

SedonaSetup - SV - Service Levels

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The Service Level is a required field on each System record, Ticket record, and a System Inspection record.

The Service Level automates the amounts that will be invoiced to your customer for the service performed. These default amounts and rates may be overridden at the time of Service Invoicing.

This setup form is divided into three forms; General, Parts and Inspection.

- The General form is used to setup information which is mostly related to how labor will be invoiced to the Customer.
- The Parts form is used to setup information related to expensing and invoicing Inventory Parts on a Ticket.
- The Inspection form is used if your company invoices your customers for periodic inspections through cycle invoicing, and you may only invoice the customer for the Inspection RMR after the work has been completed.

Service Levels may be setup for Time & Material, Service Contracts, or even individual Customers with special negotiated rates.

Create one record for each of your company's service levels.

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Service Levels - General Form

The General form is used to setup information which is mostly related to how labor will be invoiced to the Customer for Tickets. Each data entry field will be described below.

- Costs Included - Check all checkboxes that apply to what types of services for which the customer will not be invoiced. If the Service Level covers all types of services, check all the boxes. If you are providing service to the customer on a Time & Material basis, do not check any of the boxes.
- Labor Item - If invoicing for labor hours expended on a Ticket, select which Invoice Item will be used for the customer's invoice.
- Trip Charge - If your company charges a fee for a service call in addition to any on-site labor hours:
 - If the Bill as Labor checkbox is selected, the Trip Charge will use the same Invoice Item as the Labor Item (previous field); also enter an amount in the Charge field.
 - If the Bill as Labor checkbox is not selected, in the Item Code field, select the Invoice Item to be used for invoicing the trip charge and enter an amount in the Charge field.
- Other Charge - This field allows you to automatically add an additional charge to tickets when they are created. For example, you may want to charge the customer for a fuel service charge.
- Labor Calculation - Two options are available which determine when to start calculating billable labor:
 - From Dispatch - Billable labor is tracked from the time the Technician is on his way to the appointment.

- From Arrival - Billable labor is tracked from the time the Technician arrives on site.
- Labor Rates - Enter the hourly rates used to invoice your customer for on-site service labor. If the Technician arrives on-site before or after the business hours setup for the Service Company assigned to the Ticket, all billable labor will be calculated using the Overtime rate. If the Technician is dispatched to a Ticket on a day that is listed in the Holiday setup table, all billable labor will be calculated using the Holiday rate.
- Billing - Select the appropriate billing increment and the number of minutes after the Technician arrives that the application will begin calculating billable labor charges. If a value is entered into the After the first field, this number of minutes will be deducted from the total amount of Technician labor spent on the service call.

In the example provided below, the Service Level includes a trip charge of \$60.00 which covers the first 30 minutes of labor. After the technician has been on-site for over 30 minutes, the application will calculate additional billable labor in 15 minute increments.

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Service Levels - Parts Form

The Parts form is used to setup information related to expensing and invoicing Inventory Parts on a Ticket.

- Material COGS - Select the G/L Account number that will be used when expensing parts used on a Ticket.
- Parts Item Code - Select the Invoice Item that will be used when invoicing the customer for parts used on a Ticket.
- Part Pricing - If parts are billable for the Service Level, two options are available to determine which price will be used when invoicing for parts.
 - Use Service Price 1

If this option is selected and the Res and Comm Modifier fields are set to 1.000, the application will use the exact price in the Service Price 1 field of the Part setup.

If using either or both of the Modifiers, the application will either mark up or discount the part price in the Service Price 1 field by the percentage specified in the Modifier field. Entering a value less than 1.00 will discount the part. Entering a value greater than 1 will mark up the part. For example if .80 is entered in one of the Modifier fields, the part will be priced at 80% of the price in Service Price 1 of the Part setup, thus giving the customer a 20% discount on the part.

- Use Service Price 2

If this option is selected, the exact price in the Service Price 2 field of the Part setup will be used.

Note: If the Customer record is assigned to a Part Pricing Level and the Part used has a price setup for that same Price Level for the part being sold, this will override any part pricing rules setup on the Service Level assigned to the Ticket.

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Service Levels - Inspection Form

The Inspection form facilitates the linking of an Inspection Record to an existing Recurring Line. If this option is selected, when creating or modifying an existing Inspection Record assigned to this Service Level, the User must link the Inspection to an active Recurring Line on the Inspection setup record.

When an Inspection Ticket is closed that is linked to a Recurring Line, a flag is set on that recurring line which allows that recurring line to be invoiced through Cycle Billing.

When creating an Inspection Cycle batch, you select the "Only Inspection Linked RMR" radio button, to create invoices only for completed inspections. If you do not want to invoice Inspection RMR after the Inspection is completed, when generating a cycle batch you would select the option of All RMR.

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