The Order Management course includes seventeen lessons. We recommend you follow the order of lessons as listed, but you can also use any of these lessons as a reference if you have questions as you Manage Service Orders.

**Order Management Overview**
- This lesson provides recommended outline for *Order Management* course completion.
- A Service Order progresses through a lifecycle as the status of the Service Order changes.
- The Service Order will be available in different locations as the status of the Service Order changes.

**Auto Accept for CAR Orders**
- This lesson explains how to turn ON/OFF Auto Acceptance for CAR (Conditional Auto Routing) rules.
- When Service Orders are routed using a particular CAR rule that is based on the Auto Acceptance Status set, system will either automatically accept and assign that Service order to Provider Firm or allow manual review and manual acceptance process.

**Inbox Link**
- This lesson explains how to locate and manage any Service Orders that are currently in your ServiceLive system.
- A Service Order at any stage of the life cycle can be found within the Inbox link.
- They are labeled in their current status and display next action required as indicated by the yellow action button.
- We recommend you to use the specific links to manage Service Orders and use Inbox link only to monitor.

**Respond Link**
- This lesson explains how to manage Service Orders in Respond link.
- For all “Name your Price” Service Orders, Provider Firms can Accept, Counter Offer, or Reject from the Respond link.
- All “Name Your Price” Service Order opportunities display until they Expire OR Service Order is Accepted by you or another Provider Firm.
- In Accepting or placing a Counter Offer, you are agreeing to the Terms and Conditions of Service Order.
- For details on Bid Request process, see *Bid Request* lesson in *Order Management* course.

**Respond Link – Bid Request for Sears Facilities Orders**
- This lesson explains the process to Place a Bid on a Service Order.
- All “Bid Requests” Service Order opportunities display on Respond link until they Expire OR Service Order is awarded to a Provider Firm.
- You can Place a Bid, Place a Bid and Change Bid Expiration, Place a Bid and Request New Service Date & Time or Reject Service Order.
- Comments are available for Providers & Buyers to communicate about the Service Order, ask questions or share information.
- Buyer & all Providers that received Service Order opportunity can add, view, or reply to comments.
- Comments typically are entered during the time when Providers are determining if they are going to Accept Service Order (Respond link) OR during Bid process (Respond link).
• **Schedule Link**
  - This lesson explains how to manage Service Orders in Schedule link.
  - Service Orders in Schedule link have been Accepted and now require schedule confirmation.
  - From Schedule link, Provider Firm can confirm with customer that details of Service Order are correct. (i.e. Right customer, right product, right Service Order Window).
  - You can create Notes as communication to ServiceLive Administrator Team or Buyer, or Request a Service Order Reschedule.
  - Service Orders will stay in the Schedule link until Order is marked “Pre-Call Completed”.

• **Assign Provider Link**
  - This lesson explains how to manage Service Orders in Assign Provider link.
  - From Assign Provider link you can assign a Service Provider to a Service Order if one has not yet been assigned.

• **Manage Route Link**
  - This lesson explains how to manage Service Orders in Manage Route link.
  - Service Orders displayed under this link are in Accepted, Active or Problem Status.
  - Provider Firms can also Assign/Re-assign Providers from this screen.
  - Use this link to check Providers assignment for all Service Orders on given day, that Schedule Status is updated for all service Orders assigned to Provider and to view product availability for all Service Orders schedule for given day to specific Provider.

• **Confirm Appointment Link**
  - This lesson explains how to manage Service Orders in Confirm Appointment link.
  - Once Provider Firm has Accepted a Service Order it enters Active status.
  - In Confirm Appointment link Provider Firm has the ability to confirm Time and Product Availability.
  - These Service Orders have an appointment start date within the next 3 days and their schedule status is NOT in “Time Window-Call Completed”.

• **Print Paperwork Link**
  - This lesson explains how to manage Service Orders in Print Paperwork link.
  - In the Print Paperwork link Provider Firms are able to sort, view, print, and save/email PDFs of Service Order.
  - This link contains Service Orders in all statuses of the Lifecycle and can be Saved/ emailed or Printed by appointment date or Service Provider assigned.

• **Current Order Link**
  - This lesson explains how to manage Service Orders in Current Orders link.
  - All the Service Orders that have an ACTIVE Service Window are displayed.
  - This link helps ensure that IVR compliance is met for Service Order arrivals & departures. Current Orders link should display the number of Service Providers “out in the field” for service.

• **Job Done Link**
  - This lesson explains steps to Complete Service Orders for Payment.
  - Once Provider completes work and changes Service Order status to Complete, Buyer will review required documents, confirm pricing, Close and Pay, and Rate Provider.
Order Management Overview - Provider

• Resolve Problem Link
  ▪ This lesson explains how to manage Service Orders that are in Problem status including how to Resolve Problem using Issue Resolution tab.
  ▪ A Service Order is in Problem status when there is an issue or error submitted by either Buyer or Provider in regards to completion of Service Order.

• Cancellations Link
  ▪ This lesson explains how to manage Service Orders that are in Pending Cancel status.
  ▪ Once Customer requests to Cancel Accepted Service Order that is greater than 24 hours from Appointment Date/Time (or if agreed upon by Buyer and Provider when less than 24 hours from Appointment Date/Time), Buyer will change to Cancelled status.
  ▪ If Accepted Service Order is less than 24 hours from Appointment Date/Time or past Appointment Date/Time (Active status), Buyer will change status to Pending Cancel and the Service Order will be located on Cancellations link until there is an agreed upon Cancellation.
  ▪ Provider has ability to agree with amount of Pending Cancel or ability to counter a respective Buyer’s Pending Cancel.
  ▪ Once Provider and Buyer agree to terms of Service Order in Pending Cancel status, the Service Order will automatically change to Cancelled status and will be located on Inactive tab.
  ▪ Upon Cancellation, agreed upon funds (as applicable) will be transferred to your Provider wallet.

• Awaiting Payment Link
  ▪ This lesson explains how to manage Service Orders located in Awaiting Payment link.
  ▪ Service Orders in Awaiting Payment link are completed and waiting for the Buyer to pay.

• Inactive Tab
  ▪ This lesson explains how to locate and manage Service Orders that are in Inactive tab. Once Service Orders are Closed or Cancelled, they will be located on Inactive tab.
  ▪ When Buyer Closes and Pays, Service Order will change to Closed status.
  ▪ When Buyer Cancels, Service Order will change to Cancelled status.
  ▪ It is important for Provider to Rate the Buyer once Service Order is in Closed status, which can be done from Inactive Tab.

• Search Tab
  ▪ This lesson explains steps to Search and Locate Service Orders. These steps will work for all search items you might want to use to search for Service Orders.
  ▪ You can search by Status, Market, Pricing Type, Skill, Service Category of Service Orders, etc.
  ▪ You have the ability to define searches and Create Custom Search Filters.
  ▪ There are many ways to search and locate information in ServiceLive and as you become more familiar with ServiceLive, you will find other ways to accomplish steps detailed in this lesson.