	103.23	824.50	86.70%	5,000.00	6,200.00

# Ascente – Service Dispatch Service Order Workflow Register

## 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 would like a follow-up call to discuss this in more detail.

More training videos like this are available on our website [www.compusource.com](http://www.compusource.com)

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