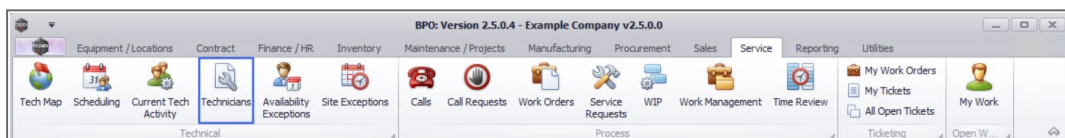


SERVICE

TECHNICIANS - SET UP

Employees need to be set up as **Technicians** in order to be assigned a **call** or **project**. As Technicians, employees use **Tech Connect** and have a **Boot Stock Warehouse** assigned to them.

Ribbon Access: *Service > Technicians*

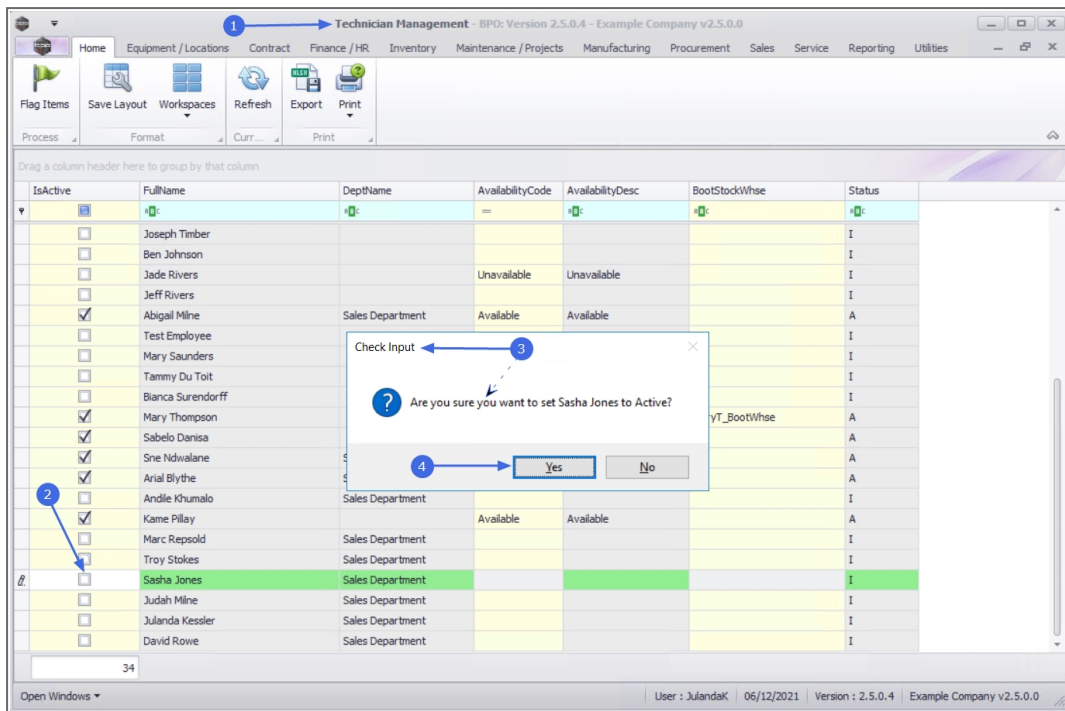


1. The **Technician Management** listing screen will be displayed.
2. In the **Is Active** column, click on the **check box** of the employee that you wish to set up as a **technician**.



Note that the **Status** of the employee is currently set to **I - Inactive**.

3. When you receive the **Check Input** message to confirm;
 - **Are you sure you want to set [employee name] to Active?**
4. Click on **Yes**.



5. The **Is Active** check box will be marked, and the **Status** field will be updated to **A** - Active.
6. The **Full Name** and **Department Name** fields cannot be edited.

SET AVAILABILITY CODE

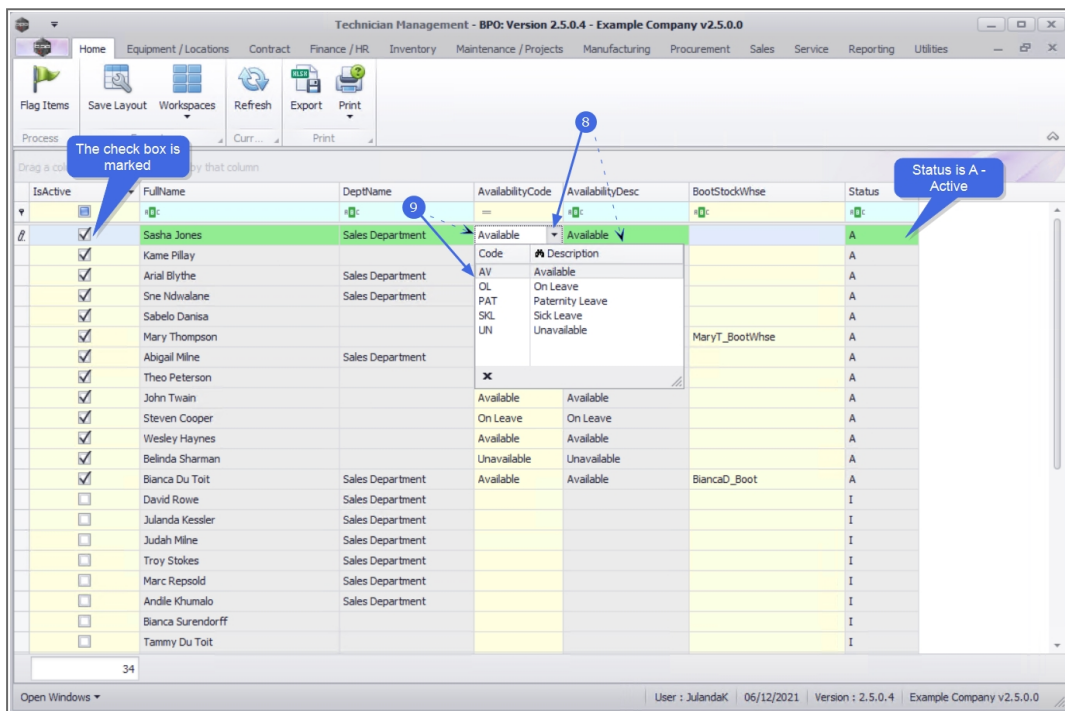
You need to set up **Availability codes** e.g. *Unavailable*, *Available* in order to set up a Technician list.

If you use *Tech Connect*, when the technician *starts* his day on his mobile device, his *status* will move from *Unavailable* to *Available*. When an assignment has been *accepted*, his *status* will change to *Unavailable* for the duration of the assignment.

The following default set up is required, but any additional codes can be added to these if you wish to use this functionality manually.

- AVA: Available - Start Day
- UNA: Unavailable - Is Unavailable, Is Default and End Day

- Click in the **Availability Code** field to display the down **arrow**.
- Click on the **arrow** to display the Availability menu options.
- Select the applicable **Availability Code** for the Technician.
 - The example has **Available** selected.



FLAG ITEMS

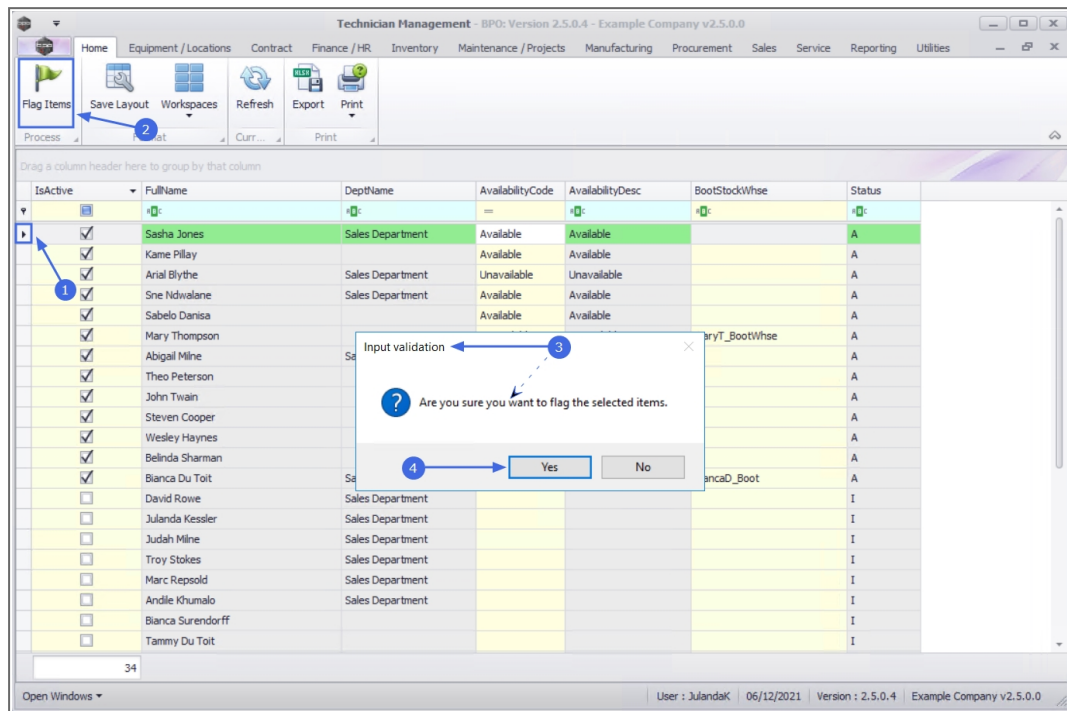
Using the Flag Items icon to select and update the availability for the Technician.

- Select the **row** of the Technician, whose Availability you wish to set.
- Click on **Flag Items**.

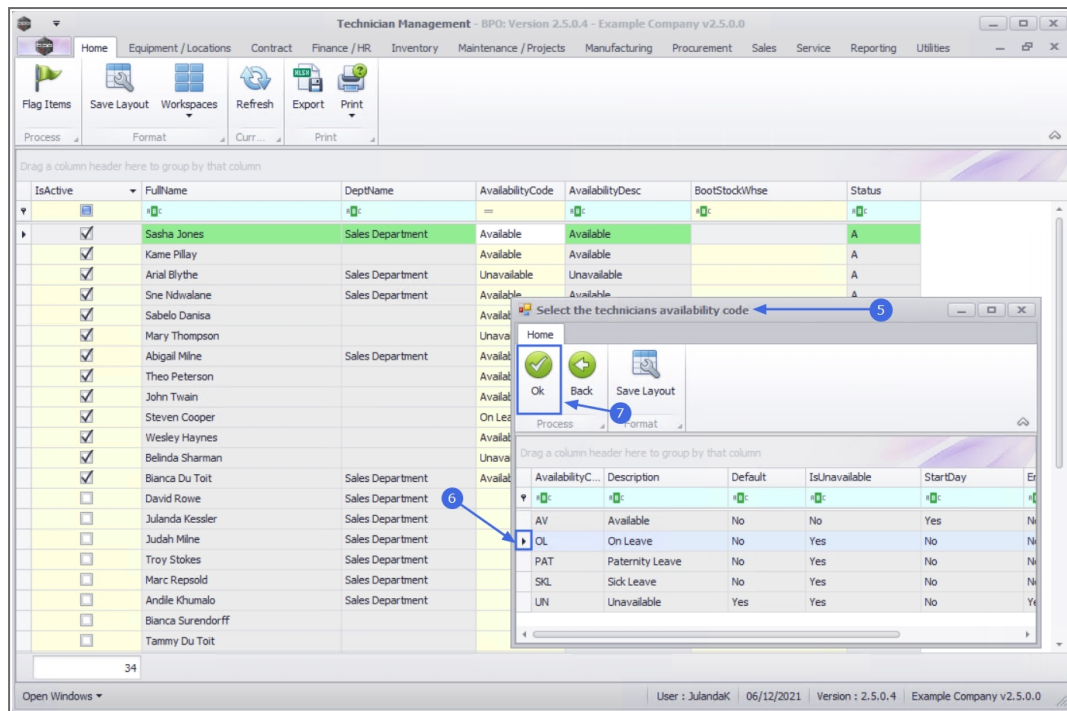


Short cut key: **Right click** to display the **Process** menu list. Click on **Flag**.

3. When you receive the **Input Validation** message to confirm;
 - **Are you sure you want to flag the selected items.**
4. Click on **Yes**.



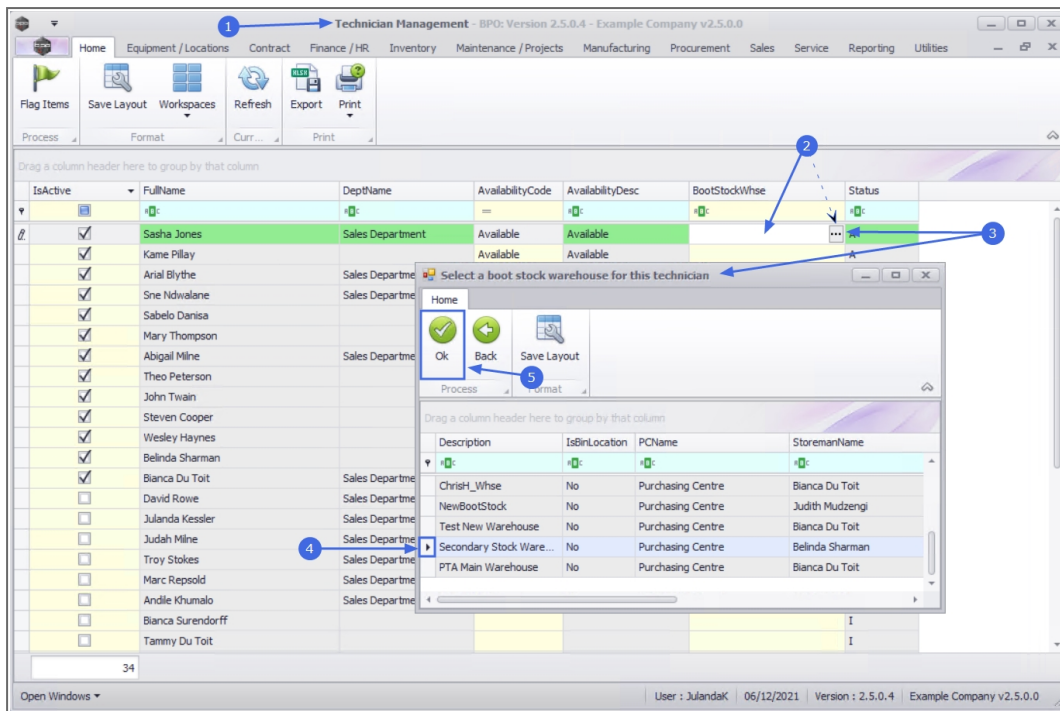
5. The **Select the technicians availability code** screen will display.
6. Select the applicable **Availability Code**.
 - The example has **On Leave** selected.
7. Click on **OK**.



By using either method, the **Availability Description** column will be updated with the code description selected.

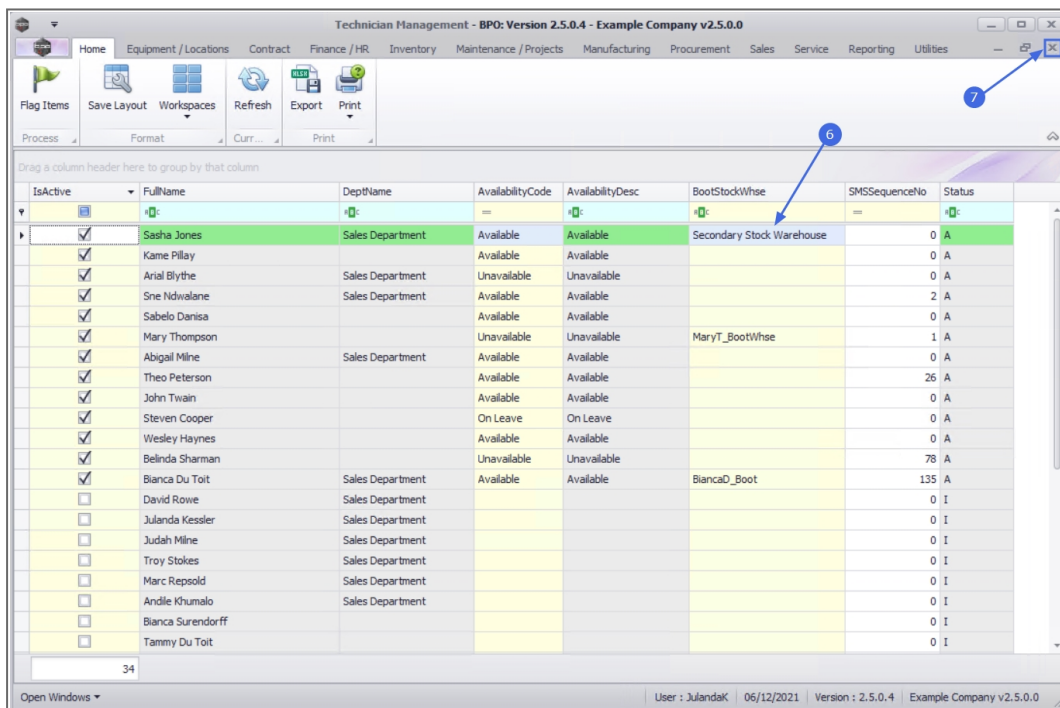
LINK A BOOT STOCK WAREHOUSE

1. From the **Technician Management** screen,
2. Click in the **Boot Stock Warehouse** field of the technician you wish to link a Boot Stock Warehouse to, to display an **ellipsis** button.
3. Click on the button to display the **Select a boot stock warehouse for this technician** screen.
4. Click on the **row** of the **Boot Stock Warehouse** you wish to link to the technician.
5. Click on **OK**.



6. The **Boot Stock Warehouse** field will update with the selection you have made.

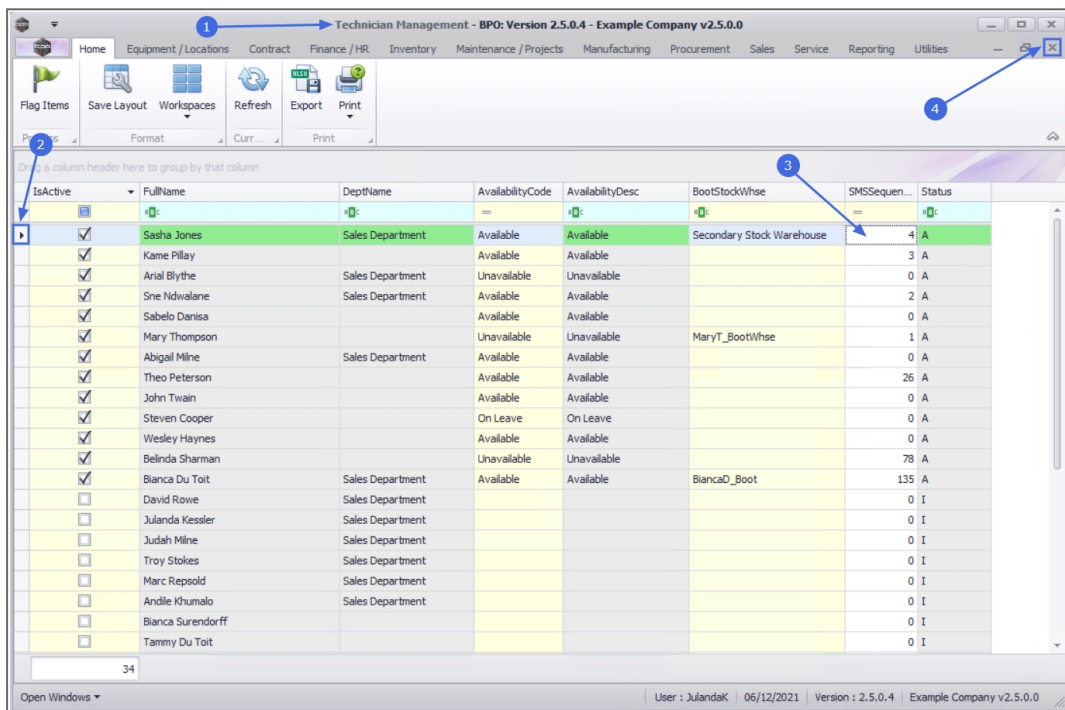
7. Click on **Close** to close the screen.



SMS SEQUENCE NO

An SMS Sequence Number can be set up for the technician if call SMS notifications are being used.

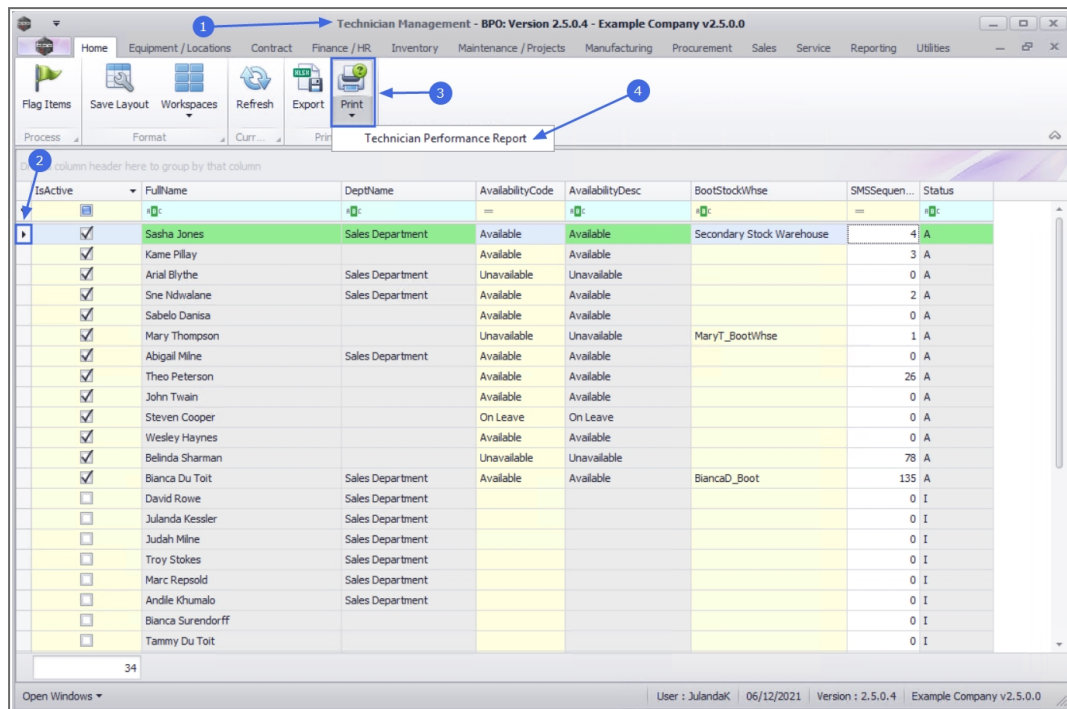
1. From the **Technician Management** screen,
2. Click in the **SMS Sequence No** field of the technician, whose SMS sequence you wish to set up.
3. Type in or use the **arrow** indicators to select the **next** SMS sequence number, else this field can be left as **0**.
4. **Close** the screen when you have finished.



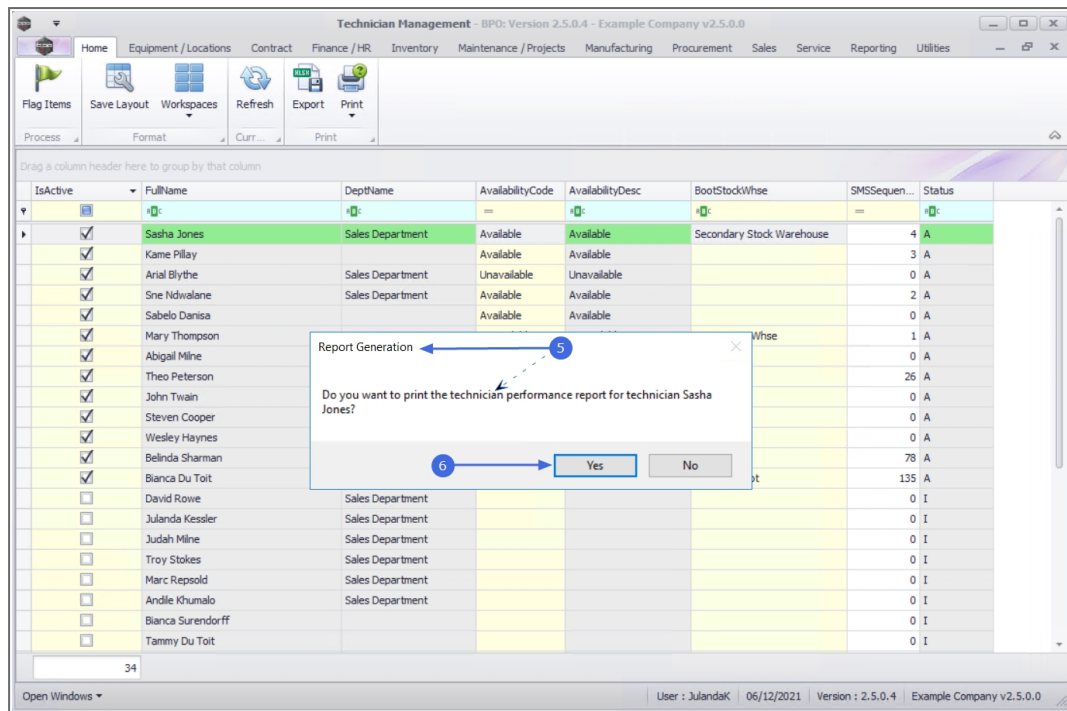
PRINT TECHNICIAN PERFORMANCE REPORT

1. From the **Technician Maintenance** screen,
2. Click in the **row** of the Technician whose performance report you wish to generate.

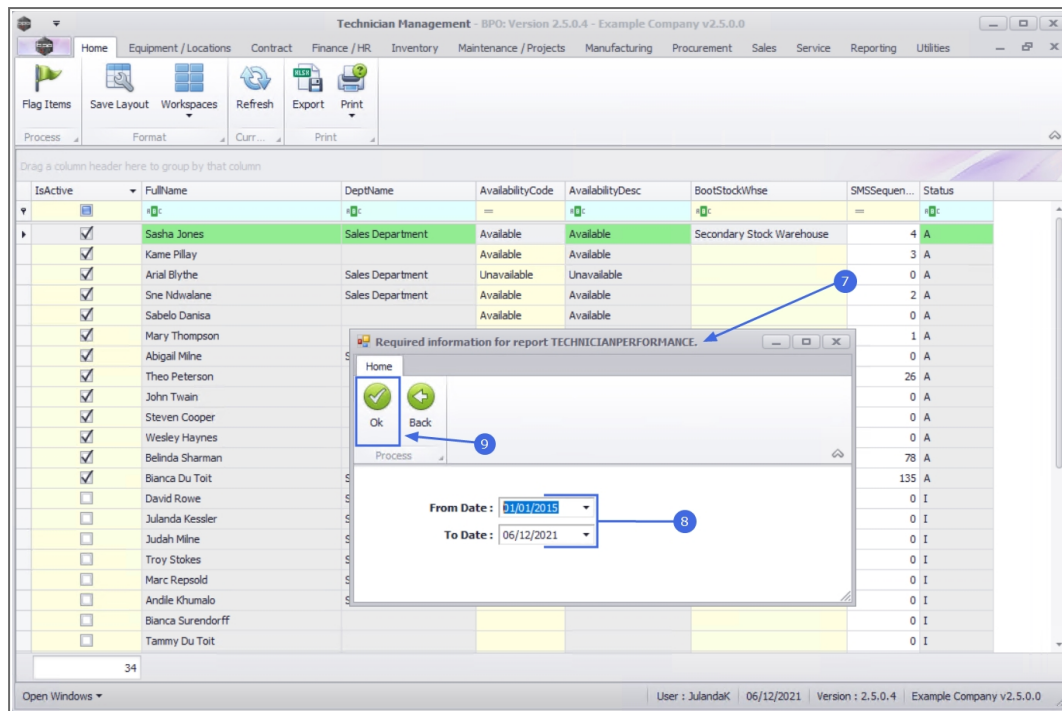
3. Click on **Print** to display the Reports menu list.
4. Click on **Technician Performance Report**.



5. When you receive the **Report Generation** message to confirm;
 - **Do you want to print the technician performance report for technician [technician name]?**
6. Click on **Yes**.



7. The **Required information for report Technician Performance** screen will display;
8. Specify the **period** you wish to generate the report for by,
 - Click to type in the **From Date**, or use the down **arrow** the select the date using the calendar function.
 - Click to type in the **To Date**, or use the down **arrow** the select the date using the calendar function.
9. Click on **OK**.



10. The Technician Performance report will display in the **Reports Preview** Screen.
11. The report will contain details regarding:
 - the **Call, Customer, Work Order** and **Asset Information**,
 - the **Event Log** for the technician,
 - the **Invoiced Stock**, Labour, any Prior Issues and Machine Contract Information.
12. From this screen you can you can make cosmetic changes to the document, as well as **Save, Zoom, Add a Watermark, Export** or **Email** the Technician Performance Report.
13. **Close** the report screen when done.



Preview 10

File View Background

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Technician Performance Report

Example Company v2.5.0.0

Street No and Road Name PO Box 1234
Area New Town
City Durban
South Africa South Africa
0000 1234
Reg No.: 0000000asa4521 **Fax No.** 031 12 4545
VAT No.: 0000000 **Tel No.:** 031 123 4567

Manager:
Technician:
Start Date: 01/01/2020 **End Date:** 06/12/2021

Event Date:

Call Information
Call No:
Call Status:
Call Desc:

Customer Information
Customer Code:
Customer:

Work Order Information
Work Order No:
Work Status:
Scheduled Start:
Work Order Desc:

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