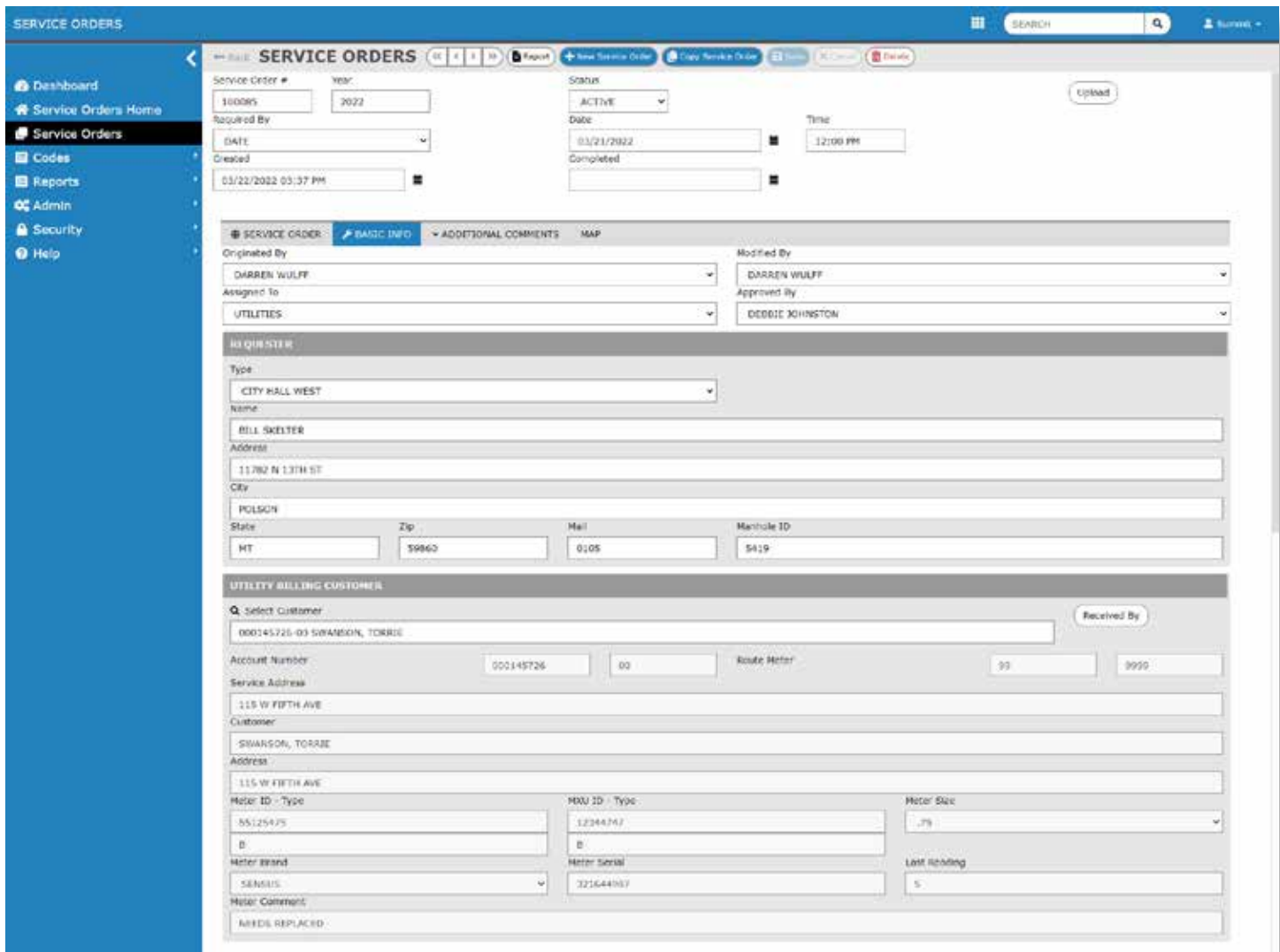**Summit Service Orders** is web-based, cloud hosted software that leverages advanced technology, data integration, and streamlined capabilities to reduce office staff workloads and improve field staff workflows.

This intuitive, easytouse application allows staff to generate, prioritize, assign, track, approve, and close out service orders whether you're at the office or in the field. Staff can also view service locations, maps and get driving directions from the application's interface. And that's just for starters. Summit Service Orders is loaded with extensive features, process automation and timesaving functions, such as Google Maps and **Utility Billing** Integration.

FEATURES & FUNCTIONS FOR STREAMLINED CAPABILITIES

Service Order Information
- Service Order #, Year, Status, Required By Date/Time, Created Date/Time, and Completed Date
- Service Order Type, Amount, and Fee Status Utility Billing Customer Information

Date/Time Tracking
- Created Date and Time
- Completed Date and Time
- Required By Date and Time

Search By
- Utility Billing Account and ID
- Customer Name
- Service Address

View Service Order Status
- Active
- Completed
- Held
- Re-Opened
- X-Cancelled

Sort lists of service orders by
- Service Order #
- Type
- Required By
- Assigned
- Status
- Completed Date
- Created Date
- Requester Name

Track by Person Responsible
- Originated By and Modified By
- Approved By
- Assigned To

Track by Requester
- Requester Types such as: Customer, Construction Company, City Hall, Water Department, etc.
- Person requesting service, including name and address, Mail Code, and Manhole ID

Integration with Utility Billing
View Utility customer information on the service order:
- Account Number, RouteMeter
- Utility service address
- Customer name and address
- Meter information, including Meter ID Type, MXU ID Type, Meter Size, Meter Serial, Last Reading, and Meter Comment
- Plus view all service orders related to a utility account from **Utility Billing**

Service Order Form for field staff
- Pre-defined service order type templates allow selection of correct form for the service to be performed
- An amount may be optionally specified
- Form can be modified to include special instructions
- Additional instructions or information related to the service order may be included separately from the form on the Additional Comments tab
- Relevant documents and images can be attached to the service order via the Upload button
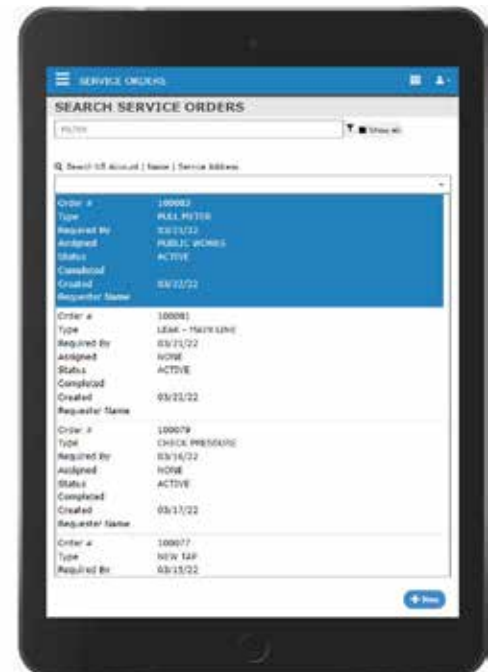
Quick Start, Search, View, and Track

Everything you need is at your fingertips:

- Easily create and assign new service orders or track the progress of existing service orders
- All service orders are displayed in a comprehensive list with the ability to sort by Order #, Type, Required by, Assigned, Status, Completed date, Created date, and Requester Name
- Responsive search results allow you to locate specific service orders by a variety of service order details or by Utility Billing account information
- View any service order, add notes, edit, or close them as needed

Field Mobility

- Summit Service Orders is compatible with all laptops, smartphones, and tablets
- Service orders are available to field staff immediately after creation
- Service orders can be updated with new information as it becomes available
- Office staff can send alerts via email to field crew, alerting them to high priority jobs and changes to work orders
- Field staff can update status to show work is complete or provide additional comments
- Field staff can update service records with photos taken from the field in real time

Google Maps Integration

- Easily view property locations from the Maps tab of any service record
- Includes Street View functionality
- Toggle between Map and Satellite views, including Terrrain options

Manager Tools

- Easily define the next service order number
- System automatically logs most recent service order number
- Monitor application activity with comprehensive Activity Trail that records username, item accessed, and date accessed information
- Audit Trail functionality logs form field changes for all records by tracking date changed, user, field changed, previous and new field values, and the reason for the change

Security

- Track user application usage over time
- Add, edit, or remove application users on the fly
- Assign users to predefined Admin, User, or Read Only Menu and Form Groups or create your own
  - Menu Groups restrict user access to specific application menus, such as Admin, Codes, or Security
  - Form Groups restrict user access to specific forms and/or form fields and functions, such as the Service Type form, its details, and the ability to create new service types, copy service types, save or delete service type records
- Easily view which users have edit abilities and which have read only permissions

Comprehensive Reporting

- Track and manage service order details with extensive filtering options
- Export reports to PDF, Excel (newer), Excel, Rich Text, CSV, Word XML, JSON, OpenDoc, OpenDoc Sheet, or PowerPoint file formats

Reports

Summit Service Orders provides useful reports to make tracking daily duties simple and efficient with everything you need built in:

- **SO Listing -** Displays a summarized list of all service orders with the ability to apply filters for various us fields, including service order status, type, assigned, and operator information. Also includes filter options for Created, Required By, and Completed Date Ranges, and if the service order has been printed.

- **SO Single Full -** Displays individual service order details with the ability to apply filters for various fields, including service order status, type, assigned, and operator information. Also includes filter options for a Required By Date Range, if the service order has been printed, and Service Order ID.

- **Remote Actions Listing -** Displays a list of service orders and the action associated with each in an interactive, customizable format. Includes options to format headings or detail rows, hide or move column locations, apply filters for various fields, and sort in ascending or descending order. Filter options include service order status and type, and date range.

- **SO Listing Graph -** Displays list of service orders by type, including a total for each. This information is also displayed in a chart below the list that can be customized in a variety of common chart types (including pie, bar, line, etc.) and multiple color schemes.

Summit Service Orders is only available with BMS Cloud Hosting. Variations of some mobile internet devices may affect software compatibility and limit functions.