

Skilled Service Manager Program Overview

Developed by Sean Skilling
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Use the Web to have multiple users (with varying access permissions) create and track service calls for an unlimited number of technicians. Generate invoices from the field, capture revenue from follow-up work needed, keep a running view of all posted and invoiced revenue.

Capture video or stills of items requiring followup work, and send them to the customers. Push customers directly to your payment processor.

The program is developed to be cloud based, it can be accessed from any location, home, office, field, van, etc.

Use it on a phone, tablet or computer the application is fully responsive.

TO FILTER, SELECT TECH, AND DATE

APR 2019
TECH

TODAY

+1 DAY +2 DAY

To view appointment information here, click on the item in the calendar.

TODAY'S APPTS

Customer: Groothoff
Tech/Code: EK - HVAC SC
Town: MYSTIC
Window: All Day

Customer: Van Winkle
Tech/Code: BB - OIL ATU
Town: MYSTIC
Window: 8-11 AM

Calendar Shows:

\$8,608 POSTED, \$10,760 INVOICED
11 JOBS AWAITING FOLLOW UP (5 IN APRIL)
17 INCOMPLETE INVOICES (10 IN APRIL)

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1st	2nd	3rd	4th	5th	6th
	\$1,457 billed / \$1,457 total	\$3,833 billed / \$3,833 total	\$665 billed / \$665 total	\$676 billed / \$676 total	\$139 billed / \$1,069 total	
	POSTED inv006302	POSTED inv006340	POSTED inv006354	POSTED inv006337	POSTED inv006234	
	MA - Healy LEDYARD - OIL ATU 08:00 AM	BB - Baker STONINGTON - OIL INST 08:00 AM	MA - Restaurant PAWCATUCK - GAS SC 08:00 AM	MA - Vega OAKDALE - OIL ATU 08:00 AM	MA - Moran N. STONINGTON - OIL ATU 08:00 AM	
	POSTED inv006334	POSTED inv006343	POSTED inv006348	POSTED inv006344	DONE inv006358	
	BB - Hancock QUAKER HILL - ATU 03:00 PM	MA - Moran WESTERLY - GAS SC 03:00 PM	MA - Ficarra WESTERLY - OIL ATU 10:00 AM	Follow Up! MA - Freedman MYSTIC - OIL ATU 10:00 AM	Done inv006358 Edit inv006358	MA - Clark N. STONINGTON - OIL ATU 10:00 AM

Streamlined Scheduling:

- ◇ standardize addresses
- ◇ track tax status
- ◇ same day
- ◇ on call
- ◇ diagnostic
- ◇ standardize rates for techs
- ◇ standardize services (like an annual tune-up)
- ◇ over-ride as needed
- ◇ Schedule start and end times, as well as the time window. Once scheduled, this can automatically be emailed to the customer (along with any schedule updates).

- ◇ monthly jobs posted v invoiced
- ◇ daily amount posted
- ◇ requiring follow up service
- ◇ invoices needing office attention

No Appointments Scheduled!

ADD A NEW EVENT

Date: Sat 6th April 2019
04/06/2019

taxable
 non-taxable

None
 S/D
 O/C
 DIAG

Customer First Name: _____
Customer Last Name: _____
Customer Phone with area code: _____
Last ATU: _____
Customer Email: info@hewlett-packard.com
Customer Address: _____
Town: _____

Address: ad
ASHAWAY
EAST GREENWICH
GLASTONBURY
EAST HARTFORD
EAST LYME
UNCASVILLE

Rate: STRTZ 99.00
File ATU: ATU4 179.95

Window: 8-11
Time: 3pm 00
Time: 4pm 00

Notes: Additional Notes

Field Invoices:

- ◇ generate invoices in the field
- ◇ run through the standard tests for either heating or cooling plants
- ◇ enter parts (both billable and non-billable)
- ◇ enter hours at standard and OT rates
- ◇ rate assigned from the office
- ◇ calculates the tax based on the location
- ◇ record notes
- ◇ mark the invoice for office follow up
- ◇ record a video of issues he has found

Amount	Item	Price	Extended
0	Labor Hours Regular	89.00	0.00
0	Labor Hours OT	129.00	0.00
0	Annual Tune Up	129.95	0.00
	Total Parts (from the parts section)		0
1	Supplies	0	0
	Service Charge		0
	SUBTOTAL		0.00
	SALES TAX	CT 6.25% - RI 7% - MD Only	0.00
	TOTAL		0.00

Video

This button will activate your camera (only works with iOS6+ or Android 3.0+). Use this button to capture the video of the client system, be sure to focus on the elements that require service. If your camera does not activate automatically, switch to the camera and save it to your camera roll, then use the button to upload it.

If you have do NOT have a video to upload, just go ahead and click the SAVE VIDEO button.

If you try to upload a video and it fails (probably because it is too large), just reload the page and select the icon from the nav. You can then reshoot the video at a lower resolution (try SD instead of HD), or skip the video altogether and just generate the invoice. Keep the video on your phone and we'll deal with it at the office. This is your chance to go back and make any final adjustments, once the video is uploaded the last step will be to close this job!

Browse: No file selected.
Groothoff6307

SAVE VIDEO

ASSIGNED TECH:

CLIENT: GROOTH
ADDRESS: 13 GEORGE ST MYSTIC
PHONE: (860) 333-7546
LAST ATU:

Notes

Enter your Notes

Mark for follow up

No Yes

SAVE NOTES You must save your notes before continuing

Separately Billable Parts:

HYDR
BACKFLOW PREVENTER - 1/2inch SWEAT HYDR-0055-BKFLW \$82.90**
BACKFLOW PREVENTER - 1/2inch NPT HYDR-0050-SRFLW \$84.90**
FLANGE SET WITH BOLTS HYDR-FLANSESET \$28.90**
CIRC FLANGE SET, 1.00 HYDR-CRFLG-1.00 \$28.90**

MAJOR PARTS:

MAJOR PARTS
MALL (77) - MCRFBR FFLT-SM-MICRO \$8.99**
EDUM (F84) - MCRFBR FFLT-MICRO \$8.99**
NRGE (2A700) - MCRFBR FFLT-LRG-MICRO \$12.99**
AMP FFLT-STRA-J \$10.99**
AMP FFLT-STRA-J \$12.99**
TER KIT, GAUGE BRKT FFLT-SPNDFILTERKIT \$78.99**
DAVED PER FT (200) FFLT-FOLLOWING-PIPE \$40.99**
COMPLETE - SMALL (77) FFLT-FILTERCOMPLETE \$14.99**
PIN ON (10 MICRON) FFLT-FINON \$12.99**
LO FFLT-STRA-R \$10.99**

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Parts & Installations:

For larger jobs, like installations or similar, the parts database allows the office to enter details of the install and then assign them to the scheduled appointment.

The parts database is also the source for the taxable and non-taxable parts used in the field.

Installations

Complete this form to create an installation

Customer First Name: Customer Last Name:

Install Description (for tech + invoice):

Materials Cost (taxable): Total Cost:

Approximate Install Date:

CREATE INSTALLATION EVENT

Existing Installs (click to edit)

Select	Cost Name	Desc	Materials	Total Price
<input checked="" type="checkbox"/>	MICHAEL BAKER	INSTALL HF-40 INDIRECT ON WET-LEG OF EXISTING STEAM BOILER for 2019-04-03	1540.00	3450.00
<input checked="" type="checkbox"/>	JARED RILEY	INSTALL 3 CIRCULATORS, ELIMINATE SWEAT-CHECKS, 1/2" ANTI-FREEZE for 2019-03-23	320.00	609.00
<input checked="" type="checkbox"/>	STEVE SINGER	INSTALL - HYBRID ELECTRIC HOT WATER HEATER for 2019-03-20	620.00	1800.00
<input checked="" type="checkbox"/>	JENNY BROWN	INSTALL - HF-40 INDIRECT HOT WATER HEATER for 2019-03-08	1040.00	1950.00
<input checked="" type="checkbox"/>	DIANNE FABRICANT	INSTALL - OIL FIRED WARM AIR FURNACE for 2019-03-07	2150.00	4250.00

Categories

category abbreviation:
category name:

CREATE CATEGORY

id	Name
1	AFLT
2	BIRF
3	BIRN
4	BIRP
5	BIRSN
6	CRPF
7	CRPP
8	GAS
9	HYDR
10	RIZL
11	SCNH

Parts

AFLT-AIR FILTER

Name:
SKU:
Manufacturer Part N°:
Preferred Supplier:
Reseller Part N°:

price:

CREATE PART

Rates

Rate:
description:

CREATE RATE

Current Rates

Filter	Rate
AFLT	99.95
ATU	179.95

Existing Products

Device	Name	SKU	Cat ABBR	Cat Name	HP Pnt	Prof Supplier	Reseller Pnt	Price
<input checked="" type="checkbox"/>	AIR FILTER - PLEATED	12X12X1	AFLT	AFLT				7.95
<input checked="" type="checkbox"/>	AIR FILTER - PLEATED	14X14X1	AFLT	AFLT				8.95
<input checked="" type="checkbox"/>	AIR FILTER - PLEATED	16X16X1	AFLT	AFLT				8.95
<input checked="" type="checkbox"/>	AIR FILTER - PLEATED	16X20X1	AFLT	AFLT				8.95
<input checked="" type="checkbox"/>	AIR FILTER - PLEATED	16X25X1	AFLT	AFLT				24.95
<input checked="" type="checkbox"/>	AIR FILTER - PLEATED	20X20X1	AFLT	AFLT				9.95
<input checked="" type="checkbox"/>	AIR FILTER - PLEATED	20X20X2	AFLT	AFLT				14.95
<input checked="" type="checkbox"/>	AIR FILTER - PLEATED	20X20X5	AFLT	AFLT				37.95
<input checked="" type="checkbox"/>	AIR FILTER - PLEATED	20X25X1	AFLT	AFLT				10.95
<input checked="" type="checkbox"/>	AIR FILTER - PLEATED	20X25X3	AFLT	AFLT				34.95
<input checked="" type="checkbox"/>	AIR FILTER - PLEATED	24X24X1	AFLT	AFLT				14.95
<input checked="" type="checkbox"/>	AIR FILTER - PLEATED	24X24X1	AFLT	AFLT				14.95
<input checked="" type="checkbox"/>	BLACK IRON NIPPLE, 1.5" X 1/2"	BIRN-1.50112.00	BIRN	BIRN				14.95
<input checked="" type="checkbox"/>	BURNER COUPLING - BECKETT	BRNK-COUP-BECK	BRNK	OIL BURNER				24.95
<input checked="" type="checkbox"/>	BURNER COUPLING - CARLIN	BRNK-COUP-CARL	BRNK	OIL BURNER				24.95
<input checked="" type="checkbox"/>	BURNER COUPLING - RIELO	BRNK-COUP-RIEL	BRNK	OIL BURNER				28.95
<input checked="" type="checkbox"/>	FUEL PUMP - SUNTECH 320A-3056	BRNK-PPMP-A	BRNK	OIL BURNER				198.10
<input checked="" type="checkbox"/>	FUEL PMP - SUNTECH 320A	BRNK-PPMP-B	BRNK	OIL BURNER				198.22
<input checked="" type="checkbox"/>	BURNER SONITOR - BECKETT	BRNK-SOAT-BECK	BRNK	OIL BURNER				78.95
<input checked="" type="checkbox"/>	BURNER SONITOR - CARLIN	BRNK-SOAT-CARL	BRNK	OIL BURNER				82.95
<input checked="" type="checkbox"/>	BURNER SONITOR - RIELO	BRNK-SOAT-RIEL	BRNK	OIL BURNER				82.95
<input checked="" type="checkbox"/>	AQUASTAT - HYDROLEVEL 3250+	OCNT-AQUA-3250+	OCNT	OIL CONTROL				262.10
<input checked="" type="checkbox"/>	CAD CELL COMPLETE	OCNT-CAD CELL COMPLT	OCNT	OIL CONTROL				24.95

Service Invoice # 006339

BEST ENERGY (860) 599-1920

www.bestenergyctri.com
4 Mechanic Street Pawcatuck, CT 06379
CT HOD: #1022 | CT HTG-405746
Last ATU: 03/01/2019
Work Scheduled: Oil Annual Tune Up
Date: April 09, 2019
Tech: sean tester

Sean Skilling
102 ASPETUCK RIDGE RD
LEDYARD CT, 06339

Email: info@thereflectedpast.com
Phone: (860) 799-0747

Description	Quantity	Price Per Unit	Amount
Regular Hours	0.00	\$ 99.00	\$ 0.00
ATU	1	\$ 179.95	\$ 179.95
Parts:			
AIR FILTER - PLEATED - 16X25X1	1	\$ 8.95	\$ 8.95
GAUGE GLASS WASHER WSHR	1	\$ 3.00	\$ 3.00
FLARE FITTING, 3/8" FLARE X 90	1	\$ 4.45	\$ 4.45
FLARE FITTING, 3/8" FLARE X MALE	1	\$ 4.45	\$ 4.45
Non-billable Parts:			
BACKFLOW PREVENTER - 1/2" SWEAT	1		
FLARE FITTING, 3/8" FLARE X 90	1		
Supplies			
		\$ 0.00	\$ 0.00
Service Charges (SD)			
		\$ 20.00	\$ 20.00
Additional service recommendations may be made based on this invoice.			
Subtotal			\$ 220.80
Tax			\$ 14.02
Total			\$ 234.82

Tests	Checklists
Stack Temp: °F	Replace Primary Filter: NO
CO: ppm	Replace Secondary Filter: NO
CO2: %	Replace Strainer: NO
Draft: ° WC	Clean/adjust Electrodes: NO
Efficiency: %	Check Tube End Cone: NO
	Pump Pressure: NO
	Clean Smoke Pipe: NO
	Check Safety Lockout: NO
	Low Water: NO
	Check Igniter Arc: NO
	Check/Replace Relief: NO
	Check/Replace Air Eliminator: NO
	Check Blower/Belt: NO
	Heat Exchanger: NO
	Heat Exchange Type: NO
	Check CAD Cell: NO
	Check Replace Feeder: NO
	Inspect for Contract: NO

Invoice:

Normally, the tech submits the invoice and it is reviewed by the office before being emailed to the customer, but if the customer pays by check, he marks it paid and they sign the invoice electronically.

- ◆ Includes company logo
- ◆ can use any starting invoice number
- ◆ shows test results
- ◆ emails invoice to the customer with a link to the video
- ◆ link to the payment screen
- ◆ data from this invoice populates the payment info