

## Service Orders and Maintenance Orders

### Service Orders vs Maintenance Orders

Service Orders	Maintenance Orders
Designed to organize and track work requests that are associated with a customer in Utility Management	Designed to organize and track work requests that are NOT associated with a customer in Utility Management
Organize personnel and action codes by department	Organize personnel and action codes by department
Customize functionality by action code	Customize functionality by action code
Interface with Utility Management to update service and billing information	Combine multiple tasks into one maintenance order
Create billings when completing a service order	Track work requests, assignments and completion
Combine multiple tasks into one service order	
Streamline the new customer process	

### Service Order Inquiry

Utility Management > Service Orders > Service Order Inquiry

Allows you to view all details about the Service Order including information from Create New Service Order, New Customer Information, and Submitted (information sent from the mobile app)

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

Caselle Connect® Service Order Inquiry

Service order:  Service order  1 of 9

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

Search Actions Customer Location Attachments

Search:  Show Detail

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

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

Caselle Connect® Service Order Inquiry

Service order:  Service order 1 of 9

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

Search Actions Customer Location Attachments

Description	Status
Water Meter Removal Reading	Pending

Action Action Created Action Canceled Action Completed New Customer Submitted

Department: Action code: Water Removal Reading Meter information  
 Description: Water Meter Removal Reading Meter ID: 35620041  
 Due date: Size: 1  
 Due time: Multiplier: 1.0000  
 Status: Pending

Field	Data
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## Customer Inquiry

Utility Management > 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 the Location > Service Orders tab in Customer Inquiry.

Close 04/30/2021

Caselle Connect® > Utility Management > Customer Inquiry

Caselle Connect® Customer Inquiry

Customer:  Customer 19 of 28

1.102.01 Norma's Hair Salon 169 S Commerce Ave Account balance: 206.31  
[10 Terrace Court](#) Balance due: 04/30/2019 [206.31](#)  
 1102 Anycity WI 88888 Last payment: 03/15/2021 196.47-

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

Location Additional Fields Service Orders Stock Certificates Attachments Notes

Completed Date	Created Date	Status	Service Order Number	Description	Completed Comment
08/09/2016	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
03/31/2015	03/31/2015	Completed	601	Water Meter Removal Reading	

Service Order Inquiry  
 Modify Service Order  
 Complete Service Order

There is a shortcut icon in the top menu that will take you directly to Create New Service Orders, this pulls the customer information into the form (looks like a wrench crossed with a shield).

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. Reminder: Service Order Inquiry ALWAYS opens with the filter for Pending status service orders; click on the filter icon to turn it off if you are wanting to look at a Completed/Cancelled status service order

This will also take you to Modify Service Order or Complete Service Order tabs

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## *Organization – Action Codes*

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Utility Management > Organization > Action Codes

At their most basic level, Action Codes are the foundation of Utility Management and allow for multiple actions to occur in Connect: meter changeouts, period meter readings, meter disconnects/reconnects, etc.

Some action codes are only meant to be used in the background (such as Period Meter Reading and New Connect) and cannot be used as Service Orders.

To incorporate an action code as a service order, under the Service Order tab, 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. Install Meter, Remove Meter, Replace Meter, Final Reading, 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 the option to Allow Batch Completion for service orders that do not affect meters or billing.

If you have charges associated with service orders, they can be set up to be created when a service order is completed.


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:  

Sequence detail form:  

☐ Allow batch completion

☒ Allow billings to be created with this action code


Service:

Amount:

Description:

When Creating, Assigning, or Completing a service order, additional system-defined or user defined fields can be set up 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 Complete Actions fields should match the fields selected on the Meter Activity tab of the Action Code including any Copy from old meter options.

Caselle Connect® > Utility Management > Organization > Action Codes

Caselle Connect® Action Codes 

Action code:  Action code 13 of 34

Action code: Electric Replace Reading

Action Code Meter Activity **Service Orders** Notes

Service Orders Departments Create Actions Complete Actions

**Additional Complete Fields**

- Read route
- Read sequence
- Meter location

☐ Display only  
☐ Require a value

**Additional New Complete Fields**

- Read route
- Read sequence
- Meter size
- Multiplier
- Meter location
- EMR code
- EMR ID

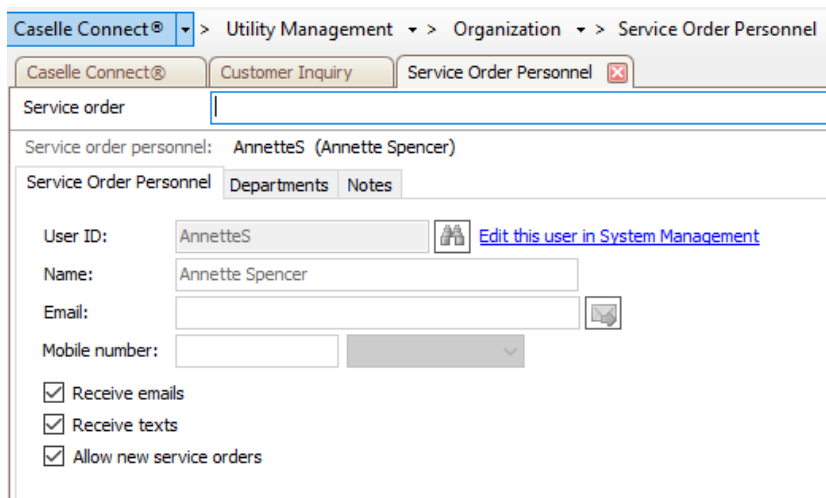
☐ Display only  
☐ Require a value  
☒ Copy from old meter

## Setup

Utility Management > Organization > Service Order Personnel

### Personnel

- Configure the personnel for assigning and completing service orders. Any personnel that will be using Service Order must be set up 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 Email and Mobile Number fields also come from System Management)



The screenshot shows the 'Service Order Personnel' setup form in the Caselle Connect application. 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 close button). The form has a 'Service order' dropdown menu. Below that, it says 'Service order personnel: AnnetteS (Annette Spencer)'. There are three sub-tabs: 'Service Order Personnel' (active), 'Departments', and 'Notes'. The 'Service Order Personnel' tab contains the following fields and options:

- User ID:** A text field containing 'AnnetteS' and a link icon with the text 'Edit this user in System Management'.
- Name:** A text field containing 'Annette Spencer'.
- Email:** A text field with an email icon to its right.
- Mobile number:** A text field with a dropdown arrow to its right.
- Checkboxes:**
  - ☒ Receive emails
  - ☒ Receive texts
  - ☒ Allow new service orders

Utility Management > Organization > Service Order Departments

### Departments

- Configure the departments for assigning and completing service orders. Any department that will be using Service Orders must be set up 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.

Casele Connect® > Utility Management > Organization > Service Order Departments

Casele Connect® Customer Inquiry Service Order Departments

Department:  Department

Service order department: Electric

Service Order Department Personnel Action Codes Notes

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

Description: Electric

Abbreviated description: Ele

Service order department: Electric  
Service Order Department Personnel Action Codes Notes

Personnel

Name

Annette Spencer  
Jeffrey C. Harrison  
Marvin Gison  
Mary Gardner

User ID: AnnetteS  
Name: Annette Spencer

Selection

Please select the appropriate personnel...

Available personnel:

Ronald J. Jones  
Thomas Carter

Selected personnel:

Annette Spencer  
Jeffrey C. Harrison  
Marvin Gison  
Mary Gardner

Select ->  
Select All ->  
<- Deselect  
<- Deselect All

Help OK Cancel

Service order department: Electric  
Service Order Department Personnel Action Codes Notes

Action Code

Electric Check for Tampering  
Electric Disconnect Reading  
Electric Final Reading  
Electric Install Reading  
Electric Non-Pay Turn Off  
Electric Non-Pay Turn On  
Electric Reconnect Reading  
Electric Removal Reading  
Electric Repair Reading  
Electric Replace Reading  
Electric Reset Meter

Action code: Electric Check for Tampering  
Description: Electric Meter Check for Tampering  
Abbreviation: TAMPER

Selection

Please select the appropriate action code...

Available action code:

Electric Meter New Connect Reading  
Garbage Can Delivery  
Garbage Can Removal  
Garbage Can Repair  
Garbage Can Replacement  
Water Meter Check for Leaks  
Water Meter Disconnect Reading  
Water Meter Final Reading  
Water Meter Install Reading  
Water Meter New Connect Reading  
Water Meter Non-Pay Turn Off Reading  
Water Meter Non-Pay Turn On Reading  
Water Meter Reconnect Reading  
Water Meter Removal Reading  
Water Meter Repair Reading  
Water Meter Replacement Reading  
Water Meter Testing  
Water Re-Read  
Water Reset Meter

Selected action code:

Electric Meter Check for Tampering  
Electric Meter Disconnect Reading  
Electric Meter Final Reading  
Electric Meter Install Reading  
Electric Meter Non-Pay Turn Off Reading  
Electric Meter Non-Pay Turn On Reading  
Electric Meter Reconnect Reading  
Electric Meter Removal Reading  
Electric Meter Repair Reading  
Electric Meter Replacement Reading  
Electric Reset Meter

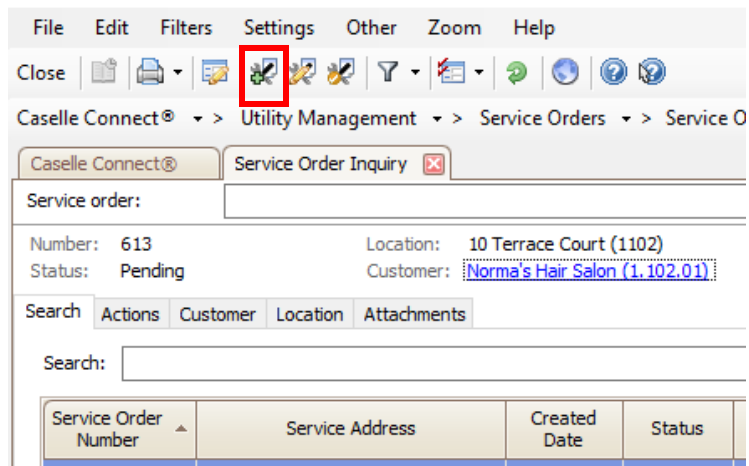
Select ->  
Select All ->  
<- Deselect  
<- Deselect All


Help OK Cancel

## Create Service Orders

Utility Management > Service Orders > Create Service Order

1. There are several ways to get to Create Service Orders. If Customer Inquiry or Service Order Inquiry is open, click on the Create Service Order icon or use the link on the Checklist.



2. Enter the Customer Number if needed – if using the icon from an Inquiry screen, the system will already have the customer pulled in
  - a. If the customer already has pending service orders, there will be a warning next to the customer field
  - b. All service orders associated with this location will be listed under Location history
  - c. Clicking on the  in front of a service order in history will open Service Order Inquiry for that Service Order
  - d. Complete fields Created Comment, Due Date, Due Time if needed
  - e. If using mobile service orders, make sure that the Display comment in the online work order list box is checked

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

### 3. Enter through or click over to the Actions tab

- Allows you to add an Action Code to the service order (or multiple Action Codes to one service order)
- Choose the department and personnel to assign the action to (if needed)
- Choose the appropriate action code
- Enter through to populate the meter information (if multiple meters are on the service, you can drop down to choose which one needs the action applied)
- The billing services are visible on the right side
- Each action added will appear at the bottom of the screen
- If you need to modify an action, click on the pencil, or click the X to delete/abort that action
- The system will assume you want to add another action, if you are finished, you can either click Enter again to Save or move onto the New Customer tab (for Final Reading action codes only)



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

Caselle Connect® Create New Service Orders

Service Order Actions New Customer Attachments

Department: Electric  
Assigned to: AnnetteS  
Action code: Electric Final Reading  
Meter ID: 394521KW



Service order number: 625  
Customer number: 1.106.01  
Name: Simpson Reception Center  
Service address: 710 E Parkway  
Location history:

Date	Number	Status	Description

Services:

Description	Meter ID	Status
Electric	394521KW	
Water	18547262	
Sewer		
Garbage	2857	
Yard Light		
Miscellaneous		
Shutoff		
Sales Tax		
Penalty		

Actions:

Action Code	Meter ID	Status
  Electric Final Reading	394521KW	Pending

#### 4. New Customer tab

- For Final Reading action codes, the New Customer information tab will activate so any information about the new customer can be added at this point
- This screen can have the same fields as Setup New Customer
- Any information added here will flow through to Setup New Customer when the service order and subsequent final is completed
- Once this is complete, a pop up for the Modify Mailing Address will allow the old customer's forwarding information to be updated at this time
- These options prevent the need to enter information multiple times
- If you do not have all the information for the new customer, you can fill out partial information here and add to it later
- Remember: Address 1 and Address 2 fields are the mailing address, no need to fill it out here if it's the same as the Service Address
- Caution: If using the CoSigner/Owner Account trigger on Setup New Customer, you do NOT want to set it up at this point. On this screen, simply type Landlord/Cosigner/etc in the Name field as a reminder to check the Owner Account box when you get to Setup New Customer

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

Caselle Connect® Create New Service Orders

Service Order Actions New Customer Attachments

Name: Customer, New

Address 1:

Address 2:

City: Anycity

State/Province: WI

Zip/Postal code: 88888

Telephone 1: 888-567-1486

Telephone 2:

Work phone:

DL number:

Social Security number: 0

☐ Senior Citizen

Service order number: 625

Customer number: 1.106.01

Name: Simpson Reception Center

Service address: 710 E Parkway



Location history:

Date	Number	Status	Description
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Services:

Description	Meter ID	Status
Electric	394521KW	
Water	18547262	
Sewer		
Garbage	2857	
Yard Light		
Miscellaneous		
Shutoff		
Sales Tax		
Penalty		

Actions:

Action Code	Meter ID	Status
  Electric Final Reading	394521KW	Pending

## Modify Service Orders

Utility Management > Service Orders > Modify Existing Service Order

- Any open/pending service orders can be modified through Modify Existing Service Order
- Information can be modified on the Service Order, Action Codes or New Information tabs
  - Can include adding an additional action code to the existing service order (for example: Water Final Reading and then Check Meter for Leak)



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

Caselle Connect® Utility Bills Modify Existing Service Orders

Service Order Actions New Customer Attachments

Service order number: 625  
Customer: 214702 (791 Palisades Dr - Welling, Martin E.)  
Created comment:

☒ Display comment in the online work order list

Service order number: 625  
Customer number: 2.147.02  
Name: Welling, Martin E.  
Service address: 791 Palisades Dr  
Location history:

Date	Number	Status	Description
06/06/2013	200	Completed	Water Meter Install Reading
08/30/2022	625	Pending	Water Meter Final Reading

Services:

Description	Meter ID	Status
Electric	511148KW	
Water	34125667	
Water - Meter 2	34125660	
Sewer		
Garbage	5887	
Miscellaneous		
Shutoff		
Sales Tax		
Penalty		

Actions:

Action Code	Meter ID	Status
Water Final Reading	34125660	Pending

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

Caselle Connect® Utility Bills Modify Existing Service Orders

Service Order Actions New Customer Attachments

Department: Water  
Assigned to:  
Action code: Water Check for Leaks  
Meter ID: 34125660

Service order number: 625  
Customer number: 2.147.02  
Name: Welling, Martin E.  
Service address: 791 Palisades Dr  
Location history:

Date	Number	Status	Description
06/06/2013	200	Completed	Water Meter Install Reading
08/30/2022	625	Pending	Water Meter Final Reading

Services:

Description	Meter ID	Status
Electric	511148KW	
Water	34125667	
Water - Meter 2	34125660	
Sewer		
Garbage	5887	
Miscellaneous		
Shutoff		
Sales Tax		
Penalty		

Actions:

Action Code	Meter ID	Status
Water Final Reading	34125660	Pending

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

Caselle Connect® Utility Bills Modify Existing Service Orders

Service Order Actions New Customer Attachments

Name: New Customer  
Address 1:  
Address 2:  
City: Anycity  
State/Province: WI  
Zip/Postal code: 88888  
Telephone 1:  
Telephone 2:  
Work phone:  
DL number:  
Social Security number: 0  
☐ Senior Citizen

Service order number: 625  
Customer number: 2.147.02  
Name: Welling, Martin E.  
Service address: 791 Palisades Dr  
Location history:

Date	Number	Status	Description
06/06/2013	200	Completed	Water Meter Install Reading
08/30/2022	625	Pending	Water Meter Final Reading

Services:

Description	Meter ID	Status
Electric	511148KW	
Water	34125667	
Water - Meter 2	34125660	
Sewer		
Garbage	5887	
Miscellaneous		
Shutoff		
Sales Tax		
Penalty		

Actions:

Action Code	Meter ID	Status
Water Final Reading	34125660	Pending

3. Cancelling a Service Order in Modify Existing Service Order
  - a. In Modify Existing Service Order, enter the service order number and hit enter
  - b. With the service order pulled up this way, you can click on the Delete icon
  - c. Cancel the current service order
    - i. Can be cancelled if customer cancelled the request (such as a property sale no longer going through, final reading no longer needed)
    - ii. Will ask for a cancellation note to be made for record purposes; note the date and information about the cancellation
    - iii. If multiple action codes on service order, one action can be cancelled while the other remains pending
    - iv. Location will keep record that service order was made and cancelled
  - d. Permanently delete the current service order
    - i. Used only if there should be NO RECORD of the service order existing ie entering the service order on the wrong account, training purposes
  - e. Abort changes on the current service order
    - i. Undo button for any changes made, reverts back to saved service order

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

Caselle Connect® Utility Bills Modify Existing Service Orders

Service Order Actions New Customer Attachments

Service order number: 625

Customer: 214702 (791 Palisades Dr, "Welling, Martin E.")

Created comment:

☒ Display comment in the online work order list

Service order number: 625  
Customer number: 2,147.02  
Name: Welling, Martin E.  
Service address: 791 Palisades Dr  
Location history:

Date	Number	Status	Description
06/06/2013	200	Completed	Water Meter Install Reading
08/30/2022	625	Pending	Water Meter Final Reading

**Delete/Abort**

☒ Cancel the current service order

☒ Permanently delete the current service order

☒ Abort changes on the current service order

Help Cancel

Meter ID	Status
511148KW	
34125667	
34125660	
5887	

Shutoff  
Sales Tax  
Penalty

Actions:


Action Code	Meter ID	Status
Water Final Reading	34125660	Pending

## Completing Service Orders

### Utility Management > Service Orders > Complete Service Order

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

Caselle Connect® Complete Service Orders

Service order number:  

Customer number:


Customer name:

Service address:

Actions:

Action	Meter ID	Completed

Completed by:


Completed date:  

Save/Next Skip Finish

- Completing service orders does multiple things in the system
  - Completes the service order for all action codes included
  - If a meter install, remove, or replacement it creates the meter activity record for the meter change
  - If a final reading, completing will lead you through the Final Bill Process
- HINT: The Enter key is crucial in this screen
- Enter (or search for) the service order number you wish to complete
- Hit Enter key to populate the service order
- Complete the fields as necessary (remember that each action code may have different fields to complete based on choices set up on the action code)

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

Caselle Connect® Manage Submitted Service... Complete Service Orders

Service order number: 621 

Customer number: 2.149.01

Customer name: Bates, William S.

Service address: 733 Palisades Dr

Actions:

Action	Meter ID	Completed
Water Check for Leaks	23468972	<input checked="" type="checkbox"/>

Completed by: mgilson Marvin Gilson

Completed date: 04/11/2022

Activity date: 04/11/2022

Prior read: 1449

Reading: 1452







Completed comment: No leak found.

Save/Next Skip Finish


### If using the mobile app:

#### Utility Management > Service Orders > Manage Submitted Service Orders

1. By starting at Manage Submitted Service Orders you can choose to complete via batch or single mode (this is an option set on the action code)
2. Next to each service order is a dropdown arrow that will allow you to Display Submitted information or Delete Submitted information
  - a. Use this to see the information entered into the app directly
  - b. Deleting submitted information allows you to then modify a service if need be and have a technician submit the information again
3. For the Batch mode simply click on the box next to the service orders you want to complete and click the GO button in the menu





Close      

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

Caselle Connect® Manage Submitted Service... 


Service orders: Number of service orders selected: 0


Batch (2) Single (0)

			Service Order Number	Service Address	Created Date	Imported Date	Due Date	Description	Assigned To	Department
<input type="checkbox"/>			621	733 Palisades Dr	04/21/2021	04/21/2021		Water Meter Check for L...		Water
<input type="checkbox"/>			622	540 Oak Hills Dr	04/21/2021	04/21/2021		Water Meter Check for L...		Water

- For Single mode, click on the pencil next to the service order to open Complete Service Order

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

Caselle Connect® Manage Submitted Service... Complete Service Orders 

Service order number:  

Customer number:


Customer name:


Service address:

Actions:

Action	Meter ID	Completed
Water Check for Leaks	23468972	<input type="checkbox"/>

Completed by:  Marvin Gilson

Completed date:  

Activity date:  

Prior read:

Reading:

Completed comment:

- Submitted information will populate automatically (as you ENTER through the fields)
- If necessary, enter additional information manually
- Continue to Complete Service Order Section same as non-app users

## Printing Service Orders

Utility Management > Reports > Service Order  
Utility Management > Reports > Service Order List

Service orders can be printed upon creation or by Utility Management > Reports > Service Orders  
Forms will look different for various service orders based on setup of the Form Sequence chosen on the Action Code in Organization

Caselle Connect® > Utility Management > Reports > Service Orders

Caselle Connect® Service Orders ✕

Title:  ☐ Default report 1 of 1 ⏮ ⏪ ⏩ ⏭

Report Options Forms Print Settings

Selection criteria:

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

**Anycity Corporation**  
SERVICE ORDER

Service Order No: 625 Created By: admin Created Date: 08/30/2022

**Service Information:**

Service Address: 791 Palisades Dr

**Due Date:**

Comments:

**Customer Information:**

Customer No: 2,147.02  
Customer Name: Welling, Martin E.  
Phone Number: 920-745-3284

**Action: Water Final Reading**

**Current Meter Information:**

Meter ID: 34125660  
Manufacturer: Neptune  
Size: 150  
Serial No: 6672W  
Last Reading: 13,848  
Current Reading: \_\_\_\_\_

Comments:

Completed By: \_\_\_\_\_

Completed Date: \_\_\_\_\_

**Anycity Corporation**  
SERVICE ORDER

Service Order No: 615 Created By: Mary Gardner Created Date: 03/31/2015

**Service Information:**

Service Address: 4601 American Parkway

**Due Date:**

Comments:

**Customer Information:**

Customer No: 1,103.01  
Customer Name: Joe's Drive-In  
Phone Number: 608-444-3355

**Action: Water Check for Leaks**

**Current Meter Information:**

Meter ID: 22034628  
Manufacturer: Neptune  
Size: 1  
Serial No: 2763W  
Last Reading: \_\_\_\_\_  
Current Reading: \_\_\_\_\_

Comments:

Completed By: \_\_\_\_\_

Completed Date: \_\_\_\_\_

## Utility Management > Reports > Service Order List

The best way to pull a list of pending/outstanding service orders – recommended to print on a regular basis to ensure all service orders are completed (or cancelled if necessary)





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

Caselle Connect® 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: All To: All

[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)

☒ mgilson (Marvin Gilson)

☒ 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"/>

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 Pallsades 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