

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.

CREATE ON CALL ORDER
? X

| | | | |
|------------------|--------------|------------|----------|
| SCHEDULE DATE | SERVICE CODE | ORDER TYPE | QUANTITY |
| 02/27/24 Tuesday | | | 1 |

REQUESTED BY

CONTACT

REASON CODE

ORDER NOTES

PREPAYMENT

PO NUMBER

BLANKET PO

EXTERNAL ID

ROUTE

CHARGES

+
 Charges must match Equipment

Charges must match Material

| GROSS QTY | NO CHARGE QTY | CHARGE QTY | UOM | CHARGE CODE | PER UNIT | VENDOR RATE | MINIMUM TYPE | MINIMUM | TOTAL |
|-----------|---------------|------------|-----|-------------|----------|-------------|--------------|---------|-------|
| | | | | | | | | | |

CREATE

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.

The screenshot shows a software interface with a calendar and a modal window. The calendar displays dates from Feb 25 to Mar 29. The modal window is titled 'CREATE ON CALL ORDER' and contains the following fields and options:

- SCHEDULE DATE: 03/07/24 Thursday
- SERVICE CODE: [Dropdown]
- ORDER TYPE: [Dropdown]
- QUANTITY: 1
- REQUESTED BY: [Text]
- CONTACT: [Text]
- REASON CODE: [Dropdown]
- ORDER NOTES: [Text]
- PREPAYMENT: [Checkbox]
- PO NUMBER: [Text]
- BLANKET PO: [Text]
- EXTERNAL ID: [Text]
- ROUTE: [Text]
- CHARGES: [List of charges with checkboxes]
- CREATE: [Button]

A red arrow points to the 'Create On Call Order' option in a context menu that appears over the calendar date Mar 13. The context menu includes the following options:

- Add Active Service
- Create On Call Order
- Add Appointment
- Add Note
- Add Task
- Add Manual Charge
- Add Account Request

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.

The screenshot displays a software interface for creating an 'On Call Order'. A left-hand menu is open, with a red arrow pointing to the 'On Call Order' option. The main window shows a 'CREATE ON CALL ORDER' dialog box with the following fields and sections:

- SCHEDULE DATE:** 02/20/24 Tuesday
- SERVICE CODE:** (dropdown menu)
- ORDER TYPE:** (dropdown menu)
- QUANTITY:** 1
- REQUESTED BY:** (text field)
- CONTACT:** (dropdown menu)
- REASON CODE:** (dropdown menu)
- ORDER NOTES:** (text area)
- PO NUMBER:** (text field)
- BLANKET PO:** (dropdown menu)
- EXTERNAL ID:** (text field)
- ROUTE:** (dropdown menu)
- CHARGES:**
 - Charges must match Equipment
 - Charges must match Material
- Table:**

| GROSS QTY | NO CHARGE QTY | CHARGE QTY | UOM | CHARGE CODE | PER UNIT | VENDOR RATE | MINIMUM TYPE | MINIMUM | TOTAL |
|-----------|---------------|------------|-----|-------------|----------|-------------|--------------|---------|-------|
| | | | | | | | | | |
- CREATE:** (button)

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.