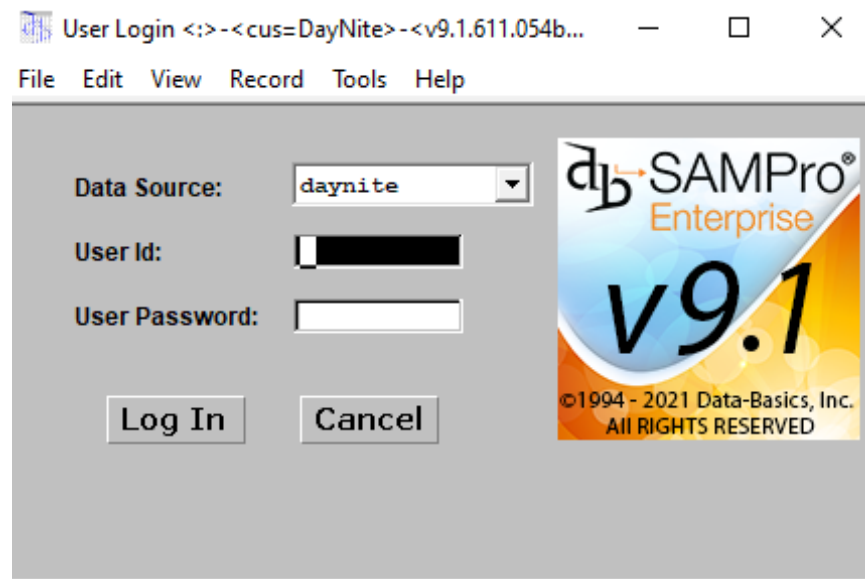




How To Place A Service Call (Sam Pro)

This will be the step by step guide on how to place a service call on marketplace.

- Log in to Sam Pro



- Select the Service Management Folder



- Select the New Call Icon



- Using the search text field enter the customers address (PRESS ENTER TO START SEARCH)

Search Text:	<input type="text" value="10 Charles Street (EXAMPLE)"/>		
Search For:	<input type="radio"/> Alpha <input type="radio"/> Phone <input checked="" type="radio"/> Street <input type="radio"/> Name <input type="radio"/> Id <input type="radio"/> Any		
Dispatch Note:			
Site Name:	<input type="text"/>		
Service Ctgry Id:	<input type="text"/>		
Original Caller:	<input type="text"/>		
<input type="checkbox"/> PO Required?			
WorkCode Id:	<input type="text" value="0"/>	Est Hrs:	<input type="text"/>
Work Requested:	<div style="height: 100px;"></div>		
Date Scheduled:	<input type="text" value="Apr 28, 2021"/>	Time Scheduled:	<input type="text" value="06:00:00pm"/>
Technician Id:	<input type="text"/>	Call Seq:	<input type="text"/>
Workorder Name:	<input type="text"/>		
Web Log Id:	<input type="text"/>	Esc.Profile Id:	<input type="text"/>
Date Must Complete:	<input type="text"/>	Time Must Complete:	<input type="text"/>
Work Order User1:	<input type="text"/>		

- Results matching this address will be displayed (Select the correct site)

REMEMBER confirm site name with the customer there is a chance there are multiple customers under one address.

- Review the billing comment pop up (Usually no action is required)
- If the billing comment pop shows COD please follow the COD procedure (ENTER COD PROCEDURE LINK HERE)
- Select Service Category
- Enter original caller full name and contact number

Contact Information (Sam Pro)

- If PO REQUIRED is checked you must request a PO from the person placing the service call

- Select the work code ID (Work code is mainly the type of equipment for example: dishwasher)
- Complete call script
- Enter the work requested with the customers issue as detailed as possible and also get the location of the issue.
- Select contract piece by company type ALS-REF-HVAC
- Select Market Source (How did you receive the call ? Phone? Email?)
- Click ADD work order



Market Source Definitions