# ADD STANDARD JOB TO SERVICE CALL/SEGMENT

## Introduction

This procedure covers creating service call structure by adding a standard job to it. This can be completed from the Service call creation screen or from the Segment view.

A standard job contains predefined values including:

* Item estimate lines
* Hour estimate lines
* Misc cost estimate lines
* Standard segment texts
* Check list items

These can be found in the relevant fast tabs within the standard jobs segment/operation.

Standard jobs can also have flat rate pricing which can be applied during this process or later on by using a function.

This procedure is linked to the following business process:

* SER 2.1

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## Prerequisites

The service call must already be created. See *SER\_1.2(SOP)Create a Service Call* for more information

## Terminology and Icons

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| Service Call | A job that a technician must complete |
| Segment/Operation | A task within a service call |
| Standard Job | A template that can be used to create a segment automatically with all the parts, labour and miscellaneous items that are usually required for that piece of work |
| Operating Unit | This is the ‘Cost centre’ where the work is being completed |
| Warehouse | The warehouse selected drives the location that the service sales will be attributed to |
| Estimate lines | Estimate lines outline the content of a segment or operation. They are estimates only and the actual time and charges will be added while you are working on the segment or operation |
|  | View the segments of the service call |
|  | Opens the **Standard job selection** form |
|  | Opens the Standard job selection form from the **Create new service call** window |
|  | Views the segments and estimate lines within the standard job template |
|  | Adds the standard job to the service call or segment |
| J:\Training - Inspire\eMerge training icons\Important Black.png | This icon highlights important or useful information that is related to the step you are completing |

## Steps

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| ADD STANDARD JOB FROM SERVICE CALL CREATION SCREEN | |
|  | *From within the* ***Create new service call*** *window*  Click **Add standard job**  C:\Users\johi\AppData\Local\Temp\SNAGHTML3caac0.PNG |
|  | *The* ***Standard job selection*** *window displays*  Search for the required standard job using:   * Press **CTRL + G** to display the search grid * Right click > **Filter by Field** |
|  | J:\Training - Inspire\eMerge training icons\Important Black.pngHighlight the job and click **Standard job segments**  If you are sure of the standard job you want to select, go to Step 5 |
|  | *The* ***Standard job segments*** *window displays*  Review the segment estimate lines from the fast tabs of the standard job to ensure it contains the detail you require  J:\Training - Inspire\eMerge training icons\Important Black.pngClick **Close**  Remember you can use this as your base and can add and remove elements to fit your requirements |
|  | *The* ***Standard job selection*** *window displays*  Highlight the required job, then click **Add** |
|  | If there is a flat rate applied to the standard job you will get a message asking if you want to use it or not   * **Yes** – applies flat rate to the new segment * **No** – continues with standard rates – see Step 15 for how to get a Flat Rate price once the segment is created |
|  | *A notification will display advising that the standard job has been added to the service call*  Click **Close** |

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|  | *The* ***Mandatory fields*** *window displays*  Complete the following fields:   * **Operating unit** – this is the place where the work is being performed – eg ‘1002 – Field Service’ * J:\Training - Inspire\eMerge training icons\Important Black.png**Warehouse** – check that this is correct – it should default in from the service call   Ensure these selections are correct as this is who will be attributed to the sale  Click **OK** |
|  | *The* ***Standard job selection*** *window re-displays*  Do you have further standard jobs to add?   * Yes – repeat Steps 3-8 * No - click **Close** |

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|  | *The* ***Service segments*** *window will display with the new segment containing the standard job*  A red \* next to a fast tab indicates there are mandatory fields that you need to complete inside that fast tab  J:\Training - Inspire\eMerge training icons\Important Black.pngC:\Users\johi\AppData\Local\Temp\SNAGHTML61843e.PNG |

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| ADD STANDARD JOB FROM WITHIN A SERVICE SEGMENT | |
|  | Open the required service call – see *QRG – Find a Service Call* for more information |
|  | Click **Add standard job**  C:\Users\johi\AppData\Local\Temp\SNAGHTML65ba89.PNG |
|  | Repeat Steps 2-10 |

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| GET A FLAT RATE PRICE | |
|  | Open the required service call – see *QRG – Find a Service Call* for more information |
|  | Highlight the segment and click **Manage > Get flat rate price**. This will look at the standard job flat rate and apply the correct flat rate pricing based off the customer/contract/division  C:\Users\johi\AppData\Local\Temp\SNAGHTML10831be.PNG |

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| WHERE TO NEXT | |
| Add segments and/or operations to the service call | *SER\_1.3(SOP)Add Structure to a Service Call* |
| Copy a segment from another service call | *SER\_1.6(SOP)Copy a service call or a segment from a service call* |
| Add estimate lines to the segment | *SER\_1.4(SOP)Add Pricing to a Service Call* |
| Quote the service call | *SER\_1.5(SOP)Create a Quote from a Service Call or Segment* |
| Start the segment | *SER\_1.1(SOP)Workflow of a Service Call* |