

Add a Service Level

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To add a new Service Level, from the main menu, arrive at the Service Levels setup with this path: Setup > Operations > Service Levels.

The Service Levels list opens. Click the **Add Service Level** button at the upper left of the form.

Service Levels

[+ Add Service Level](#) Show Inactive Service Levels NO

Service Level Code	Description	Invoice Parts	Invoice Labor	
Full Maintenance Contract	Full Maintenance Contract	<input type="radio"/> NO	<input type="radio"/> NO	Edit Delete
Gold Service	Premium	<input checked="" type="radio"/> YES	<input checked="" type="radio"/> YES	Edit Delete
Install - Contract Amount	Contract Pricing	<input type="radio"/> NO	<input type="radio"/> NO	Edit Delete
Install T & M	Installation - Time & Material	<input type="radio"/> NO	<input checked="" type="radio"/> YES	Edit Delete
Service Level Test 1	service level test one	<input checked="" type="radio"/> YES	<input checked="" type="radio"/> YES	Edit Delete
SVC Contract-COM	Service Contract - Commercial	<input type="radio"/> NO	<input type="radio"/> NO	Edit Delete
SVC T&M RES	Time and Material Residential	<input checked="" type="radio"/> YES	<input checked="" type="radio"/> YES	Edit Delete

1 - 7 of 7 items [Refresh](#)

The Edit Service Level form opens. Each data entry field is described below.

The screenshot shows a 'Service Level' configuration window. It contains the following fields and controls:

- Service Level Code:** SVC T&M RES
- Description:** Time and Material Residential
- Base Service Fee:** \$85.00
- Service Item:** Service Fee
- Invoice Labor:** YES (toggle)
- Hourly Labor Rate:** \$75.00
- Labor Item:** Service Labor - Taxable
- Billing Increment:** 15 Minutes
- Billing After Minutes:** 30
- Invoice Parts:** YES (toggle)
- Other Charges:** YES (toggle)
- Other Item:** Fuel
- Other Amount:** \$10.00
- Inactive:** NO (toggle)

At the bottom, there are 'Save' and 'Cancel' buttons.

Data Entry Fields

Data entry fields preceded by an asterisk are required.

- ***Service Level Code:** Type a short description of the service level. Maximum of 25 characters.
- ***Description:** Type a long description for the service level.
- **Base Service Fee:** If your company charges a fee for a service call in addition to any on-site labor hours, enter the amount.
- ***Service Item:** If an amount was entered in the Base Service Fee field, you must select an Item Code from the drop-down list for invoicing the Service Fee.
- **Invoice Labor:** If labor is billable, set the toggle button to Yes.
- **Hourly Labor Rate:** Enter the hourly rate for calculating billable labor.
- ***Labor Item:** If an amount was entered in the Hourly Labor Rate field, you must select an Item Code from the drop-down list for invoice labor charges.
- **Billing Increment:** Select the appropriate billing increment from the drop-down list. If labor is billable, the number of billable hours will be rounded to the nearest increment selected.
- **Billing After Minutes:** If your company is charging a Service Fee and this includes an initial amount of time on-site, then enter a value in this field.

For example, our service fee is \$85.00, which covers the first half hour of labor. We would enter 30 in this field. If the technician is on site for more than 30 minutes, any time after 30 minutes will be calculated as billable labor.

- **Invoice Parts:** If parts are billable, set the toggle button to Yes.
- **Other Charges:** If Other Charges (anything that is not parts or labor) are billable, set the toggle button to Yes.
- ***Other Item:** If you have a particular item you want to include on every service work order, select the Item Code from the drop-down list.
- **Other Amount:** If an Item Code was selected in the Other Item field, you must enter the amount.
- **Inactive:** If this service level will no longer be used, set the toggle button to Yes.

When finished, click the **Save** button at the bottom of the form.
