Schedule an On Call Order

Last Modified on 12/02/2024 12:07 pm PST

Pathway: Customer > Search > Accounts

The following process applies to scheduling On-Call orders. Fields in red are required and must be completed in order to save and schedule the order. Fill in any additional fields based on your company's requirements for scheduling on-call orders.

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Permissions

The following permissions are required to add an on call order to a site:

Permission ID	Permission Name
5	View Account
6	View Site
89	Add On Call Work Order

Field Descriptions

Field	Description
Scheduled Date	The date the service is scheduled for.
Service Code	The service code for the service being completed.
Order Type	Generalizes the what the order is for.

Quantity	Indicates the quantity of services being created.
Requested By	Option to enter the name of the person who requested the service.
Contact	Displays a drop down of available contacts for the site.
Reason Code	Identifies the purpose for the on call order.
Prepayment	Prepayment may be required prior to servicing. This can be initiated by sending a prepayment request link to a designated account contact, or by charging the prepayment amount to a payment method on file."
Order Notes	Option to add notes for the driver to see.
PO Number	Field to enter the purchase order number if one applies.
Blanket PO	Drop down selection of available blanket purchase orders to which the charge can be linked.
External ID	The identification number for the work order that will display outside of navusoft.
Route	The route assigned for the on call service.
Charges	
Charges Must Match Equipment	Select to only charge a preset amount for equipment.
Charges Must Match Material	Select to only charge a preset amount for material.
Gross QTY	The total quantity amount.
No Charge QTY	Indicates an amount the customer will not be charged for.
Charge QTY	The amount at which charges will apply.
UOM	The unit of measurement that is used to calculate quantity.
Charge Code	The charge code applied.
Per Unit	The fee charged for each unit of the chargeable quantity.
Vendor Rate	The rate applied by the vendor that will be included in the charges.
Minimum Type	The minimum amount or quantity to charge the service for.
Minimum	The minimum amount work order will be charged.
Total	The total amount for the on call service being charged.

Create On Call Order - Calendar

If this method is used, the Scheduled Date will correspond to the calendar date for which the On Call order was created.

QTY 5	SERVICE CODE 3 Yard Trash S 4 Yard Trash S R 📋 <	ervice											
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ALENDAR	R 🗐 🔇							E11B	2x per week		\$ 227.70 per month		02/09/24
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- 1. Right-click on the requested servicing day from the Calendar in the customer's account.
- 2. Select Create On-Call Order from the pop-up list for the 'Create On Call Order' editor to display.

Create On Call Order - Account Menu

If this method is used, the Scheduled Date will default to the current date.

48973 Navusoft Pre	mier Waste							489	73002	Cloned Site				
Active Service Appointment Attachment Available Products	oa St CA 90015-1306 Net 20 ERY PRINTED		Active DIVISIC ACCOU CLASS BILL GR	n NT MGR OUP	QAWA House COMM Test 2	STE Account ERCIAL		2		2222 Clone Site Los Angeles, CA 900	015		Active DIVISION SERVICE RE SALES REP SOURCE	QAWAS GION QA Serv House A Call In
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Split Site into New Account			CHARGES											
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Ma	ar 10							CREATE						Mar 15
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- 1. Click the **Green +** to display the list of action options.
- 2. Select **On Call Order** from the pop-up list for the '*Create On Call Order*' editor to display.