



Field Staff – Service Job

1. Clock in for the day with **Daily Timekeeping** on the top right

(Green = logged out - Red = logged in)

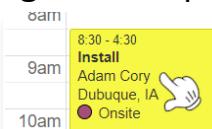


2. When you're ready to go to a **Job**

- a. You can view **Job** details Tap/Click
- b. Change **Technician status** to: "**In-Route**" (This lets dispatching know your/team's status)
- c. You have an option to contact the client by Phone/Email/or text by Selecting:

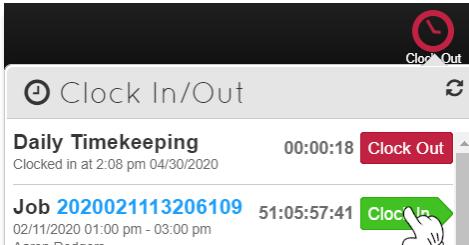
Contact Client

on the bottom Right



3. When you arrive to the **Job Site** change the **Technician status** to: "**Onsite**" (Ref: 2.-a.)

4. Go to the Clock on the top right-hand corner and **Clock In** to that **Job**



5. Diagnose what needs to be done for the **Job**

6. When you Complete Diagnosing the **Job**, Create an **Order** for the Service needed or

Items needed by viewing **Job** details. And Click/Tap

Create Order

(Ref: 2.-a.)

Note: *Create Order* means you are creating an Invoice/Work Order/Agreement, you should create an Order ONCE for a Service Job. If you already created an **Order**, Tap/Click on the **Job** on your **Calendar** and go to the **Call** to locate the **Order** you have already created.

7. Put notes in for Yourself/Installer, as well as notes for the Customer and the Comparable Options.

Notes for Installer

Notes for Client

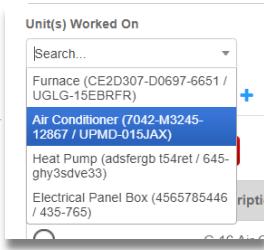
Notes for Best

Clients ONLY see **Notes for Client** and
Notes for (Option), NOT Notes for Installer

8. Select any **Units** you are working on

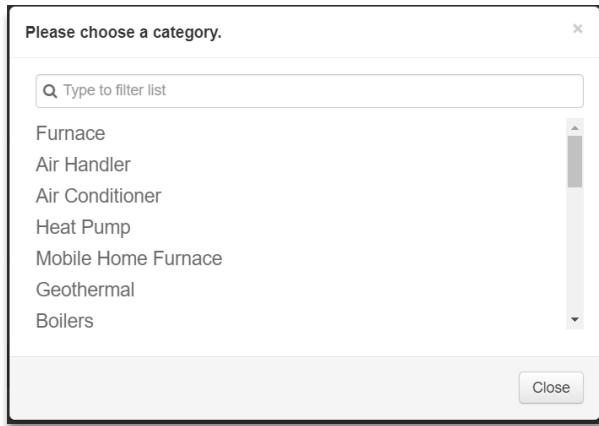
9. Tap/Click **+ Add Item**

Browse your Equipment, Parts, and Service Catalog



If you do not see any units, Tap/Click **Enter Data > Units** and add the Unit there before returning to the **Order Estimate**

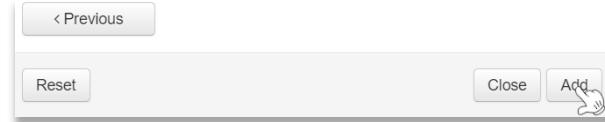
Use the **Filter bar** to quickly find Items (EX: I want a Copper Line Set. Searching "Copper" or "Line Set" will work, But Not "Copper Set")



Ex 1: Furnace> Lennox> 80% 2-Stage > 60k BTU 3 Ton

Ex 2: Service > Clean Electrical Contacts

Navigation is at the bottom of your Catalog, make sure to Tap/Click **Add** after each Item you Select.



*Note: When Selecting an Item or Service, you will see the Item **Highlight** like this. **IF** you are using **Inventory tracking**; the Item will show what truck it can be taken off of or it will show that it is not being tracked. You will not see the item at this point but it **IS STILL SELECTED***

10. Look over all the Items added and make sure there is nothing needs to be removed. To remove unwanted Items, select the item with the white dot on the left and **Remove**.

		Description	Price	Qty	Taxable	Total
(1)	Images	G 16 Air Conditioner 1.5 (GSX)	\$3,556.88	1	Include	\$3,556.88
(1)		Line Set 3/8 X 3/4 X 35' This will be sized for the new unit causing easy flow of the refrigerant and will be insulated for efficiency and prevent condensation leaks.	\$379.66	1	Include	\$379.66
<input checked="" type="checkbox"/>		3/8 X 3/4 X 40' LINE SET	\$428.40	1	Include	\$428.40

11. When Creating Comparisons Tap/Click on your Next Option

(Note: Best, Better, Good are the Defaults, your company may customize this)

12. Tapping/Clicking

Select Option

will chose the items for the **Invoice**

If the Client is not making a payment today, skip these steps and proceed directly to

[View Outputs > Client Agreement](#)



ThermoGrid®

Payments that will be made TODAY

1. Retail Options:

- a. **Partial** = A Partial payment will be taken today

i. Select: **Discounts, Fees, Payments**

\$ Payments, Discounts, Fees :

ii. Select: Payment type

iii. Change **Tax Rate** if needed and change **Payment Method**

iv. Input the amount that is to be paid today

v. Tap/Click **View Outputs > Client Agreement**

+ Discounts & Fees

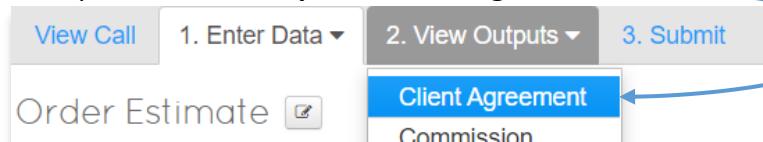
+ Payment (No Dealer Fee)

+ Payment (* Dealer Fee Available)

- b. **Full** = The Total payment for the Job will be taken today

i. Change **Tax Rate** if needed and change **Payment Method**

ii. Tap/Click **View Outputs > Client Agreement**



To add a second payment, chose the other Dealer Fee option that you did not chose for the first payment.

2. Scroll down and You will see **Payment** ► Tap on this for the payment options to show up. You will be able to capture a Credit Card ([CardConnect](#)) or a Check payment ([1st Pay Gateway](#))

3. Enter the Card information or Check information. Authorize, as well as Store the card for later use in this area. (*If the Client wants to pay later with this card, even if no payment is taken today, you can have the card on file by authorizing and saving*)

4. To **Capture** the payment from the Authorized card, Tap/click on the Cog/Gear Icon, this will also show if the card has been instantly approved.

Credit Card Transactions

	Authorize	Capture	Transaction #	Card Number	\$ Amount	
	Approved		121353062114	4062	\$1.00	<input type="checkbox"/>

Have the Client Enter name, sign and Save the Signature

Name

Signature


Signature Above



13. Tap/Click on **Submit Select the checkbox to verify and **Submit Order****

View Call 1. Enter Data 2. View Outputs 3. Submit

Submit Purchase Order

 I verify that the order is complete or ready to be scheduled for installation. All changes will be saved and the order will become read only.



Which boxes should I check?

14. Sign out of the Job & Change Technician status to: "Complete"

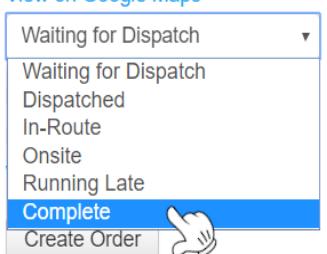
Contractor Demo Corey A 

Clock In/Out  

Job 2019072222401762 09/11/2019 01:30 pm - 03:10 pm Duane Schneider
Clocked in at 1:14 pm 01/11/2021

00:00:48  



Technician Status: 
Waiting for Dispatch
Waiting for Dispatch
Dispatched
In-Route
Onsite
Running Late
Complete
Create Order 

You may now check your **Calendar** and proceed to your next **Job**

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