

ServiceLedger

Getting Started Guides



Getting Started with the Task Manager

This guide will document how to use the ServiceLedger Task Manager for managing service tasks including preventative maintenance tasks, recurring tasks and more.


Introduction:

Service Tasks are the common task you perform on your jobs. Tasks are useful for assigning tasks to resources on jobs, recurring tasks you perform for customers, updating the estimated job duration based upon how long you believe the task should take, updating invoice charges on the job associated with the task to eliminate duplicate entry of the invoice charges later and tracking productivity and efficiency of your resources by comparing actual time against estimated task time.

Note: You can always decide to use Service Tasks later if you decide not to use this feature initially upon deployment.

Creating Tasks:

Service Tasks is a feature of the Service/Work Order Module in ServiceLedger. To create task, click on **Service | Tasks** from the **Navigator** to open the **Service Task List** and view existing tasks in your system, if any.

Click the  **Add New Record** button to add a new task. This will open the **Task Window**.

Task

Close Window Save Price Levels bd

Task

Details

Task ID: Window Cleaning

Name: Window Cleaning

Description: Window Cleaning

Type: [dropdown]

Duration: 0.0 Calculate duration based on labor items

Assigned to: John

Items

Add Item Remove

Qty.	UoM	T. Qty	Item ID	Description	Price	Ext. Price	...
1	Hr	1	Labor	Labor	\$0.00	\$0.00	⊞
1	Ea	1	Default Part	Cleaning Supplies	\$21.87	\$21.87	⊞

Total Price: \$21.87 Total Cost: \$18.67

1. Enter a unique **Task ID** – this will be the unique identifier for the task.
2. Enter a **Name** for the task.
3. Enter a **Description** for the task. The description can be a short description, or possibly be used to enter specific instructions of what needs to be performed on this task.
4. Select a **Type** for the task. This is useful when you want to sort different tasks to different types.
5. Enter the **Duration** for the task. This is the estimated time you expect this task to be completed in.
6. **Calculate Duration based on Labor Items** is a useful checkbox if you want to automatically default the duration of the task to the quantity of labor items you enter on the task. For example, if you are billing two hours for the task, it will default the duration to two hours for duration.
7. If desired, you can choose a default technician for this task to be **Assigned To** whenever you add it to a work order. It is possible to assign the task to different technicians on each work order.

8. Click the **Save** button to save the task.

Adding Task Items:

Task Items allow you to automatically insert invoice charges on jobs where you add the task. Task Items are useful if you have any fixed rate pricing associated with a task and you want to ensure you invoice the customer for the task when the job is closed.

Note: While the items will automatically be added as invoice charges on a job when you add the task to the job, you can always delete or modify the invoice charges later if you like.

To add a task item to a task, click the **Add Item** button on the **Items** tab.

The screenshot shows a software dialog box titled "Task Item" with a close button in the top right corner. The main heading is "Add Task Item". Under the "Details" section, there is a dropdown menu for "Item ID" currently showing "Default Part". Below this is a text area for "Description" containing "Cleaning Supplies". There are input fields for "Qty" (set to 1), "Ea" (unit dropdown), and a small box with "1". Below these are "Price" (\$21.87) and "Cost" (\$18.67) fields. To the right of these are checkboxes for "Show on Work Order" (checked), "Show on Invoice" (checked), and "Add Item to PO" (unchecked). At the bottom left is "Extended Price" (\$21.87) and a "Task P. Levels" button. At the bottom are "Cancel", "Save & New", and "Save & Close" buttons.


1. Select the **Item ID** from your **Item List**.
2. Use the default description for the item or modify as necessary for the task.
3. Enter the **Qty** of the item to be added to the job.
4. Use the default price or modify as necessary for the task.
5. Use the default cost or modify as necessary for the cost.
6. If the item must be purchased prior to scheduling, you can select the **Add Item to PO** checkbox to flag ServiceLedger that the item needs to be ordered when added to a job.

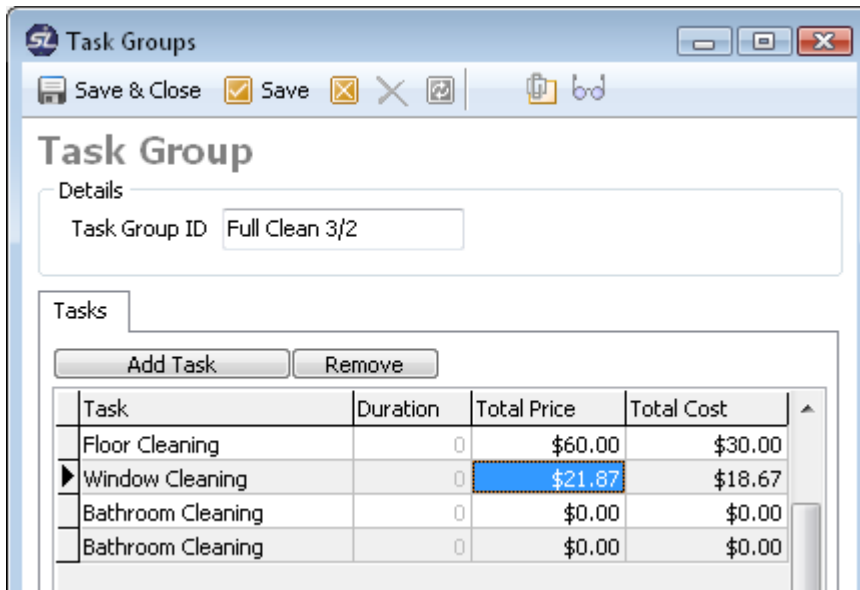
7. The **Show on Work Order** checkbox allows you to flag the item to print on the work order. This is useful if the item is used primarily to update job costing and you do not want your customer to see the item on the work order.
8. The **Show on Invoice** checkbox allows you to flag the item to print on an invoice. This is useful if the item is used primarily to update job costing on the job and you do not want your customer to see the item on the invoice.
9. Each task can have multiple task items associated with it. If you want to add multiple items to the task, follow the steps above until all items have been added to the task.

Creating Task Groups:

Task Groups allow you to group multiple tasks into a single group to eliminate the need to add multiple tasks to a job individually. When you group tasks, it will allow you to add a task group to a job and explode all of the tasks associated with that group onto the job. All items and invoice charges associated with the individual tasks of the group will explode on the job too under Invoice Charges.

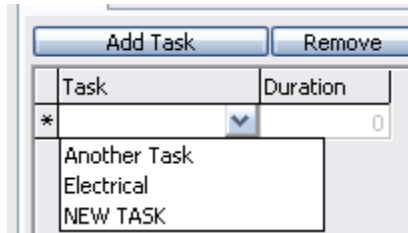
To create a **Task Group**, click on **Service | Task | Task Group** on the **Navigator** to open the **Task Group List**.

Click the  **Add New Record** button to add a new task group.



Task	Duration	Total Price	Total Cost
Floor Cleaning	0	\$60.00	\$30.00
Window Cleaning	0	\$21.87	\$18.67
Bathroom Cleaning	0	\$0.00	\$0.00
Bathroom Cleaning	0	\$0.00	\$0.00

1. Enter a unique **Task Group ID**. This is the unique identifier that will identify this task group in ServiceLedger.
2. Click the **Add Task** button to add a task. *Note: There is no limit on how many tasks you can add to a task group.*



3. Select the task from the drop-down box.
4. Repeat until all tasks have been added to the task group.
5. Click the **Save & Close** button to save and close the task group.

Adding Tasks or Task Groups to Jobs:

Adding a task or task group to a job will update the job duration and invoice charges based upon the parameters you have defined on the tasks when you set them up. On each job you will have a **Task** tab where you can view all of the tasks associated with that job.

Adding Tasks to Jobs:

From the **Task** tab on the job, click the **Add Task** button to add a task. *Note: Each job can have multiple tasks added.*

Work Order Task Entry

Add Task Item

Details

Task ID Window Cleaning Change Order

Price Level

Description Window Cleaning

Quantity 1

Duration Ea. 0.0 Total 0.0 Act. 0.0 Complete

Assigned to John

Due Date

Scheduled

Completed

Equipment

Items Schedules

Default Inventory Location Main

Qty	UoM	T. Qty	Description	Price	Cost	Ext. Price
1.0	Hr	1.0	Labor	\$0.00	\$0.00	\$0.00
1.0	Ea	1.0	Cleaning Sup	\$21.87	\$18.67	\$21.87

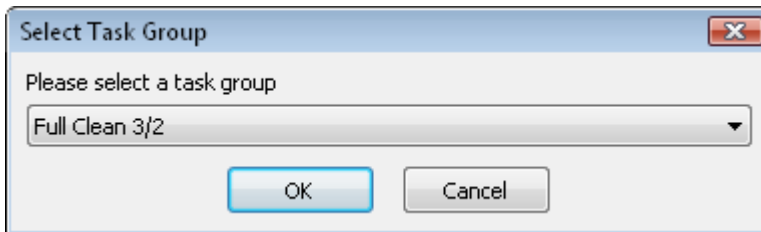
Total Cost \$18.67 Total Price \$21.87

1. Select the task you are adding from the **Task ID** drop-down box.
2. Use the default description of the task or modify the description for this specific job as necessary.
3. Enter the **Quantity** of the task. For example, if you are going to perform this task five times, enter a quantity of 5.
4. Use the default **Duration** of the task or modify the duration for this specific job as necessary.
5. **Assigned To** is the resource assigned to the task.
6. **Due Date** is the date the task is due by.
7. **Scheduled** is the date the task is scheduled for. You must schedule the task (not work order) in order to see this date populated.
8. **Completed** is the date the task is completed.
9. **Equipment** is the equipment record the task is associated with, if any.

10. Click **Save & New** to add a new task to the job or **Save & Close** to save the task to the job.

Adding Task Groups to Jobs:

From the **Task** tab on the job, click the **Add Task Group** button to add a task group.



1. Select the task group from the drop-down box you want to add to the job.

Scheduling Tasks from the Task Window:

From the Task Window, you can click on the **Schedule Tech** button to schedule resources. This option provides you with more flexible options if you want to enter a start date and assign some or all of the task duration to one or multiple resources.

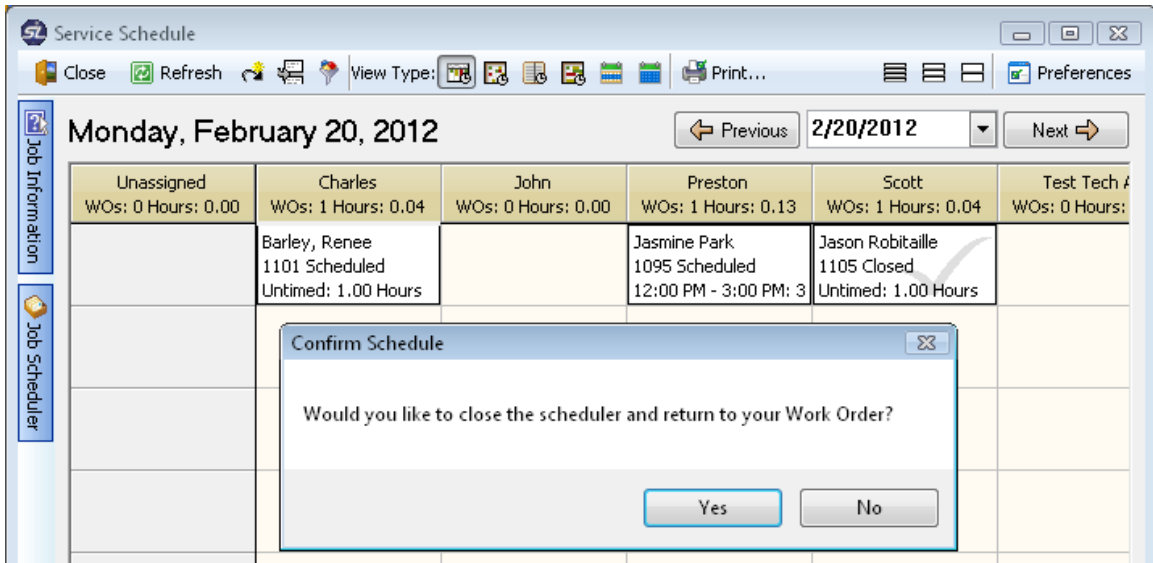
Scheduling Tasks on Jobs (From Work Orders):

Each task can be assigned or scheduled to one resource, however if you have multiple tasks on a job each task can be assigned or scheduled to a different resource. Scheduling a task is similar to scheduling a work order with the only difference being you are scheduling a task of the job.

From the **Task** tab on the job, click on the task you want to schedule and click on the **Schedule Task** button to launch the scheduler.

Add Task Add Task Group Remove Schedule This Task				
Task ID	Duration	Description	Technician	Scheduled For
Another Task	4.0	Another Task	John	12/30/2006 Untimed
▶ Electrical	4.0	Electrical		

Select the tech and date you wish to schedule the task for to schedule the task to the resource.



The Task list will be updated with the scheduled information after you refresh the work order. *Note: When you schedule resources to tasks, it will also update the job schedule with the resource information.*

Task ID	Duration	Description	Technician	Scheduled For	Completed
Another Task	4.0	Another Task	John	12/30/2006 Untimed	<input type="checkbox"/>
Electrical	4.0	Electrical	Preston	12/30/2006 Untimed	<input type="checkbox"/>

Completing Tasks on Jobs:

Completing a task is as easy as opening the task and checking the **Complete** checkbox on the task. When you complete the task, it will update the **Completed Date** field on the task to the date you completed the task.

Add Task Item

Details

Task ID: Window Cleaning Change Order

Price Level:

Description: Window Cleaning

Quantity: 1

Duration Ea: 0.0 Total: 0.0 Act: 0.0 Complete

Recurring Tasks for Accounts:

If you have common tasks you perform for your customers on a regular basis, you can setup a recurring task to remind you the task is due and have ServiceLedger automatically create a job for that task.

From the account record, click on the **Tasks** tab to view existing recurring tasks for a customer. Click on **Add Task** to add a new recurring task for the account. *Note: A customer can have one or more recurring tasks scheduled and/or have one or more recurring tasks for each service location.*

Account Task

Add Account Task

Details

Task ID: Window Cleaning [▼] [Add Task]

Name: Window Cleaning

Description: Regular Window Cleaning [▲▼]

Duration: 1.5

Default Tech: John [▼]

Recurrence & Next Date Set

Set this task up with a recurring schedule

Recur this task every: 6 Months [▼]

Recur from date completed

Service Location: Main [▼]

Next Occurrence Date: 3/1/2012 [▼]

Items

[Add Item] [Remove]

Qty	UoM	T. Qty	Description	Price	Cost	Ext. Price
▶ 1.5	Hr	1.5	Labor	\$40.00	\$20.00	\$60.00
1	Ea	1	Cleaning Supplies	\$21.87	\$18.67	\$21.87

Total Cost: \$0.00 Total Price: \$0.00

[Cancel] [Save & New] [Save & Close]

1. Select the **Task ID** from the drop-down box.
2. **Name** will auto-populate to the name for the task.
3. **Description** will auto-populate for the description of the task.
4. **Duration** will auto-populate for the default duration of the task.
5. **Default Tech** is the default technician assigned to the task. Leave blank if none.
6. Click the **Set this task up with a recurring schedule** checkbox.

7. Enter the recurring frequency.
8. Select the location if the customer has multiple locations.
9. Enter the **Next Date** or **Start Date** for when you want to start the recurring task.

Processing Recurring Tasks via Task Scheduler:

The **Task Scheduler** is where you will process recurring tasks and create jobs for the task. Click on **Service | Task | Task Scheduler** from the **Navigator** to open the **Task Scheduler**.

Filter the date range to the range you want to process jobs for and click the **Preview** button to get a preview of all tasks scheduled for that period.

Select the task you want to create jobs for by clicking the **X** box to the left of the task. Use the **Check All** checkbox in the lower-left hand corner to check all tasks.

Modify the **Task Date**, as necessary, and **Technician**, as necessary by clicking on the drop-down for each task under **Task Date** or **Technician**.

If you have multiple tasks for the same date and same location for a customer, you can elect to have them consolidated on a single job by clicking on the **Consolidate tasks with same date and location** checkbox.

Click on the **Process** button to process and create the jobs. Jobs will be created and will either be assigned to a technician, or left unassigned for the task date based upon your scheduling preferences.

Task Scheduler

3/1/2009 [v] 3/31/2009 [v] Preview

The following tasks are scheduled during this period.

Work Order Options

- Create a separate work order for each account task below
- Put all tasks at the same location & same date on a work order together
- Put all tasks at the same location & any date on a work order together

x	Account	Location	Task	Dur	Task Date	Technician
<input type="checkbox"/>	Chekris, Benjamin	Ship	Electrical	2.0	3/2/2009	