

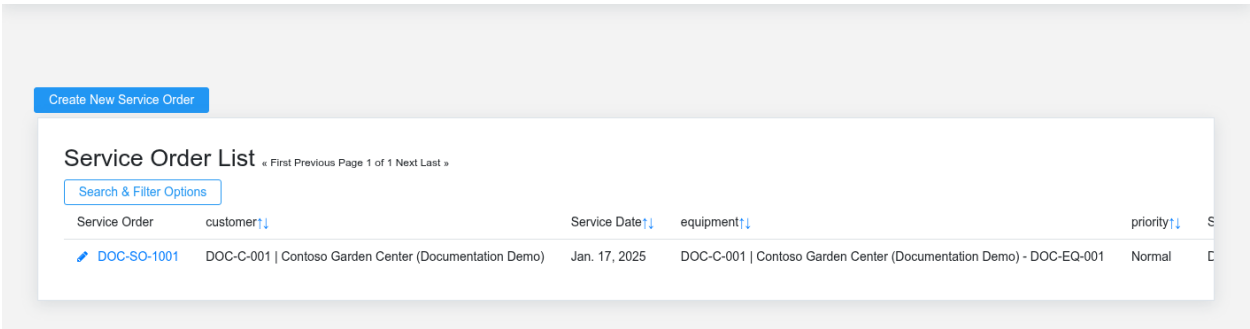
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Service

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Service overview



The Service workspace related to this reference article.

Service coordinates customer equipment, promised work, technician availability, parts, labor, schedule, and status. Use it to keep the office, dispatcher, technician, and customer working from the same description of the job rather than maintaining separate informal schedules.

Follow the service lifecycle

1. Capture prospective work as a [Service Lead](#) when the job is not yet qualified or approved.
2. Maintain the customer-owned [Equipment](#) so the correct unit, serial number, meter, and condition follow the work.
3. Prepare a [Service Quote](#) when parts, labor, tax, and scope require customer approval.
4. Reserve time with a [Booking](#), then coordinate approved work through a [Service Order](#).
5. Assign the appropriate [Technician](#), account for normal working hours and approved leave, and use the technician workspace for daily execution.
6. Update status, notes, parts, labor, and completion information as the work actually progresses.

Operational screens

The [Technician Workspace](#) focuses the signed-in technician on assigned work and next actions. [Mobile Alerts](#) call attention to changed work; they do not replace the service order as the source of truth. Supervisors use [Technician Leave Approvals](#) to protect schedule capacity before accepting or moving bookings.

Dispatch and completion controls

Confirm equipment identity, customer, location, priority, promised window, technician, and current status before dispatching. Record parts and labor against the service order that consumed them. Do not mark work complete merely to remove it from a queue; completion should mean the operational work, customer communication, and required billing handoff are actually finished.