

# Service Orders and Maintenance Orders

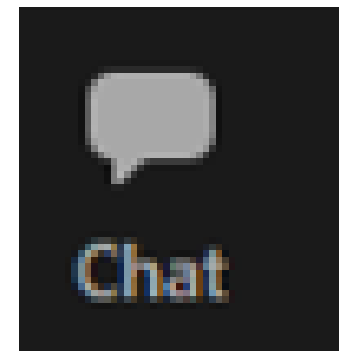
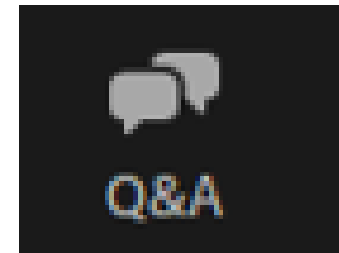
**Thursday: 1:45 – 3:00**

Presenter: **Therese Powers**

Monitor: **Brian Smith**

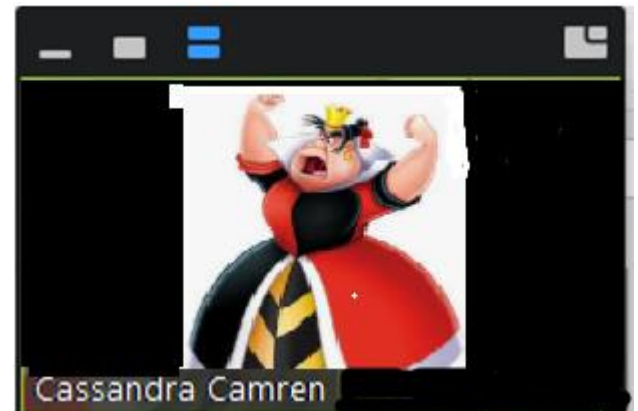
# Communicating

- Q&A button found at bottom of screen. Use to ask questions of Presenter/Monitor. Everyone will see.
- Chat button found at bottom of screen. Use to communicate issues with Monitor. Only seen by yourself, monitor and presenter
- Scroll over the video image if you don't see and it will appear at bottom of screen.



# Presenter & Monitor Image

- The Presenter and Monitor images may block part of your screen.
- You can click on the bar above the pictures and drag it to another monitor or you can click on the single narrow line to hide their images.



# Housekeeping

Door Prize Winner

**Kristy Wiederholt**

**Iowa Lakes Regional Water**

Documents:

<https://www.civicsystems.com/documents>

# Service Orders and Maintenance Orders

**Presenter: Therese Powers**  
**Monitor: Brian Smith**

**Thursday: 11:15 – 12:30**

## Service Orders

- Inquiry
  - Customer Inquiry
  - Service Order Inquiry
- Setup
  - Action Codes
  - Departments
- Service Orders
  - Create Service Orders
  - Modify Service Orders
  - Manage Submitted Service Orders
  - Complete Service Orders

- Service Order Examples
  - Final Forms
  - Meter Activity Forms
  - Reread and Other forms
- Reports
  - Outstanding Service Orders
  - Reprint Service Orders

## Maintenance Orders

- Inquiry
- Setup
- Maintenance Orders

## Mobile App

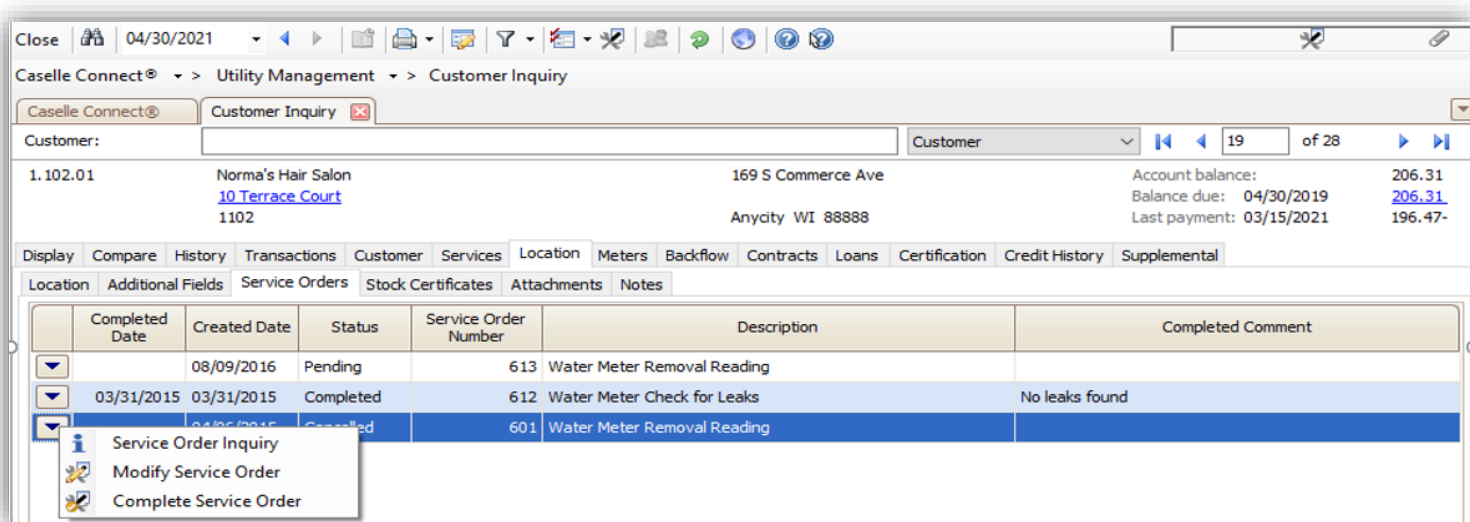
# Service Order Overview

The Service Orders module is designed to organize and track work requests that deal with a customer in Utility Management.

- Organize personnel and action codes by department
- Customize functionality by action code
- Interface with Utility Management to update service and billing information
- Create billings when completing a service order
- Combine multiple tasks into one service order
- Stream-line the new customer process

# Customer Inquiry

In Customer Inquiry, there is an icon in the top right corner if there is a Service Order on this customer. Service Orders are attached to the Location, so they will appear in Location > Service Orders in Customer Inquiry. There is also a link to Create Service Orders in Customer inquiry.



The screenshot shows the 'Customer Inquiry' window in Caselle Connect. The customer is 'Norma's Hair Salon' at '169 S Commerce Ave, Anycity WI 88888'. The account balance is 206.31, and the last payment was 196.47 on 03/15/2021. A list of service orders is displayed below the customer details.

Completed Date	Created Date	Status	Service Order Number	Description	Completed Comment
	08/09/2016	Pending	613	Water Meter Removal Reading	
03/31/2015	03/31/2015	Completed	612	Water Meter Check for Leaks	No leaks found
	04/06/2015	Canceled	601	Water Meter Removal Reading	

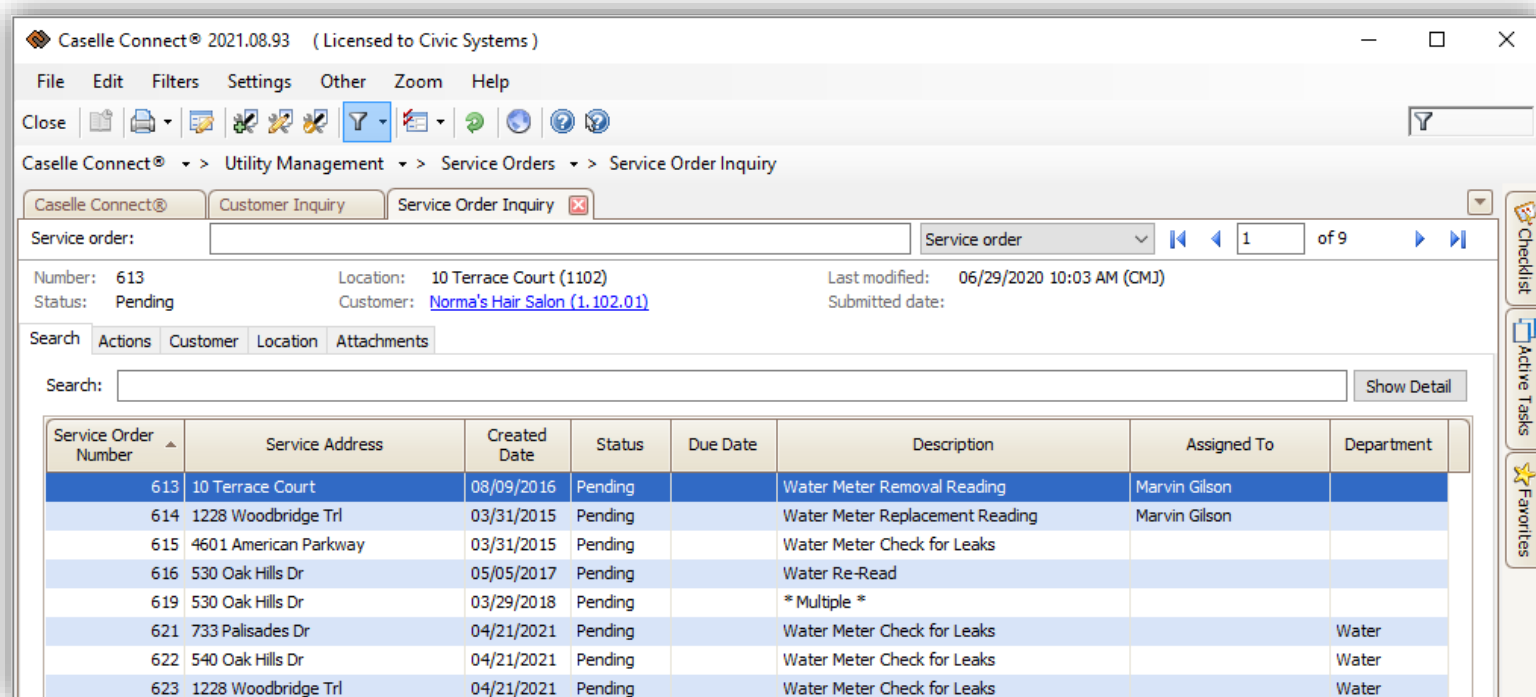
A context menu is open over the first service order (613), showing options: 'Service Order Inquiry', 'Modify Service Order', and 'Complete Service Order'.

To go to Service Order Inquiry from Customer Inquiry, double click on the service order you want to see or click the down arrow next to it and select Service Order Inquiry. You can also go directly to Modify Service Order or Complete Service Order from here.

# Service Order Inquiry

Utility Management > Service Orders > Service Order Inquiry allows you to view all details about the Service Order.

The Search Tab shows basic information about the service order, who/when it was created, assigned, completed or cancelled.



The screenshot shows the 'Caselle Connect' application window. The title bar indicates the version is 2021.08.93 and it is licensed to Civic Systems. The menu bar includes File, Edit, Filters, Settings, Other, Zoom, and Help. The toolbar contains various icons for file operations and navigation. The breadcrumb trail shows the path: Caselle Connect® > Utility Management > Service Orders > Service Order Inquiry. Below the breadcrumb, there are tabs for 'Caselle Connect®', 'Customer Inquiry', and 'Service Order Inquiry' (which is active). The 'Service order:' field is empty. To the right, there is a dropdown menu for 'Service order' and a pagination indicator showing '1 of 9'. Below this, the following information is displayed:

- Number: 613
- Status: Pending
- Location: 10 Terrace Court (1102)
- Customer: [Norma's Hair Salon \(1.102.01\)](#)
- Last modified: 06/29/2020 10:03 AM (CMJ)
- Submitted date:

Below the information, there are tabs for 'Search', 'Actions', 'Customer', 'Location', and 'Attachments'. The 'Search' tab is active. It contains a search bar and a 'Show Detail' button. Below the search bar is a table with the following data:

Service Order Number	Service Address	Created Date	Status	Due Date	Description	Assigned To	Department
613	10 Terrace Court	08/09/2016	Pending		Water Meter Removal Reading	Marvin Gilson	
614	1228 Woodbridge Trl	03/31/2015	Pending		Water Meter Replacement Reading	Marvin Gilson	
615	4601 American Parkway	03/31/2015	Pending		Water Meter Check for Leaks		
616	530 Oak Hills Dr	05/05/2017	Pending		Water Re-Read		
619	530 Oak Hills Dr	03/29/2018	Pending		* Multiple *		
621	733 Palisades Dr	04/21/2021	Pending		Water Meter Check for Leaks		Water
622	540 Oak Hills Dr	04/21/2021	Pending		Water Meter Check for Leaks		Water
623	1228 Woodbridge Trl	04/21/2021	Pending		Water Meter Check for Leaks		Water



# Service Order Inquiry

The Actions Tab shows all the fields associated with the service order, who/when it was created, assigned, completed or cancelled, any meter information, final/new customer information and any information related to "other" tasks.

Caselle Connect® > Utility Management > Service Orders > Service Order Inquiry

Caselle Connect® Customer Inquiry Service Order Inquiry

Service order: [Service order] 3

Number: 615 Location: 4601 American Parkway (1103) Last modified: 08/09/2016 11:02 AM (acs)  
 Status: Pending Customer: Joe's Drive-In (1.103.01) Submitted date:

Search Actions Customer Location Attachments

Description	Status
Water Meter Check for Leaks	Pending

Action Action Created Action Canceled Action Completed New Customer Submitted

Department: Action code: Water Check for Leaks Meter information  
 Description: Water Meter Check for Leaks EMR ID:  
 Due date: Size: 1  
 Due time: Multiplier: 1.0000  
 Status: Pending

Field Data

Caselle Connect® > Utility Management > Service Orders > Service Order Inquiry

Caselle Connect® Customer Inquiry Service Order Inquiry

Service order: [Service order] 3 of 4

Number: 615 Location: 4601 American Parkway (1103) Last modified: 08/09/2016 11:02 AM (acs)  
 Status: Pending Customer: Joe's Drive-In (1.103.01) Submitted date:

Search Actions Customer Location Attachments

Description	Status
Water Meter Check for Leaks	Pending

Action Action Created Action Canceled Action Completed New Customer Submitted

Created date: 03/31/2015 Created by: Mary Gardner Created time: 11:02 AM  
 Action created comment:  
 Existing notes:  
 New note:  
 Add Note

Assigned to: Assigned date:

Caselle Connect® > Utility Management > Service Orders > Service Order Inquiry

Caselle Connect® Customer Inquiry Service Order Inquiry

Service order: [Service order] 3 of 4

Number: 615 Location: 4601 American Parkway (1103) Last modified: 08/09/2016 11:02 AM (acs)  
 Status: Pending Customer: Joe's Drive-In (1.103.01) Submitted date:

Search Actions Customer Location Attachments

Description	Status
Water Meter Check for Leaks	Pending

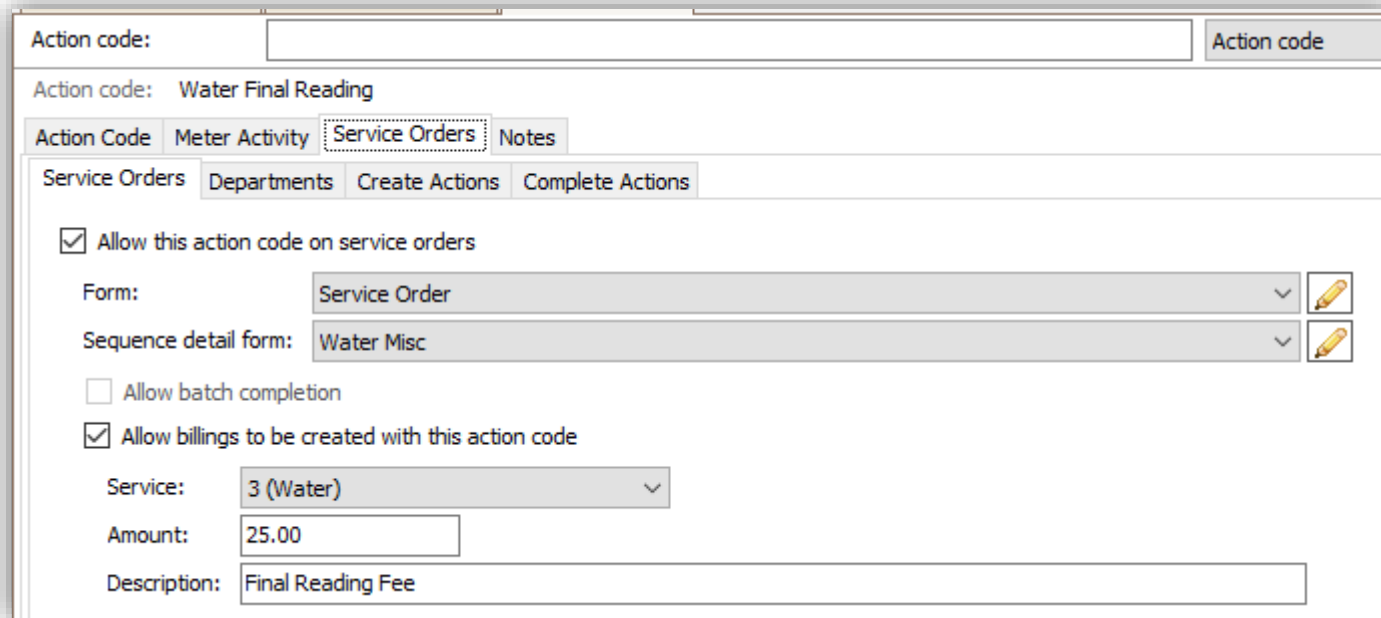
Action Action Created Action Canceled Action Completed New Customer Submitted

Submitted date: Submitted time:  
 Action completed date: Action completed time:  
 Action completed by:  
 Action completed comment:  
 Existing notes:  
 New note:  
 Add Note

Completed by: Completed date:

# Action Codes

**Utility Management > Organization > Action Codes** – For each action code that will be used in Service Orders, check the “Allow this action code on service orders” box and set your form options. There are 5 main action codes for each metered service that are used in Service Orders. They are Install meter, Remove Meter, Replace Meter, Final Reading and Other. Each type of action code may require different information on the printed Service Order form, so different Sequence detail forms are setup and assigned to each action code. If using Mobile Service Orders, there is an option to Allow Batch Completion for Service Orders that don’t affect meters or billing. If you have charges associated with service orders they can be created when a service order is complete.



The screenshot shows the 'Action Codes' configuration window. At the top, there is a search bar for 'Action code:'. Below it, the selected action code is 'Water Final Reading'. The interface has several tabs: 'Action Code', 'Meter Activity', 'Service Orders' (which is active), and 'Notes'. Under the 'Service Orders' tab, there are sub-tabs: 'Service Orders', 'Departments', 'Create Actions', and 'Complete Actions'. The main configuration area includes a checked checkbox 'Allow this action code on service orders'. Below this, there are two dropdown menus: 'Form:' set to 'Service Order' and 'Sequence detail form:' set to 'Water Misc', each with an edit icon. Further down, there is an unchecked checkbox 'Allow batch completion' and a checked checkbox 'Allow billings to be created with this action code'. At the bottom, there are three fields: 'Service:' set to '3 (Water)', 'Amount:' set to '25.00', and 'Description:' set to 'Final Reading Fee'.


Action code:


Action code: Water Final Reading

Action Code Meter Activity **Service Orders** Notes

Service Orders Departments Create Actions Complete Actions


☒ Allow this action code on service orders

Form: Service Order 

Sequence detail form: Water Misc 

☐ Allow batch completion

☒ Allow billings to be created with this action code

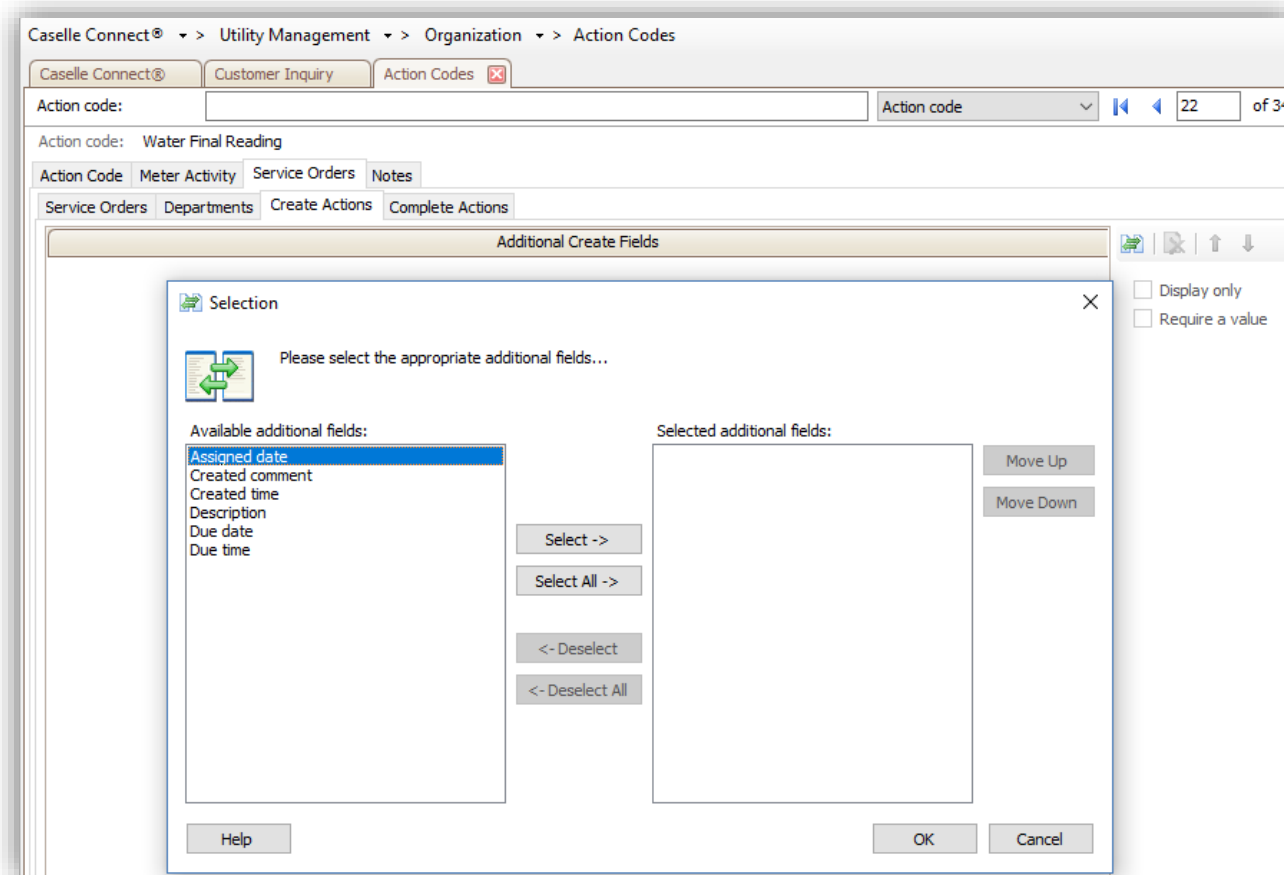
Service: 3 (Water) 

Amount: 25.00

Description: Final Reading Fee

# Action Codes - Additional Fields

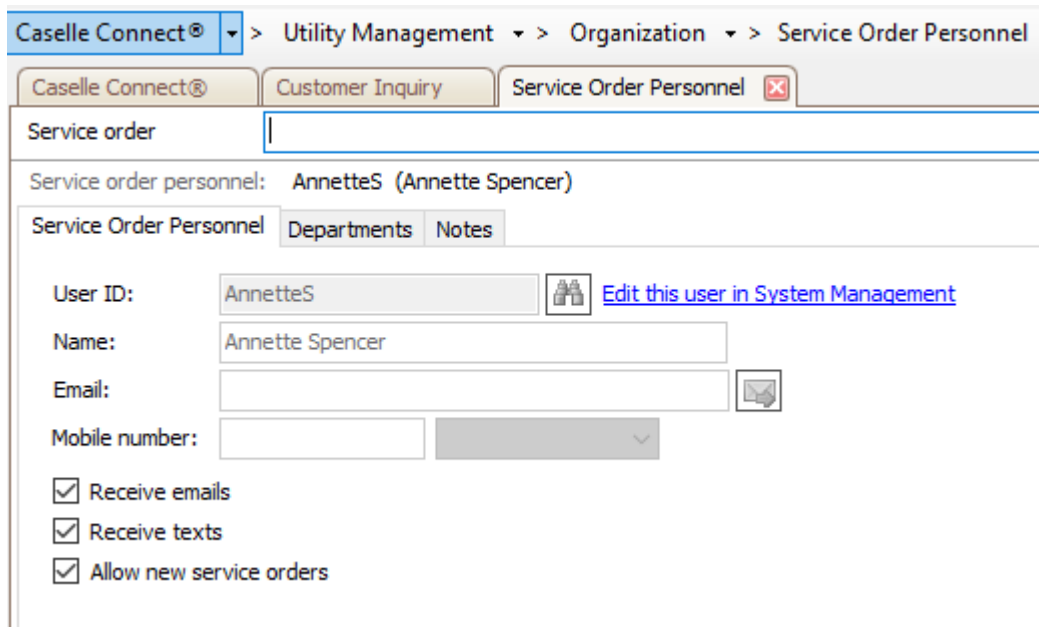
When Creating, Assigning or Completing a service order, additional system-defined or user defined fields can be setup to appear. User Defined Fields are configured under Utility Management > Organization > Organization. Assign the fields by highlighting the field on the left and choosing Select.



The screenshot displays the 'Caselle Connect' application window. The breadcrumb navigation at the top reads: 'Caselle Connect® > Utility Management > Organization > Action Codes'. Below this, there are tabs for 'Caselle Connect®', 'Customer Inquiry', and 'Action Codes' (which is active). The 'Action code:' field contains 'Water Final Reading'. A dropdown menu shows 'Action code' and a page indicator shows '22 of 34'. Below the tabs, there are sub-tabs: 'Action Code', 'Meter Activity', 'Service Orders', and 'Notes'. Under 'Service Orders', there are further sub-tabs: 'Service Orders', 'Departments', 'Create Actions', and 'Complete Actions'. The 'Additional Create Fields' dialog box is open, showing a list of 'Available additional fields' on the left and 'Selected additional fields' on the right. The 'Available additional fields' list includes: 'Assigned date' (highlighted), 'Created comment', 'Created time', 'Description', 'Due date', and 'Due time'. The 'Selected additional fields' list is currently empty. Between the two lists are buttons: 'Select ->', 'Select All ->', '<- Deselect', and '<- Deselect All'. To the right of the 'Selected additional fields' list are 'Move Up' and 'Move Down' buttons. At the bottom of the dialog are 'Help', 'OK', and 'Cancel' buttons. On the right side of the dialog, there are checkboxes for 'Display only' and 'Require a value'.

# Personnel

Configure the personnel for assigning and completing service orders. Any personnel that will be using Service Orders must be setup in System Management and then selected in Service Order Personnel. If using the mobile app, they can choose to receive email and/or text when something is assigned to them.

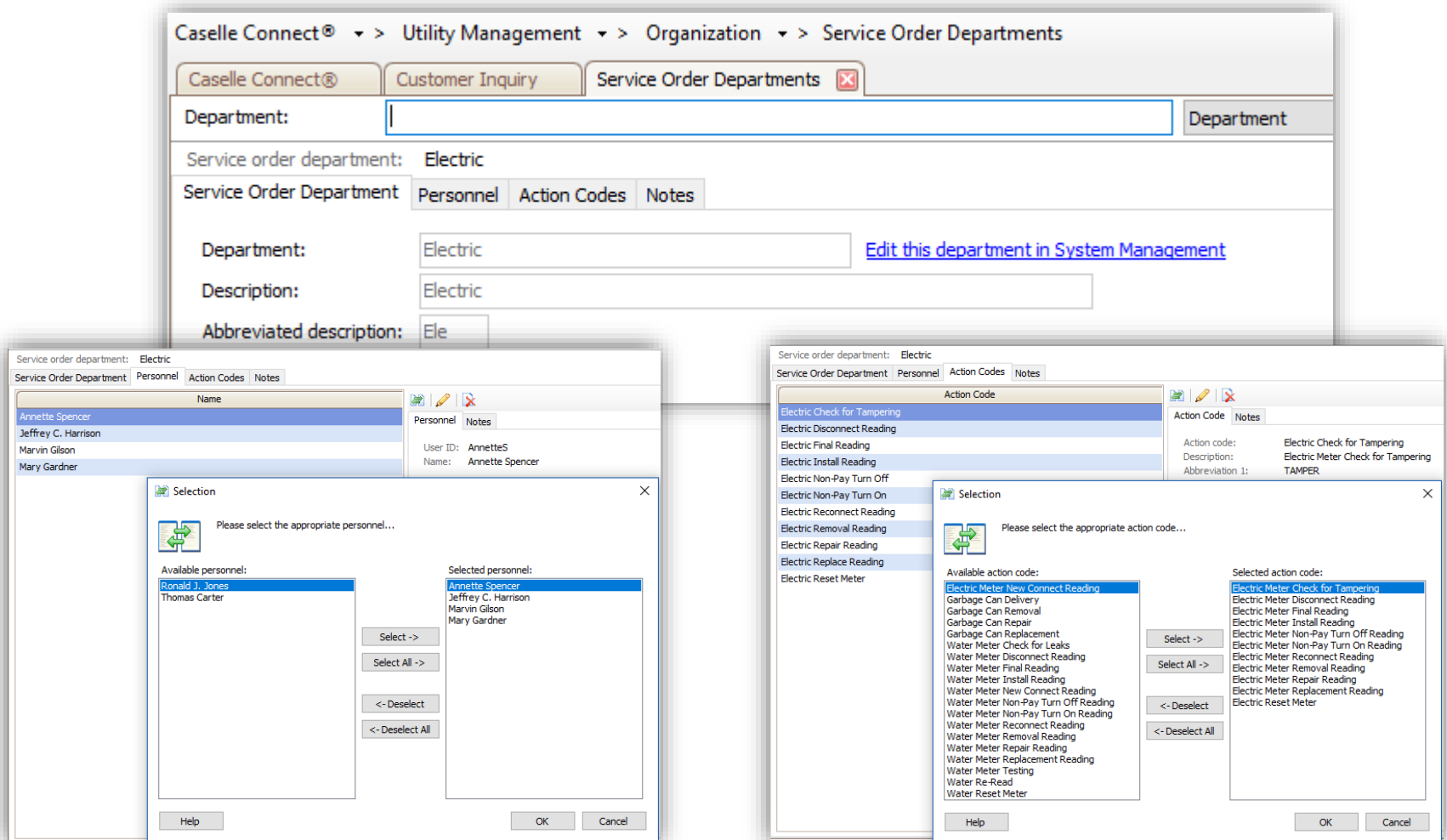


The screenshot shows the 'Service Order Personnel' configuration page in the Caselle Connect system. The breadcrumb trail at the top reads: Caselle Connect® > Utility Management > Organization > Service Order Personnel. Below this, there are three tabs: 'Caselle Connect®', 'Customer Inquiry', and 'Service Order Personnel' (which is active and has a red 'X' icon). A 'Service order' search bar is present. The 'Service order personnel' is set to 'AnnetteS (Annette Spencer)'. Below this, there are three tabs: 'Service Order Personnel' (active), 'Departments', and 'Notes'. The 'Service Order Personnel' tab contains the following fields and options:

- User ID:** AnnetteS (with a user icon and a link: [Edit this user in System Management](#))
- Name:** Annette Spencer
- Email:** (with an email icon)
- Mobile number:** (with a dropdown arrow)
- ☒ Receive emails
- ☒ Receive texts
- ☒ Allow new service orders

# Departments

Configure the departments for assigning and completing service orders. Any departments that will be using Service Orders must be setup in System Management. Select the personnel that may be assigned the service orders in that department and select the action codes that may be assigned to that department.



**Caselle Connect®** > Utility Management > Organization > Service Order Departments

Service order department: Electric

Department:  Department

Service Order Department: Personnel Action Codes Notes

Department: Electric [Edit this department in System Management](#)

Description: Electric

Abbreviated description: Ele

**Personnel Selection**

Please select the appropriate personnel...

Available personnel:	Selected personnel:
Ronald J. Jones	Annette Spencer
Thomas Carter	Jeffrey C. Harrison
	Marvin Gilson
	Mary Gardner

Buttons: Select ->, Select All ->, <- Deselect, <- Deselect All

**Action Codes Selection**

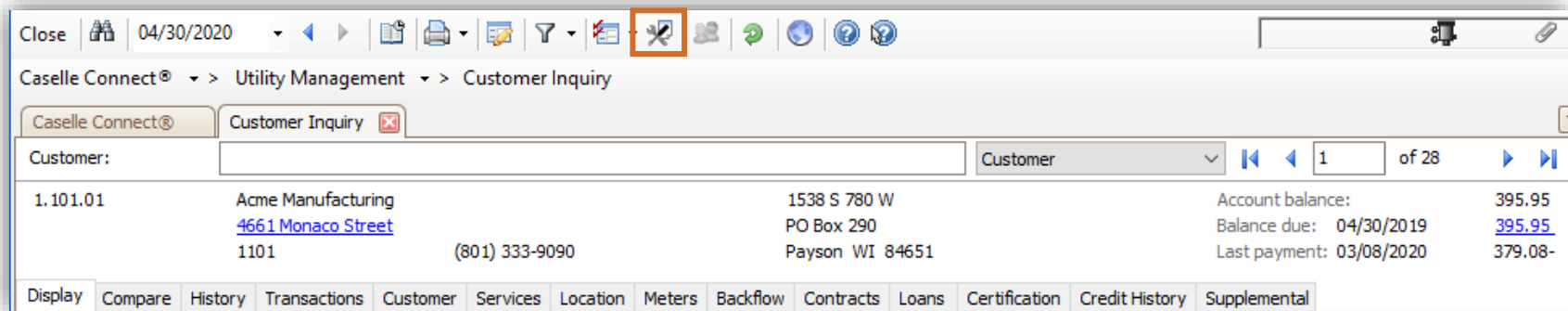
Please select the appropriate action code...

Available action code:	Selected action code:
Electric Meter New Connect Reading	Electric Meter Check for Tampering
Electric Meter Disconnect Reading	Electric Meter Disconnect Reading
Electric Meter Final Reading	Electric Meter Final Reading
Electric Meter Install Reading	Electric Meter Non-Pay Turn Off Reading
Electric Meter Non-Pay Turn Off Reading	Electric Meter Non-Pay Turn On Reading
Electric Meter Reconnect Reading	Electric Meter Reconnect Reading
Electric Meter Removal Reading	Electric Meter Repair Reading
Electric Meter Replace Reading	Electric Meter Replacement Reading
Electric Reset Meter	Electric Reset Meter

Buttons: Select ->, Select All ->, <- Deselect, <- Deselect All

# Create Service Orders

There are several ways to get to Create Service Orders. If Customer Inquiry or Service Order is open, click on the Create Service Order icon; through the menu go to **Utility Management > Service Orders > Create Service Order**, or select Create Service Order from the Checklist.

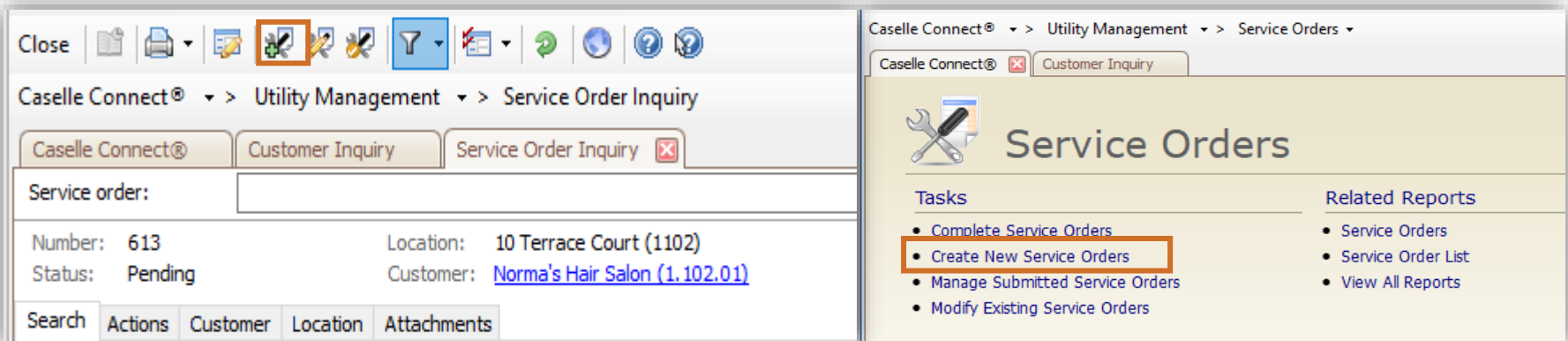


Caselle Connect® > Utility Management > Customer Inquiry

Customer:  Customer 1 of 28

1.101.01	Acme Manufacturing <a href="#">4661 Monaco Street</a> 1101 (801) 333-9090	1538 S 780 W PO Box 290 Payson WI 84651	Account balance: 395.95 Balance due: 04/30/2019 <a href="#">395.95</a> Last payment: 03/08/2020 379.08-
----------	---	---	---

Display Compare History Transactions Customer Services Location Meters Backflow Contracts Loans Certification Credit History Supplemental



Caselle Connect® > Utility Management > Service Order Inquiry

Service order:

Number: 613	Location: 10 Terrace Court (1102)
Status: Pending	Customer: <a href="#">Norma's Hair Salon (1.102.01)</a>

Search Actions Customer Location Attachments

Caselle Connect® > Utility Management > Service Orders

**Service Orders**

Tasks

- Complete Service Orders
- Create New Service Orders**
- Manage Submitted Service Orders
- Modify Existing Service Orders

Related Reports

- Service Orders
- Service Order List
- View All Reports

# Create Service Orders

Enter the Customer Number, if necessary.

If there are pending open service orders for a customer, the warning will appear.

All service orders associated with this location will be listed under Location history.



Clicking on the  in front of a service order in history will open Service Order Inquiry for that Service order.

Caselle Connect® > Utility Management > Service Orders > Create New Service Orders

Caselle Connect® Customer Inquiry Create New Service Orders


Service Order Actions New Customer Attachments

Service order number:

Customer: 110201 (10 Terrace Court, Norma's Hair Salon)  

Created comment:




☒ Display comment in the online work order list

Due date:  

Due time:

Service order number:   
 Customer number: 1.102.01  
 Name: Norma's Hair Salon  
 Service address: 10 Terrace Court

Location history:

	Date	Number	Status	Description
	04/06/2015	601	Cancelled	Water Meter Removal Reading
	03/31/2015	612	Completed	Water Meter Check for Leaks
	08/09/2016	613	Pending	Water Meter Removal Reading

Services:

Description	Meter ID	Status
Electric	389526KW	
Water	35620041	
Sewer		
Garbage	2684	
Miscellaneous		
Shutoff		
Sales Tax		
Penalty		

Actions:

	Action Code	Meter ID	Status

Enter the service order information.  
 If using mobile service orders, make sure the box is checked to display the comment and that Due time is used not Scheduled time.

# Create Service Orders - Actions

On the Actions tab, select the Action code(s) that apply. Pressing enter will populate the meter information. The billing services are visible on the right side. You can add multiple actions on one service order. Each action added will appear at the bottom of the screen. The most common actions are replace, final and other.

Caselle Connect® > Utility Management > Service Orders > Create New Service Orders

Caselle Connect® Customer Inquiry Create New Service Orders

Service Order Actions New Customer Attachments

Department: Water

Assigned to: AnnetteS

Action code: Water Final Reading

Meter ID: 35620041

Service order number: 621

Customer number: 1.102.01

Name: Norma's Hair Salon

Service address: 10 Terrace Court



Location history:

	Date	Number	Status	Description
i	04/06/2015	601	Cancelled	Water Meter Removal Reading
i	03/31/2015	612	Completed	Water Meter Check for Leaks
i	08/09/2016	613	Pending	Water Meter Removal Reading

Services:

Description	Meter ID	Status
Electric	389526KW	
Water	35620041	
Sewer		
Garbage	2684	
Miscellaneous		
Shutoff		
Sales Tax		
Penalty		

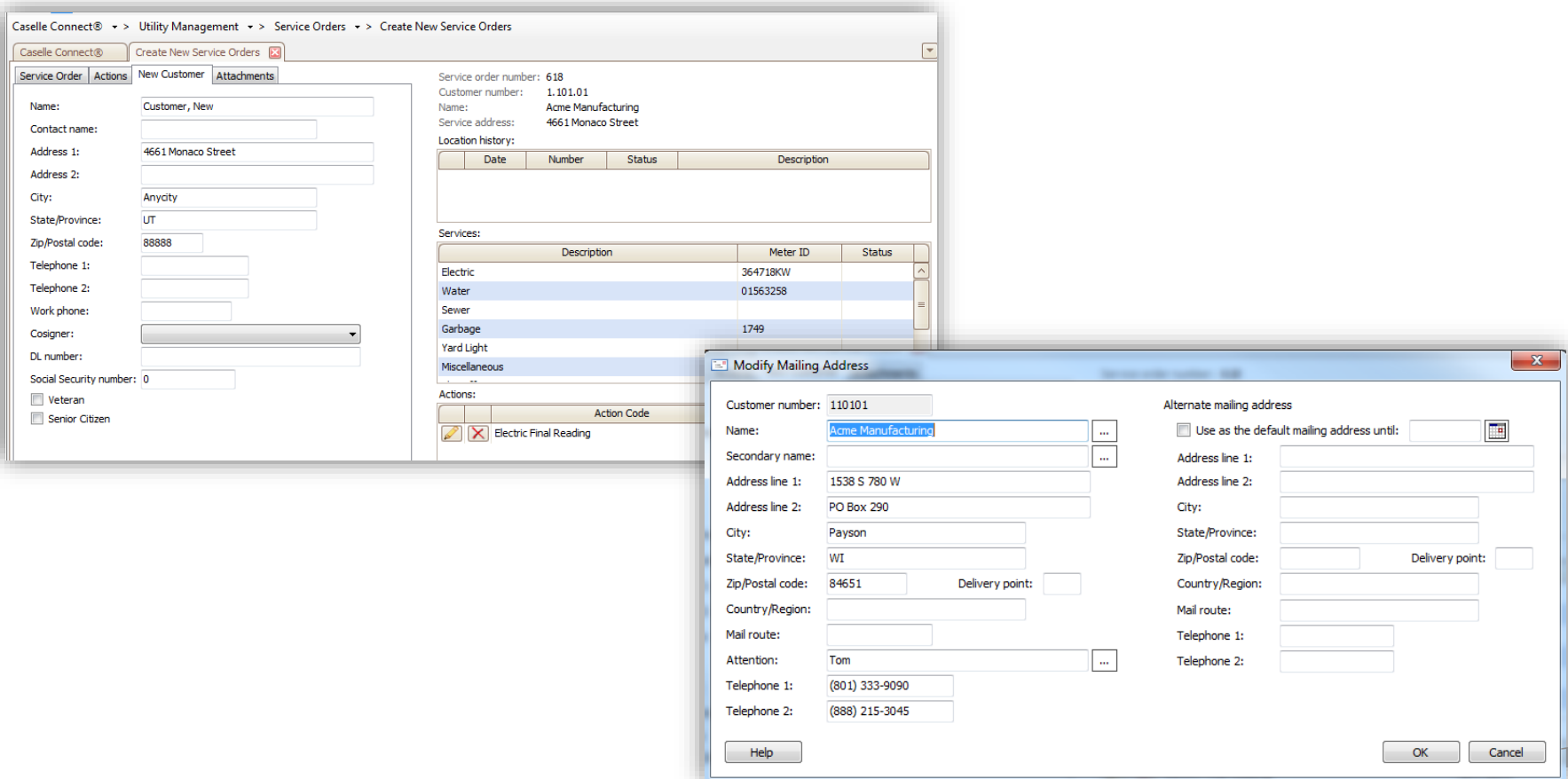
Actions:

	Action Code	Meter ID	Status
 	Electric Final Reading	389526KW	Pending



# Create Service Orders – New Customer Information

For Final Reading actions codes, the New Customer Information tab will appear so any information for the new customer can be added. This screen can have the same fields as Setup New Customer that can be entered at this time to flow to Setup New Customer when the final is processed. Once this is complete, a pop up for the Modify Mailing Address will allow the old customer's forwarding to be updated at this time. These options will prevent the need to enter information multiple times.



The screenshot shows the 'Create New Service Orders' window in Caselle Connect. The 'New Customer' tab is active, displaying fields for customer information and a list of services. A 'Modify Mailing Address' pop-up is overlaid on the bottom right.

**Service Order Details:**

- Service order number: 618
- Customer number: 1.101.01
- Name: Acme Manufacturing
- Service address: 4661 Monaco Street
- Location history:

Date	Number	Status	Description

**Services:**

Description	Meter ID	Status
Electric	364718KW	
Water	01563258	
Sewer		
Garbage	1749	
Yard Light		
Miscellaneous		

**Actions:**

Action Code
Electric Final Reading

**Modify Mailing Address Pop-up:**

Customer number: 110101

Name: Acme Manufacturing

Secondary name:

Address line 1: 1538 S 780 W

Address line 2: PO Box 290

City: Payson

State/Province: WI

Zip/Postal code: 84651

Country/Region:

Mail route:

Attention: Tom

Telephone 1: (801) 333-9090

Telephone 2: (888) 215-3045

**Alternate mailing address:**

☐ Use as the default mailing address until:

Address line 1:

Address line 2:

City:

State/Province:

Zip/Postal code:

Country/Region:

Mail route:

Telephone 1:

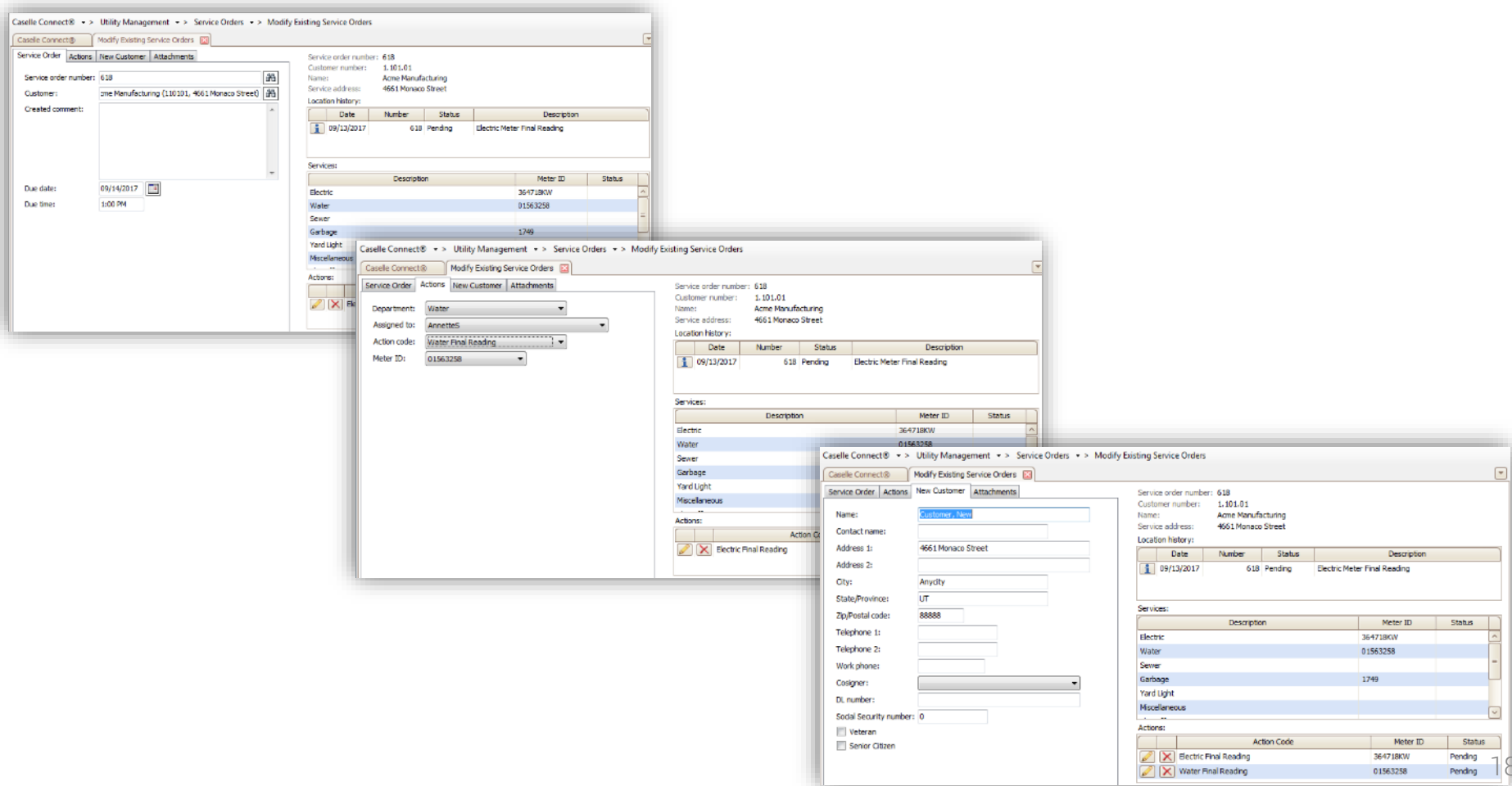
Telephone 2:

Buttons: Help, OK, Cancel

# Modify Service Orders

Any open/pending service orders can be modified through Utility Management > Service Orders > Modify Existing Service Order.

Information can be modified on the Service Order, Action Codes or New Customer Information.



**Caselle Connect® - Utility Management - Service Orders - Modify Existing Service Orders**

Service order number: 618  
Customer number: 1.101.01  
Name: Acme Manufacturing  
Service address: 4661 Monaco Street  
Location history:

Date	Number	Status	Description
09/12/2017	618	Pending	Electric Meter Final Reading

Services:

Description	Meter ID	Status
Electric	364718KW	
Water	01563258	
Sewer		
Garbage	1749	
Yard Light		
Miscellaneous		

Due dates: 09/14/2017  
Due time: 1:00 PM

**Caselle Connect® - Utility Management - Service Orders - Modify Existing Service Orders**

Service order number: 618  
Customer number: 1.101.01  
Name: Acme Manufacturing  
Service address: 4661 Monaco Street  
Location history:

Date	Number	Status	Description
09/13/2017	618	Pending	Electric Meter Final Reading

Services:

Description	Meter ID	Status
Electric	364718KW	
Water	01563258	
Sewer		
Garbage	1749	
Yard Light		
Miscellaneous		

Actions:

Department: Water  
Assigned to: AnnetteS  
Action code: Water Final Reading  
Meter ID: 01563258

**Caselle Connect® - Utility Management - Service Orders - Modify Existing Service Orders**

Service order number: 618  
Customer number: 1.101.01  
Name: Acme Manufacturing  
Service address: 4661 Monaco Street  
Location history:

Date	Number	Status	Description
09/13/2017	618	Pending	Electric Meter Final Reading

Services:

Description	Meter ID	Status
Electric	364718KW	
Water	01563258	
Sewer		
Garbage	1749	
Yard Light		
Miscellaneous		

Actions:

Name: Customer New  
Contact name:  
Address 1: 4661 Monaco Street  
Address 2:  
City: AnyCity  
State/Province: UT  
Zip/Postal code: 88888  
Telephone 1:  
Telephone 2:  
Work phone:  
Cosigner:  
DL number:  
Social Security number: 0  
☐ Veteran  
☐ Senior Citizen

Actions:

Action Code	Meter ID	Status
Electric Final Reading	364718KW	Pending
Water Final Reading	01563258	Pending

# Canceling a Service Order

To cancel a service order, go to Modify Existing Service Order, find the SO and click Delete. You will then have the opportunity to Cancel, Permanently Delete or Abort Changes. A service order can be cancelled if the customer called and cancelled the request, or a service order can be deleted if the service order was entered on the incorrect account. When a service order is cancelled, enter the date and information about the cancellation on each Action to be cancelled. One action can be cancelled without cancelling all actions. When a service order needs to be deleted, check the box **Delete Permanently** and save for each action to be deleted.

Caselle Connect® > Utility Management > Service Orders > Modify Existing Service Orders

Caselle Connect® Modify Existing Service Orders

Service Order Actions New Customer Attachments

Service order number: 618

Customer: Acme Manufacturing (110101, 4661 Monaco Street)

Created comment:

Due date: 09/14/2017

Due time: 1:00 PM

Service order number: 618

Customer number: 1.101.01

Name: Acme Manufacturing

Service address: 4661 Monaco Street

Location history:

Delete/Abort

☐ Cancel the current service order  
☐ Permanently delete the current service order  
☒ Abort changes on the current service order

Help Cancel

Status	Description
Pending	Electric Meter Final Reading
Pending	Water Meter Final Reading

Meter ID	Status
364718KW	Pending
01563258	Pending
1749	Pending

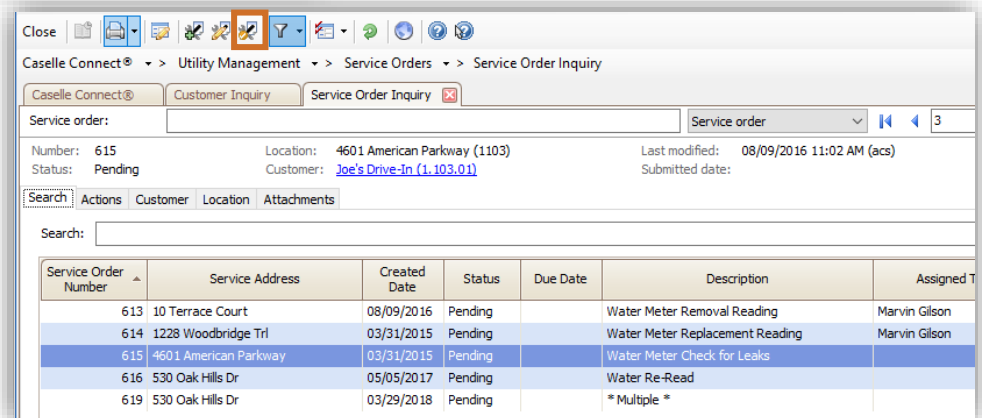
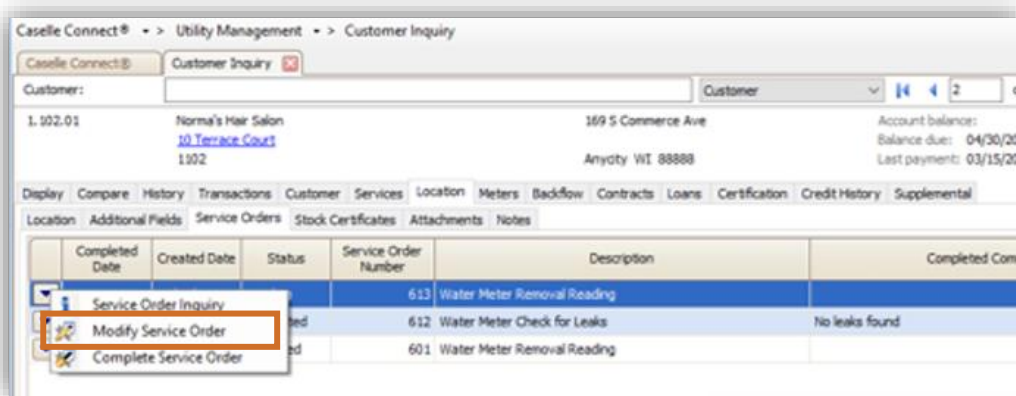
Miscellaneous

Actions:

Action Code	Meter ID	Status
Electric Final Reading	364718KW	Pending
Water Final Reading	01563258	Pending

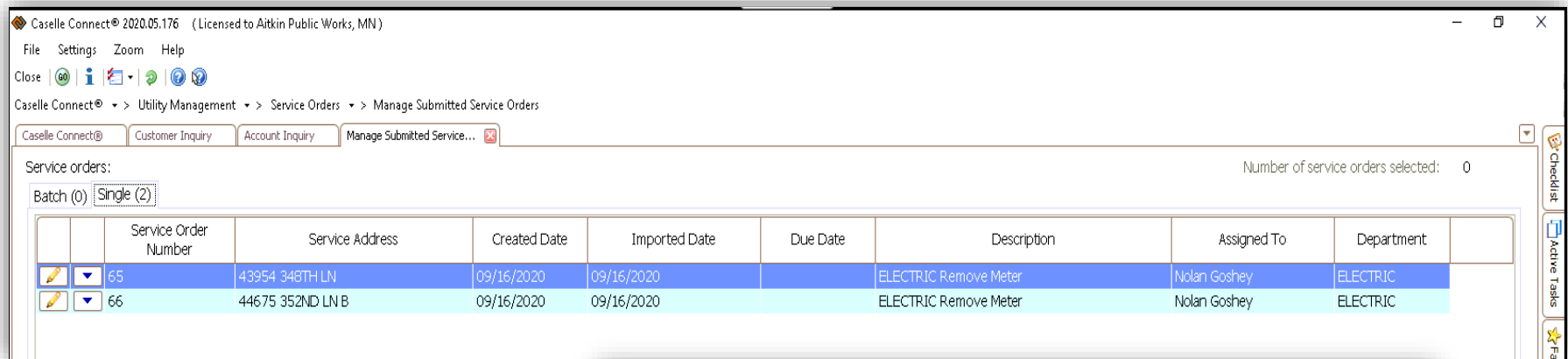
# Complete Service Orders

There are several ways to get to Complete Service Orders. If Customer Inquiry or Service Order is open, click on the Complete Service Order icon; through the menu go to **Utility Management > Service Orders > Complete Service Order** or select Complete Service Order from the Checklist.



# Complete Service Orders

If using the Mobile app, you can complete service orders through the menu **Utility Management > Service Orders > Manage Submitted Service Orders**. Other service orders can be completed using the batch mode. Any service orders relating to meters or finals can be completed singly by clicking on the Complete Service Order icon next to the service order, which will open the Complete Service Order process.



Caselle Connect® 2020.05.176 (Licensed to Aitkin Public Works, MN)

File Settings Zoom Help

Close [Icons]

Caselle Connect® > Utility Management > Service Orders > Manage Submitted Service Orders

Caselle Connect® Customer Inquiry Account Inquiry Manage Submitted Service...

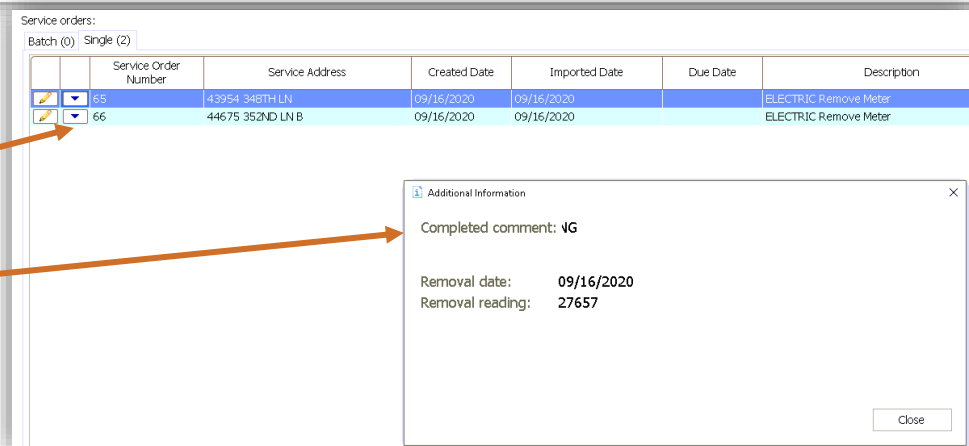
Service orders: Number of service orders selected: 0

Batch (0) Single (2)

	Service Order Number	Service Address	Created Date	Imported Date	Due Date	Description	Assigned To	Department
[Edit] [Dropdown]	65	43954 348TH LN	09/16/2020	09/16/2020		ELECTRIC Remove Meter	Nolan Goshey	ELECTRIC
[Edit] [Dropdown]	66	44675 352ND LN B	09/16/2020	09/16/2020		ELECTRIC Remove Meter	Nolan Goshey	ELECTRIC

Checklist Active Tasks Favorites

The dropdown next to the service order gives the option to Display submitted information or Delete submitted information. Clicking Display submitted information will open the Additional Information box.



Service orders: Batch (0) Single (2)

	Service Order Number	Service Address	Created Date	Imported Date	Due Date	Description
[Edit] [Dropdown]	65	43954 348TH LN	09/16/2020	09/16/2020		ELECTRIC Remove Meter
[Edit] [Dropdown]	66	44675 352ND LN B	09/16/2020	09/16/2020		ELECTRIC Remove Meter

Additional Information

Completed comment: VG

Removal date: 09/16/2020

Removal reading: 27657

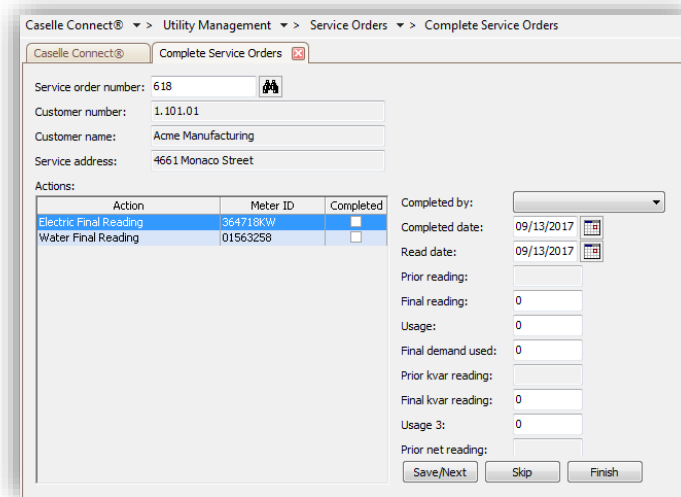
Close

# Complete Service Orders

Enter the service order to complete, if necessary. Each action will come up in order on the left side of the screen, enter the fields needed to complete each action. The Complete fields are setup on the Action Code and are selected by the utility.

Completing service orders does multiple things.

- It completes the service order for all service orders.
- If the service order is a meter install, remove or replacement, it will create the meter activity record for the meter change.
- If the service order is a final reading, completing it will lead you through the Final Billing process.



Caselle Connect® > Utility Management > Service Orders > Complete Service Orders

Caselle Connect® Complete Service Orders

Service order number: 618

Customer number: 1.101.01

Customer name: Acme Manufacturing

Service address: 4661 Monaco Street

Actions:

Action	Meter ID	Completed
Electric Final Reading	364718KW	<input type="checkbox"/>
Water Final Reading	01563258	<input type="checkbox"/>

Completed by:

Completed date: 09/13/2017

Read date: 09/13/2017

Prior reading:

Final reading:

Usage:

Final demand used:

Prior kvar reading:

Final kvar reading:

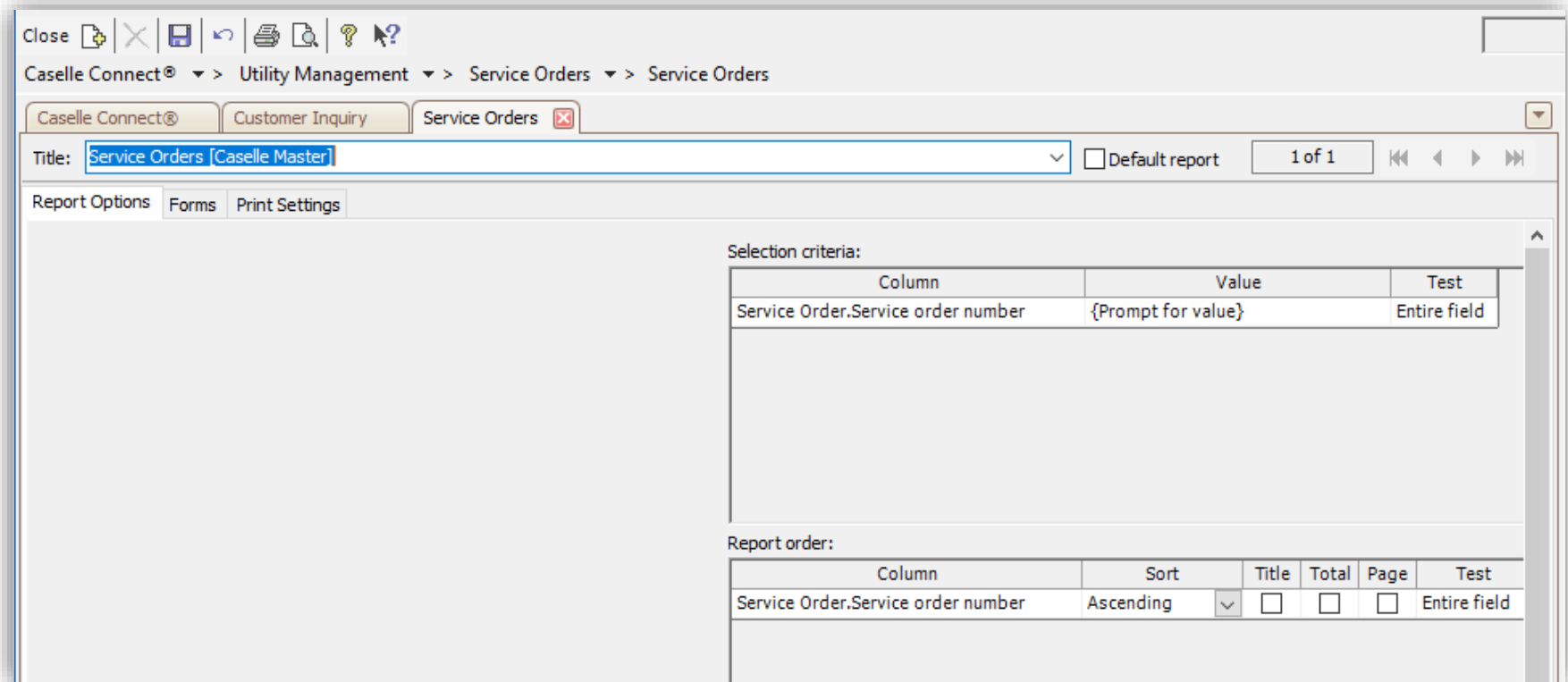
Usage 3:

Prior net reading:

Save/Next Skip Finish

# Printing Service Orders

Service orders can be printed upon creation, upon saving modifications or through **Utility Management > Service Orders>Service Orders**.



The screenshot shows the 'Service Orders' report configuration window in Caselle Connect®. The breadcrumb trail is 'Caselle Connect® > Utility Management > Service Orders > Service Orders'. The window has tabs for 'Caselle Connect®', 'Customer Inquiry', and 'Service Orders'. The 'Title' field is set to 'Service Orders [Caselle Master]'. There are checkboxes for 'Default report' and a page indicator '1 of 1'. Below the title bar are tabs for 'Report Options', 'Forms', and 'Print Settings'. The 'Report Options' tab is active, showing 'Selection criteria' and 'Report order' sections.

**Selection criteria:**

Column	Value	Test
Service Order.Service order number	{Prompt for value}	Entire field

**Report order:**

Column	Sort	Title	Total	Page	Test
Service Order.Service order number	Ascending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Entire field

# Meter Activity Form

Ancity Corporation		
SERVICE ORDER		
Service Order No: 609	Created By: Jeffrey C. Harrison	Created Date: 09/13/2016
<b>Service Information:</b>		
Service Address: 180 S Commerce Ave		
<b>Due Date:</b>		
Comments:		
<hr/>		
<b>Customer Information:</b>		
Customer No: 1.101.01		
Customer Name: Acme Manufacturing		
Phone Number: (333) 825-9421		
<hr/>		
Action: <b>Water Replace Meter</b>		
Current Meter Information:		New Meter Information:
Meter ID:	01563258	Meter ID: _____
Manufacturer:	Neptune	Manufacturer: _____
Size:	1 1/2	Size: _____
Serial No:	1534W	Serial No: _____
Last Reading:		
Current Reading:	_____	Current Reading: _____
<hr/>		
<b>Comments:</b>		
Completed By:		Completed Date:
_____		_____



# Reread or Other Form

## Any Village

## Work Order

Work Order No. 1

 Created Date: 01/20/2016 10:18 AM  
 Due Date: 01/20/2016  
 Requested By:

 Name: ACME INC  
 Account #: 4-283690-00  
 Route #: 6 Sequence #: 1820  
 Address: 1500 E NORTH AVE  
 Phone Number: 920-687-3915  
 New Customer Information:

 Request  
 Comments:

Service Order: 3

Page: 2

Task: DEDUCT METER Other -

**HIGH USAGE**

204,140

**CURRENT METER:**

 Meter ID: 097139893  
 ERT #: 68987834

 Size: 1 INCH  
 Mfg: BADGER  
 Dials: 7

 Current Read Date: 01/11/2016  
 Current Read: 960,000

**Meter Read:**

Read Date	Read	Usage	Read Date	Read	Usage
12/10/2015	939,586	34,190	06/09/2015	859,771	122,480
11/09/2015	936,167	106,680	05/08/2015	847,523	83,010
10/09/2015	925,499	144,100	04/09/2015	839,222	19,300
09/09/2015	911,089	168,960	03/12/2015	837,292	7,880
08/10/2015	894,193	197,580	02/11/2015	836,504	5,180
07/09/2015	874,435	146,640	01/09/2015	835,986	9,240

Task: WATER Other -

**HIGH USAGE**

2,904,000

**CURRENT METER:**

 Meter ID: 001028890  
 ERT #: 68987861

 Size: 3 INCH  
 Mfg: BADGER  
 Dials: 7

 Current Read Date: 01/11/2016  
 Current Read: 75,000

**Meter Read:**

Read Date	Read	Usage	Read Date	Read	Usage
12/10/2015	72,096	967,000	06/09/2015	66,487	874,000
11/09/2015	71,129	1,085,000	05/08/2015	65,613	745,000
10/09/2015	70,044	922,000	04/09/2015	64,868	546,000
09/09/2015	69,122	950,000	03/12/2015	64,322	647,000
08/10/2015	68,172	940,000	02/11/2015	63,675	737,000
07/09/2015	67,232	745,000	01/09/2015	62,938	463,000

Task: DEDUCT METER Other -

**HIGH USAGE**

146,100

**CURRENT METER:**

 Meter ID: 094068986  
 ERT #: 68987849

 Size: 2 INCH  
 Mfg: BADGER  
 Dials: 7

 Current Read Date: 01/11/2016  
 Current Read: 38,000

**Meter Read:**

Read Date	Read	Usage	Read Date	Read	Usage
12/10/2015	36,539	58,200	06/09/2015	33,776	29,700
11/09/2015	35,957	50,400	05/08/2015	33,479	31,800
10/09/2015	35,453	43,600	04/09/2015	33,161	22,500
09/09/2015	35,017	44,900	03/12/2015	32,936	24,400
08/10/2015	34,568	46,700	02/11/2015	32,692	34,400
07/09/2015	34,101	32,500	01/09/2015	32,348	25,800

Completed By:

Date:

Entered in Clarity:

# Final Reading Form

## Any Village

## Work Order

Work Order No. 2

Name: KEROUAC, MURDOCH & JEWEL  
 Account #: 1-700820-15  
 Route #: 1 Sequence #: 3640  
 Address: **1921 W MAIN ST**  
 Phone Number: 920-470-5838

Created Date: 06/13/2016 1:09 PM  
 Due Date: 06/13/2016  
 Requested By: CUSTOMER

### New Customer Information:

KEROUAC, MURDOCH & JEWEL  
 1921 W MAIN ST

LITTLE CHUTE WI

**Request**      **CREATED COMMENT**  
**Comments:**

Task:

## WATER Final Reading

### CURRENT METER:

**Meter ID:** 091284644  
**EMR Code:** R  
**ERT #:** 21977793

**Size:** 5/8 INCH  
**Mfg:** BADGER

**Prior Read Date:** 12/11/2015  
**Prior Read:** 87,629

**Meter Read:** \_\_\_\_\_

Completed By:

Date:

Entered in Clarity: \_\_\_\_\_

# Service Order List

The best way to identify outstanding service orders, or what has been scheduled, is through Service Order List. It is recommended that this report is printed on a regular basis to make sure all service orders are completed.

Caselle Connect® > Utility Management > Service Orders > Service Order List

Caselle Connect® Service Orders Service Order List

Definition: Service Order List - by Due Date [Caselle Master] Filter: All 1 of 1

Report Options Columns Print Settings

Report dates

From: 09/13/2017 To: 09/13/2017

[Advanced options...](#)

Dates based on: Due date

Statuses:

☐ Status

☐ Cancelled

☐ Completed

☒ Pending

Assigned to:

☒ Service Order Personnel

☒ Unassigned

☒ AnnetteS (Annette Spencer)

☒ JefferyH (Jeffrey C. Harrison)

☒ MaryG (Mary Gardner)

☒ RonaldJ (Ronald J. Jones)

☒ ThomasC (Thomas Carter)

Selection criteria:

Column	Value	Compare
Service Order.Service order number	All	Entire field
Service Order Department.Department	All	Entire field

Report order:

Section: Main

Column	Sort	Title	Total	Line	Page	Use
Service order.Due date	Ascending	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Entire field
Service order.Service order number	Ascending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Entire field
Service order.Sequence number	Ascending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Entire field

Report sections:

Section	Print	Headings	Detail	Totals	Line	Page
Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

# Service Order List

The master report can be modified to show only certain statuses or add User Defined Fields used for scheduling or assignment.

Anycity Corporation

Service Order List

Page: 1

Sep 13, 2016 03:32PM

Report Criteria:

Include: Cancelled, Completed, Pending, Partial

Service Order Number	Sequence Number	Description	Service Address	Customer Number	Created Date	Completed Date
200	1	Water Meter Install Reading	791 Palisades Dr	2.147.01	06/06/2012	06/08/2012
400	1	Garbage Can Repair	667 E Parkway	1.105.01	06/01/2013	06/15/2013
401	1	Garbage Can Delivery	667 E Parkway	1.105.01	07/16/2013	07/19/2013
402	1	Garbage Can Delivery	115 S Commerce Ave	1.103.01	07/21/2013	07/31/2013
600	1	Water Meter Check for Leaks	60 N Commerce Ave	1.108.01	02/26/2014	
601	1	Water Meter Removal Reading	169 S Commerce Ave	1.102.01	04/06/2014	
602	1	Water Meter Replacement Reading	115 S Commerce Ave	1.103.01	03/06/2014	
603	1	Water Meter Check for Leaks	667 E Parkway	1.105.01	03/16/2014	
604	1	Water Meter Check for Leaks	180 S Commerce Ave	1.101.01	03/11/2014	
605	1	Water Meter Replacement Reading	667 E Parkway	1.105.01	03/16/2014	
607	1	Electric Meter Replacement Reading	665 E Parkway	1.104.01	03/29/2014	
608	1	Water Meter Check for Leaks	530 Oak Hills Dr	2.153.01	03/26/2014	
609	1	Water Meter Replacement Meter	180 S Commerce Ave	1.101.01	09/13/2016	09/13/2016



# Questions?

# Maintenance Orders Overview

The Maintenance Orders module is designed to organize and track work requests that are not associated with a customer in Utility Management.

- Organize personnel and action codes by department
- Customize functionality by action code
- Combine multiple tasks into one service order
- Track work requests, assignments and completion

# Inquiry

**Maintenance Orders > Maintenance Orders > Inquiry** allows you to view all details about the Maintenance Order.

The Search Tab shows basic information about the maintenance orders, who/when it was created, assigned, completed or cancelled.

Caselle Connect® > Maintenance Orders > Maintenance Orders > Inquiry

Caselle Connect® Inquiry ✕

Maintenance order:  Maintenance order ▼ 1 of 3

Number: 610 Status: Pending Last modified date: 04/02/2014 10:54 AM  
 Location: 120 Center St Last modified by: MaryG

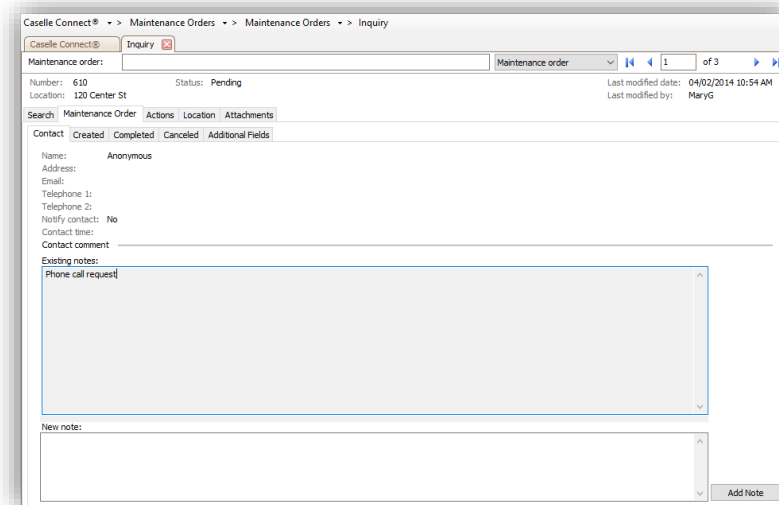
Search Maintenance Order Actions Location Attachments

Search:  Show Detail

Maintenance Order Number	Created Date	Status	Due Date	Description	Assigned To	Department
610	04/01/2014	Pending	04/15/2014	Check Pipeline For Leaks	Thomas Carter	Public Works
611	06/29/2020	Pending		Fix Pothole In Street		Streets
612	09/15/2021	Pending	09/17/2021	Check Pipeline For Leaks	Thomas Carter	Public Works

# Inquiry

The Maintenance Order Tab shows all the fields associated with the maintenance order, who/when it was created, assigned, completed, cancelled, or submitted. The Action Tab shows all the actions associated with the maintenance order



Caselle Connect® > Maintenance Orders > Maintenance Orders > Inquiry

Maintenance order:  Maintenance order 1 of 3

Number: 610 Status: Pending Last modified date: 04/02/2014 10:54 AM  
 Location: 120 Center St Last modified by: MaryG

Search Maintenance Order Actions Location Attachments

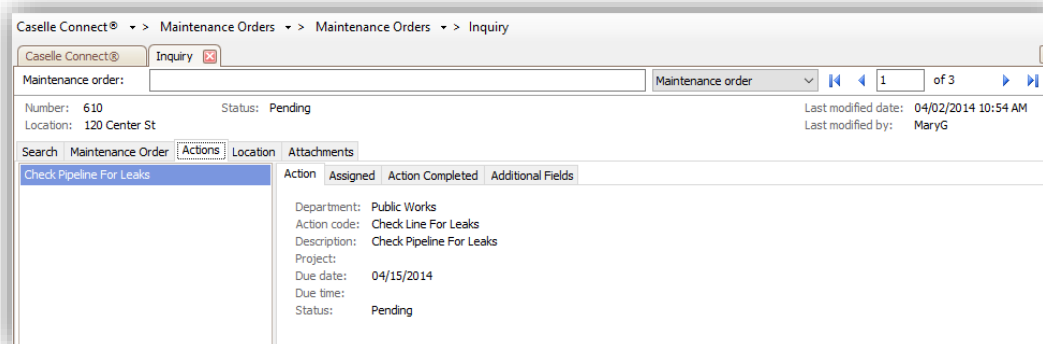
Contact Created Completed Canceled Additional Fields

Name: Anonymous  
 Address:  
 Email:  
 Telephone 1:  
 Telephone 2:  
 Notify contact: No  
 Contact time:  
 Contact comment:

Existing notes:  
 Phone call request

New note:

Add Note



Caselle Connect® > Maintenance Orders > Maintenance Orders > Inquiry

Maintenance order:  Maintenance order 1 of 3

Number: 610 Status: Pending Last modified date: 04/02/2014 10:54 AM  
 Location: 120 Center St Last modified by: MaryG

Search Maintenance Order Actions Location Attachments

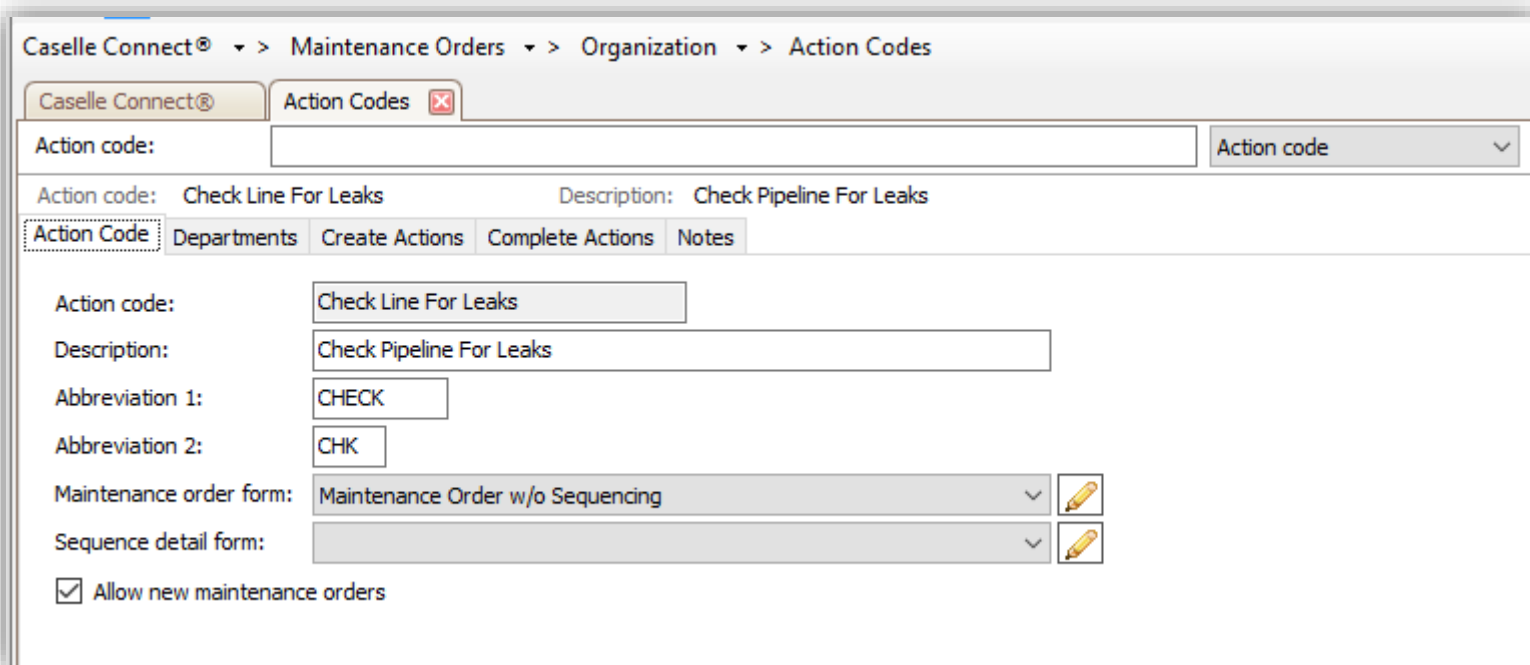
Check Pipeline For Leaks Action Assigned Action Completed Additional Fields

Department: Public Works  
 Action code: Check Line For Leaks  
 Description: Check Pipeline For Leaks  
 Project:  
 Due date: 04/15/2014  
 Due time:  
 Status: Pending



# Action Codes

**Maintenance Orders > Organization > Action Codes** – For each task that will be tracked in Maintenance Orders, setup the action code, description, abbreviations and select your form. Any tasks can be setup as action codes. Each type of action code may require different information on the printed Service Order form, so different Sequence detail forms can be setup and assigned to each action code.

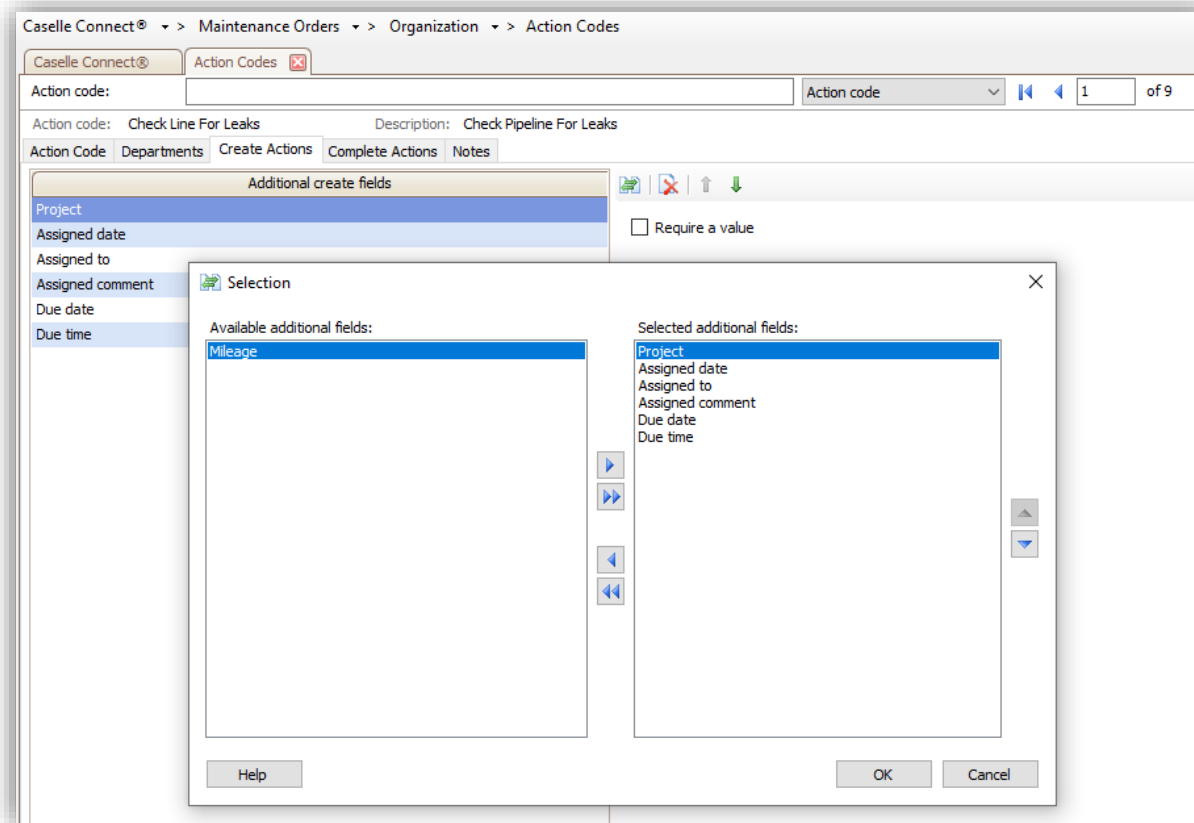


The screenshot shows the 'Action Codes' setup form in the Caselle Connect application. The breadcrumb trail at the top reads 'Caselle Connect® > Maintenance Orders > Organization > Action Codes'. Below this, there are tabs for 'Caselle Connect®' and 'Action Codes'. The main form area has a header with 'Action code: Check Line For Leaks' and 'Description: Check Pipeline For Leaks'. Below the header are four tabs: 'Action Code' (selected), 'Departments', 'Create Actions', 'Complete Actions', and 'Notes'. The 'Action Code' tab contains the following fields:

- Action code:** Check Line For Leaks
- Description:** Check Pipeline For Leaks
- Abbreviation 1:** CHECK
- Abbreviation 2:** CHK
- Maintenance order form:** Maintenance Order w/o Sequencing (with a dropdown arrow and a pencil icon)
- Sequence detail form:** (with a dropdown arrow and a pencil icon)
- ☒ Allow new maintenance orders

# Action Codes - Additional Fields

When Creating or Completing a maintenance order, additional system-defined or user defined fields can be setup to appear. User Defined Fields are configured under Maintenance Orders > Organization > Organization. Assign the fields by highlighting the field on the left and choosing Select.



The screenshot displays the 'Caselle Connect' application window, specifically the 'Maintenance Orders > Organization > Action Codes' section. The main window shows a list of action codes, with 'Check Line For Leaks' selected. A 'Selection' dialog box is open in the foreground, allowing the user to choose additional fields for the selected action code. The dialog box has two panes: 'Available additional fields' and 'Selected additional fields'. The 'Available additional fields' pane lists 'Project' and 'Mileage'. The 'Selected additional fields' pane lists 'Project', 'Assigned date', 'Assigned to', 'Assigned comment', 'Due date', and 'Due time'. The 'Project' field is highlighted in both panes. The dialog box also includes a 'Require a value' checkbox and 'OK' and 'Cancel' buttons.

Caselle Connect® > Maintenance Orders > Organization > Action Codes

Action code: [ ] Action code [ ] 1 of 9

Action code: Check Line For Leaks Description: Check Pipeline For Leaks

Action Code Departments Create Actions Complete Actions Notes

Additional create fields

Project  
Assigned date  
Assigned to  
Assigned comment  
Due date  
Due time

Selection

Available additional fields:

Mileage

Selected additional fields:

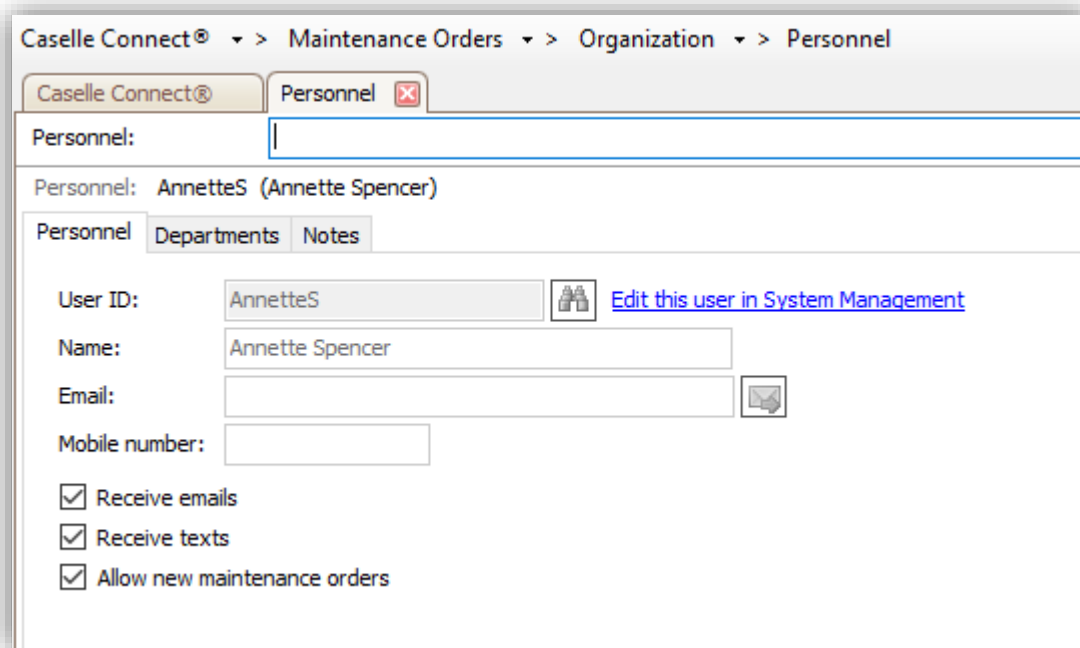
Project  
Assigned date  
Assigned to  
Assigned comment  
Due date  
Due time

Require a value

Help OK Cancel

# Personnel

Configure the personnel for assigning and completing maintenance orders. Any personnel that will be using Maintenance Orders must be setup in System Management and then selected in Personnel. If using the mobile app, they can choose to receive email and/or text when something is assigned to them.



The screenshot shows the 'Personnel' management page in the Caselle Connect application. The breadcrumb trail at the top reads: 'Caselle Connect® > Maintenance Orders > Organization > Personnel'. Below this, there are two tabs: 'Caselle Connect®' and 'Personnel' (which is active and has a close button). A search bar labeled 'Personnel:' is present. Below the search bar, the selected personnel is 'AnnetteS (Annette Spencer)'. There are three sub-tabs: 'Personnel' (active), 'Departments', and 'Notes'. The 'Personnel' sub-tab contains the following fields and options:

- User ID:** A text field containing 'AnnetteS' and a small icon of three people. To the right is a blue link: 'Edit this user in System Management'.
- Name:** A text field containing 'Annette Spencer'.
- Email:** A text field with a small envelope icon to its right.
- Mobile number:** A text field.
- Checkboxes:**
  - ☒ Receive emails
  - ☒ Receive texts
  - ☒ Allow new maintenance orders

# Departments

Configure the departments for assigning and completing maintenance orders. Any departments that will be using Maintenance Orders must be setup in System Management. NOTE: These department names must be different from the departments used in Service Orders. Select the personnel that may be assigned the service orders in that department and select the action codes that may be assigned to that department.

Caselle Connect® > Maintenance Orders > Organization > Departments

Caselle Connect® Departments

Department:  Department

Department: Public Works

Department Personnel Action Codes Notes

Department:  [Edit this department in System Management](#)

Description:

Abbreviated description:

Caselle Connect® > Maintenance Orders > Organization > Departments

Caselle Connect® Departments

Department:  Department

Department: Public Works

Department Personnel Action Codes Notes

Name

Jeffrey C. Harrison  
Marvin Gilson  
Thomas Carter

Personnel Notes

User ID: JefferyH  
Name: Jeffrey C. Harrison

Selection

Available personnel:  
Annette Spencer  
Mary Gardner  
Ronald J. Jones

Selected personnel:  
Jeffrey C. Harrison  
Marvin Gilson  
Thomas Carter

Help OK Cancel

Caselle Connect® > Maintenance Orders > Organization > Departments

Caselle Connect® Departments

Department:  Department

Department: Public Works

Department Personnel Action Codes Notes

Action Codes

Check Line For Leaks  
Empty Garbage Can  
Fix Crack In Sidewalk  
Repair/Replace Garbage Can  
Replace Sign  
Sprinkler Repair (Inactive)

Action Code Notes

Action code: Check Line For Leaks  
Description: Check Pipeline For Leaks  
Abbreviation 1: CHECK

Selection

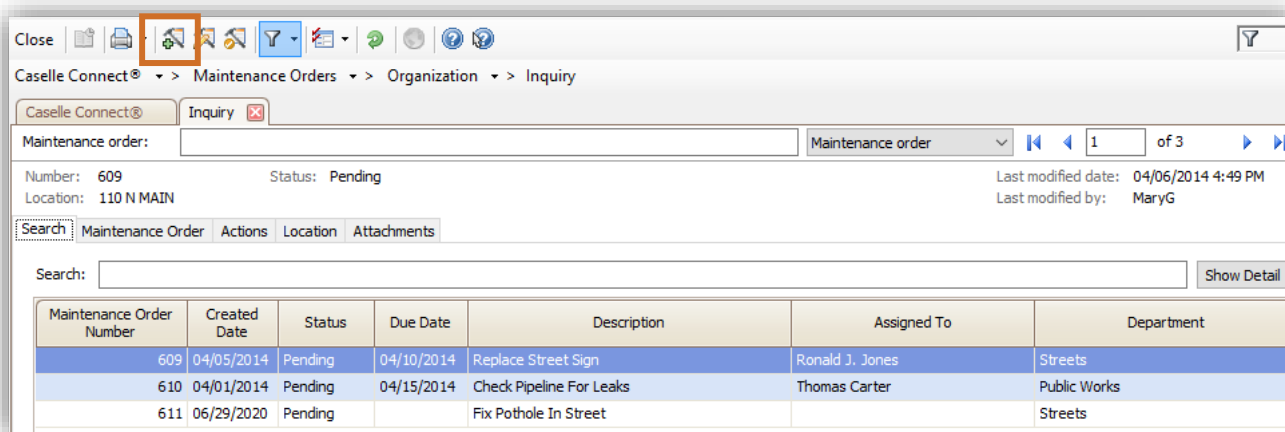
Available action codes:  
Fix Pothole  
Tree Down  
Undog Storm Drain

Selected action codes:  
Check Line For Leaks  
Empty Garbage Can  
Fix Crack In Sidewalk  
Repair/Replace Garbage Can  
Replace Sign  
Sprinkler Repair

Help OK Cancel

# Create Maintenance Orders

There are a few ways to get to Create Maintenance Orders. If Inquiry is open, click on the Create Maintenance Order icon; through the menu go to **Maintenance Orders > Maintenance Orders > Create Maintenance Orders**, or select Create Maintenance Orders from the Checklist.



Caselle Connect® > Maintenance Orders > Organization > Inquiry

Maintenance order:  Maintenance order  of 3

Number: 609 Status: Pending Last modified date: 04/06/2014 4:49 PM  
Location: 110 N MAIN Last modified by: MaryG

Search Maintenance Order Actions Location Attachments

Search:  Show Detail

Maintenance Order Number	Created Date	Status	Due Date	Description	Assigned To	Department
609	04/05/2014	Pending	04/10/2014	Replace Street Sign	Ronald J. Jones	Streets
610	04/01/2014	Pending	04/15/2014	Check Pipeline For Leaks	Thomas Carter	Public Works
611	06/29/2020	Pending		Fix Pothole In Street		Streets



Caselle Connect® > Maintenance Orders > Maintenance Orders >

Maintenance Orders

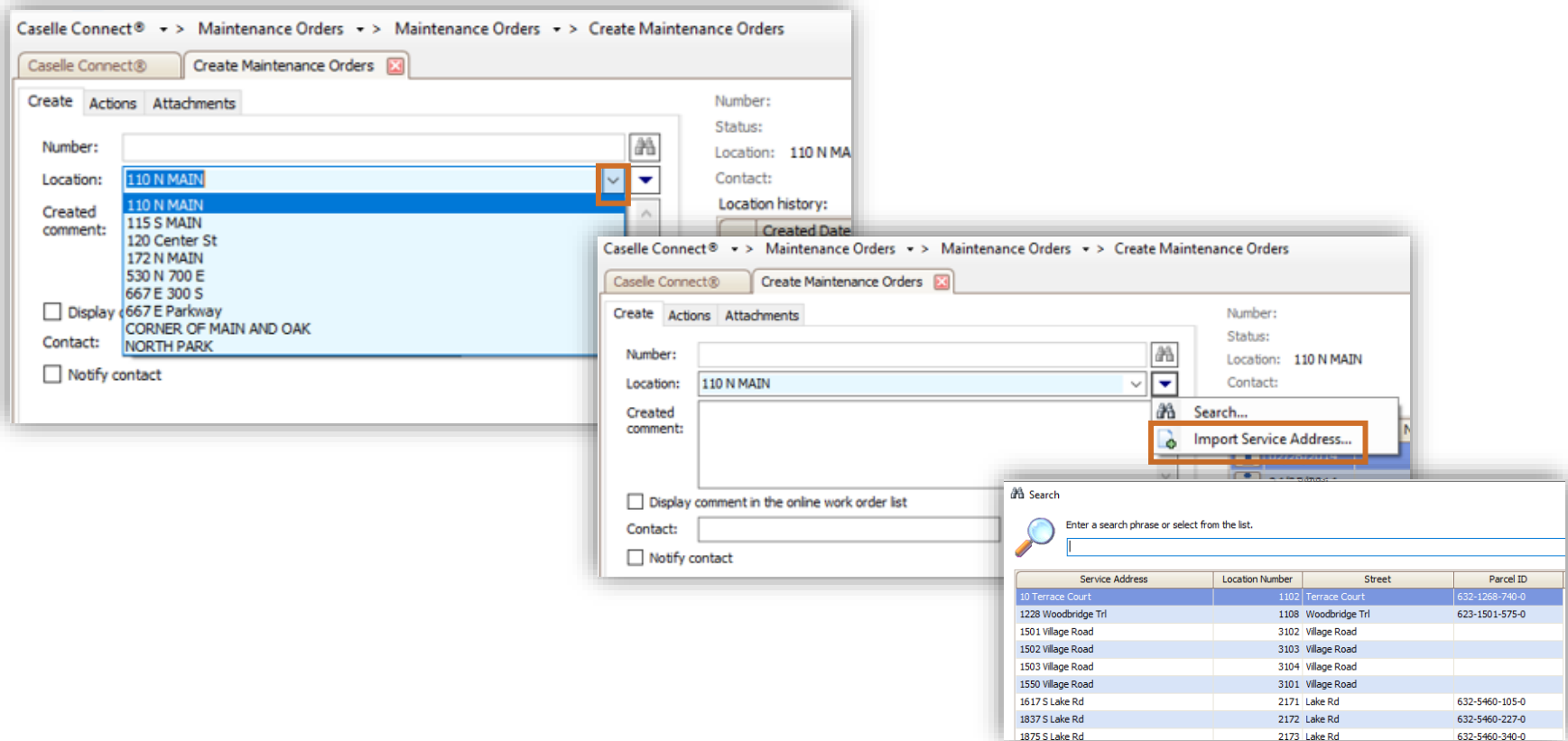
Tasks	Related Reports	Miscellaneous
<ul style="list-style-type: none"> <li>Complete Maintenance Orders</li> <li><b>Create Maintenance Orders</b></li> <li>Modify Maintenance Orders</li> </ul>	<ul style="list-style-type: none"> <li>Maintenance Order List</li> <li>Maintenance Orders</li> <li>View All Reports</li> </ul>	<ul style="list-style-type: none"> <li>Checkout</li> <li>Delete History</li> <li>Inquiry</li> <li>Recalculate</li> </ul>

# Create Maintenance Orders

Enter the Location address.

If the address has been used in the past it will appear in the dropdown list or the search function.

Locations can also be Imported from Utility Management by selecting Import Service Address from the dropdown menu.



**Caselle Connect®** > Maintenance Orders > Maintenance Orders > Create Maintenance Orders

**Create Maintenance Orders**

Number:

Location: **110 N MAIN**

Created comment:

☐ Display

Contact:

☐ Notify contact

Number:

Status:

Location: 110 N MA

Contact:

Location history:

Created Date:

Search...


Import Service Address...

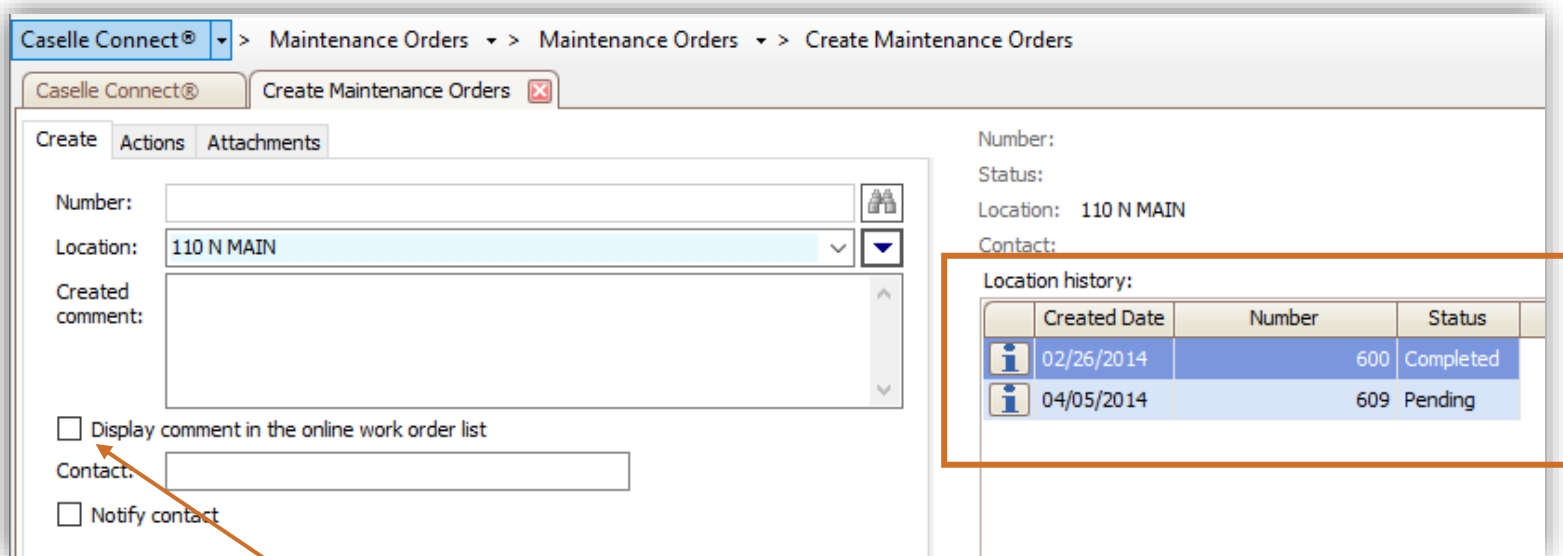
Search

Enter a search phrase or select from the list.

Service Address	Location Number	Street	Parcel ID
10 Terrace Court	1102	Terrace Court	632-1268-740-0
1228 Woodbridge Trl	1108	Woodbridge Trl	623-1501-575-0
1501 Village Road	3102	Village Road	
1502 Village Road	3103	Village Road	
1503 Village Road	3104	Village Road	
1550 Village Road	3101	Village Road	
1617 S Lake Rd	2171	Lake Rd	632-5460-105-0
1837 S Lake Rd	2172	Lake Rd	632-5460-227-0
1875 S Lake Rd	2173	Lake Rd	632-5460-340-0

# Create Maintenance Orders

All maintenance orders associated with this location will be listed under Location history.  
 Clicking on the  in front of a maintenance order in history will open Inquiry for that maintenance order.



Caselle Connect® > Maintenance Orders > Maintenance Orders > Create Maintenance Orders



Caselle Connect® Create Maintenance Orders

Create Actions Attachments

Number:   
 Location: 110 N MAIN  
 Created comment:   
☐ Display comment in the online work order list  
 Contact:   
☐ Notify contact

Number:  
 Status:  
 Location: 110 N MAIN  
 Contact:

Location history:

	Created Date	Number	Status
	02/26/2014	600	Completed
	04/05/2014	609	Pending

Enter the maintenance order information. If using the mobile app, make sure the box is checked to display the comment.

# Create Maintenance Orders - Actions

On the Actions tab, enter the department and select the Action code(s) that apply. Pressing enter will bring up any additional fields that need to be populated. You can add multiple actions on one maintenance order. Each action added will appear at the bottom right side of the screen.

Caselle Connect® > Maintenance Orders > Maintenance Orders > Create Maintenance Orders

Caselle Connect® Create Maintenance Orders

Create Actions Attachments

Department: Public Works

Action code: Check Line For Leaks

Description: Check Pipeline For Leaks

Project:

Assigned date: 09/16/2021

Assigned to: Thomas Carter

Assigned comment: Leak in front yard

Due date: 09/17/2021

Due time: 1:00 PM

Number: 612

Status: Pending

Location: 110 N MAIN

Contact:

Location history:

	Created Date	Number	Status
	02/26/2014	600	Completed
	04/05/2014	609	Pending

Actions:

	Action Code	Status
	Check Line For Leaks	Pending



# Modify Maintenance Orders

Any open/pending maintenance orders can be modified through Maintenance Orders > Maintenance Orders > Modify Maintenance Orders.

Information can be modified on the Maintenance Order or Action Codes

Caselle Connect® > Maintenance Orders > Maintenance Orders > Modify Maintenance Orders

Caselle Connect® Modify Maintenance Orders

Create Actions Attachments

Number: 612

Location: 110 N MAIN

Created comment:

☒ Display comment in the online work order list

Contact:

☐ Notify contact

Number: 612  
Status: Pending  
Location: 110 N MAIN  
Contact:

Location history:

Created Date	Number	Status
--------------	--------	--------

Actions:

Action Code
Check Line For Leaks

Caselle Connect® > Maintenance Orders > Maintenance Orders > Modify Maintenance Orders

Caselle Connect® Modify Maintenance Orders

Create Actions Attachments

Department: Public Works

Action code: Check Line For Leaks

Description: Check Pipeline For Leaks

Project:

Assigned date: 09/16/2021

Assigned to: Thomas Carter

Assigned comment: Leak in front yard

Due date: 09/17/2021

Due time: 1:00 PM

Number: 612  
Status: Pending  
Location: 110 N MAIN  
Contact:

Location history:

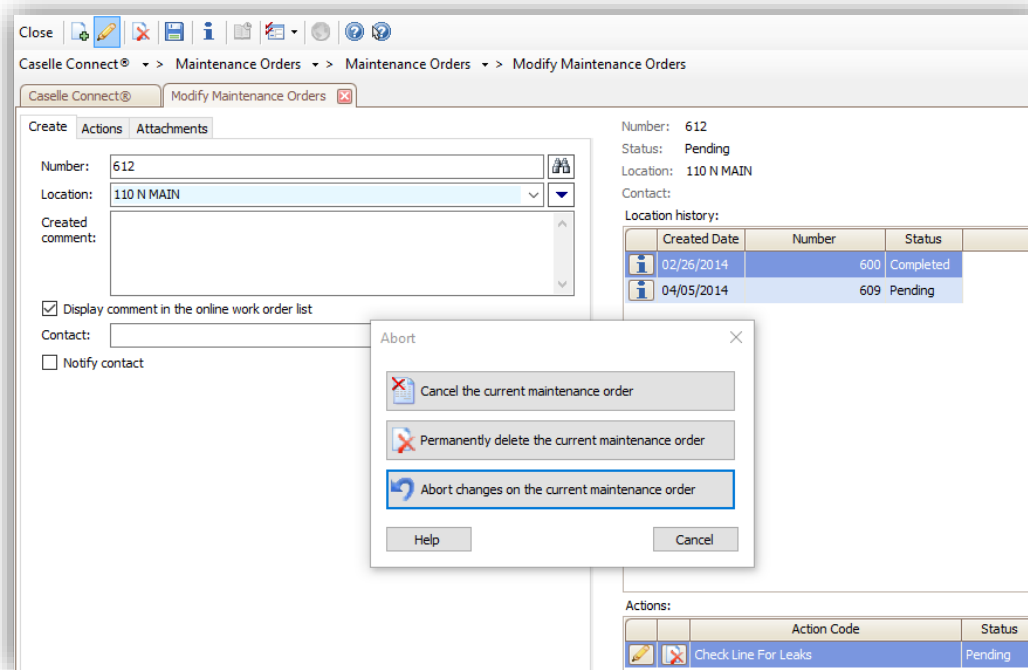
Created Date	Number	Status
02/26/2014	600	Completed
04/05/2014	609	Pending

Actions:

Action Code	Status
Check Line For Leaks	Pending

# Canceling a Maintenance Order

To cancel a maintenance order, go to Modify Maintenance Orders, find the order and click Delete. You can Cancel, Permanently Delete or Abort Changes. A maintenance order can be cancelled if you want to keep history of the cancelled the request, or it can be deleted if the maintenance order was entered on the incorrect location. When a maintenance order is cancelled, enter the date and information about the cancellation on each Action to be cancelled. One action can be cancelled without cancelling all actions. When a maintenance order needs to be deleted, check the box **Delete Permanently** and save for each action to be deleted.



Caselle Connect® > Maintenance Orders > Maintenance Orders > Modify Maintenance Orders

Caselle Connect® Modify Maintenance Orders

Create Actions Attachments

Number: 612

Location: 110 N MAIN

Created comment:

☒ Display comment in the online work order list

Contact:

☐ Notify contact

Number: 612

Status: Pending

Location: 110 N MAIN

Contact:

Location history:

Created Date	Number	Status
02/26/2014	600	Completed
04/05/2014	609	Pending

Abort

☒ Cancel the current maintenance order

☒ Permanently delete the current maintenance order

☒ Abort changes on the current maintenance order

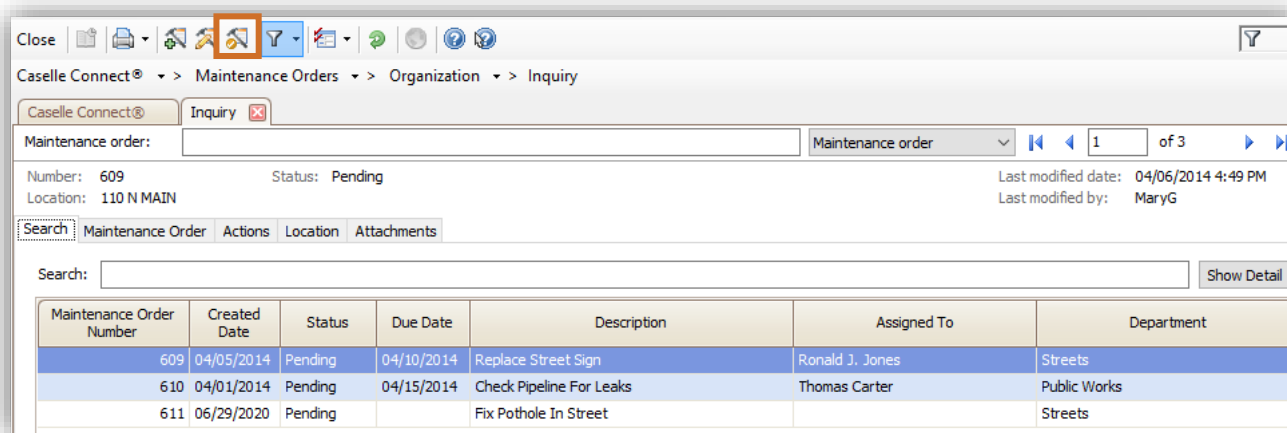
Help Cancel

Actions:

Action Code	Status
Check Line For Leaks	Pending

# Complete Maintenance Orders

There are a few ways to get to Complete Maintenance Orders. If Inquiry is open, click on the Complete Maintenance Order icon; through the menu go to **Maintenance Orders > Maintenance Orders > Complete Maintenance Orders** or select Complete Maintenance Orders from the Checklist.



Caselle Connect® > Maintenance Orders > Organization > Inquiry

Caselle Connect® Inquiry

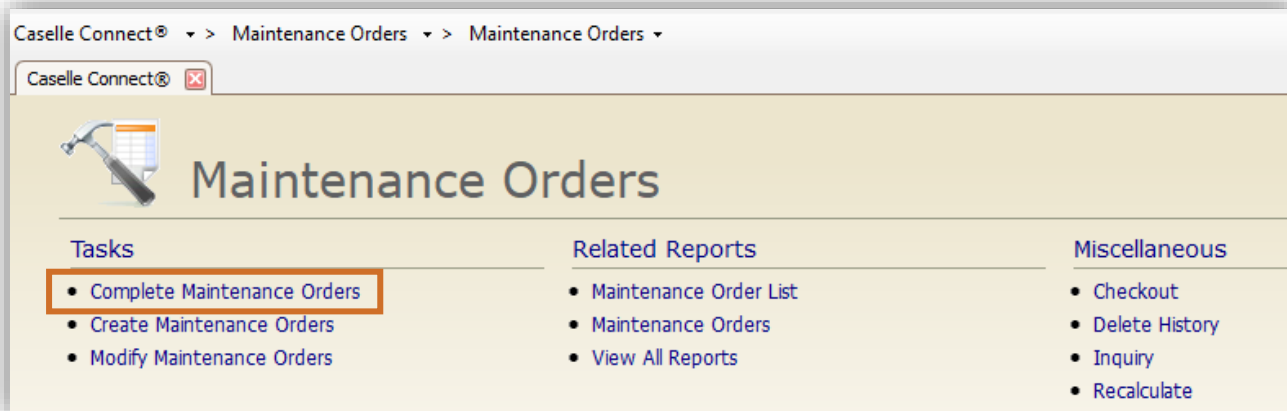
Maintenance order:  Maintenance order 1 of 3

Number: 609 Status: Pending Last modified date: 04/06/2014 4:49 PM  
 Location: 110 N MAIN Last modified by: MaryG

Search Maintenance Order Actions Location Attachments

Search:  Show Detail

Maintenance Order Number	Created Date	Status	Due Date	Description	Assigned To	Department
609	04/05/2014	Pending	04/10/2014	Replace Street Sign	Ronald J. Jones	Streets
610	04/01/2014	Pending	04/15/2014	Check Pipeline For Leaks	Thomas Carter	Public Works
611	06/29/2020	Pending		Fix Pothole In Street		Streets



Caselle Connect® > Maintenance Orders > Maintenance Orders >

Caselle Connect®

## Maintenance Orders

### Tasks

- Complete Maintenance Orders
- Create Maintenance Orders
- Modify Maintenance Orders

### Related Reports

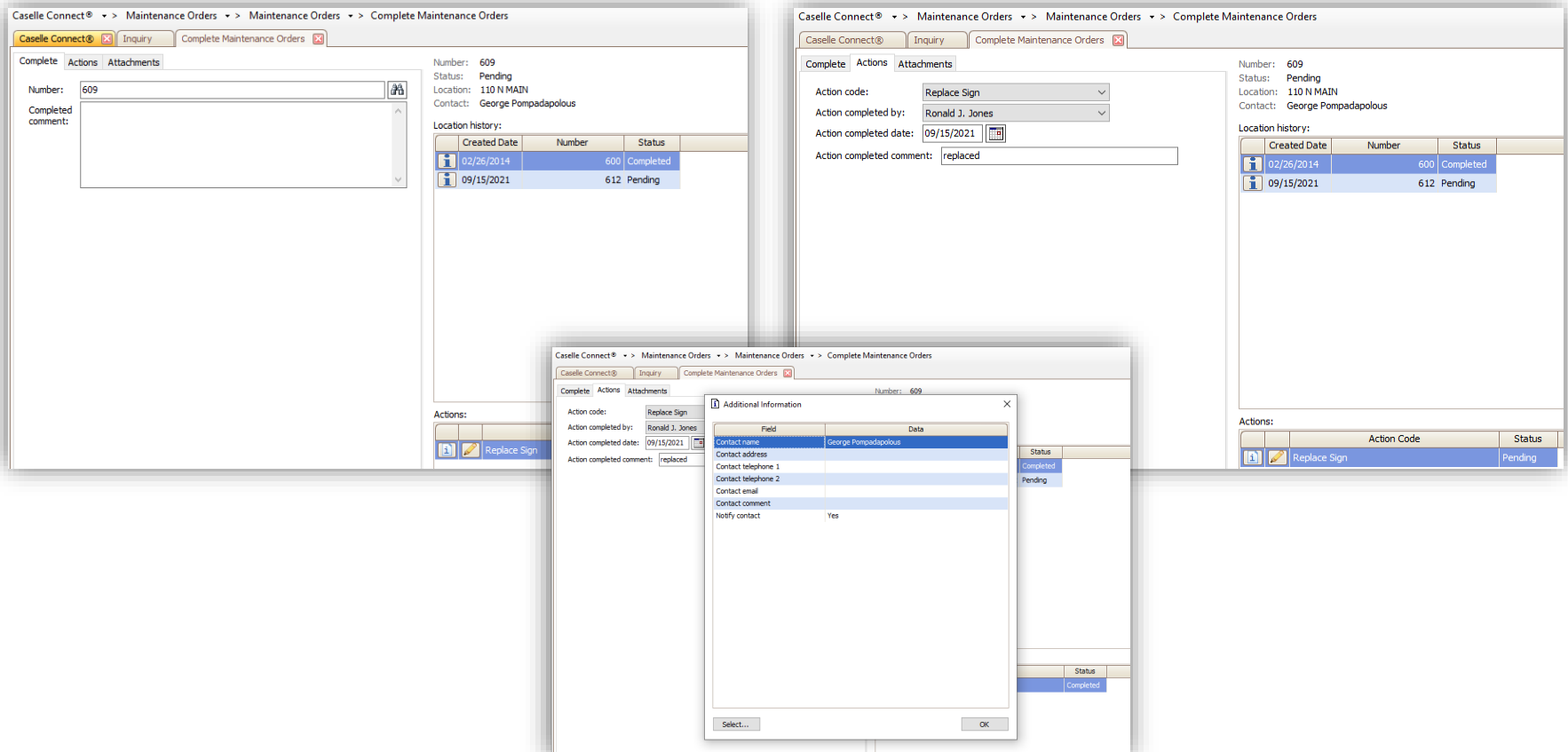
- Maintenance Order List
- Maintenance Orders
- View All Reports

### Miscellaneous

- Checkout
- Delete History
- Inquiry
- Recalculate

# Complete Maintenance Orders

Enter the maintenance order to complete. Enter the Completed comment, if necessary. Each action will come up in the order on the bottom right side of the screen, enter the fields needed to complete each action. The Complete fields are setup on the Action Code. Contact information can be set to popup when a maintenance order is completed.



Caselle Connect® - > Maintenance Orders - > Maintenance Orders - > Complete Maintenance Orders

Complete Actions Attachments

Number: 609  
Status: Pending  
Location: 110 N MAIN  
Contact: George Pompadopolous

Location history:

Created Date	Number	Status
02/26/2014	600	Completed
09/15/2021	612	Pending

Actions:

Replace Sign

Caselle Connect® - > Maintenance Orders - > Maintenance Orders - > Complete Maintenance Orders

Complete Actions Attachments

Action code: Replace Sign  
Action completed by: Ronald J. Jones  
Action completed date: 09/15/2021  
Action completed comment: replaced

Location history:

Created Date	Number	Status
02/26/2014	600	Completed
09/15/2021	612	Pending

Actions:

Action Code	Status
Replace Sign	Pending

Caselle Connect® - > Maintenance Orders - > Maintenance Orders - > Complete Maintenance Orders

Complete Actions Attachments

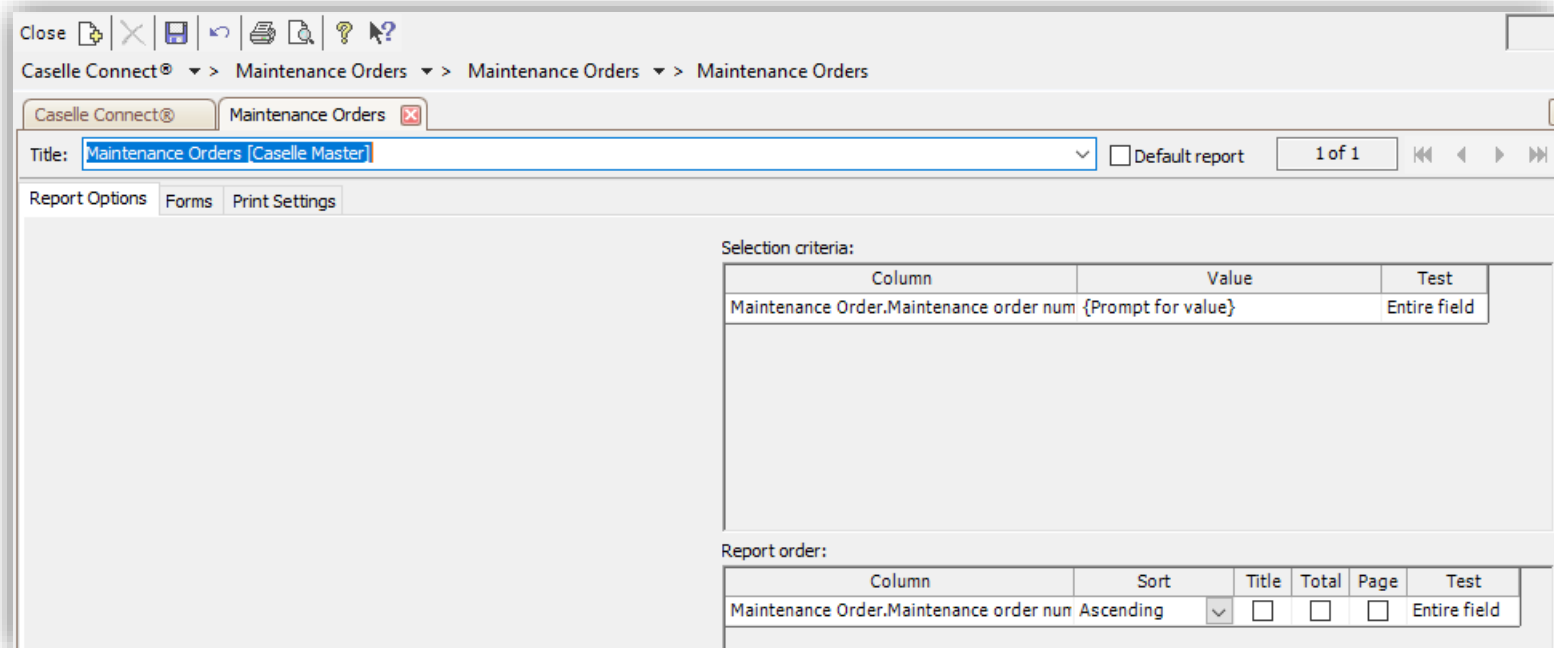
Additional Information

Field	Data
Contact name	George Pompadopolous
Contact address	
Contact telephone 1	
Contact telephone 2	
Contact email	
Contact comment	
Notify contact	Yes

Select... OK

# Printing Maintenance Orders

Maintenance orders can be printed upon creation, upon saving modifications or through **Maintenance Orders > Maintenance Orders > Maintenance Orders**



The screenshot shows the 'Caselle Connect' application window with the 'Maintenance Orders' report selected. The title bar indicates the path: 'Caselle Connect > Maintenance Orders > Maintenance Orders > Maintenance Orders'. The main window has tabs for 'Report Options', 'Forms', and 'Print Settings', with 'Report Options' currently active.

**Title:** Maintenance Orders [Caselle Master] ☐ Default report 1 of 1

**Selection criteria:**

Column	Value	Test
Maintenance Order.Maintenance order num	{Prompt for value}	Entire field

**Report order:**

Column	Sort	Title	Total	Page	Test
Maintenance Order.Maintenance order num	Ascending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Entire field

## Maintenance Order with sequence detail

Ancity Corporation	
MAINTENANCE ORDER	
Maintenance Order No:	609
Location:	110 N MAIN
Created By:	MaryG
Comments:	Contact ran over the stop sign.
Created Date: 04/05/2014	
Contact Information:	
Requested By:	George Pompadapolous
Phone Number:	
Action: Replace Street Sign	
Due Date:	04/10/2014
Time:	
Assigned To:	Ronald J. Jones
Date:	
Comments:	Determine if sign can be attached to a new sign post.
Completed By:	
Completed Date:	
Time:	
Comments:	
Office Use Only	
Recorded By:	
Recorded Date:	

## Maintenance Order without sequence detail

**Ancity Maintenance Order**

Person Calling: \_\_\_\_\_

Address: \_\_\_\_\_

Phone #: \_\_\_\_\_ Date Received: 02/26/2014

Received by: MaryG

Description of Request:  
Water settling has been reported around this address.

Location of Problem: 110 N MAIN

Assigned Comments:  
Please confirm any leaking and take necessary steps to repair.

Assigned To: Jeffrey C. Harrison Date Assigned: \_\_\_\_\_

Due Date: 02/27/2014 Date Completed: \_\_\_\_\_

Completion Information: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Other Comments: \_\_\_\_\_  
\_\_\_\_\_

# Maintenance Order List

The best way to identify outstanding maintenance orders, or what has been scheduled, is through Maintenance Order List. It is recommended that this report is printed on a regular basis to make sure all maintenance orders are completed.

Caselle Connect® > Maintenance Orders > Maintenance Orders > Maintenance Order List

Caselle Connect® Maintenance Order List

Definition: Maintenance Order List - by Due Date [Caselle Master] Filter: All 3 of 4

Report Options Additional Options Columns Print Settings

Report dates

From: Prompt To: Prompt

[Advanced options...](#)

Dates based on: Due date

Statuses:

☒ Status

☐ Canceled

☐ Completed

☒ Pending

Assigned to:

☒ Personnel

☒ Unassigned

☒ AnnetteS (Annette Spencer)

☒ JefferyH (Jeffrey C. Harrison)

☒ MaryG (Mary Gardner)

☒ mgilson (Marvin Gilson)

☒ RonaldJ (Ronald J. Jones)

☒ ThomasC (Thomas Carter)

Selection criteria:

Column	Value	Compare
Maintenance Order.Maintenance order n...	All	Entire field

Report order:

Section: Main

Column	Sort	Title	Total	Line	Page	Use
Maintenance Order Detail.Due date	Ascending	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Entire field
Maintenance Order.Maintenance order nu...	Ascending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Entire field

Report sections:

Section	Print	Headings	Detail	Totals	Line	Page
Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>



# Maintenance Order List

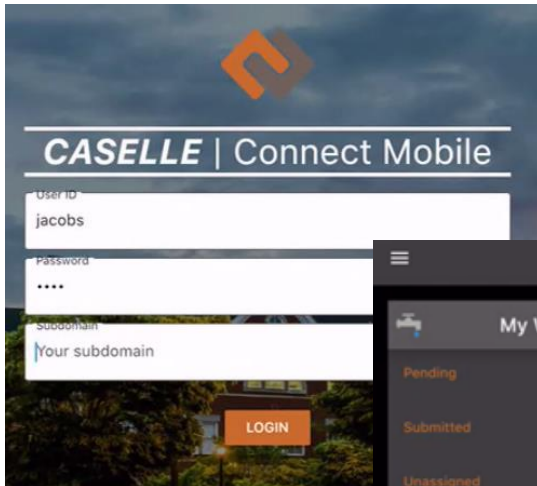
The master reports can be modified to show only certain statuses or add User Defined Fields used for scheduling or assignment.

Anycity Corporation		Maintenance Order List - by Due Date		Page: 1
		Due date: All		Sep 15, 2021 9:36AM
Report Criteria:				
Statuses included: Pending				
Maintenance Order Number	Location	Action Code	Assigned To	Due Date
04/15/2014				
610	120 Center St	Check Line For Leaks	ThomasC	04/15/2014
09/17/2021				
612	110 N MAIN	Check Line For Leaks	ThomasC	09/17/2021



# Questions?

# Mobile Work Orders App



**CASELLE | Connect Mobile**

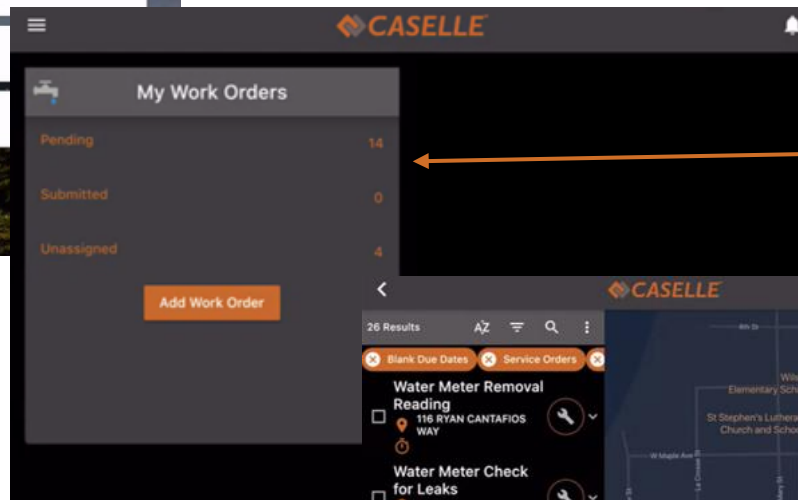
User ID  
jacobs

Password  
.....

Subdomain  
Your subdomain

**LOGIN**

Log in using your Caselle username and password and your utility's Subdomain .



**CASELLE**

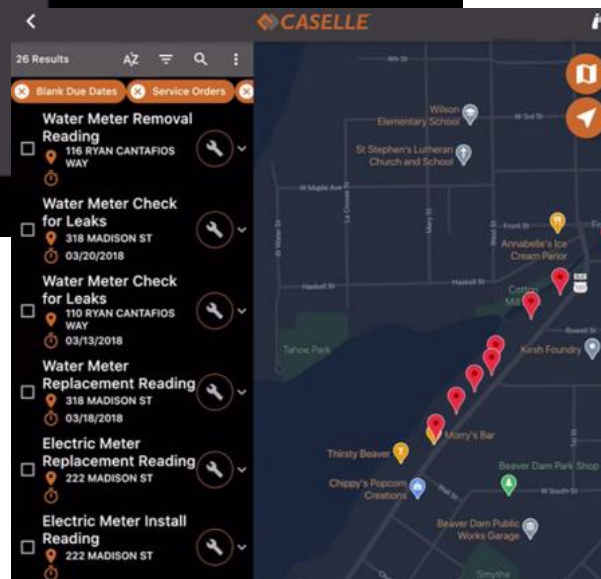
**My Work Orders**

Pending	14
Submitted	0
Unassigned	4

**Add Work Order**

Work Orders will be categorized as Pending, Submitted & Unassigned. Work Orders can also be added here.

The Work orders will be listed on the left side and if latitude & longitude are setup on the location in Caselle, they will be mapped on the right.



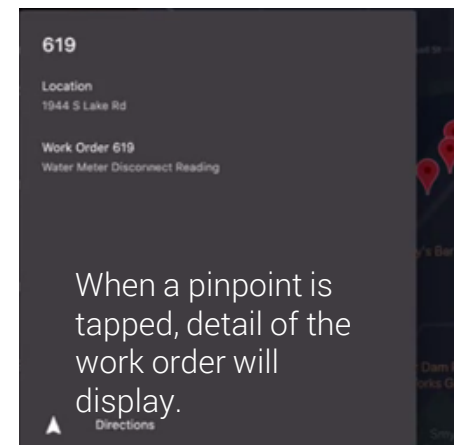
**CASELLE**

26 Results

Blank Due Dates Service Orders

- ☐ Water Meter Removal Reading  
116 RYAN CANTAFIOS WAY
- ☐ Water Meter Check for Leaks  
318 MADISON ST  
03/20/2018
- ☐ Water Meter Check for Leaks  
116 RYAN CANTAFIOS WAY  
03/13/2018
- ☐ Water Meter Replacement Reading  
318 MADISON ST  
03/18/2018
- ☐ Electric Meter Replacement Reading  
222 MADISON ST
- ☐ Electric Meter Install Reading  
222 MADISON ST

Map view showing locations with red pins.



**619**

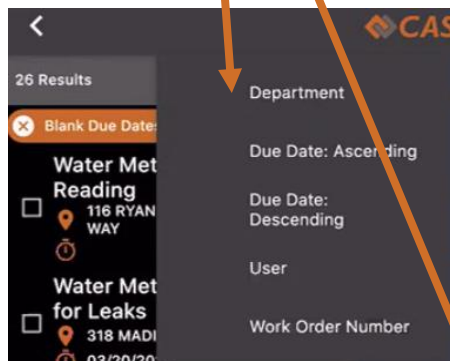
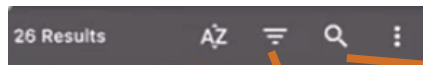
Location  
1944 S Lake Rd

Work Order 619  
Water Meter Disconnect Reading

When a pinpoint is tapped, detail of the work order will display.

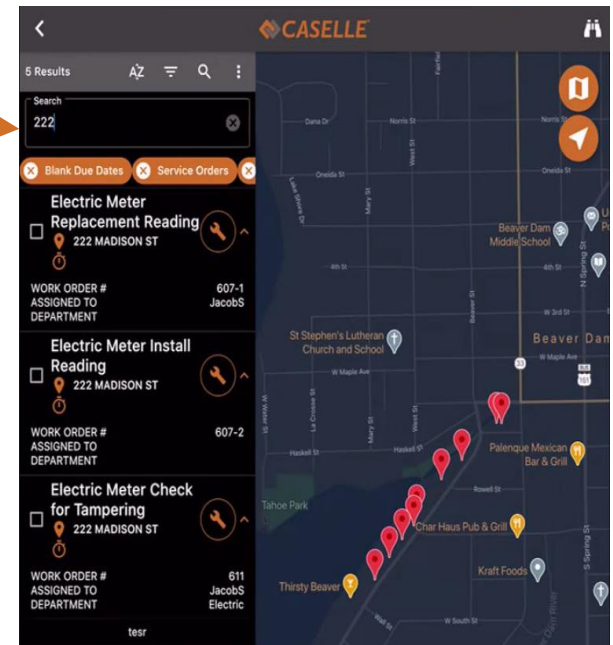
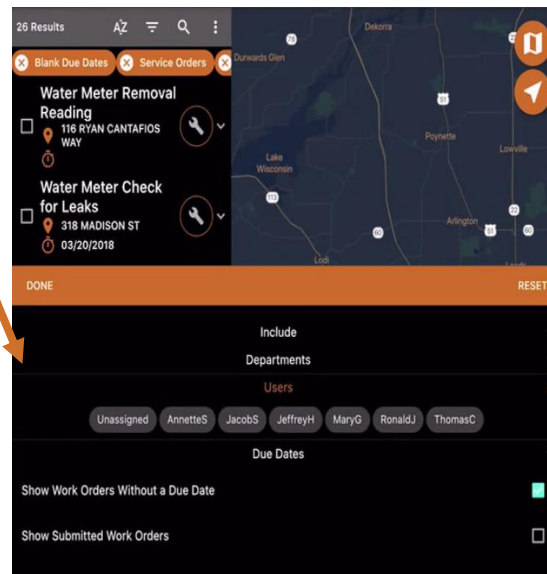
Directions

# Mobile Work Orders App




Tapping on the **AZ** will give the sort options

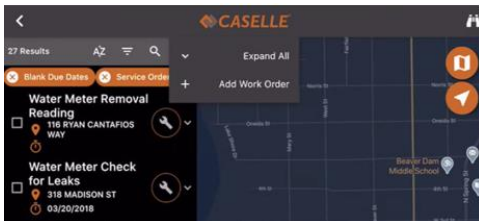
Tapping on the **Filter** icon will open filtering options. Filters include Departments, Users, Due Dates and Submitted Work Orders.




Tapping on the **Search** icon will open the search function. This is a character search and will match any fields with what is typed in.

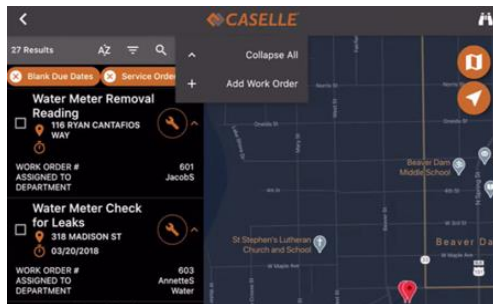
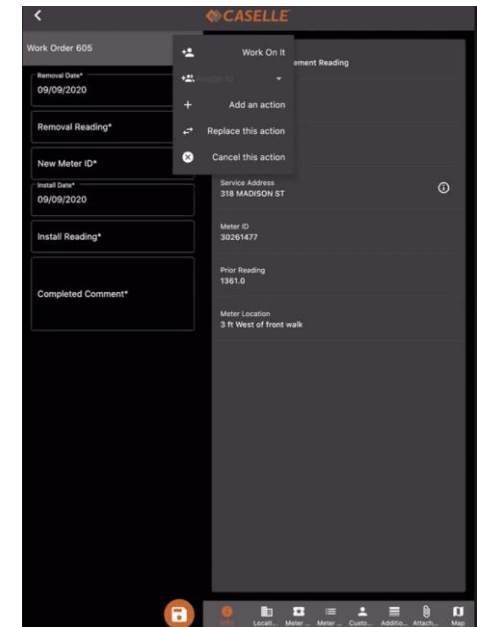
# Mobile Work Orders App


Tapping on the  will give the option to Expand or Collapse additional information or Add Work Order.

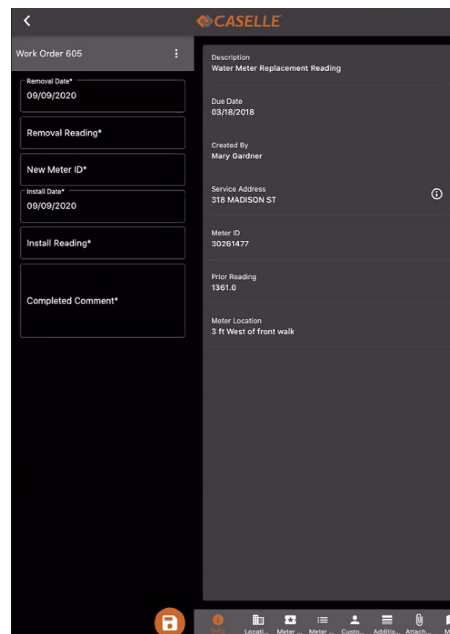



## THE WORK ORDER

The right side will prompt the user for the information needed to complete the Work Order. This differs based on the type of work order. Once this is filled in tap on the  to submit the work order. The left side gives basic info about the work order including the Meter ID & Last Reading.

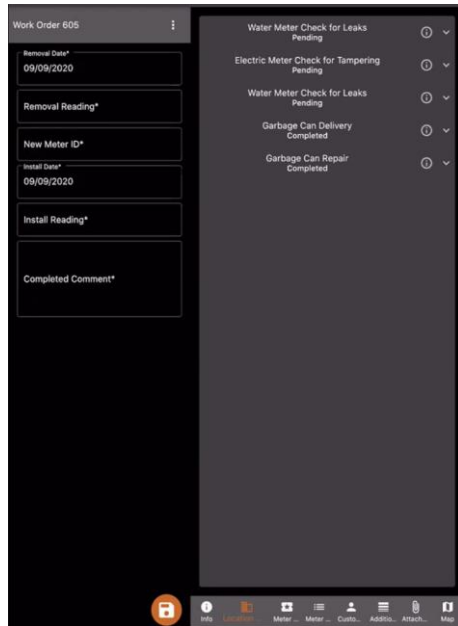


Tapping on the  will open the work order.

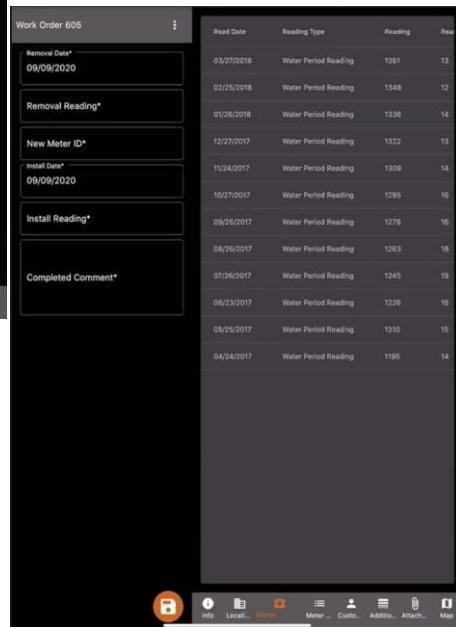


Tapping on the  will give the option to Work On It (this assigns it to you). Assign it to someone else, Add, Replace or Cancel an Action.



# Mobile Work Orders App

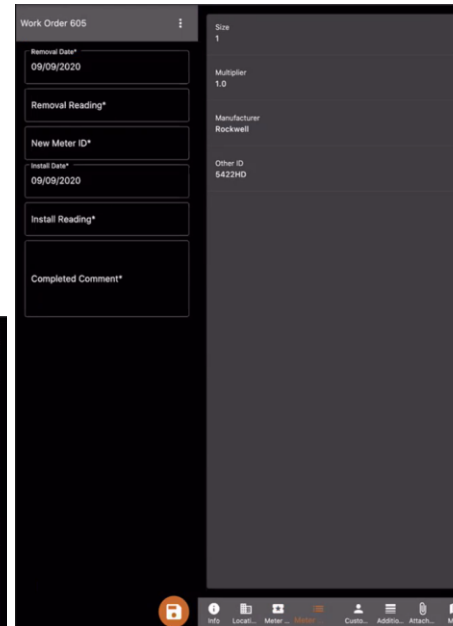


The first Meter icon will display reading and usage history for the meter.

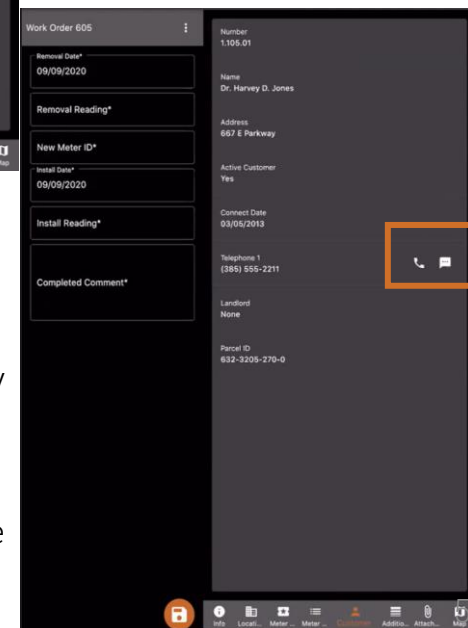


Read Date	Reading Type	Reading	Res
03/07/2018	Water Period Reading	1381	13
02/25/2018	Water Period Reading	1348	12
01/26/2018	Water Period Reading	1336	14
12/27/2017	Water Period Reading	1322	13
11/24/2017	Water Period Reading	1309	14
10/27/2017	Water Period Reading	1295	16
09/26/2017	Water Period Reading	1279	16
08/26/2017	Water Period Reading	1263	18
07/26/2017	Water Period Reading	1245	19
06/23/2017	Water Period Reading	1226	16
05/23/2017	Water Period Reading	1210	15
04/24/2017	Water Period Reading	1195	14

The icon bar across the bottom gives additional information about the customer. Tapping on the Location icon will show any other work orders at that location. Tapping on the  will open the work order. Tapping on the  will give a little more info about it.



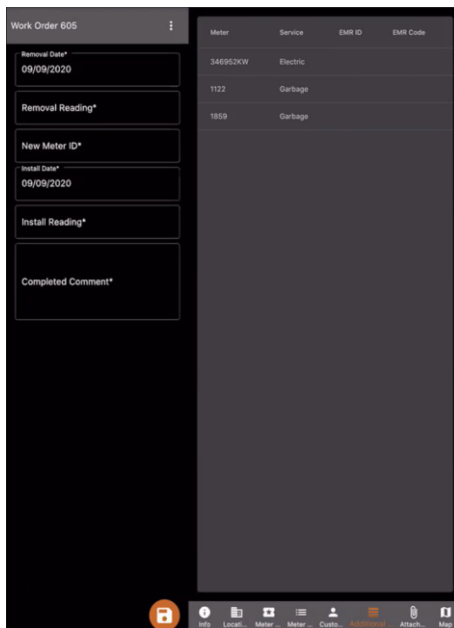
The second Meter icon will display any fields that are populated on the meter in Caselle.



The Customer icon will display customer information including phone number and email address. These can be used to communicate with the customer by voice, text or email.

# Mobile Work Orders App

Additional will list other meters at the location.



Work Order 605

Meter	Service	EMR ID	EMR Code
346952KW	Electric		
1122	Garbage		
1859	Garbage		

Removal Date\* 09/09/2020

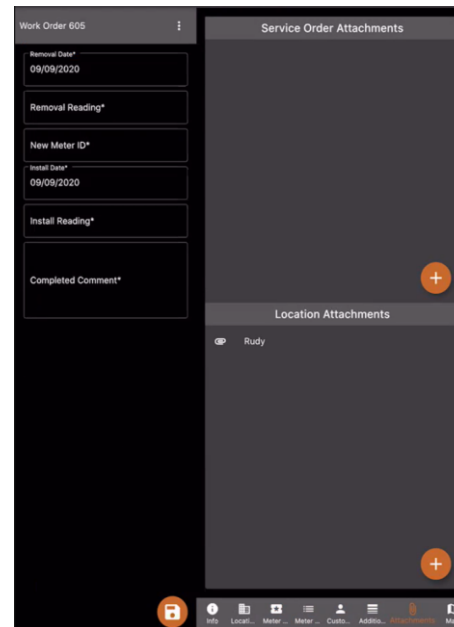
Removal Reading\*

New Meter ID\*

Install Date\* 09/09/2020

Install Reading\*

Completed Comment\*



Work Order 605

Service Order Attachments

Removal Date\* 09/09/2020

Removal Reading\*

New Meter ID\*

Install Date\* 09/09/2020

Install Reading\*

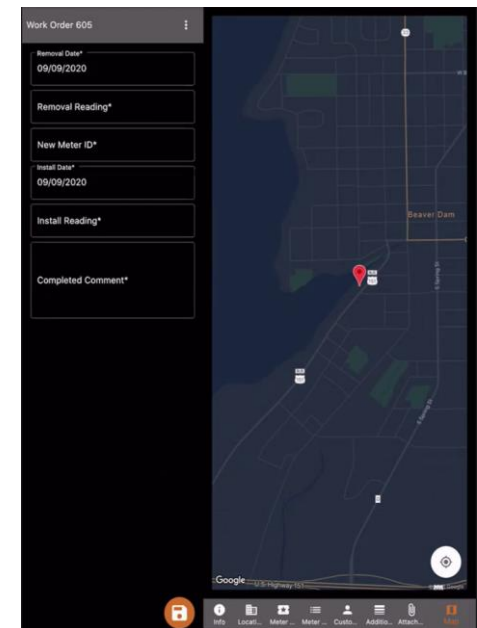
Completed Comment\*

Location Attachments

Rudy

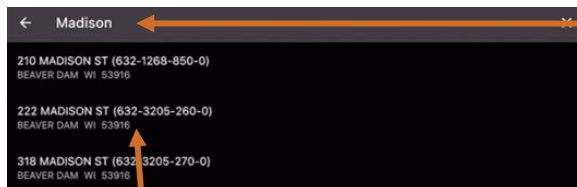
Attachments will allow pictures and other attachments to be shared between the office and the field. Using Amazon's free file sharing service Amazon S3.

Map will show the location on a map. Tapping on the pinpoint will give the option to get directions based on your current location.



# Mobile Work Orders App


Any property in the system can be accessed by tapping on the binoculars.



Type in any part of the address for the property. Any matching properties will display.

Tap on the desired location and the Account information will display.



Tap on the  to add a work order.

**Add a work order**


Department\*  
Electric

Action\*  
Electric Final Reading

Assign To  
Jeffrey C. Harrison

Meter ID  
556178KL

Created Comment

Select the Department, Action, Assigned to, Meter and enter a created comment then tap the  to save it.





# Questions?