Service Orders and Maintenance Orders

Thursday: 1:45 – 3:00

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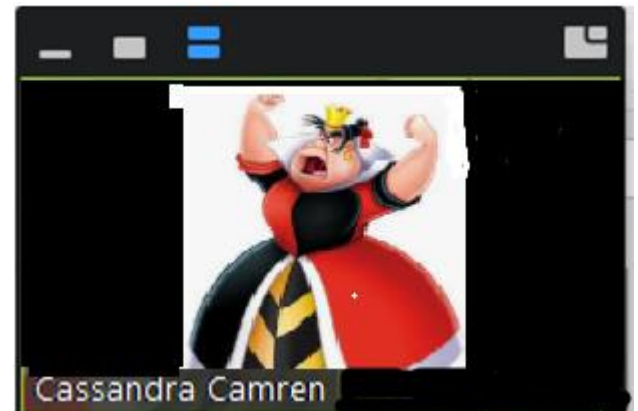
Monitor: **Brian Smith**

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.
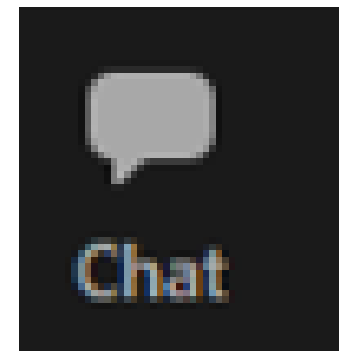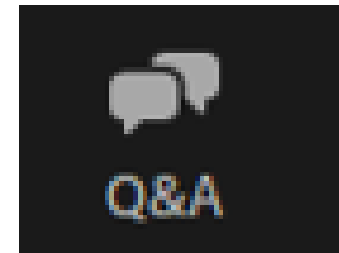
Presenter & Monitor Image

- 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.

Cassandra Camren

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

www.civicsystems.com 1-888-241-1517
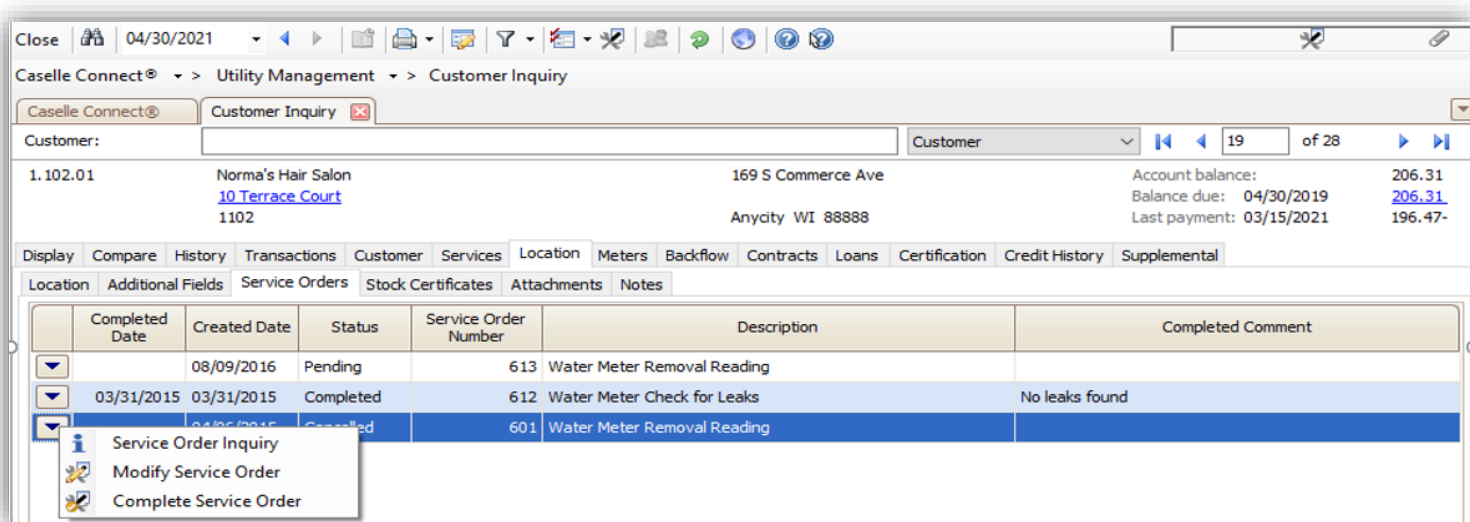
Service Order Overview

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.

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.

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.

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.

Action code: 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
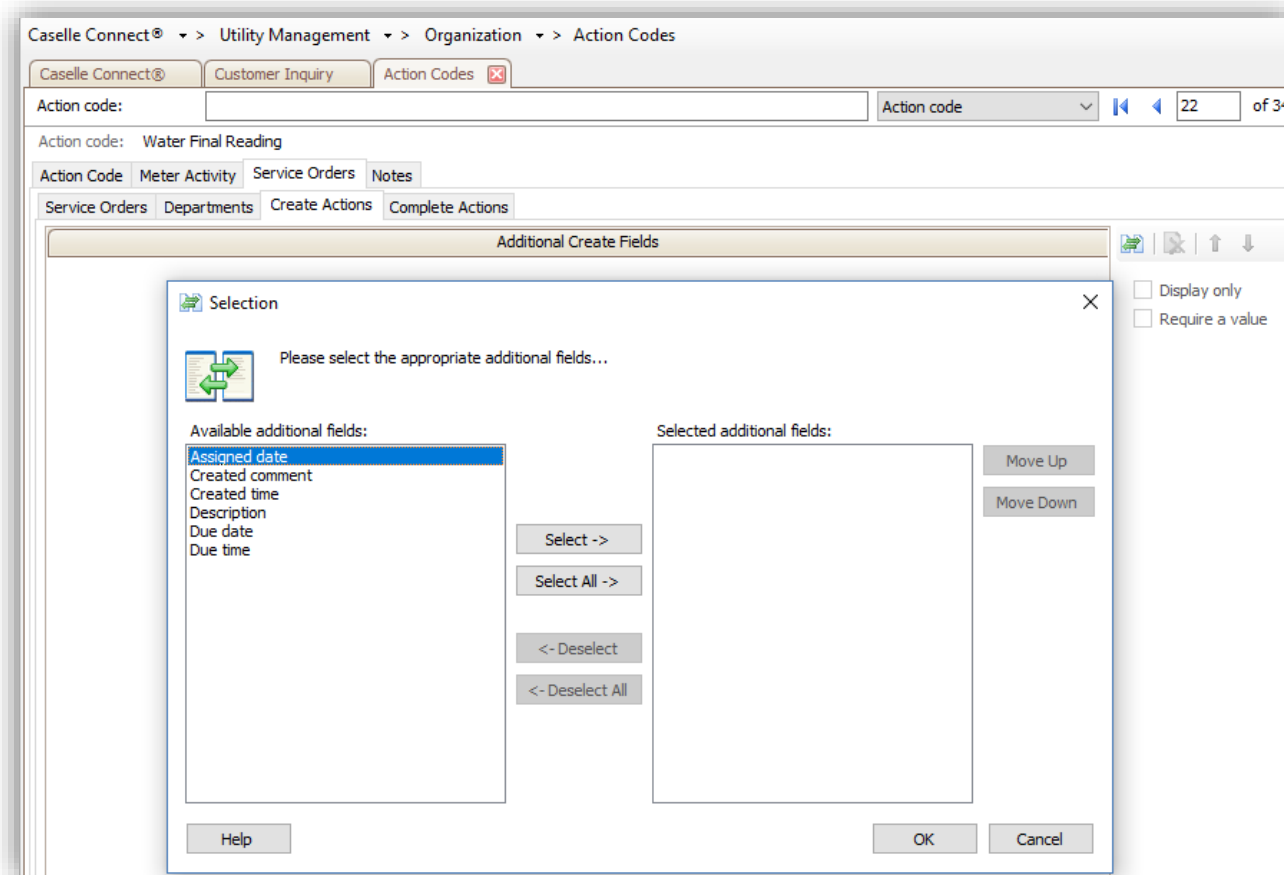
Service: 3 (Water)

Amount: 25.00

Description: Final Reading Fee
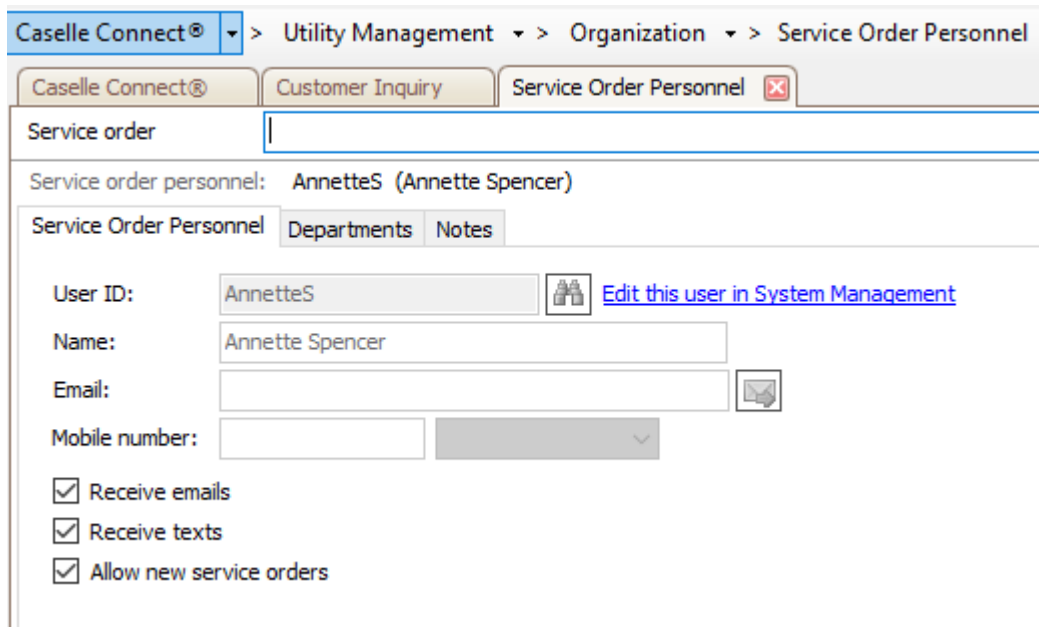
Action Codes - Additional Fields

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.

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.
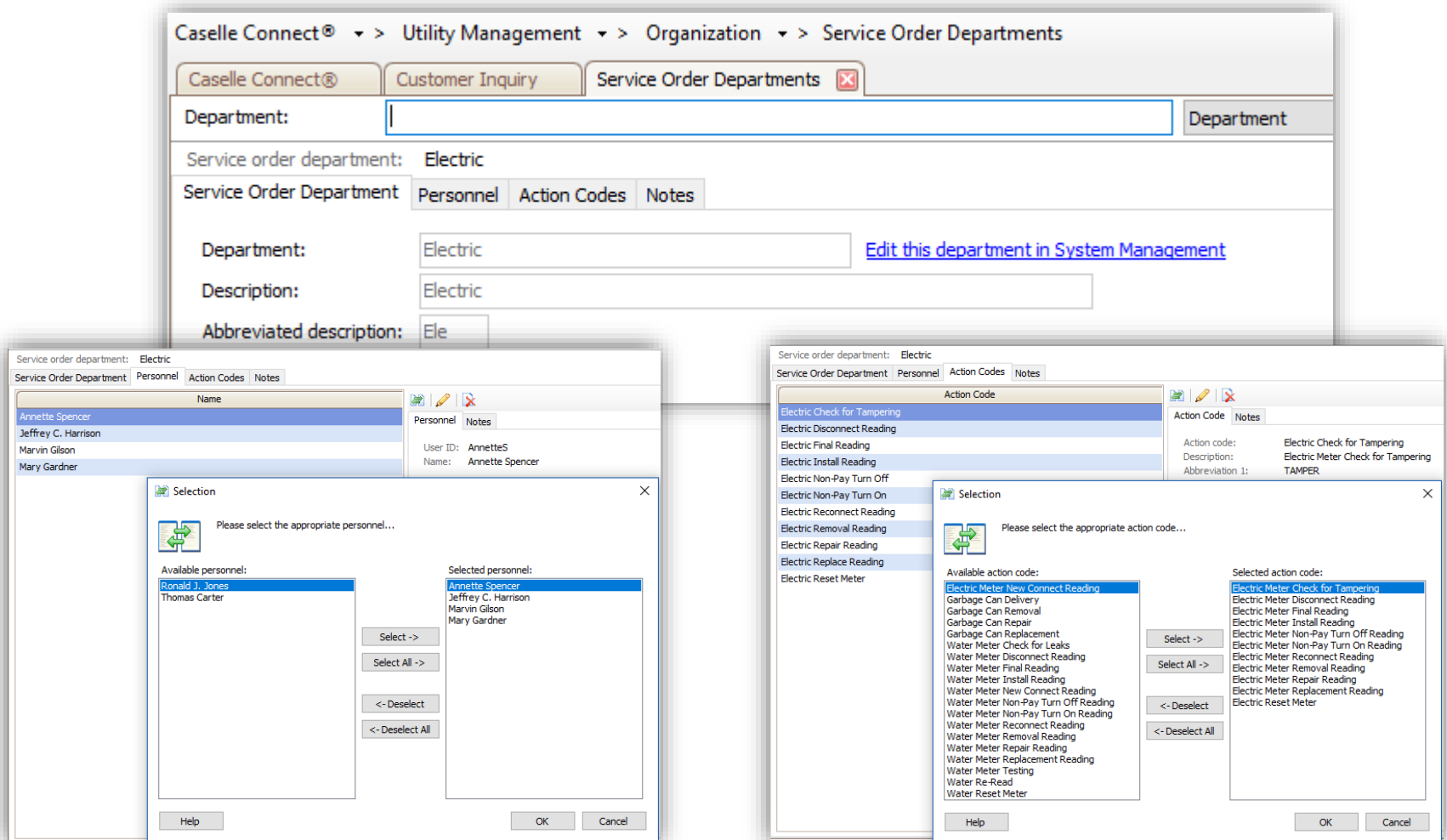
Departments

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.

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.

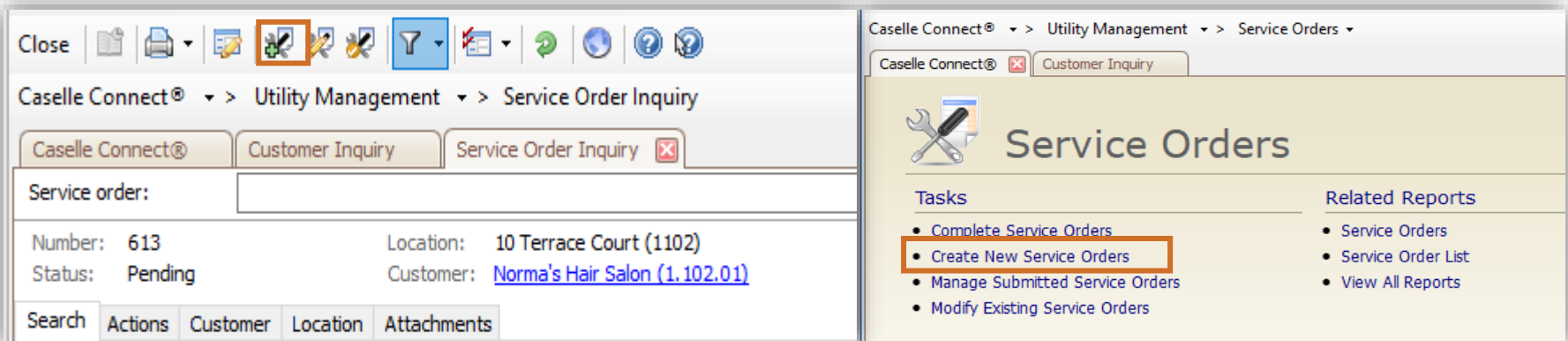# Create Service Orders

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 ℹ️ in front of a service order in history will open Service Order Inquiry for that Service order.

Enter the service order information. If using mobile service orders, make sure the box is check 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.

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.

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.

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.

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.
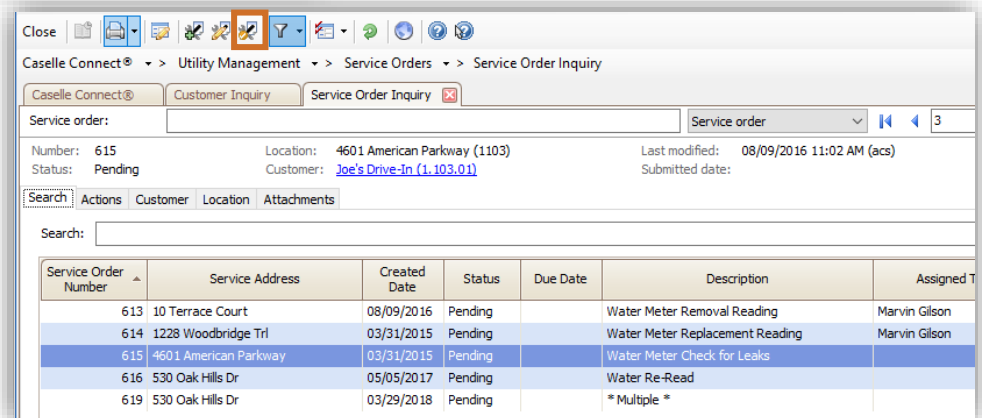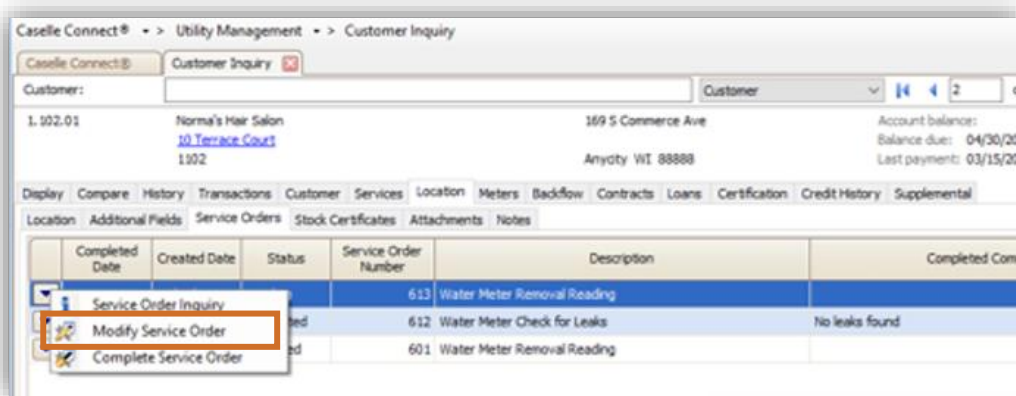
Complete Service Orders

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.

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.
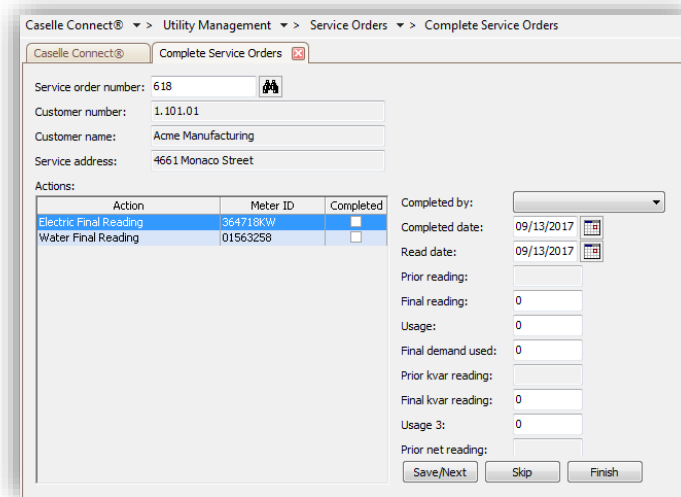
Complete Service Orders

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.

Printing Service Orders

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

Meter Activity Form

Anycity Corporation
SERVICE ORDER

Service Order No: 609   Created By: Jeffrey C. Harrison   Created Date: 09/13/2016

Service Information:

Service Address: 180 S Commerce Ave

Due Date:

Comments:

Customer Information:

Customer No: 1.101.01
Customer Name: Acme Manufacturing
Phone Number: (333) 825-9421

Action: **Water Replace Meter**

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:	_____

Comments:

Completed By: Completed Date:

_____   _____

Any Village   **Work Order**

Work Order No.   1

Name: ACME INC	Created Date: 01/20/2016 10:18 AM
Account #: 4-283690-00	Due Date: 01/20/2016
Route #: 6 Sequence #: 1820	Requested By:
Address: **1500 E NORTH AVE**	
Phone Number: 920-687-3915	

New Customer Information:

Request
Comments:

Task: **WATER Other**   -   **HIGH USAGE**

                                                    2,904,000

CURRENT METER:

Meter ID: **001028890**	Size: 3 INCH	Current Read Date: 01/11/2016
ERT #: 68987861	Mfg: BADGER	Current Read: 75,000
	Dials: 7	**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**	Size: 2 INCH	Current Read Date: 01/11/2016
ERT #: 68987849	Mfg: BADGER	Current Read: 38,000
	Dials: 7	**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

Service Order: 3   Page: 2

Task: **DEDUCT METER Other**   -   **HIGH USAGE**

                                                    204,140

CURRENT METER:

Meter ID: **097139893**	Size: 1 INCH	Current Read Date: 01/11/2016
ERT #: 68987834	Mfg: BADGER	Current Read: 960,000
	Dials: 7	**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

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 Comments: **CREATED COMMENT**

Task:

WATER Final Reading

CURRENT METER:

Meter ID:	**091284644**	Size:	5/8 INCH	Prior Read Date:	12/11/2015
EMR Code:	R	Mfg:	BADGER	Prior Read:	87,629
ERT #:	21977793			**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.

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.

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

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.

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.

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.

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.

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.

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.

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.

Enter the maintenance order information. If using the mobile app, make sure the box is check 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.

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

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.

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.
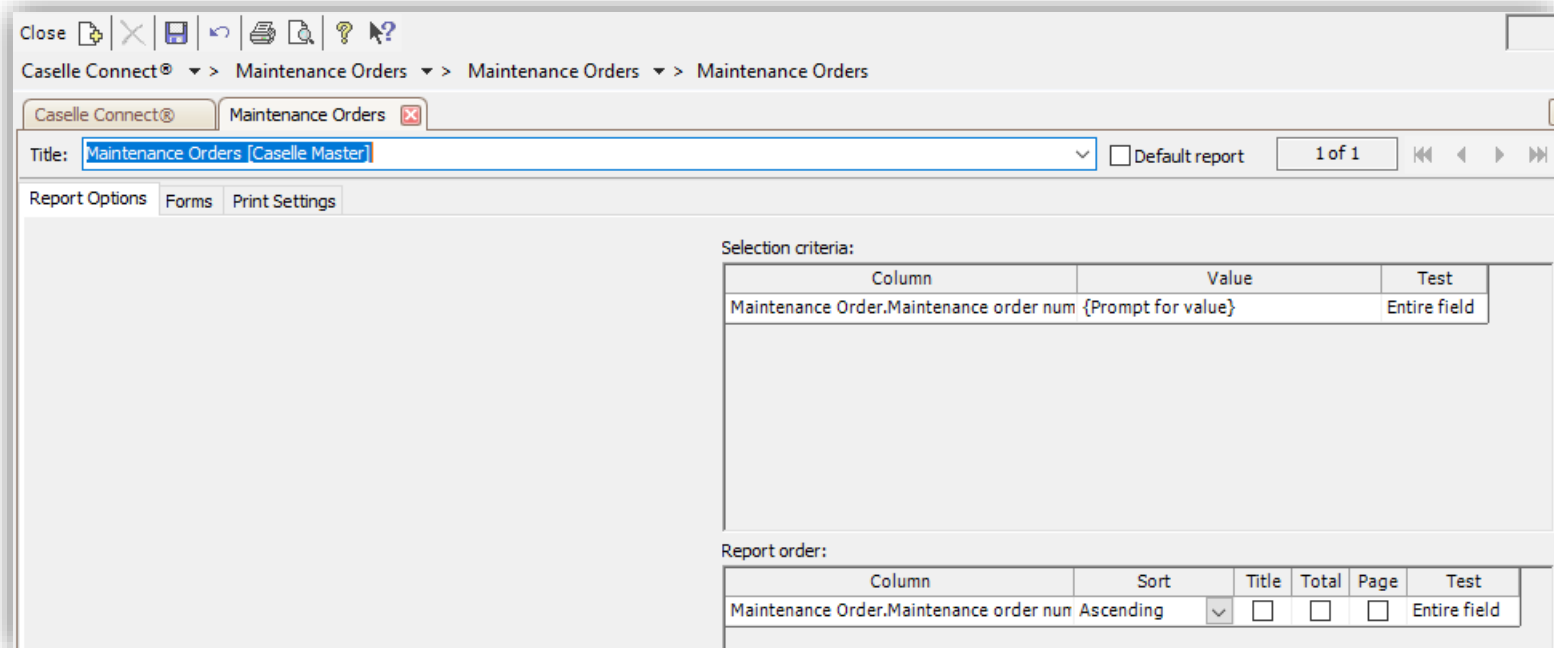
Complete Maintenance Orders

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.

Printing Maintenance Orders

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

Maintenance Order with sequence detail

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strong software, strong community

Anycity Corporation
MAINTENANCE ORDER

Maintenance Order No: **609**
Location: 110 N MAIN
Created By: MaryG   Created Date: 04/05/2014
Comments: Contact ran over the stop sign.

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

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.
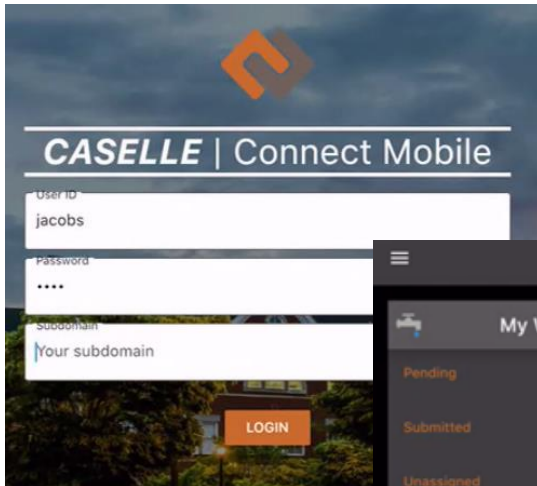
Maintenance Order List

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
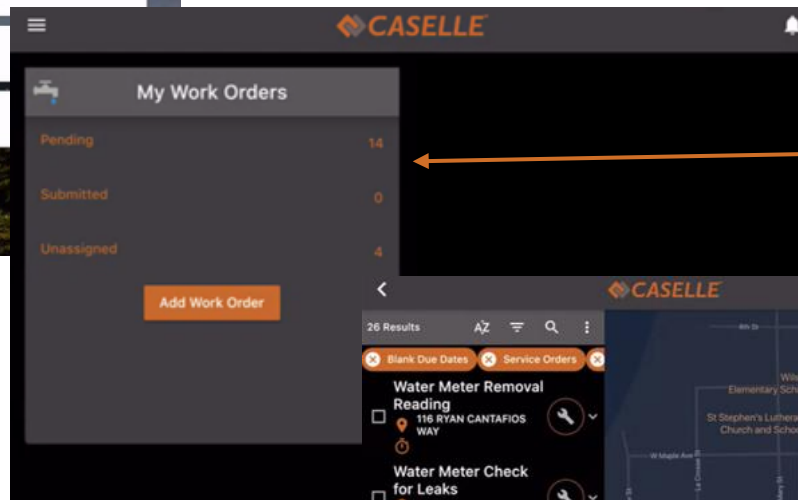
Log in using your Caselle username and password and your utility's Subdomain .
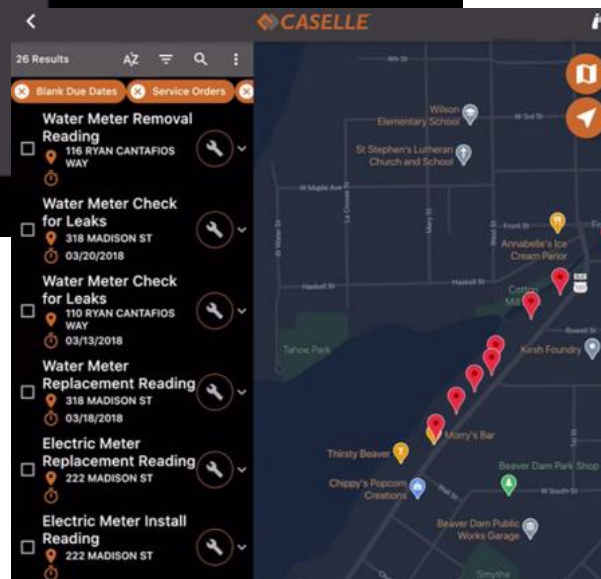
Work Orders will be categorized as Pending, Submitted & Unassigned. Work Orders can also be added here.

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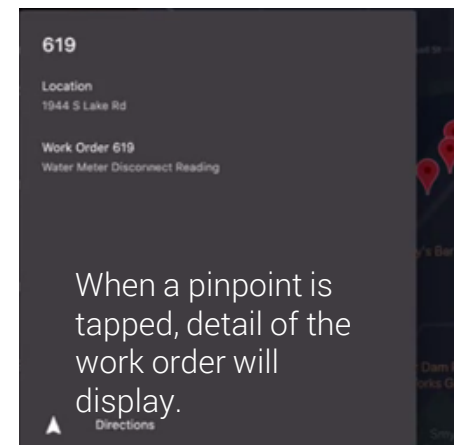
When a pinpoint is tapped, detail of the work order will display.

Mobile Work Orders App

Tapping on the [filter icon] will open filtering options. Filters include Departments, Users, Due Dates and Submitted Work Orders.
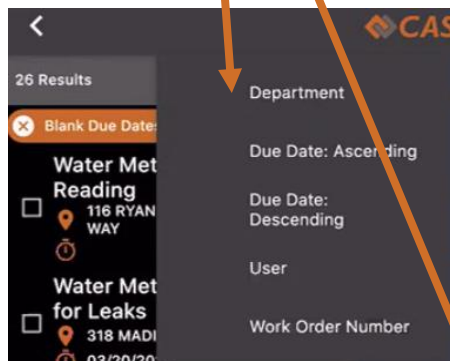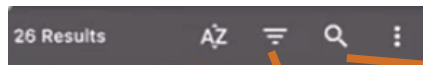
Tapping on the [AZ icon] will give the sort options
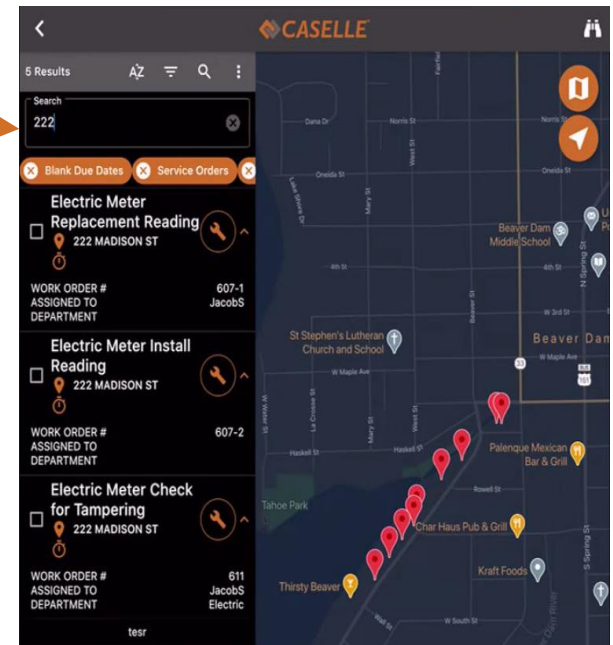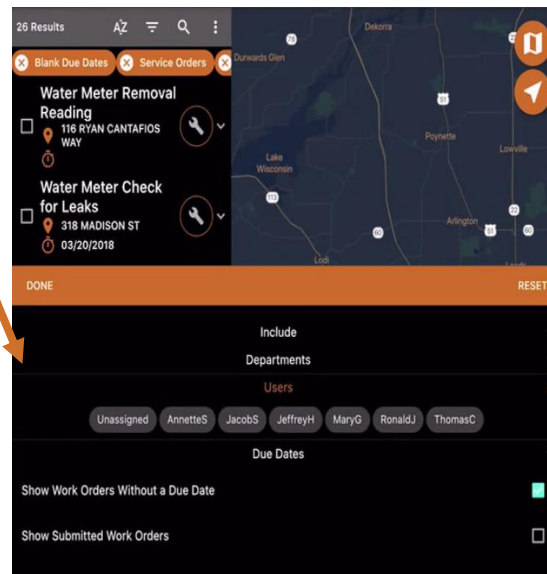
Tapping on the [search icon] will open the search function. This is a character search and will match any fields with what is typed in.

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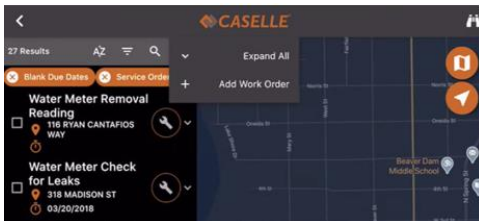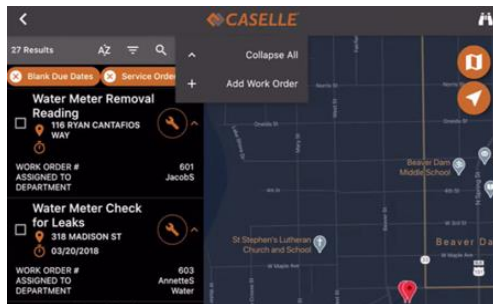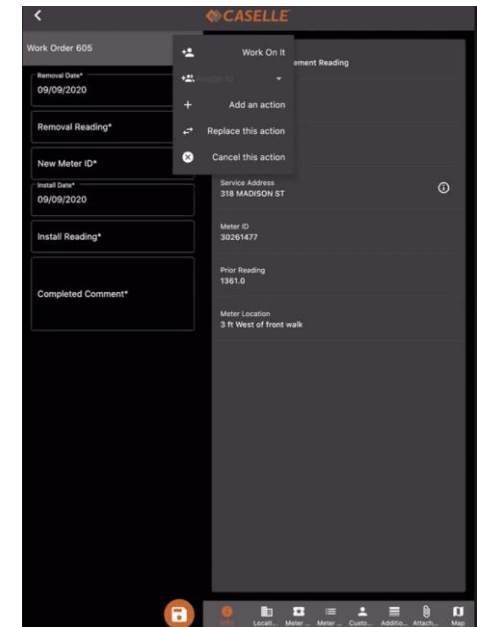
Tapping on the will give the option to Expand or Collapse additional information or Add Work Order.

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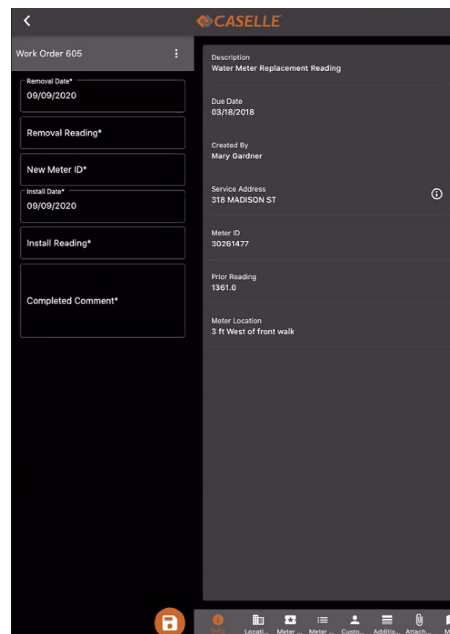
Tapping on the will give the option to Work On It (this assigns it to you). Assign it to someone else, Add, Replace or Cancel an Action.

Mobile Work Orders App

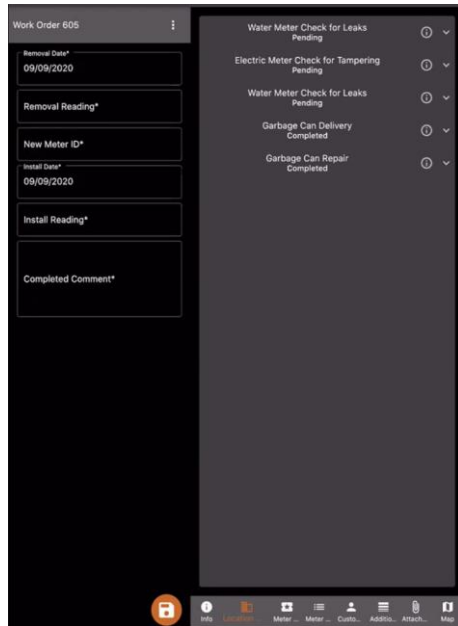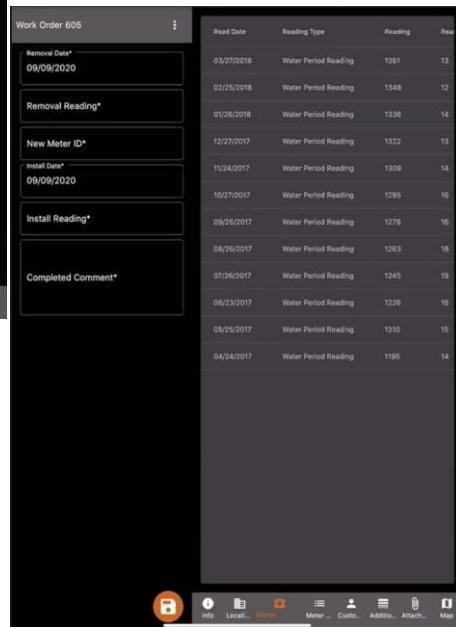The first Meter icon will display reading and usage history for the meter.

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

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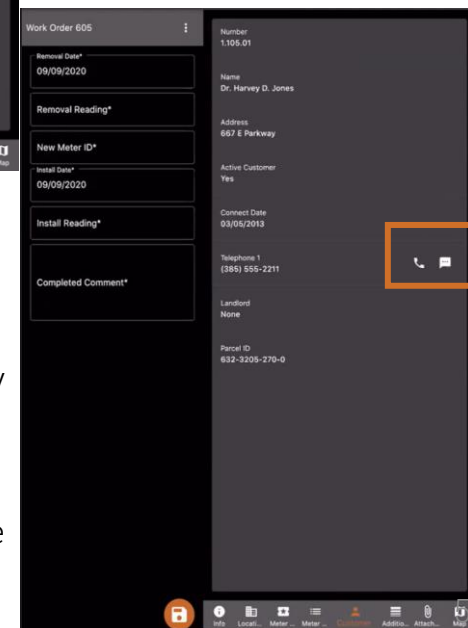
The Customer icon will display customer information including phone number and email address. These can be used to communicate with the customer by voice, text or email.

Mobile Work Orders App

Additional will list other meters at the location.
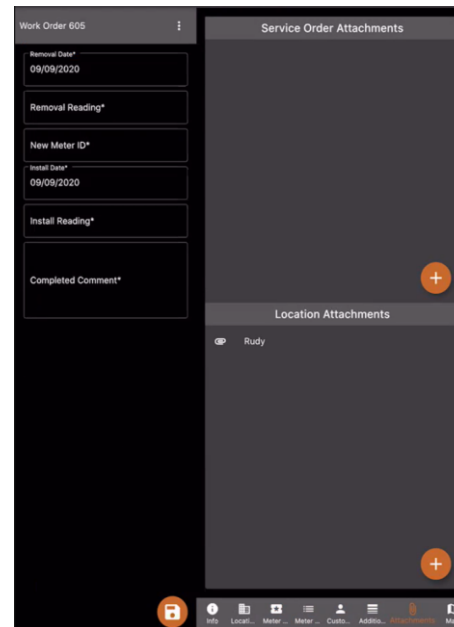
Map will show the location on a map. Tapping on the pinpoint will give the option to get directions based on your current location.

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.

Mobile Work Orders App

< ◆CASELLE 🔭   ← Any property in the system can be accessed by tapping on the binoculars.

← Madison   ×

210 MADISON ST (632-1268-850-0)
BEAVER DAM WI 53916

222 MADISON ST (632-3205-260-0)
BEAVER DAM WI 53916

318 MADISON ST (632-3205-270-0)
BEAVER DAM WI 53916

Type in any part of the address for the property. Any matching properties will display.
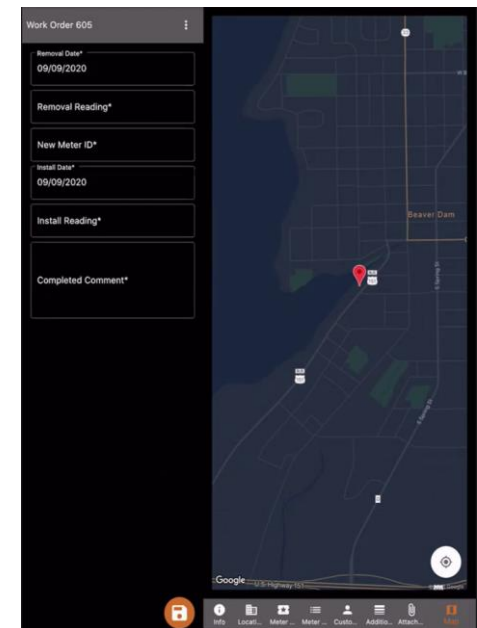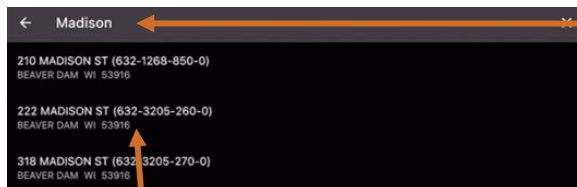
Tap on the desired location and the Account information will display.

◆CASELLE   +
222 MADISON ST (632-3205-260-0)
BEAVER DAM WI 53916

Customer #
1.104.01

Customer Name
Dr. Ronald T. Smith

Address
222 MADISON ST

City, State Zip
BEAVER DAM WI 53916

Connect Date
06/25/2013

Customer | Location History | Meters | Meter Activity | Attachments | Map

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?