

Service Level Auto Adding Line Item to Work Order

06/20/2024 4:38 pm EDT

In case 104261 the Dealer asked us why every time she added the service level T&M it would automatically add a line item to the work order and she would have manually delete this. This is tied to the service level and this is how you enable/disable this feature

1. Go into Setup then Service Levels and click the pencil icon to the right of the service level in question

ABC Company

Customers Invoices Payments RMR Work Orders Proposals Calendar GL Reports Setup Accounting

Service Levels [Add Service Level](#)

☐ Show Inactive Service Levels

Service Level Code	Name	Invoice Parts	Invoice Labor	Action
T&M - \$49.95 Trip	Time and Material- \$49.95	Yes	Yes	Edit Delete

11 - 11 of 11 items 10 items per page

1. If the Other charges option is enabled, a line item will be added to the work order

ABC Company

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Service Level: [Cancel](#) [Save](#)

Service Level:

Service Level Code: T&M - \$49.95 Trip

Description: Time and Material- \$49.95

Base Service Fee: \$115.00

Service Item Code: Service Labor

Invoice Labor: ☒

Hourly Labor Rate: \$115.00

Labor Item Code: Deposit

Billing Increment: 30 Minutes

Bill After Minutes: 60

Misc:

Inactive: ☐

Inactive Date:

Invoice Parts: ☒

Other Charges: ☒

Other Item Code: trip fee

Other Amount: \$49.95

1. In this example, when we add the trip fee T&M to a work order, we see the Service Fee line item

ABC Company

Erick

Support

ab

Logout

Customers

Customer Search: name - cust #

Customers

Invoices

Payments

RMR

Work Orders

Proposals

Calendar

GL

Reports

Setup

Accounting

Edit Work Order - 2560 : Brett Frank - 1004-555

Customer

Void

Cancel

Save

Site: #1 Brett Frank - 25 Ri...

Tax: None1 - 8.2500%

25 Richmond Road

Beachwood, OH 44445

Requested By

(555) 555-5555

brettfr@perennialssoftware.com

Purchase Order Number

Work Order Date: 2/2/2024

System: Burglar Alarm-9999

Panel Type: Vista 100 Control Panel

Location: side door

Service Level: T&M - \$49.95 Trip

Base: \$115.00 Labor: \$115.00

Increment: 30 min. Bill After: 60 min.

Warranty Labor: Expired: 2/24/2015 | One Year Warr...

Warranty Parts: Expired: 2/24/2015 | One Year Warr...

Sales Package: Select a Sales Package:

Type: Service Call

Status: New

Salesperson: Brad Solomon

Technician: Please Select:

Warehouse: Main Warehouse -...

Brief Description

500 characters remaining

Service Fee

Labor

Items

Parts

Est Tax

Total

RMR

\$115.00

\$0.00

\$49.95

\$0.00

\$9.49

\$174.44

\$0.00

Appointments

Items

Parts

RMR

Notes

Complete

System Parts

System Notes

Zones

Utilities

Add Items

S...	Item Code	Item Description	Qty	Rate	Ta...	Sales Tax	Amount	Item Cost	Total C...	Labor U...
+	trip fee	trip fee	1	\$49.95	N	null	\$49.95	\$0.00	\$0.00	0.00

- At this point you can either delete the line item or remove it from the service level

ABC Company

Erick

Support

ab

Logout

Customers

Customer Search: name - cust #

Customers

Invoices

Payments

RMR

Work Orders

Proposals

Calendar

GL

Reports

Setup

Accounting

Cancel

Save

Service Level:

Service Level Code: T&M - \$49.95 Trip

Description: Time and Material- \$49.95

Base Service Fee: \$115.00

Service Item Code: Service Labor

Invoice Labor: ☒

Hourly Labor Rate: \$115.00

Labor Item Code: Deposit

Billing Increment: 30 Minutes

Bill After Minutes: 60

Misc:

Inactive: ☐

Inactive Date:

Invoice Parts: ☒

Other Charges: ☐

Other Item Code: trip fee

Other Amount: \$0.00

Edit Work Order - 2560 : Brett Frank - 1004-555

Customer Void Cancel Save

Site: #1 Brett Frank - 25 Ri...
Tax: None1 - 8.2500%
25 Richmond Road
Beachwood, OH 44445
Requested By
(555) 555-5555
brettff@perennialsoftware.com
Purchase Order Number
Work Order Date: 2/2/2024

System: Burglar Alarm-9999
Panel Type: Vista 100 Control Panel
Location: side door
Service Level: T&M - \$49.95 Trip
Base: \$115.00 Labor: \$115.00
Increment: 30 min. Bill After: 60 min.
Warranty Labor: Expired: 2/24/2015 | One Year Warr...
Warranty Parts: Expired: 2/24/2015 | One Year Warr...
Sales Package: Select a Sales Package:

Type: Service Call
Status: New
Salesperson: Brad Solomon
Technician: Please Select:
Warehouse: Main Warehouse -...
Brief Description
500 characters remaining

Service Fee	Labor	Items	Parts	Est Tax	Total	RMR
\$115.00	\$0.00	\$0.00	\$0.00	\$9.49	\$124.49	\$0.00

Appointments Items 0 Parts 0 RMR 0 Notes Complete System Parts System Notes Zones 1 Utilities

Add Items

S...	Item Code	Item Description	Qty	Rate	Ta...	Sales Tax	Amount	Item Cost	Total C...	Labor U...

10 items per page No items to display