

# ServiceLedger Service Management System



## ServiceLedger Tech Portal Setup & User Guide

**Service Tracking, Scheduling, Dispatching, Invoicing and Management  
Software for Service Organizations**

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# Introduction

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The ServiceLedger Tech Portal allows your technicians to access and update information in the ServiceLedger Service Management System from any location, using any web-enabled device.

## **Overview**

The primary function of the ServiceLedger Tech Portal is to allow technicians and sub-contractors access to their work orders while away from the central office. Specifically, the Tech Portal allows your technicians to:

1. View and modify basic work order information (type, status, request, etc.)
2. View the schedules of all technicians assigned to a work order
3. Create tech work entries from schedules or arbitrarily
4. Create labor, travel, and mileage invoice item for entries
5. Add, modify, and complete tasks
6. Add and modify invoice items
7. Add and modify equipment
8. View and print (if a printer is available) work orders
9. Capture customer signatures

To supplement the work order functionality outlined above, the ServiceLedger Tech Portal also allows technicians to:

1. Add new accounts
2. Add new items for use in work orders
3. Add new account equipment for use in work orders

Each of these capabilities can be enabled or disabled according to the needs of your organization.

## ***System Requirements***

Before installing the ServiceLedger Tech Portal, please verify that your server and intended client hardware meet the minimum system requirements recommended by ServiceLedger Inc.

### **Server Requirements**

All ServiceLedger web applications, including the Tech Portal, use a running instance of the ServiceLedger Service Management System in order to communicate with the ServiceLedger database. Server requirements are as follows:

- Pentium 4 – 2.0 GHz Processor or better
- 1GB Memory and 2GB Hard Drive space free
- Color Monitor, Video adapter capable of at least 800x600 with 256 colors
- A Windows Professional or Windows Server operating system
- High Speed Internet Access
- A public IP address or DNS entry
- Microsoft Internet Information Services (IIS) 5.0 or higher

### **Client Requirements**

While the main ServiceLedger Service Management System application can only be run on windows computers connected to a network, the ServiceLedger Tech Portal can be accessed from any device that has a web browser and maintains a continuous connection to the internet. While Javascript support is not required, it greatly improves usability and is highly recommended.

Most computer web browsers, including Internet Explorer, Firefox, and Safari, should have no problem with the Tech Portal. In addition, mobile devices such as smartphones and tablets are generally compatible and can take advantage of advanced features such as touch-based signature capture.

## ***Installation & Setup***

ServiceLedger typically provides Tech Portal installation as a free service to customers who have purchased the portal.

Prior to scheduling an installation, please:

- Choose a computer to act as your web server
- Ensure that Internet Information Services (IIS) is installed
- Ensure that the Microsoft .NET framework versions 1.1 and 2.0 are installed
- Run all windows updates to ensure that you are running the latest releases of IIS and the Microsoft .NET framework

IIS is available for all business editions of Windows and can typically be added either via the Programs & Features section of the control panel or the Server Roles configuration panel. The .NET framework is frequently installed by Windows Update, but if it is not installed, it can be downloaded from Microsoft's website.

The tech portal is licensed separately from the application. If you do not have a license at this point, please contact us at 940.497.2834 or via [sales@serviceledger.com](mailto:sales@serviceledger.com) to acquire a license for the tech portal.

## Site Administration

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Your ServiceLedger Administrator should be aware of a few things to successfully manage the Tech Portal. These are:

- Setting Technicians up to use the portal
- Configuring global portal options
- Configuring specific rights for technicians and vendors

Each of these is covered in detail below.

## Setting up Technicians

Technicians must be granted access to the portal before they will be able to log in and use it. To set up a technician, two things are necessary:

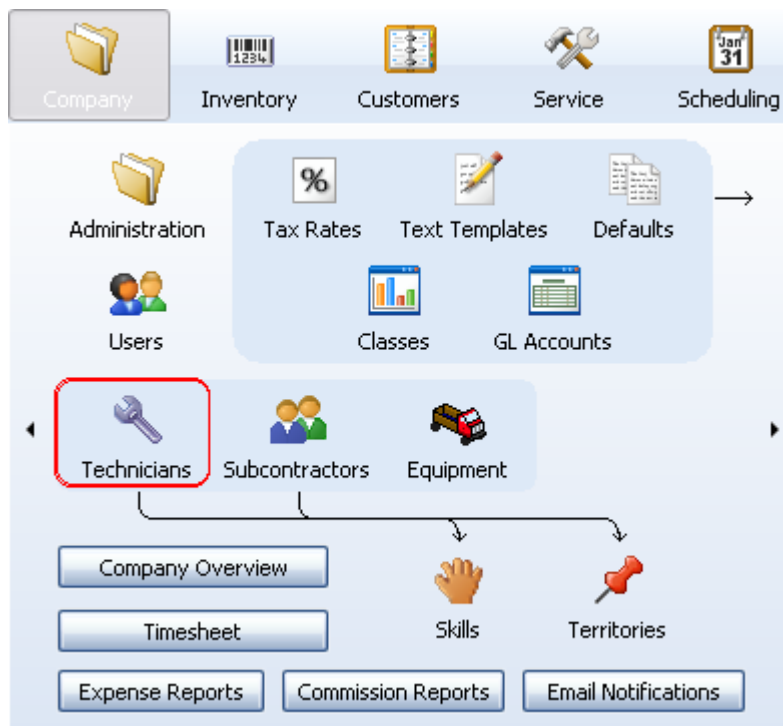
1. A web password, set up on the Technician window on the details tab
2. An allocated tech license, set up under File -> Tech Web Access

Once these two steps are complete, the technician should be able to log in using his or her Tech ID and web password as described in the application reference below.

### Tech ID and Password

To log in, a tech must have a Tech ID and Web Password set up. This is performed on the Technician or Subcontractor window. The window can be reached from, depending on your version of ServiceLedger, one of the following locations:

- Resources -> Technicians
- Administration -> Resources -> Technicians
- The navigation bar, under Company



From the technician or subcontractor list, you can double-click a technician to open the technician window.

**Technician**

Close Window Save [X] [?] [bd] Actions

**Technician**

**Details**

Tech ID: Jeremy  
 Name: Jeremy  
 Status: Active  
 Type: Employee  
 Show in Dispatch & Schedule:

**Defaults**

Default Labor Item: Default Labor  
 Default Labor Rate: \$36.00  
 Default Labor Cost: \$22.00  
 Default Comm Rate: 15.0%  
 Ranking: 1

Notes | **Address** | Workload | Time Off | Territory | Skill | Rates | Details | Custom Fields

Address 1: 1722 Kendall Dr  
 Address 2:   
 City: Denton  
 State/Prov: TX  
 Postal: 76205  
 Email: john@serviceledger.com  
 Web Password:   
 ActiveSync Dir.:   
 Home:   
 Phone:   
 Alt. Phone:   
 Fax:   
 Cell:   
 Pager:   
 Notify By:   
 Associated User:

The two underlined fields must have been filled and are used to log into the portal.

## Tech Web Access

In addition to having an ID and password set up, each tech must also be granted access through the Tech Web Access licensing window.

**Tech Web Access**

Save & Close Cancel [bd]

Number of licenses: 0, available: 0

Name	Web Access
Chuck	<input type="checkbox"/>
Hector	<input type="checkbox"/>
Jeremy	<input type="checkbox"/>
Juan	<input type="checkbox"/>
Mail Truck	<input type="checkbox"/>



For a technician to log in, you must check the Web Access box beside their name. If the tech is not set up for web access in this window, the portal will indicate that they have an invalid username or password.

## Configuring Portal Options

The tech portal has several user-configurable options that affect how it can be used by all technicians and vendors. These are all set in the following two files, both of which are located under the 'TechPortal' in folder in your ServiceLedger folder, typically "C:\Program Files (x86)\ServiceLedger\ServiceLedger"

- global.asa
- settings.aspx
- permissions.asp

The options and their effects are listed below:

### Options in Global.asa

The following variables are all located under the 'User Options' section of the 'global.asa' file. The rest of the 'global.asa' file will be configured during the initial Tech Portal install and should not be modified unless you are instructed to do so by a ServiceLedger support representative.

```
Session("DefaultPage") = "Today"
```

This option controls which tab opens by default on the Technician Home page. The 'Today' Tab loads by default, but all of the following are possible options:

- "Today"
- "Pending"
- "Past-Due"
- "Assigned"
- "Hold"
- "Completed"
- "All"

```
Session("DefaultSchedule") = "month"
```

This options controls the calendar that loads by default (in this case, the Month calendar is the default). The following are all possible options:

- "week"
- "month"
- "day"

The following options all have possible values of only '0' or '1.' For these options, '0' is equivalent to OFF, while '1' turns the option ON.

```
Session("UseItemGroups") = "0"
```

This option controls whether the 'Group Selection' item search method is available for use. By default it is disabled, but you can change it to "1" to enable it.

```
Session("UseItemSearch") = "1"
```

This option controls whether the 'Item Search' search method is available for use. It is enabled by default, but you can disable the ability to search for items by changing the option to "0."

```
Session("HideLaborAmount") = "0"
```

This option controls whether technicians can see prices and costs for items of type 'Labor.' By default, technicians can see these amounts. Set the variable equal to "1" to disallow technicians from seeing 'Labor' item prices and costs.

```
Session("HidePartsAmount") = "0"
```

This option controls whether technicians can see prices and costs for items of type 'Part.' By default, technicians can see these amounts. Set the variable equal to "1" to disallow technicians from seeing 'Part' item prices and costs.

```
Session("HideAllCost") = "0"
```

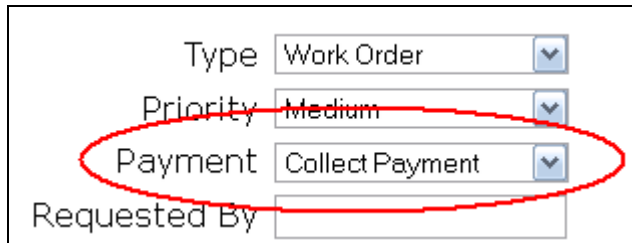
This option controls whether technicians can see *costs* on all items, regardless of type. By default, technicians can see all item costs. Set the variable equal to "1" to disallow technicians from seeing costs for all items.

```
Session("HideAllPrice") = "0"
```

This option controls whether technicians can see *prices* on all items, regardless of type. By default, technicians can see prices for all items. Set the variable equal to "1" to disallow technicians from seeing prices for all items.

```
Session("HideBilledPrice") = "0"
```

If the current work order's payment terms are set to anything other than 'Collect Payment,' (see the screenshot below, taken from the Work Order page), enabling this variable by setting it to "1" will hide all prices from the Tech Portal. By default, prices will display regardless of the payment method chosen.



The screenshot shows a form with four fields: 'Type' (Work Order), 'Priority' (Medium), 'Payment' (Collect Payment), and 'Requested By' (empty). A red oval highlights the 'Payment' dropdown menu.

```
Session("ShowOnlyParts") = "0"
```

Enabling this option by setting it to "1" only allows technicians to add items of type 'Part' to work orders. By default, this option is disabled.

```
Session("ShowOldEmailTicket") = "0"
```

This option is no longer in use.

```
Session("HideDisabledActions") = "0"
```

This option controls whether features that have been disabled by other options are still viewable to technicians. By default, disabled features are still viewable by technicians. To hide disabled features, set the value to "1."

```
Session("HideSignatureCapture") = "0"
```

Enabling this option by setting it to "1" will disable the Signature Capture feature. By default, the Signature Capture feature is always available.

```
Session("EmailPostedInvoices") = "0"
```

This option allows technicians to email posted invoices. By default this option is turned off, but you can enable it by changing the value to "1."

```
Session("ShowTicketPost") = "0"
```

This option controls whether technicians can post work orders. By default, this option is turned off, but you can enable it by changing the value to "1."

```
Session("TechSignatureFieldPresent") = "0"
```

This option controls whether the Technician Signature Capture field is available. Set the value to "1" to enable this feature. By default, Technician Signature Capture is disabled.

```
Session("StatusMap") = ""
```

This option allows you to show different work order statuses than those shown by ServiceLedger. Contact ServiceLedger for details on how to use this option.

## Options in Settings.aspx

```
Session["/"] = @"http://localhost/TechPortal/";
```

This option specifies the web location the application is served at; make sure to include the trailing slash when changing.

```
Session["~"] = @"c:\Program Files\ServiceLedger\ServiceLedger\TechPortal\";
```

This option specifies the server that the application is installed in; make sure to include the trailing slash when changing.

```
Session["CustomerPortalURL"] = @"/SLCustomerPortal/";
```

This option specifies the web location the customer portal is served at, if present; make sure to include the trailing slash when changing.

```
Session["DSN"]=@"data source=.\serviceledger;User ID=sa;Password=sldemosl;initial catalog=ServiceLedger";
```

This option is the connection string used to connect directly to the ServiceLedger database. It is used when logging in, listing information, and showing read-only records. Please make sure "Provider=SQLOLEDB;" is *not* at the beginning.

```
Session["Host"]="localhost";  
Session["HostPort"] = 8080;  
Session["HostPassword"] = "tunnel";
```

The above three options specify the computer name, tunnel port, and tunnel password of the ServiceLedger instance running in Server Mode. This is used when creating or modifying records, such as creating a new warranty or customer. For more information on server mode, see:

<http://support.serviceledger.com/kb/Default.asp?ToDo=view&questId=327>

```
Session["WebUser"] = "ADMIN";  
Session["WebPassword"] = "password";
```

The above two options specify the User and Password under which web requests will be executed in the Server Mode copy of ServiceLedger.

```
Session["ReportDirectory"] = @"c:\program files\ServiceLedger\ServiceLedger\Temp";
```

This option configures where ServiceLedger temporarily stores reports generated by technicians. If the path is invalid, please update it to the actual path ServiceLedger is installed at.

## Options in Permissions.asp

The options in this file control both subcontractors' and technicians' ability to search, print, view, edit, and add new records in the Tech Portal. Options are structured in the following way:

```
ub SetPermissions( type_id )  
    if( type_id = ctSub ) then  
        Session("ct") = ctSub  
        Session("rights.schedule") = "0"
```

[...]

```
    else  
        Session("ct") = ctTech  
        Session("rights.schedule") = "1"
```

[...]

The Session variables under `if( type_id = ctSub ) then` control subcontractor privileges.

The Session variables under `else Session("ct") = ctTech` control technician privileges.

This structure allows you to set different permissions for technicians and subcontractors. For each variable, a value of "0" disables permission, while a value of "1" enables it.

The variables are structured in such a way that you can make permissions more specific or more general depending upon the type of access you wish to grant users. For instance, the following variables control whether technicians/subcontractors have the ability to print, view, edit, or add work orders, respectively:

```
Session("rights.ticket.print") = "1"  
Session("rights.ticket.view") = "1"  
Session("rights.ticket.edit") = "0"  
Session("rights.ticket.add") = "0"
```

You have a lot of flexibility in defining these rights. You can use all four of the variables listed immediately above, with different values for each one, or you can remove the final "." and the text that follows, which creates a more general variable that can grant or deny access rights at once.

So, if you wish to deny or allow all work order rights with one variable, you can delete the above four variables and instead use the following:

```
Session("rights.ticket ") = "1"
```

Notice that the above example is identical to the previous four variables, except that the last part of the variable name has been removed. This newly created variable gives your technicians and/or subcontractors permission to print, view, edit, and add work orders with only one line of code. If you change this new variable to "0", users will be unable to print, view, edit, or add work orders.

The remaining variables in this file work in much the same way, giving you the flexibility to categorically allow / deny user privileges, or to use the more specific variables for more fine-tuned permissions.

**Important note:** Be aware which set of variables you are modifying. Though the variable names are the same for both technicians and subcontractors, the section of the document you're editing will affect whether you are granting/denying privileges to technicians or subcontractors.

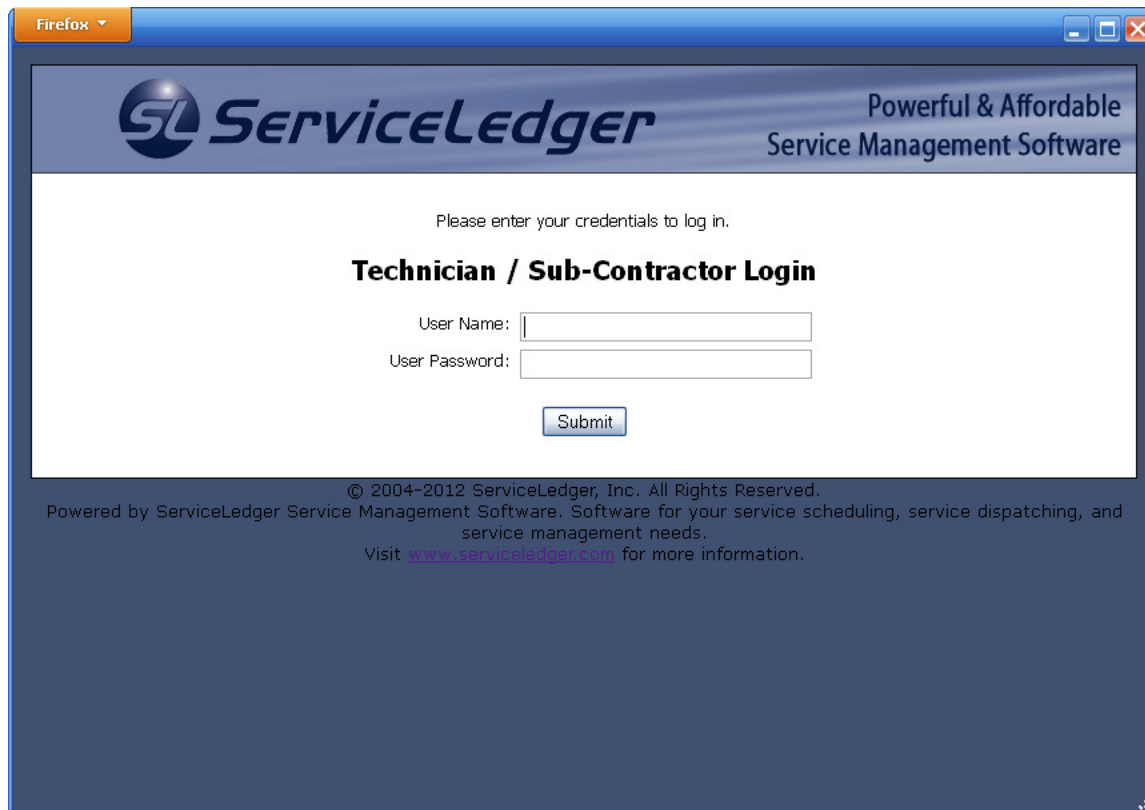
## Application Reference

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Once a tech has been set up for web access, using the ServiceLedger Tech Portal is as simple as logging in and clicking on work order links. The following sections go over the various pages included in the Tech Portal in detail.



## The Login Screen



The screenshot shows a web browser window with the title 'Firefox'. The page header features the ServiceLedger logo on the left and the text 'Powerful & Affordable Service Management Software' on the right. The main content area is a white box with a blue border. Inside this box, the text 'Please enter your credentials to log in.' is centered. Below this is the heading 'Technician / Sub-Contractor Login'. There are two input fields: 'User Name:' and 'User Password:'. A 'Submit' button is located below the password field. At the bottom of the white box, there is a copyright notice: '© 2004-2012 ServiceLedger, Inc. All Rights Reserved. Powered by ServiceLedger Service Management Software. Software for your service scheduling, service dispatching, and service management needs. Visit [www.serviceledge.com](http://www.serviceledge.com) for more information.'

The login page allows you to log into the portal. You must log in using the username and password that have been set up in ServiceLedger on your technician or subcontractor record in the Resource ID and Web Password fields.

Messages about your login will appear at the top of the login box. Error messages, such as messages about an invalid name or password, appear in red.

Usernames are not case-sensitive. (In fact, they'll be translated to all-uppercase whenever you exit the field. This behavior is normal.) Passwords, on the other hand, are case-sensitive. If you're having trouble logging in, please make sure Caps Lock is not pressed.

After entering your name and password at the Login screen, you will be presented with the Technician Home page.

## Technician Home

Firefox

**ServiceLedger** Powerful & Affordable Service Management Software

### Technician Home

Welcome, Todd.

[Add Work Order](#) | [Add Account](#) | [Add Item](#) | [Add Equipment](#) | [View Schedule](#) | [Account Search](#) | [Logout](#)

You have the following work orders:

NOTE: Please avoid using the browser's Back and Forward buttons unless told to do so.

Today Pending Past-Due Assigned Hold Completed All

#	Type	Account	Address	Phone	Request	Start Date	Priority	Status
<a href="#">2226</a>	Work Order	Balak, Mike	8753 S. Mountain View	(415)555-6636	A/C Unit Inspection	5/15/2012	Medium	Scheduled

Total work orders shown: 1

This page gives you access to all of the key features of the ServiceLedger Tech Portal. Specifically, from this page you can review your assigned work orders, open these work orders to submit changes, add new work orders, and optionally add accounts, items, and equipment to the system.

The top area of the page shows a list of links you can use to add records or search for customer service history. Below, the primary area of the page provides a list of your open work orders. The tabs above the table of work orders can be used to filter the table by status. By default, the 'Today' tab will be selected, showing only work orders that are scheduled for today. The 'Pending' tab will display all work orders that have not been completed. The next few tabs show other work orders by status: for example, the 'Past-Due' tab lists all uncompleted work orders for which the scheduled date has passed, and the 'Assigned' tab lists work orders that have been assigned, but not yet scheduled. Finally, the 'All' tab lists all open work orders.

To open a work order, click on the blue link with the work order number. This will take you to the Work Order page.

## Work Order Home Page

The Work Order page is used to add, view and modify existing work orders. It is broken into two sections: a form used to submit changes to basic work order details, and below, which provide you with a view of the extended details of the work order, as well as a way to access and modify those details. These areas are referred to below as the General Information area and the Detail Information area.

### General Information

Firefox

**ServiceLedger** Powerful & Affordable Service Management Software

### Work Order 2226

Number: 2226      Status: Scheduled

Account: Balak, Mike      Account #: 1003

Service Site: Main/Balak, Mike      Bill To: Main/Balak, Mike

8753 S. Mountain View  
Bayshore, CA 94326  
Main Phone: (415) 555-6636  
Alt. Phone: ()-

8753 S. Mountain View  
Bayshore, CA 94326  
Main Phone: (415) 555-6636  
Alt. Phone: ()-

[Account Service History](#)

Type: Work Order      Agreement: (none)      [Check Balances](#)

Priority: Medium      Project: (none)

Payment: Collect Payment      PO/Ref #:

Requested By:      Created On: 10/24/2011 3:15:00 PM

Request / Internal Notes

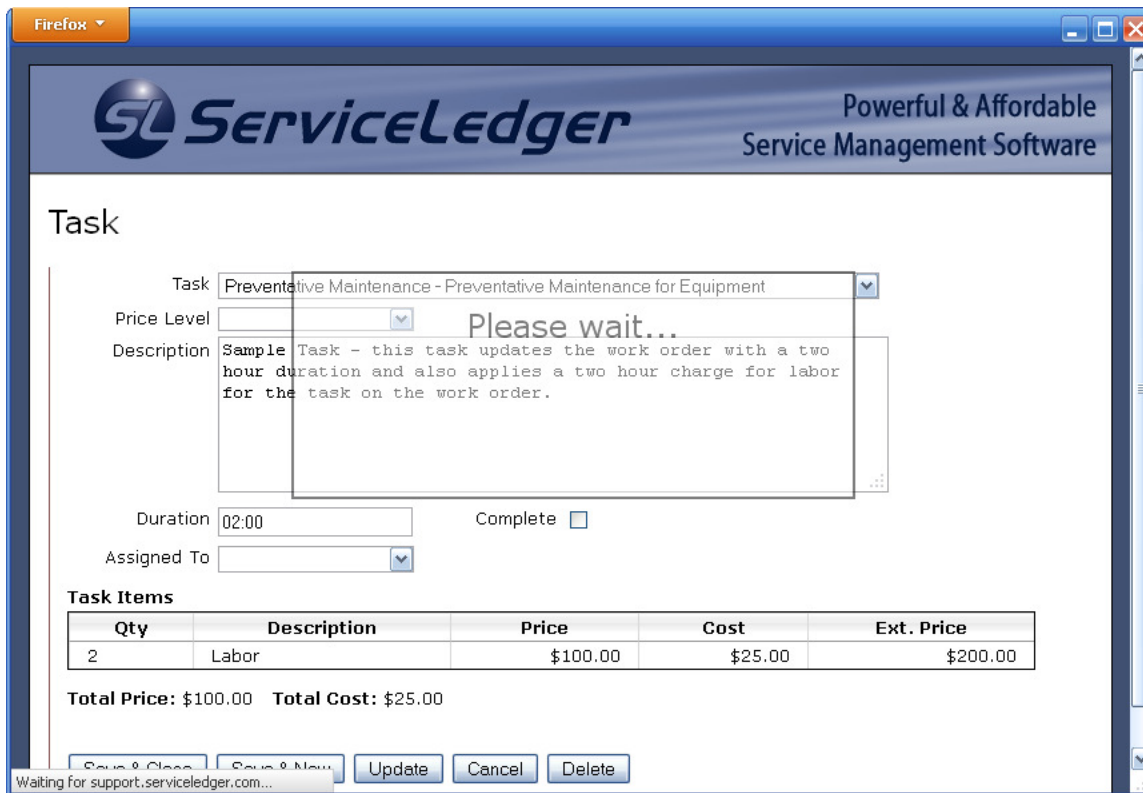
Notes: A/C Unit Inspection

Currently Assigned to Todd. [Reassign](#)

[Capture Signature](#) [View PDF Work Order](#)

In the General Information area, you can use the fields on the page to modify the work order. Please note that after some changes, the page will need to submit new information to the server and wait for a response—if Javascript is enabled, the browser will automatically send this request. When this happens, the mouse cursor should indicate that the application is waiting on a response with an hourglass or other figure.

In addition, these pages will show a warning informing you that they are processing information:



If Javascript is not enabled or available, it is recommended that you manually update the information with the Update button before saving any changes to the record.

The Save, Update, and Cancel buttons in the general information area operate on the fields in the general information area (fields located above these buttons). Their functions are:

[Save]: Save the record and return to the previous area.

[Update]: Update the information displayed by submitting any changes to the server and requesting a response containing up-to-date information. Once updated, the current page will be reloaded.

[Cancel]: Abandon all changes since the record was last saved and return to the previous area.

These buttons have no effect on the detail information below them.

Also, please note that after any changes have been made to the general information area, the record must be updated (using the 'Save' button) before detail information can be modified.

## Detail Information

Currently Assigned to Todd. [Reassign](#)

[Save & Close](#) [Save](#) [Update](#) [Cancel](#) [Capture Signature](#) [View PDF Work Order](#)

Task ID	Duration	Description	Technician	Complete	Action
Preventative Maintenance	02:00	Preventative Maintenance for Equipment		<input type="checkbox"/>	<a href="#">Edit</a>

[Add Task](#) [Add Task Group](#)

[Scheduled Technicians](#) [Technician Entries](#)

Tech	Start	End	Duration	Description	Action
Todd	11/26/2012	11/26/2012	01:00		<a href="#">Make Tech Work Entry</a> <a href="#">Edit</a> <a href="#">Schedule</a>

[Add Resource Schedule](#) [Add Tech Work Entry](#)

QTY	Item	Description	Price	Ext. Price	Tax	Action
1	Motor Belt		\$35.84	\$35.84	<input type="checkbox"/>	<a href="#">Edit</a>

[Add Invoice Item](#)

Equipment ID	Description	Tech	Duration	Problem	Notes	Action
1a	Equipment		0			<a href="#">Edit</a>

[Add Equipment Entry](#)

Tables below the general information area allow you to view and modify extended details of the current work order. Specifically, you can:

- Add, view and modify work order tasks
- View schedules for the work order (in the Scheduled Technicians tab)
- View and add Tech Work Entries (in the Technician Entries tab)
- Add, view, and modify invoice items.
- Add, view, and modify attached equipment, if the account for this work order has any equipment to attach.

A summary view of all work order details is shown in the standard work order page. The blue 'Edit' links on the right-hand side of each record allow you to edit a detail record or view more information.

In all standard record entry pages, there is a data area (bordered on the left by a single line) controlled by Save, Update, and Cancel buttons. The function of these buttons is as follows:

[Save]: Save the record and return to the previous area.

[Update]: Update the information displayed by submitting any changes to the server

and requesting a response containing up-to-date information. Once updated, the current page will be reloaded.

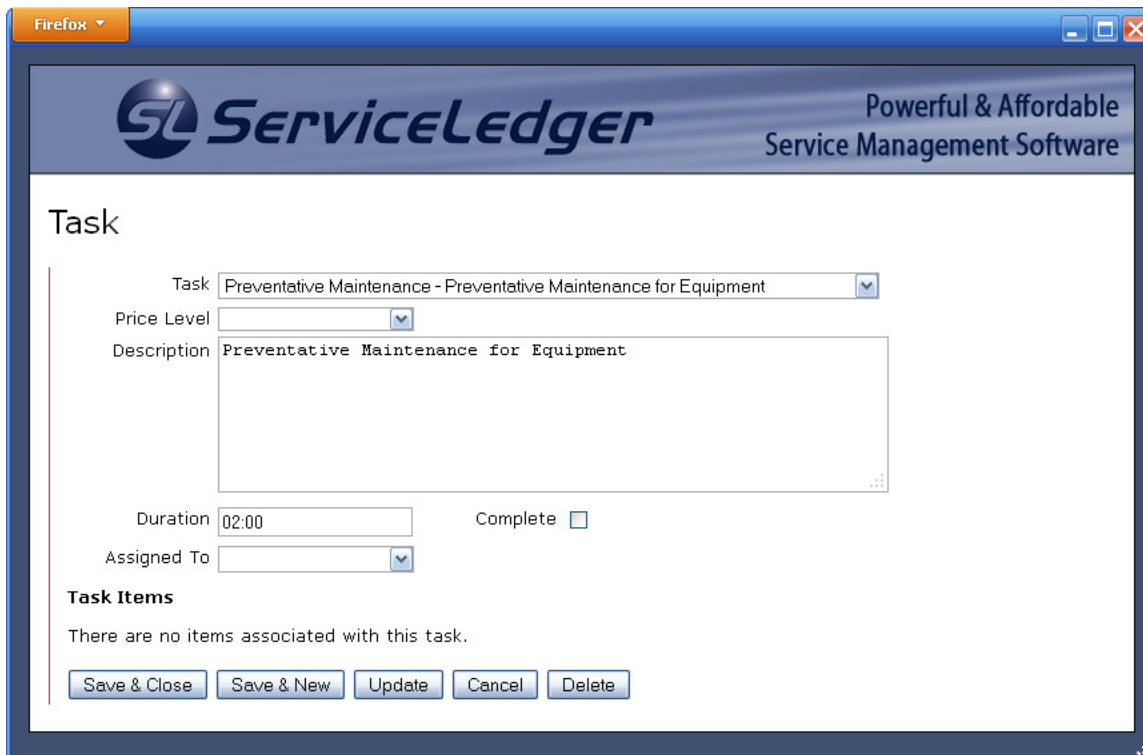
[Cancel]: Abandon all changes since the record was last saved and return to the previous area.

All fields in the data area can be used to modify the record. Please note that after some changes, the page will need to submit new information to the server and wait for a response—if JavaScript is enabled, the browser will automatically send this request. When this happens, the mouse cursor should indicate that the application is waiting on a response with an hourglass or other figure. In addition, these pages will show a warning informing you that they are processing information.

If Javascript is not enabled or available, it is recommended that you manually update the information with the Update button before saving any changes to the record.

Once the Save button is pressed, all changes will be posted immediately to the ServiceLedger database. This is true even of detail records on a work order; unlike the ServiceLedger desktop program, the ServiceLedger Tech Portal saves all changes immediately, even when dealing with detail records such as invoice charges on a work order.

## Adding Tasks



The screenshot shows a web browser window with the ServiceLedger logo and the text "Powerful & Affordable Service Management Software". The main content area is titled "Task" and contains the following fields:

- Task:** A dropdown menu with the selected value "Preventative Maintenance - Preventative Maintenance for Equipment".
- Price Level:** A dropdown menu.
- Description:** A text area containing "Preventative Maintenance for Equipment".
- Duration:** A text input field with "02:00".
- Complete:** A checkbox that is currently unchecked.
- Assigned To:** A dropdown menu.

Below the form is a section titled "Task Items" with the text "There are no items associated with this task." At the bottom of the form are five buttons: "Save & Close", "Save & New", "Update", "Cancel", and "Delete".

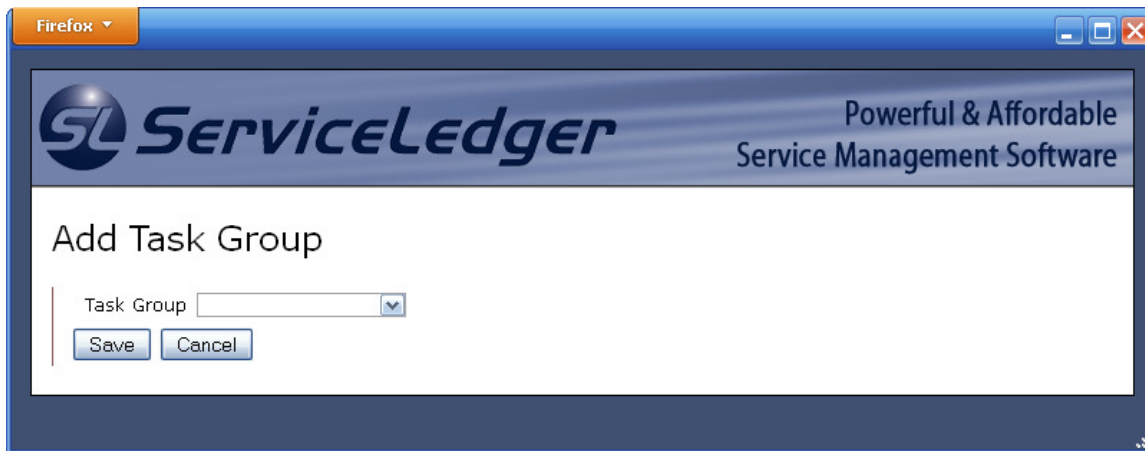
From the Work Order page, click on 'Add Task' to add a task to the work order.

Select an existing task from the dropdown field. If task price levels have been defined, select the appropriate task price level from the dropdown. The Tech Portal will automatically populate the 'Description' and 'Duration' fields with the information entered when the task was first created. If needed, you can modify these for the current work order by typing in new information. Enter the duration in (hours: minutes) format. For instance, if the job will take two and a half hours, enter '02:30' in the text field. The 'Assigned to' field allows you to select or change the specific technician to whom this task is assigned. To mark or unmark a task as being complete, check or uncheck the 'Complete' box.

The Task Items section of the page lists all invoice items associated with the task. These are defined in ServiceLedger and cannot be modified in the Tech Portal, although you can edit the invoice charges afterwards using the Items table.

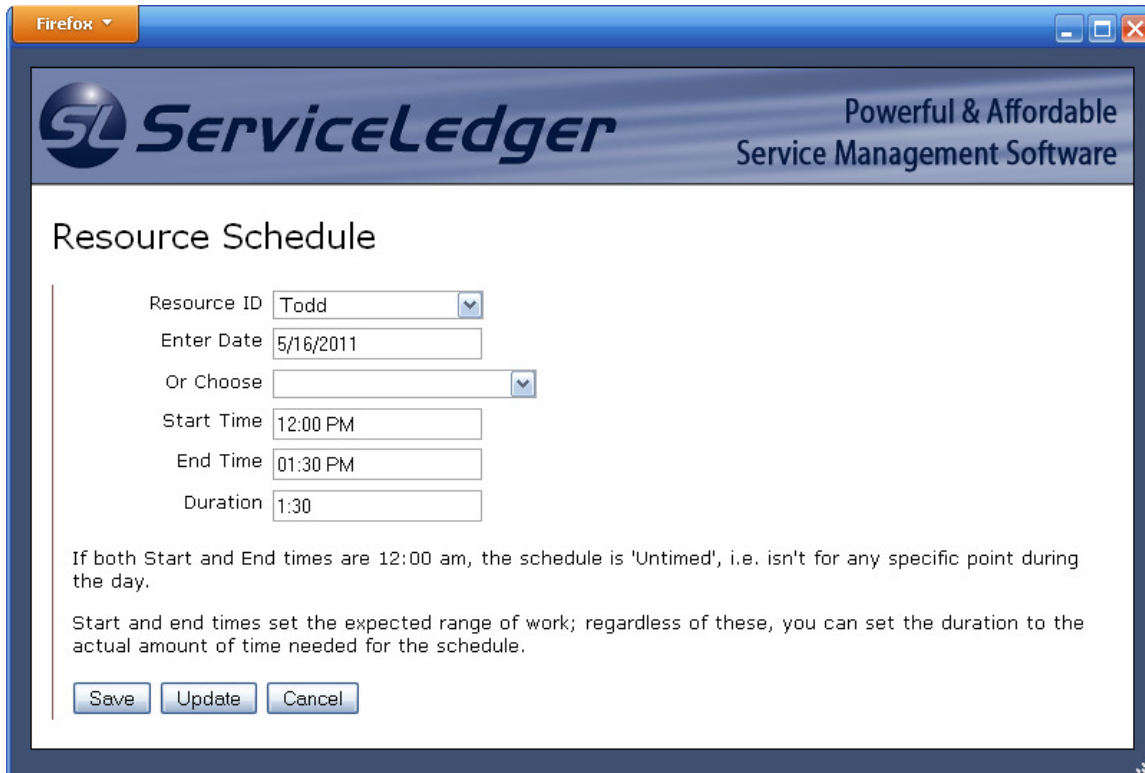
Clicking 'Save & Close' will save the current page and return to the Work Order page. Clicking 'Save & New' will save the current page and load a new page where you can add additional tasks to the work order. Clicking 'Delete' will remove the current task from the work order.

### **Adding Task Groups**



From the Work Order page, click on 'Add Task Group' to add a task group to the work order. Select the appropriate group from the 'Task Group' dropdown field and click 'Save' to add it to the work order. All tasks in the group will now be listed in the tasks table.

## Adding Schedules



The screenshot shows a web browser window titled 'Firefox' displaying the 'ServiceLedger' interface. The page header includes the 'ServiceLedger' logo and the text 'Powerful & Affordable Service Management Software'. The main content area is titled 'Resource Schedule' and contains a form with the following fields:

- Resource ID: Todd (dropdown menu)
- Enter Date: 5/16/2011 (text input)
- Or Choose: (dropdown menu)
- Start Time: 12:00 PM (text input)
- End Time: 01:30 PM (text input)
- Duration: 1:30 (text input)

Below the form, there is a note: 'If both Start and End times are 12:00 am, the schedule is 'Untimed', i.e. isn't for any specific point during the day.' Another note states: 'Start and end times set the expected range of work; regardless of these, you can set the duration to the actual amount of time needed for the schedule.'

At the bottom of the form, there are three buttons: 'Save', 'Update', and 'Cancel'.

The Tech Portal allows you to schedule work orders from the Work Order page. To schedule the work order, click on 'Add Resource Schedule' on the main Work Order page.

Select the technician to whom the work order will be assigned from the 'Resource ID' dropdown field. Enter the date in the 'Enter Date' field (format: month/date/year); the Tech Portal will default to today's date. Alternately, you can select a date up to two weeks in advance from the 'Or Choose' dropdown field. Enter the job's scheduled start and end times; times can be entered in 24-hour format (e.g., '13:00' for 1:00 pm) or in 12-hour format followed by 'AM' or 'PM.' You can enter the appointment's expected duration in the 'Duration' field (format is hours: minutes).

If you need to schedule a work order for a particular date but don't have a specific time for the job, simply leave both the start and end times as '12:00 AM.'



## Adding Tech Work Entries

**ServiceLedger** Powerful & Affordable Service Management Software

### Tech Work Entry

Technician:     Travel Duration:   
 Date:     Job Duration:   
 Travel Start:     Quantity:   
 Job Start:     Actual Qty.:   
 Job End:

Rate #:     Beginning Miles:   
 Rate:     Ending Miles:   
 Cost:     Total Miles:   
 Labor Charges:     Travel Rate:   
 Use Minimum:     Mileage Charges:   
 Bill to Agreement:

Description:

Adding technician work entries to a work order will generate labor charges or job cost information based on the actual time the technician worked. From the Work Order page, click on 'Add Tech Work Entry' to create a work entry. If the work order has already been scheduled, you can create a work entry by clicking on 'Make Tech Work Entry' under the 'Actions' column of the 'Scheduled Technicians' tab (see the screenshot below). Doing so will automatically add the work order's scheduled start and end times to the time entry.

Scheduled Technicians		Technician Entries			
Tech	Start	End	Duration	Description	Action
Todd	5/16/2012 12:30:00 PM	5/16/2012 2:00:00 PM	01:30		<a href="#">Make Tech Work Entry</a> <a href="#">Edit Schedule</a>

Select the correct technician for the work entry from the 'Technician' dropdown field. Enter the date (format: month/date/year) and travel, start, and end times (in 12- or 24-hour format). If you do not track travel times, set the travel start time to the same time as the 'Job Start' time. The Tech Portal will automatically calculate the work order's time durations and quantities based on the times entered.

If you have previously defined custom labor rates (see Administration > Resources > Technicians in ServiceLedger), select the proper rate from the dropdown. Alternately, you can manually enter labor rates and costs by typing directly in their respective fields. The Tech Portal will automatically calculate total labor charges or costs from the amounts entered.

If you will be tracking mileage, simply enter your vehicle's beginning and ending mileage in the proper fields. Mileage charges are automatically calculated based on the total number of miles driven and the travel rates you specify.

If your company always charges for a minimum amount of time (e.g., customers are always charged for at least one hour of labor), make sure the 'Use Minimum' box is checked. This will ensure that the minimum amount of time is billed even if the total time on the entry is below the minimum level.

If the work order's charges will be billed to an existing agreement rather than invoiced separately, make sure the 'Bill to Agreement' box is checked.

Enter any relevant notes about the work performed in the 'Description' field.

Tech Work Entries have the capacity to automatically generate invoice charges or job costs for labor, travel time, and travel mileage. If they are not automatically generated, you can manually add these charges from the main Work Order page. Click on the 'Technician Entries' tab (see the screenshot below), then click on the 'Labor', 'Mileage', and 'Travel' links in the 'Action' column. If the text is displayed in black and not a link, the charge has already been added.

Scheduled Technicians		Technician Entries		Duration	Description	Action
Tech	Start	End				
Todd	5/16/2012 12:30:00 PM	5/16/2012 2:00:00 PM	01:30	. Routine inspection, no problems found.	<a href="#">Edit</a> or Add Invoice Item: [Labor Mileage Travel]	

## Add Invoice Items

The screenshot shows a web browser window with the ServiceLedger logo and the text "Powerful & Affordable Service Management Software". The main heading is "Invoice Charge". Below this, there is a search instruction: "Currently choosing items by name / description search. Switch to [Full List](#), [Group Selection](#), or [Serial Search](#)." The form includes an "Item Search" field with the text "Motor" and a "Search" button. Below that is an "Item ID" dropdown menu showing "MotorBelt" and a "Description" text area. Further down, there are dropdown menus for "Manufacturer" and "Model". A table-like section contains fields for "Quantity" (1), "Price" (\$35.84), "Cost" (\$294.37), "Actual Qty" (1), "Ext Price" (\$35.84), and "Ext Cost" (\$294.37). Other fields include "From Item Location", "Warranty Exp" (5/16/2012), "Serial Number", "Technician" (Todd), "Attached Equipment", "Bill to Agreement" (checkbox), and "Taxable" (checkbox). At the bottom, there are four buttons: "Save & Close", "Save & New", "Update", and "Cancel".

To add invoice charges, click on 'Add Invoice Item' on the Work Order page. The Tech Portal offers several ways to find and add invoice items to a work order. By default, items are added by searching for them by the item name, then selecting them from a dropdown. Alternately, you can choose to select items from the entire Item List, by parent/child groups (Group Selection), or by serial number (Serial Search).

To use the default search mode, simply enter part or all of the item's ID, or enter part or all of the desired item's description text; the Tech Portal will search both of these fields for matching items once you click 'Search.' Search results are saved in the 'Item ID' dropdown; select the proper item from this list.

To select an item from the full Item List, click on the 'Full List' link at the top of the page. Select the correct item from 'Item ID' dropdown that appears.

To select an item using parent/child item groups, click on the 'Group Selection' link at the top of the page. The first 'Item ID' dropdown field selects the parent item. The second dropdown will select the child item. If that child item has its own child items, additional dropdown fields will appear, allowing you to select the exact item.

To select an item by serial number, click on the 'Serial Search' link at the top of the page. Enter all or a part of the serial number in the 'Serial Search' field, then click 'Search.' This will allow you to select the exact item from the 'Item ID' dropdown field.

Once you have selected the correct item, the Tech Portal will automatically fill in the item information field with the default information entered when you created the item. You can leave these fields at their defaults, or you can enter work-order-specific information (e.g., prices and costs) in the proper fields.

## Adding Equipment Entries

The screenshot shows the 'Equipment Entry' form in the ServiceLedger software. The form is displayed in a Firefox browser window. The header of the software reads 'ServiceLedger Powerful & Affordable Service Management Software'. The form fields are as follows:

- Equipment ID: 1a.- Equipment | Equipment (dropdown)
- Description: Equipment (text area)
- Equipment Type: Unknown (text field)
- Serial Number: (text field)
- Manufacturer: Unknown (text field)
- Install Date: (text field)
- Model: Unknown (text field)
- Warranty Exp: 2/6/2004 (text field)

Below the form fields is a table with the following columns: Code #, Problem, Resolution, and Action. Below the table is an 'Add Problem Code' dropdown menu and an 'Add Problem Code' button. Below that is a 'Reported Problem' text area and a 'Description' text area. At the bottom of the form is a 'Service Duration' text field with the value '1.5'. At the very bottom are five buttons: 'Save & Close', 'Save & New', 'Update', 'Cancel', and 'Delete'.

To add customer equipment records to the work order, click 'Add Equipment Entry' from the main Work Order page.

Select the equipment item from the 'Equipment ID' dropdown field. The Tech Portal will automatically populate the fields below with information taken from the equipment record; these fields (e.g., 'Description,' 'Manufacturer') cannot be modified in the Tech Portal.

The Tech Portal allows you to add previously defined equipment problem codes to work orders. To do so, select an existing problem code from the 'Add Problem Code' dropdown field, then click the 'Add Problem Code' button to the right. This will attach

the problem code to the equipment record and display the usual description and resolution steps associated with that code. You can edit the 'Problem' and 'Resolution' fields by clicking 'Edit' under the 'Action' column.

If you will not be using problem codes, or if you wish to add additional information about the work to be performed on the equipment, you can enter this information in the 'Reported Problem' and 'Description' fields at the bottom of the page.

If you will be tracking time spent servicing specific pieces of equipment on a work order (rather than just the time spent on the entire work order), you can enter this time in the 'Service Duration' field at the bottom of the page. Durations are entered as decimals (i.e., two and-a-half hours is entered as '2.5'). This field does not affect tech work entries.

## Capturing Signatures

Firefox

### Work Order 2219

Number  Status

Account  Account #  [Account Service History](#)

Service Site  Bill To

8753 S. Mountain View  
Bayshore, CA 94326  
Main Phone: (415) 555-6636  
Alt. Phone: ()-

8753 S. Mountain View  
Bayshore, CA 94326  
Main Phone: (415) 555-6636  
Alt. Phone: ()-

Type  Agreement  [Check Balances](#)

Priority  Project

Payment  PO/Ref #

Requested By  Created On

Request / Notes

Currently Assigned to Todd. [Reassign](#)

[View PDF Work Order](#)

To capture a customer signature, click on 'Capture Signature' on the Work Order page (see screenshot above).

In the 'Signature' field, have the customer sign their name using their finger or a stylus. Click 'Save' to capture the signature and attach it to the work order, or click 'Clear' to clear the signature field and start over.

*Note:* You must be using Internet Explorer or a modern touch-screen device (Android version 2.3 or later, or any device using iOS) to capture signatures.

**ServiceLedger** Powerful & Affordable Service Management Software

[Download as Acrobat PDF](#) **Work Order #2219**

<b>Service Site:</b> Balak, Mike Main 8753 S. Mountain View Bayshore, CA94326	<b>Billed To:</b> Balak, Mike Main 8753 S. Mountain View Bayshore, CA94326	<b>Start Date:</b> 10/22/2012 <b>End Date:</b> 10/22/2012 <b>Type:</b> Work Order <b>Status:</b> Scheduled <b>PO/Ref #:</b>
---	--	---

**Requested By:**  
**Request:**  
**Work Performed:**

**Invoice Charges**

QTY	Item	Description	Price	Ext. Price	Tax

**Signature**

Total Labor: \$0.00  
 Total Parts: \$0.00  
 Sales Tax: \$0.00  


---

 Total: \$0.00

Please note that signature capture requires either a modern touchscreen mobile device or Microsoft Windows and Internet Explorer.



## Viewing PDF Work Orders

Firefox

### Work Order 2219

Number  Status

Account  Account #  [Account Service History](#)

Service Site  Bill To

8753 S. Mountain View  
Bayshore, CA 94326  
Main Phone: (415) 555-6636  
Alt. Phone: ()-

8753 S. Mountain View  
Bayshore, CA 94326  
Main Phone: (415) 555-6636  
Alt. Phone: ()-

Type  Agreement  [Check Balances](#)

Priority  Project

Payment  PO/Ref #

Requested By  Created On

Request / Notes

Currently Assigned to Todd. [Reassign](#)

[Capture Signature](#) [View PDF Work Order](#)

To view the work order as an Adobe PDF file, click on 'View PDF Work Order' on the Work Order page (see screenshot above).

The work order will open in a new window, allowing you to preview and/or print the PDF work order.

The screenshot shows a Firefox browser window displaying a service order form. The form includes fields for address, phone numbers, and service details. A PDF window titled 'Job\_2219.pdf - Adobe Reader' is overlaid on the form, showing a preview of the work order document. The PDF content includes company information, a work order summary, and a schedule table.

**Account Service History**

Type: Work Order  
 Priority: Medium  
 Payment: Collect Payment  
 Requested By:   
 Agreement: (none)  
 Project: (none)  
 PO/Ref #:   
 Created On: 10/24/2011 3:10  
 Request / Notes:

8753 S. Mountain View  
 Bayshore, CA 94326  
 Main Phone: (415) 555-6636  
 Alt. Phone: ()-

8753 S. Mountain View  
 Bayshore, CA 94326  
 Main Phone: (415) 555-6636  
 Alt. Phone: ()-

**Job\_2219.pdf - Adobe Reader**

File Edit View Window Help  
 1 / 1 65.7% Tools Sign Comment

ServiceLedge, Inc.  
 112 Gotther  
 Lake Dallas, TX 75065  
 Phone: 940-497-2834  
 Fax: 940-497-2837  
 www.serviceledge.com

**WORK ORDER**

Work Order #: 2219  
 Type: Work Order  
 Priority: Medium  
 Payment Method: Collect Payment  
 Start Date: 10/22/2012  
 Reference #:   
 Agreement #:   
 Project #:

SERVICE SITE		BILL-TO SITE		WORK REQUESTED
Balak, Mike Mike Balak 8753 S. Mountain View Bayshore, CA 94326 (415)555-6636	Balak, Mike Mike Balak 8753 S. Mountain View Bayshore, CA 94326 (415)555-6636			

**SCHEDULE**

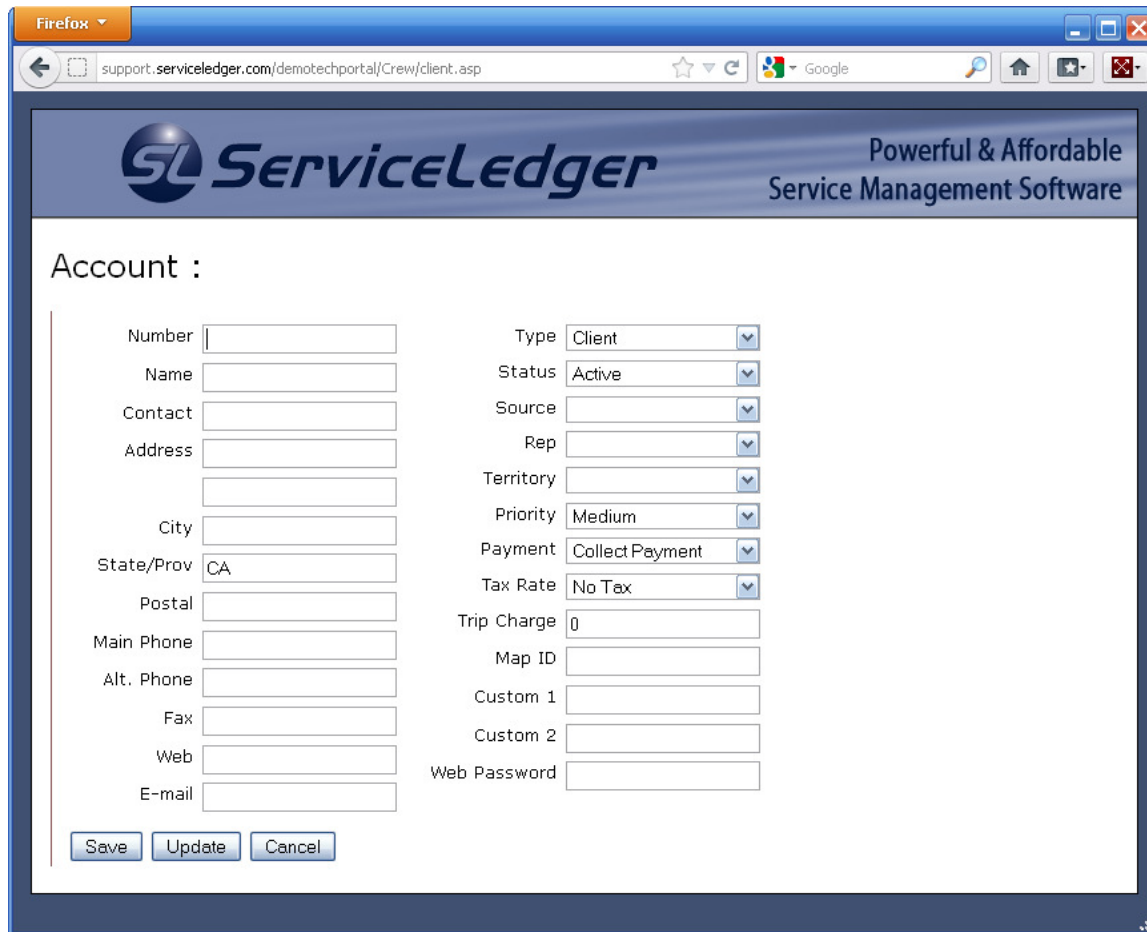
Technician	Duration	Date	Time Range
Todd	1.00	10/22/2012	Untimed

Currently Assigned to Todd. [Reassign](#)

Save & Close Save Update Cancel [Capture Signature](#) [View PDF Work Order](#)



## Creating New Accounts



The screenshot shows a Firefox browser window displaying the ServiceLedger web application. The browser's address bar shows the URL: `support.servicelledger.com/demotechportal/Crew/client.asp`. The page header features the ServiceLedger logo and the text "Powerful & Affordable Service Management Software".

The main content area is titled "Account :" and contains a form with the following fields:

Number	<input type="text"/>	Type	Client
Name	<input type="text"/>	Status	Active
Contact	<input type="text"/>	Source	<input type="text"/>
Address	<input type="text"/>	Rep	<input type="text"/>
	<input type="text"/>	Territory	<input type="text"/>
City	<input type="text"/>	Priority	Medium
State/Prov	CA	Payment	Collect Payment
Postal	<input type="text"/>	Tax Rate	No Tax
Main Phone	<input type="text"/>	Trip Charge	0
Alt. Phone	<input type="text"/>	Map ID	<input type="text"/>
Fax	<input type="text"/>	Custom 1	<input type="text"/>
Web	<input type="text"/>	Custom 2	<input type="text"/>
E-mail	<input type="text"/>	Web Password	<input type="text"/>

At the bottom of the form, there are three buttons: "Save", "Update", and "Cancel".

If enabled, technicians can create new customer accounts within the Tech Portal. Click on Add Account from the Technician Home page. Creating the account is as simple as entering the customer's information and clicking 'Save.'

## Creating New Items

Firefox

**ServiceLedger** Powerful & Affordable Service Management Software

### Invoice Charge

Currently choosing items by name / description search. Switch to [Full List](#), [Group Selection](#), or [Serial Search](#).

Item Search

Item ID

Description

[Manufacturer](#)

[Model](#)

Quantity  Actual Qty

Price  Ext Price

Cost  Ext Cost

From Item Location  Technician

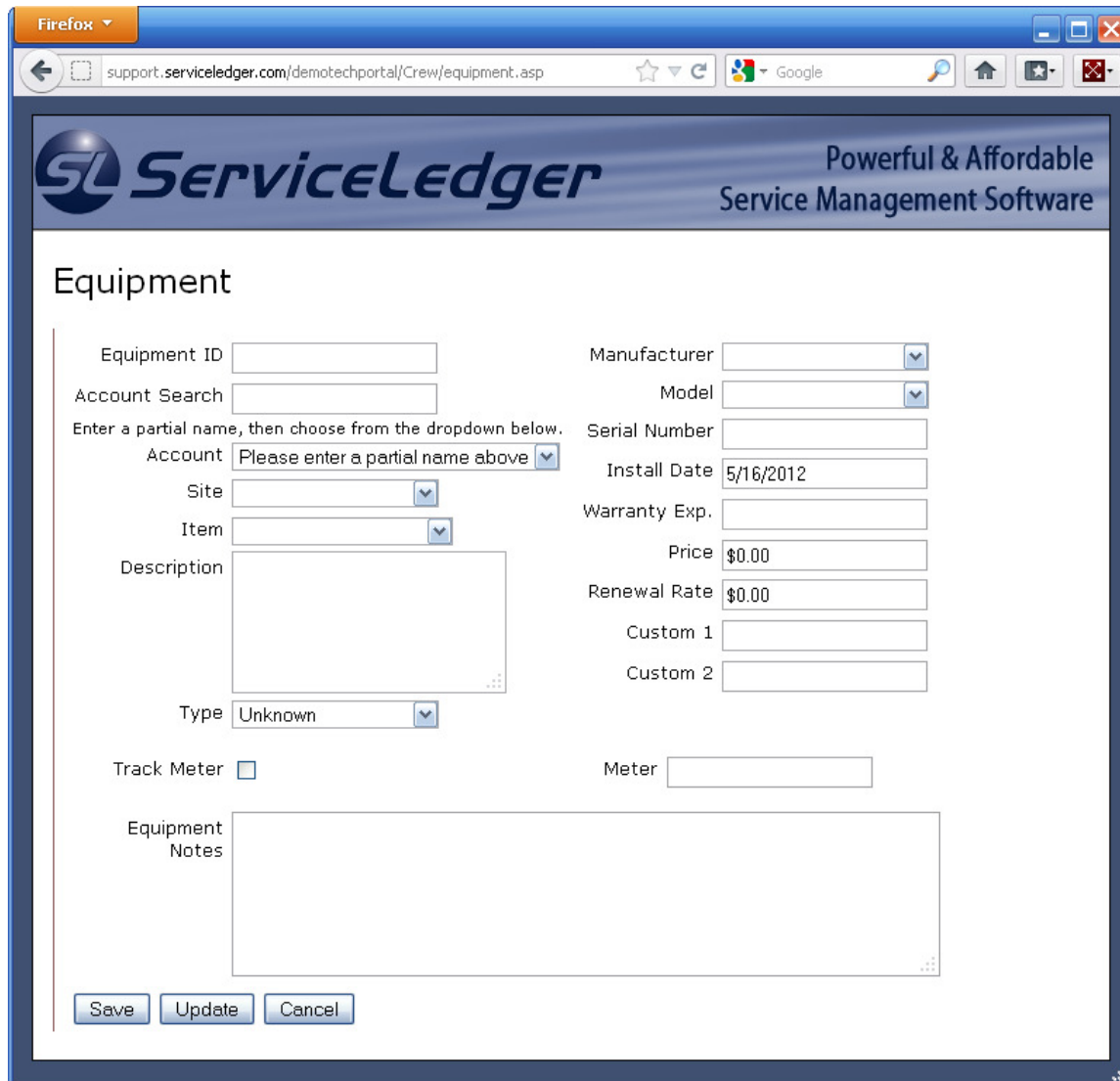
Warranty Exp  Attached Equipment

Serial Number  Bill to Agreement

Taxable

If enabled, technicians can create new items within the Tech Portal. Click on Add Item from the Technician Home page. Creating the item is as simple as entering the item's information and clicking 'Save.'

## Creating New Equipment Records



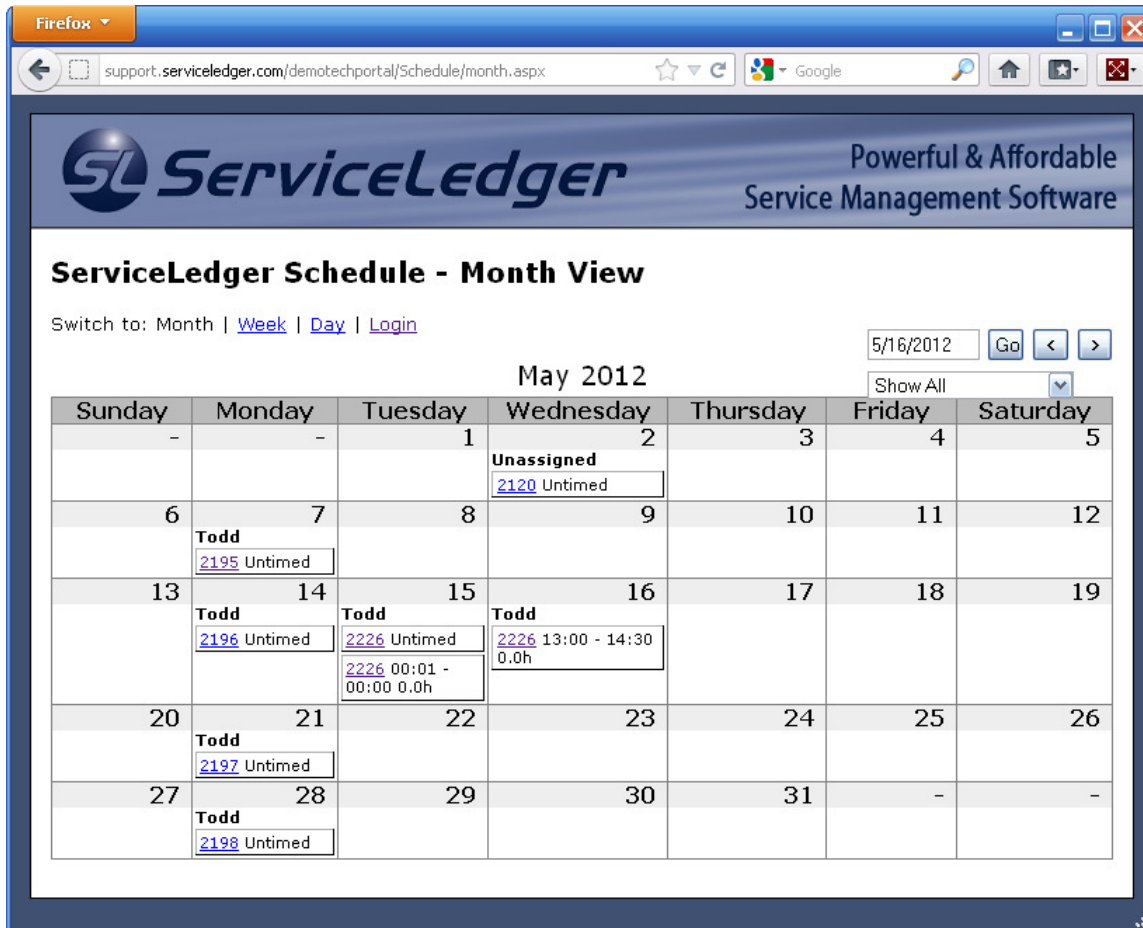
The screenshot shows a web browser window with the URL `support.servicelledger.com/demotechportal/Crew/equipment.asp`. The page header features the ServiceLedger logo and the text "Powerful & Affordable Service Management Software". The main content area is titled "Equipment" and contains a form with the following fields:

- Equipment ID:
- Account Search:
- Account:  (with a dropdown arrow)
- Site:  (with a dropdown arrow)
- Item:  (with a dropdown arrow)
- Description:
- Type:  (with a dropdown arrow)
- Track Meter:
- Equipment Notes:
- Manufacturer:  (with a dropdown arrow)
- Model:  (with a dropdown arrow)
- Serial Number:
- Install Date:
- Warranty Exp.:
- Price:
- Renewal Rate:
- Custom 1:
- Custom 2:
- Meter:

At the bottom of the form are three buttons: "Save", "Update", and "Cancel".

If enabled, technicians can create new customer equipment records within the Tech Portal. Click on Add Equipment from the Technician Home page. Creating the equipment record is as simple as entering the equipment information and clicking 'Save.'

## Viewing the Schedule



The screenshot shows a web browser window displaying the ServiceLedger Schedule - Month View page. The page header includes the ServiceLedger logo and the text "Powerful & Affordable Service Management Software". Below the header, there are navigation links for "Month", "Week", "Day", and "Login". A date selector shows "5/16/2012" with "Go" and navigation arrows. A dropdown menu is set to "Show All". The main content is a calendar grid for May 2012, with days of the week as columns and dates as rows. Scheduled jobs are listed in the cells, including "Unassigned 2120 Untimed" on Wednesday, May 2nd, and several jobs assigned to "Todd" on other days.

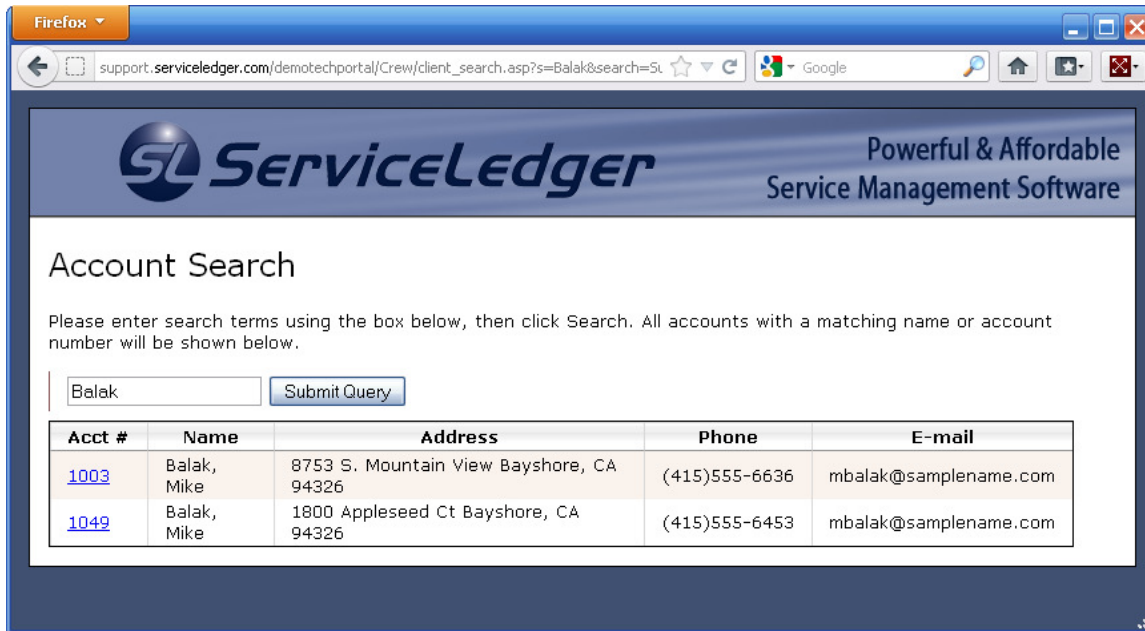
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
-	-	1	2	3	4	5
			Unassigned 2120 Untimed			
6	7	8	9	10	11	12
	Todd 2195 Untimed					
13	14	15	16	17	18	19
	Todd 2196 Untimed	Todd 2226 Untimed 2226 00:01 - 00:00 0.0h	Todd 2226 13:00 - 14:30 0.0h			
20	21	22	23	24	25	26
	Todd 2197 Untimed					
27	28	29	30	31	-	-
	Todd 2198 Untimed					

The View Schedule page allows you to view all currently scheduled jobs on a calendar. By default, the calendar will display the current month. You can choose to display only the current week or month by clicking the 'Week' or 'Day' links at the top left corner of the page.

The top right corner of the View Schedule page offers calendar navigation tools that allow you to switch between different weeks, days, or months of the calendar. You can manually enter a date (format: month/date/year) to view, or use the arrow buttons to move forward or backward in time.

Below the calendar navigation tools is a dropdown field where you can filter the jobs that are shown on the calendar. You can select 'Show All' to view all scheduled jobs, or you can choose to view only jobs assigned to a specific technician by selecting that tech's name from the dropdown. Selecting 'Unassigned' will only show jobs that have not been assigned to a specific technician.

## Account Search



The screenshot shows a Firefox browser window displaying the ServiceLedger Account Search page. The browser's address bar shows the URL: `support.servicedledger.com/demotechportal/Crew/client_search.asp?s=Balak&search=50`. The page header features the ServiceLedger logo and the tagline "Powerful & Affordable Service Management Software". Below the header, the page title is "Account Search". A message instructs the user to enter search terms in a box and click "Search". The search box contains the text "Balak" and a "Submit Query" button. Below the search box is a table with the following data:

Acct #	Name	Address	Phone	E-mail
<a href="#">1003</a>	Balak, Mike	8753 S. Mountain View Bayshore, CA 94326	(415)555-6636	mbalak@samplename.com
<a href="#">1049</a>	Balak, Mike	1800 Appleseed Ct Bayshore, CA 94326	(415)555-6453	mbalak@samplename.com

The Account Search feature allows you to search for customer records by entering only a part of the account number. To access a customer's record from the search results, simply click on the account number in the left-most column.

**Note:** This feature is only available if you have also installed the ServiceLedger Customer Portal.



# Troubleshooting

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This section discusses the troubleshooting options available when working with the Tech Portal. These options are:

- Online Help – discusses our online Knowledge Base system
- Common Questions – discusses common problems and solutions specific to the Tech Portal

You are always welcome to contact our support department if you're having trouble, but you may find these to provide a faster resolution to your problem. If they do not have the answers you need, our support department can be reached at:

[support@serviceledger.com](mailto:support@serviceledger.com)

(940) 497-2834, option 2

## ***Online Help***

The ServiceLedger Knowledge Base provides our most up-to-date technical support information. This can be reached at:

<http://support.serviceledger.com/kb/>

We strive to make keep this resource useful and up-to-date with any common problems. If you are unable to find the issue you're looking for in our knowledge base, please contact our support department for additional help and let us know that you were unable to find your problem in the knowledge base.

## ***Common Questions***

Answers to some of the most common questions about the portal are provided for convenience in this document:

When I try to log in, I get: “HTTP 500.100: The page cannot be displayed”, or “A trappable error (EEDFADE) occurred in an external object. The script cannot continue running.”

This error occurs when the dynamically linked library provided with ServiceLedger Mobile cannot communicate with the ServiceLedger Service Management System. Please ensure that:

1. Your global.asa file in the web application’s folder is correctly updated with port and tunnel password information
2. The shortcut you used to launch ServiceLedger includes the correct –aport and –tpassword parameters.

When I look at a work order, I’m seeing the information it contained before I started editing it. What’s wrong?

If you use your web browser’s navigation history or back and forward buttons, it will sometimes use previous information (stored in a cache) to display a page more quickly. If you use the ‘Save’ button on such a cached page, the old information could actually overwrite newer information!

It is recommended that you not use your web browser’s ‘Back’ and ‘Forward’ buttons while using ServiceLedger Mobile, except to recover from an error page.

Using a favorite or bookmark for the login and Technician Home pages, however, is completely safe.

After successfully logging in, I get an error page when trying to save some changes.

Currently, the dispatch system of the ServiceLedger Service Management System does not always provide specific problem information when an error occurs. Consequently, ServiceLedger Mobile occasionally cannot provide specific information when there is a problem with input data.

Please use the 'Back' button on your browser to return to the previous record entry page and look for:

- Poorly formed dates: the correct format is mm/dd/yyyy
- Poorly formed times: the correct format is hh:mm (AM or PM). An AM or PM is required.
- Dollar signs in numbers: Prices, rates, and costs are displayed with a dollar sign if Javascript is enabled. When changes are submitted, these dollar signs are usually removed. If your browser doesn't properly support Javascript 1.4 or DOM level 1, errors may cause this change not to occur. In this case, you should remove the dollar signs manually before submitting changes.