Service Level

A "Service Level" determines how you will charge a customer for a service call. This includes billing for parts and labor, or time and material. Service levels are assigned at the site and system levels. You can use one service level for all work order appointments, or you can create different service levels for different uses, for example, you may have one service level for Residential customers and another one for Commercial accounts.

Adding a New Service Level

Click "Add Service Level" in the upper right corner.

Service Level

Fill out the service level fields

Service Level Code/Description

Input a code and description for this service level in these fields. The "Service Level Code" can be an abbreviation of the description.

Base Service Fee

Input the base amount you would charge just for your technician to show up.

Service Item Code

Select a service item code from the drop-down box.

Invoice Labor

Select this checkbox if you will be billing for labor based on this service level.

Hourly Labor Rate

Input how much you will charge the customer hourly for labor if applicable.

Labor Item Code

Select a labor item code from the drop-down box.

Billing Increments

Choose from the dropdown box what minute increments you will bill the customer in. For example, if you charge an "Hourly Labor Rate" of $60.00 and choose a "Billing Increment" of 15 minutes, then you will charge the customer $15.00 every 15 minutes for labor.

Bill After Minutes

Type the number of minutes a customer gets before you start charging them the hourly labor rate. For example, if you input "30" in this field, then you will begin charging the customer the hourly billing rate after the technician has completed 30 minutes of work at the site.

Example for clarification (corresponds to values in example photo above):

- $75 for a technician to show up
- Hourly rate begins after the first 30 minutes
- After those 30 minutes, you bill at $60 an hour in 15-minute increments
- If you worked 36 minutes overall you would charge $90, ($75 + $15 = $90)

Inactive

Select this checkbox if you would like to deactivate this service level.

Invoice Parts

Select this checkbox if you will be invoicing for parts for this service level.

Other Charges

For each service level that your company has, you can add "Other Charges", or an additional fee you will be charging the customer. Select this checkbox if you would like to add "Other Charges".

Other Item Code

If applicable, select an "Other Item Code" from the dropdown box that defines the "Other Charges" you are billing for. Examples include a "trip fee" or "after-hours" fee.

Other Amount

Input the price you will be charging the customer for the "Other Charges".

Save

Click "Save" in the upper right corner to update.