

How to adjust the Service Fee on a Work Order

Last Modified on 10/18/2024 5:15 pm EDT

Service fee is part of the service level. Follow these steps below to edit your service fee.

1. Click on the Setup tab up top and then click on the Service Levels (under operations)

The screenshot shows the ABC Company software interface. At the top, there is a navigation bar with the company name "ABC Company" and user information "Erick". Below this is a search bar for customers. A main menu contains various tabs: Customers, Invoices, Payments, RMR, Work Orders, Proposals, Calendar, GL, Reports, Setup, and Accounting. The "Setup" tab is selected, and a sub-menu is displayed with categories: Company, Accounting, Operations, Items & Parts, Utilities, Uploaders, Exports, and Other. The "Service Levels" option under the "Operations" category is highlighted in blue.

2. Click on the pencil icon to the right of the Service Level in question

The screenshot shows the "Service Levels" page in the ABC Company software. At the top, there is a navigation bar with the company name "ABC Company" and user information "Erick". Below this is a search bar for customers. A main menu contains various tabs: Customers, Invoices, Payments, RMR, Work Orders, Proposals, Calendar, GL, Reports, Setup, and Accounting. The "Setup" tab is selected, and the "Service Levels" page is displayed. The page has a table with the following columns: Service Level Code, Name, Invoice Parts, Invoice Labor, and Action. The first row in the table is "T&M - \$49.95 Trip" with a name of "Time and Material- \$49.95", "Yes" for Invoice Parts, "Yes" for Invoice Labor, and a pencil icon in the Action column. The page also has a pagination bar at the bottom showing "11 - 11 of 11 items".

Service Level Code	Name	Invoice Parts	Invoice Labor	Action
T&M - \$49.95 Trip	Time and Material- \$49.95	Yes	Yes	

3. Edit the Base Service Fee to whatever you would like and then click Save

ABC Company

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Customers Customer Search: name - cust #

Customers Invoices Payments RMR Work Orders Proposals Calendar GL Reports Setup Accounting

Cancel Save

Service Level:

Service Level Code: T&M - \$49.95 Trip
 Description: Time and Material- \$49.95
 Base Service Fee: \$49.95
 Service Item Code: Service Labor
 Invoice Labor:
 Hourly Labor Rate: \$115.00
 Labor Item Code: Deposit
 Billing Increment: 30 Minutes
 Bill After Minutes: 60

Misc:

Inactive:
 Inactive Date:
 Invoice Parts:
 Other Charges:
 Other Item Code: trip fee
 Other Amount: \$0.00

4. When you create a new work order it will display the updated Service Fee

ABC Company

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Customers Customer Search: name - cust #

Customers Invoices Payments RMR Work Orders Proposals Calendar GL Reports Setup Accounting

Edit Work Order - 2600 : Rocky Balboa - 2274 Customer Void Cancel Save

Site: #1 Rocky Balboa - 78...
 Tax: 2Jtest - 5.0000%
 789 Main St.
 Cleveland, OH 44105
 Requested By
 Phone
 rocky@gmail.com
 Purchase Order Number
 Work Order Date: 10/7/2024

System: Select a System:
 Service Level: T&M - \$49.95 Trip
 Base: \$49.95 Labor: \$115.00
 Increment: 30 min. Bill After: 60 min.
 Warranty Labor: No Warranty
 Warranty Parts: No Warranty
 Sales Package: Select a Sales Package:

Type: Fire Inspection
 Status: New
 Salesperson: Dan Reynolds
 Technician: Please Select:
 Warehouse: Main Warehouse -...

Brief Description
 500 characters remaining

Service Fee	Labor	Items	Parts	Est Tax	Total	RMR
\$49.95	\$0.00	\$0.00	\$13.22	\$2.50	\$65.67	\$0.00

Appointments Items 0 Parts 1 RMR 0 Notes 0 Complete Site Parts Site Notes Zones 1 Utilities

Appointments ■ On Site ■ Dispatched ■ Scheduled ■ Completed ■ Confirmed ■ Declined ■ Break

+ New Appointment

App...	Appointment Time	Technician	Last Activity	Est Len...	Bill ...	Brea...	Labor
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