

# QRG Service Order Creation

## 1. Details

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- In the [Service Request Spreadsheet – Service Order Log Tab](#): create new row for AZ/CA billable (S), warranty (W) or preventive maintenance (PM).
  - Assign sequential Service Order (SO) ID code (“AZ/CA - S/W/PM YY ###”),
    - State Code – (AZ/CA)
    - SO Type – (S,W,PM)
    - Date - (YY)
    - ID Number - (###)
- Create a new SO In *Service Request Spreadsheet*:
  - Copy the [Template Tab](#).
  - Rename the new tab for the new service order.
    - “SO ID code, customer name (Last, First) – scope of work description.”
- Complete new SO as guided by prompts in columns to the right of sheet view (under construction).
- Create a new SO folder in the google drive in the [Service Folder for the current year](#).
  - Name the new SO folder corresponding to the SO ID code.
- Print new SO to pdf (highlight active columns, print selection), save it in the newly created SO folder.
- Update status of SO:
  - [Service Log table](#)
  - Dashboard tab if [Customer Master Tracker](#)
  - Corresponding Zoho records.