Create On Call Order

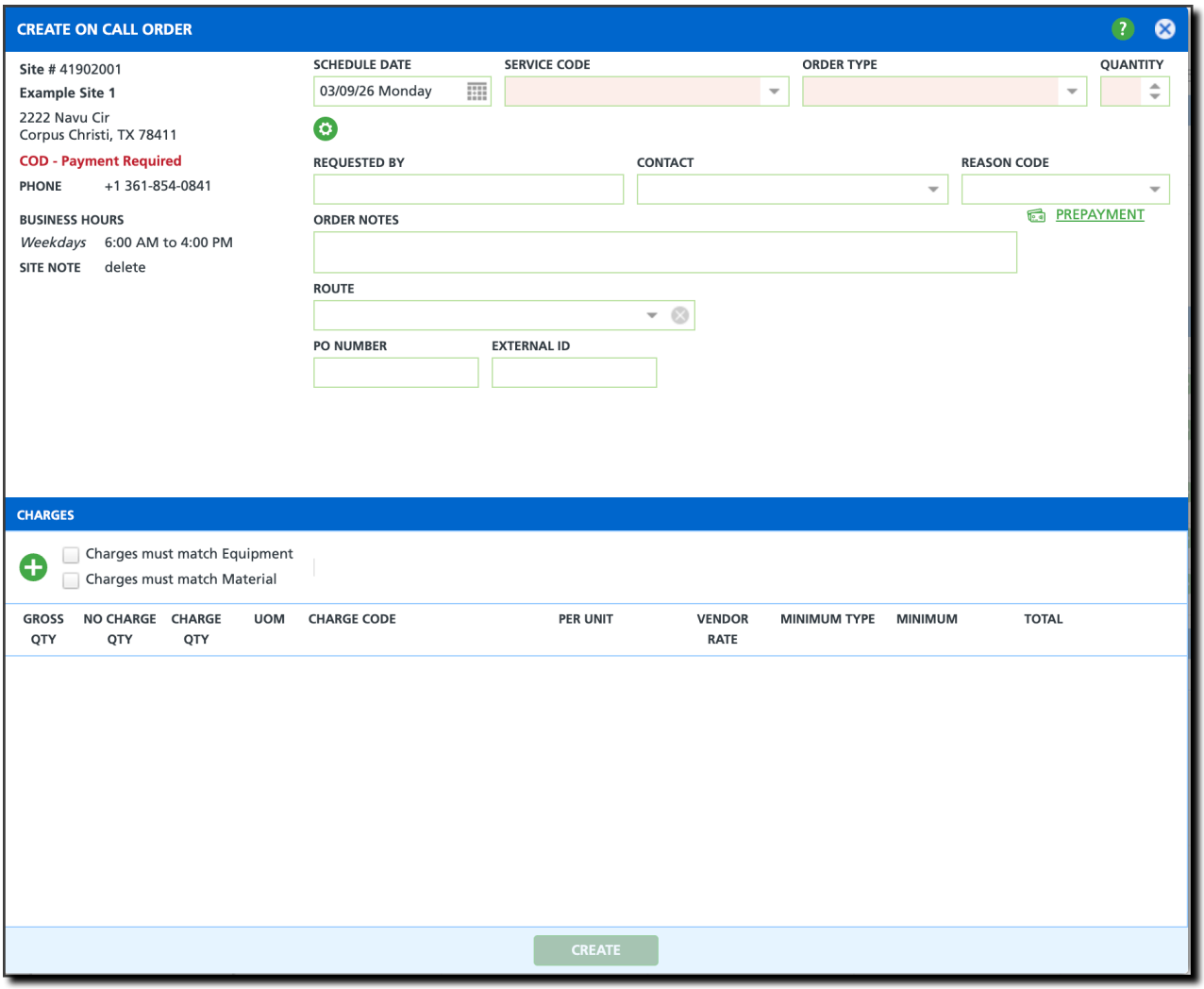
Last Modified on 06/25/2026 6:09 am PDT

Pathway: *Customer > Search > Accounts*

The following process applies to creating on-call orders. Unlike recurring services, on-call orders are not permanently routed.

Within the application, on-call orders can be created in three locations: the *Customer Service Calendar*, the *Account Menu*, *or* from *Active Services*.

Note: If an account is set up with the Create an Order configuration enabled for Customer Portal and the account has an existing service, customers can initiate their own orders via the Customer Portal.



Field Descriptions

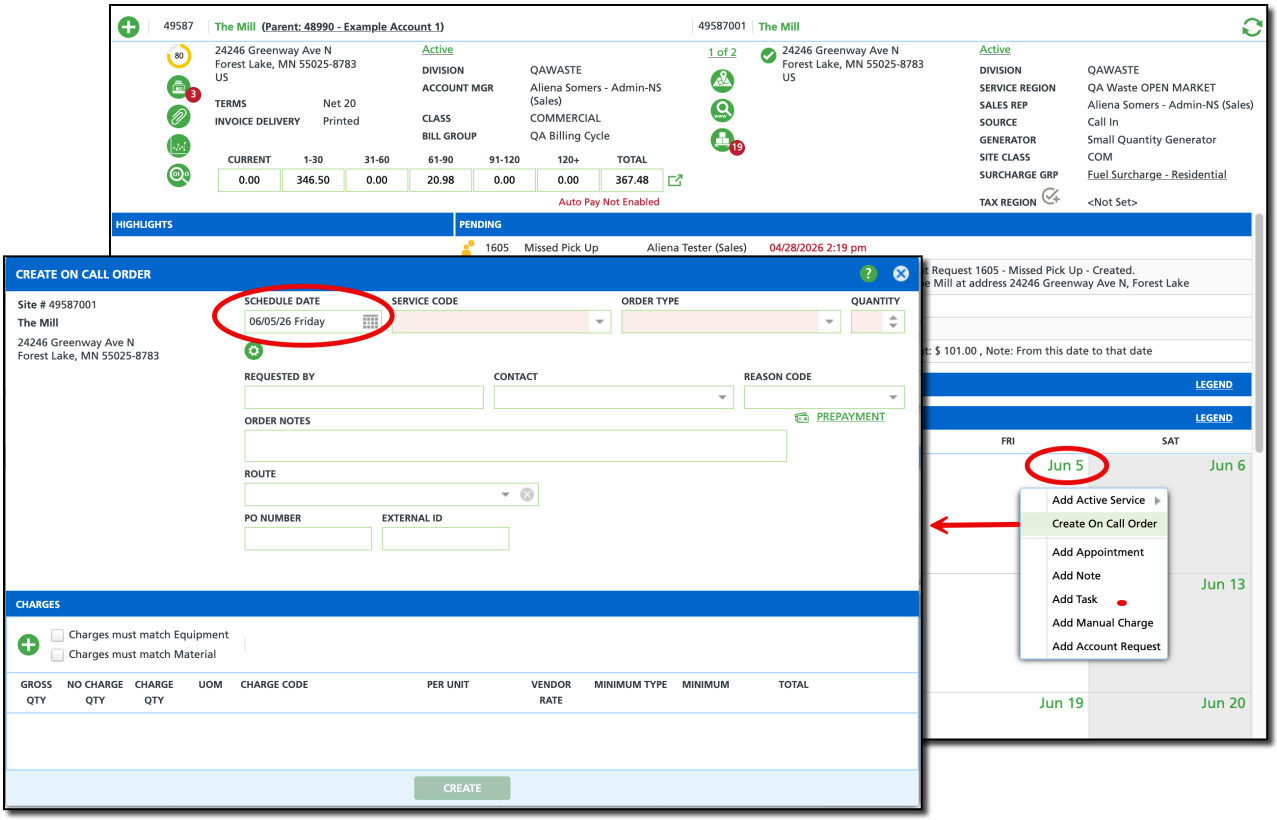
Field	Description
Scheduled Date	The date the service is scheduled for.

Service Code	The service code for the service being completed.
Order Type	This is the service transaction (work) type that is being performed. Examples include: equipment delivery/removal, extra pickup and transfer. Additional information about Order Types can be reviewed here: Work Type Setup.
Quantity	Indicates the quantity of services being created.
Requested By	The name of the person who requested the service.
Contact	Displays a drop down of available contacts for the site.
Reason Code	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. Additional information on prepayments is available here: Prepayments for On Call Orders.
Order Notes	Notes for the driver to see.
Route	The route assigned for the on call service. If a route is not assigned, it will display on the dispatch screen with the **No Route Assigned** route name (displayed in red) for the line of business the on call order applies.
PO Number	The purchase order number if one applies.
External ID	The identification number for the work order that will display outside of Navusoft.
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	The 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 the work order will be charged.
Total	The total amount for the on call service being charged.

Create On Call Order - Calendar

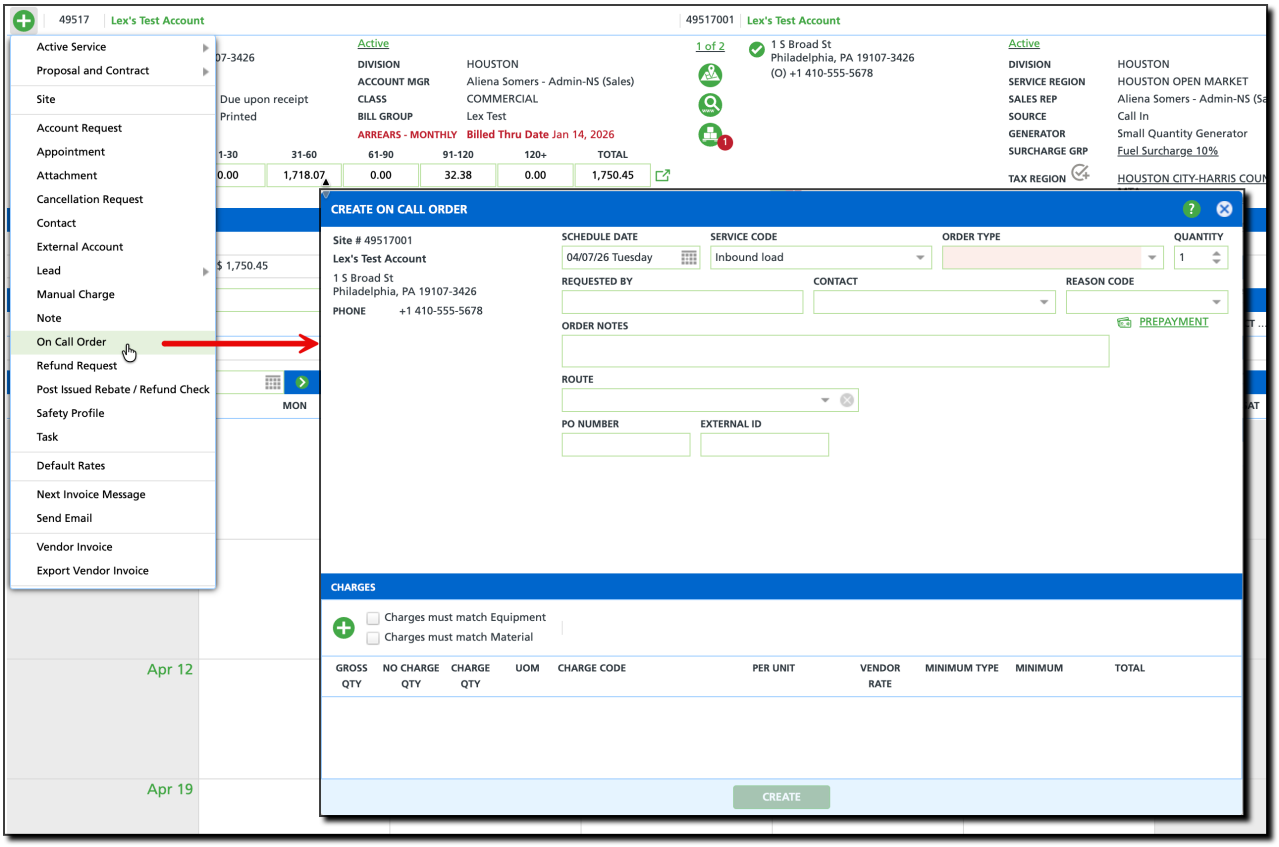
If this method is used, the Scheduled Date will correspond to the calendar date for which the On Call order was created.



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

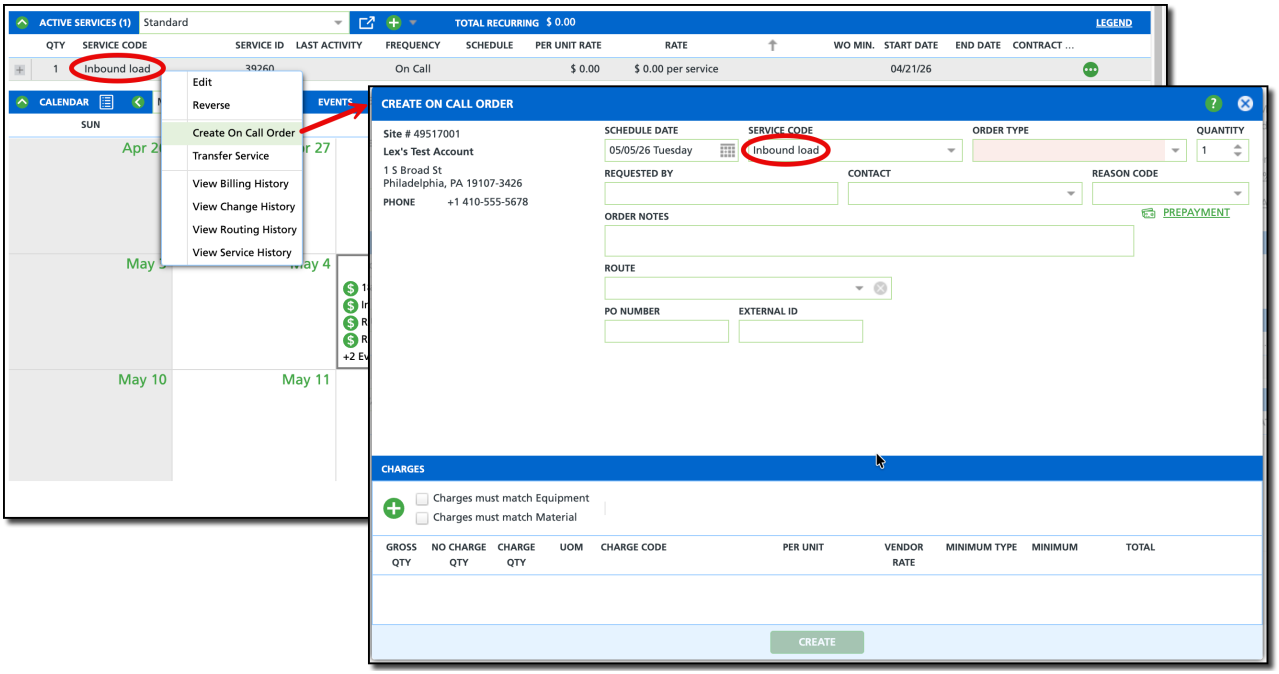
If this method is used, the Scheduled Date will default to the current date and the user will need to select which service code (if more than one exists for the site) the on-call is for.



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.

Create On Call Order - Active Services

If this method is used, the Scheduled Date will default to the current date and the Service Code will default to the service code of the active service.



1. Right-click on the active service in the Active Service section for the site.
2. Select **Create On-Call Order** from the pop-up list for the '*Create On Call Order*' editor to display.

Create an Order - Customer Portal

Customers can create an order via the Customer Portal given certain critera. For setup instructions and workflow details, refer to the Customer Portal - Create an Order article.

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

Related Articles

Prepayments (Create On Call Order)
Work Type Setup