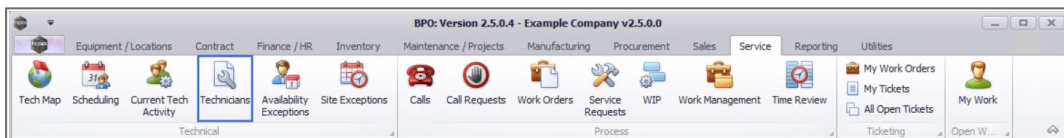# SERVICE

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*

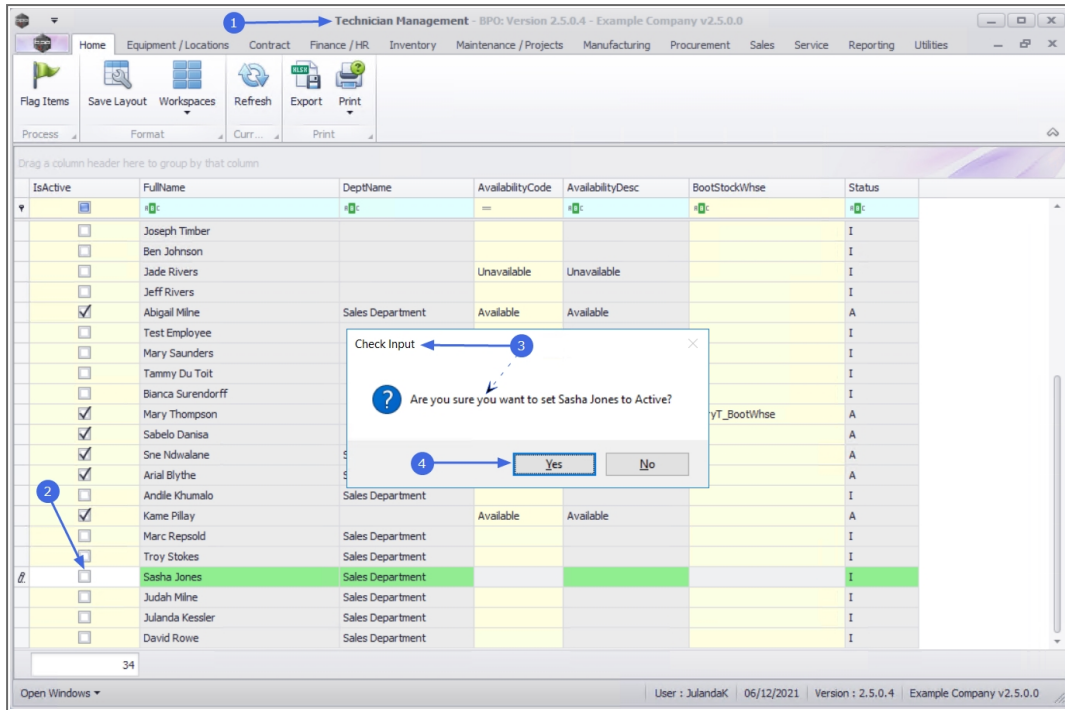1. The *Technician Management* listing screen will be displayed.
2. In the *Is Active* column, click on the **check box** of the employee that you wish to set up as a **technician**.

> ✎ **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

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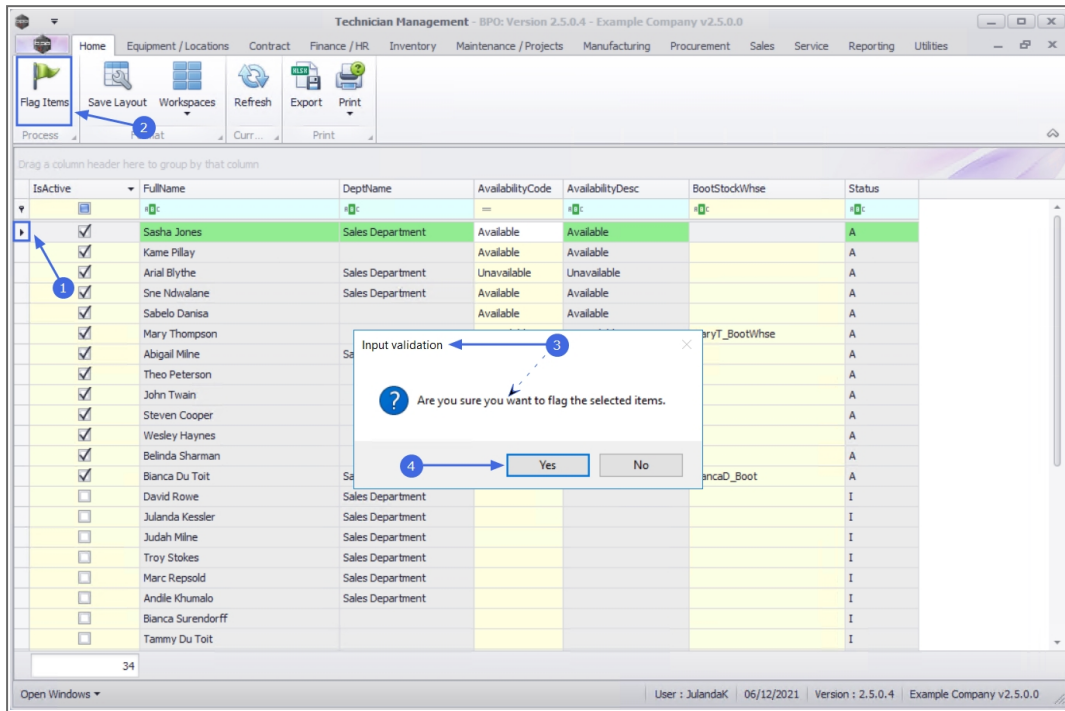   - The example has *Available* selected.
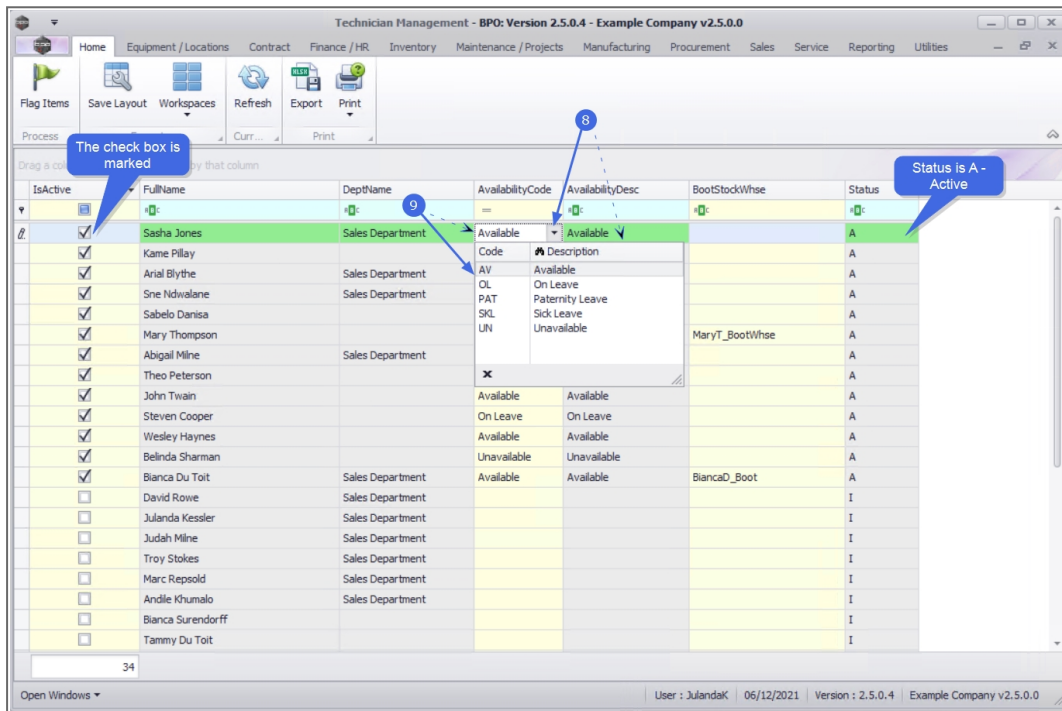
FLAG ITEMS

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

1. Select the *row* of the Technician, whose Availability you wish to set.
2. 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*.
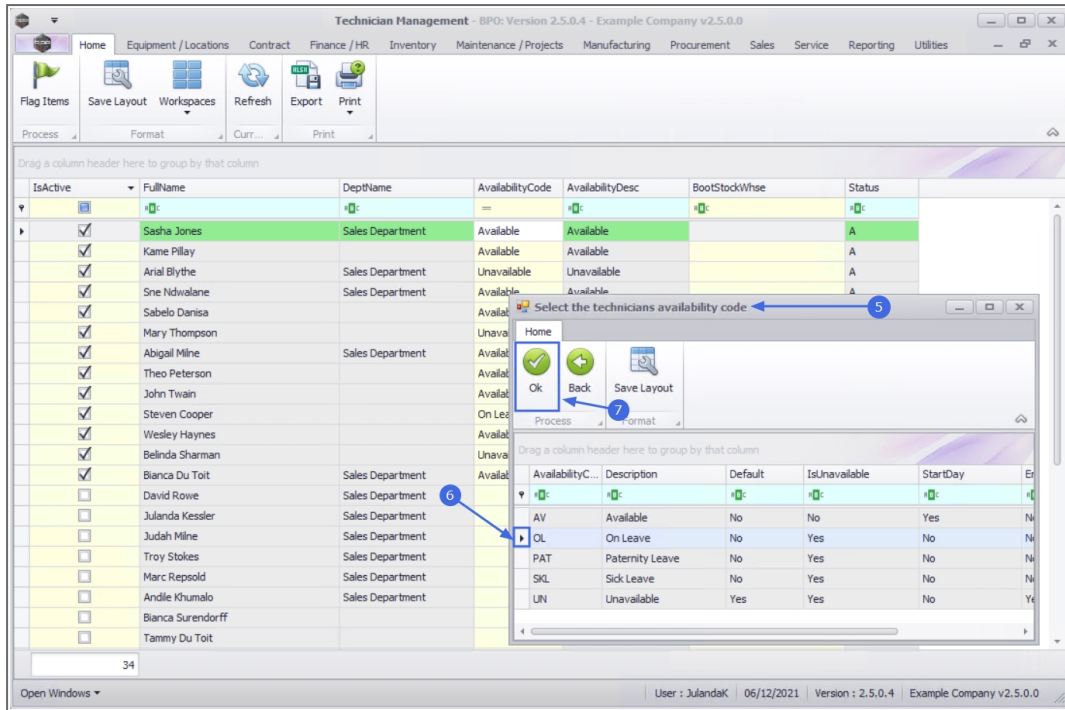
By using either method, the *Availability Description* column will be updated with the code description selected.

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*.
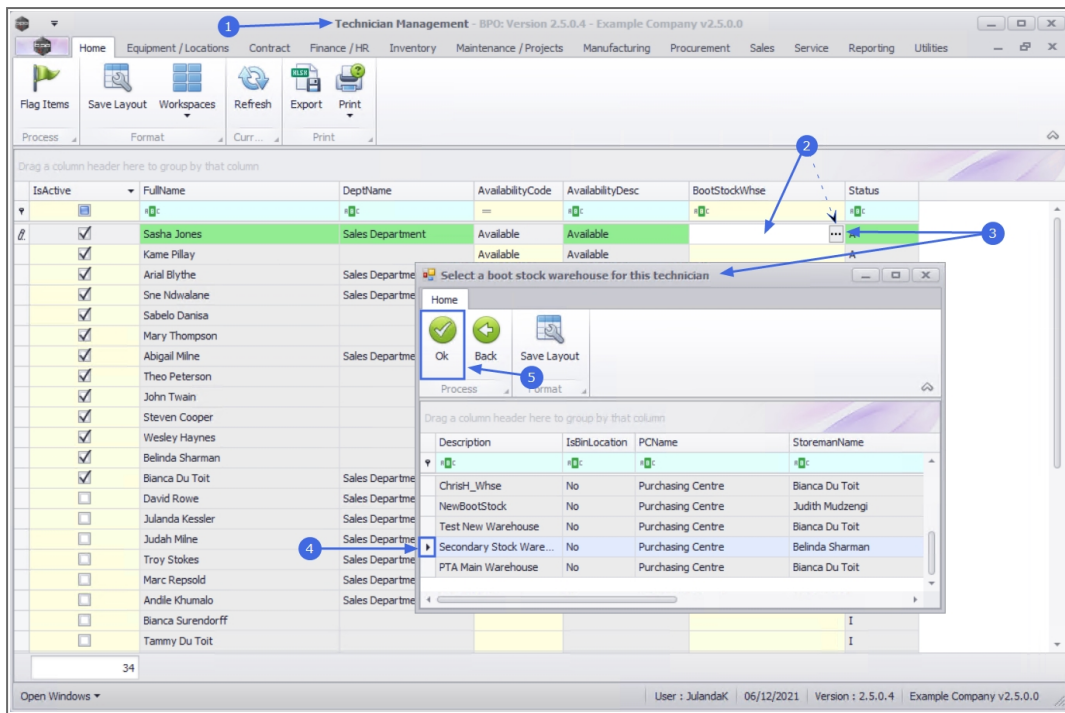
6. The *Boot Stock Warehouse* field will update with the selection you have made.
7. Click on *Close* to close the screen.
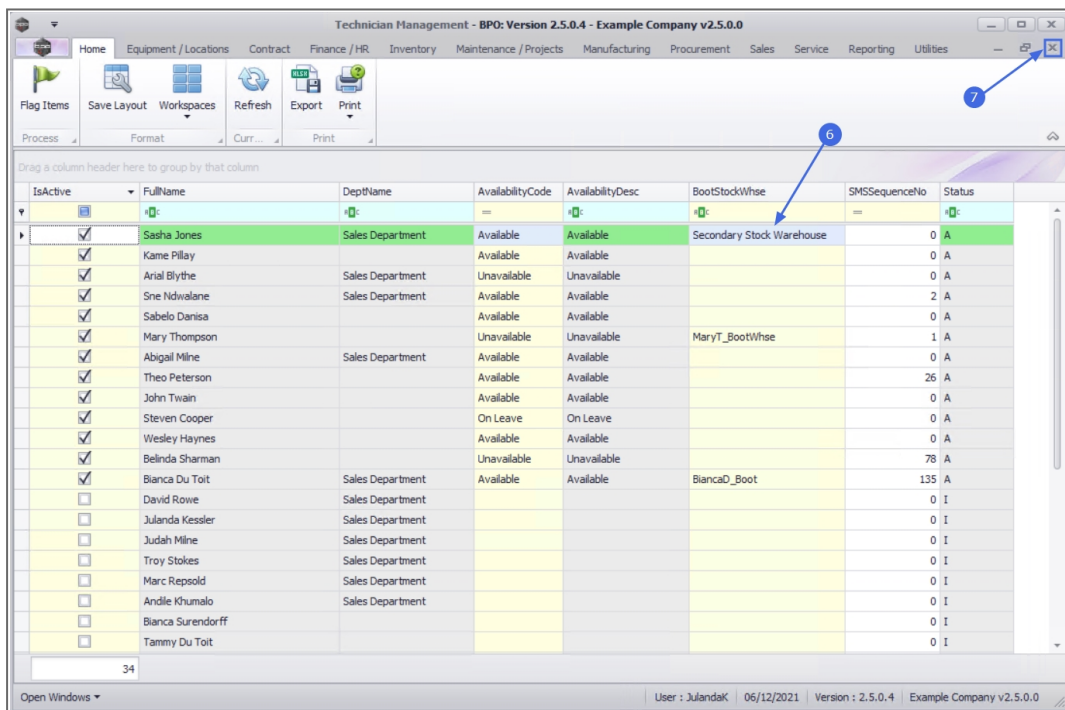
SMS SEQUENCE NO

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.
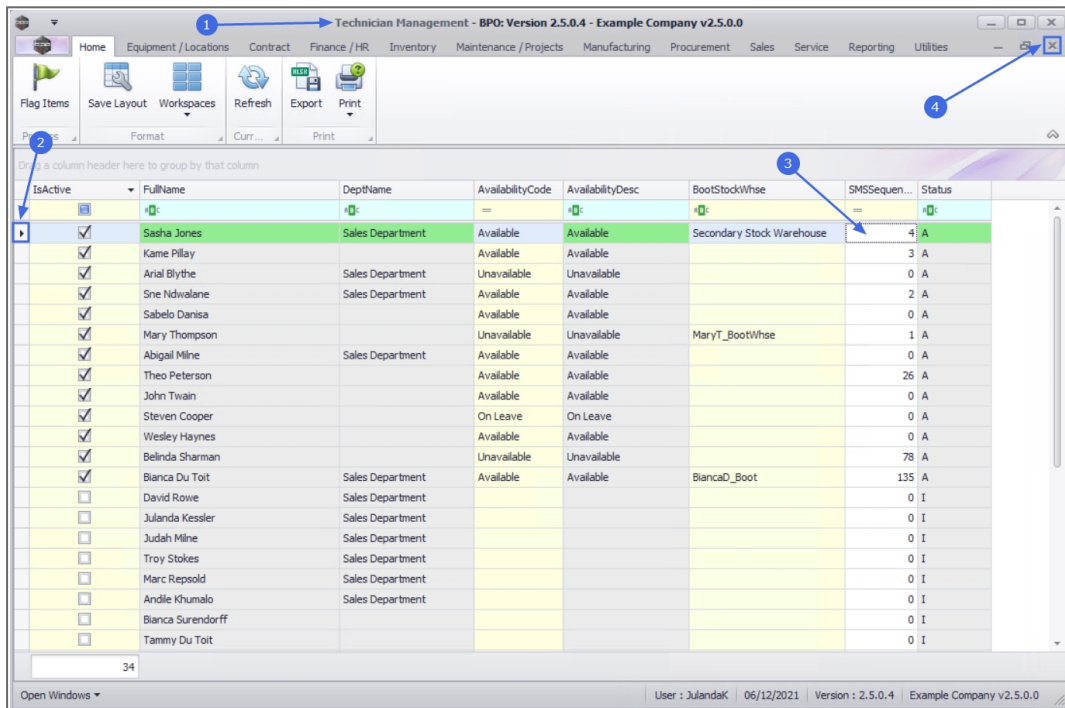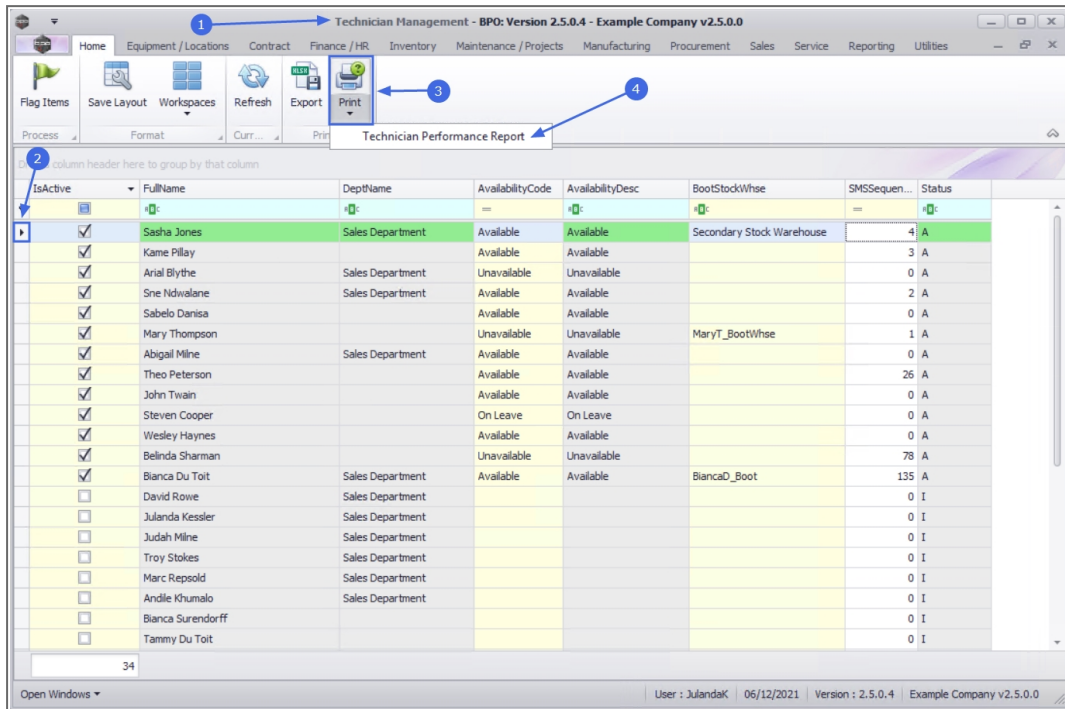

PRINT TECHNICIAN PERFORMANCE REPORT

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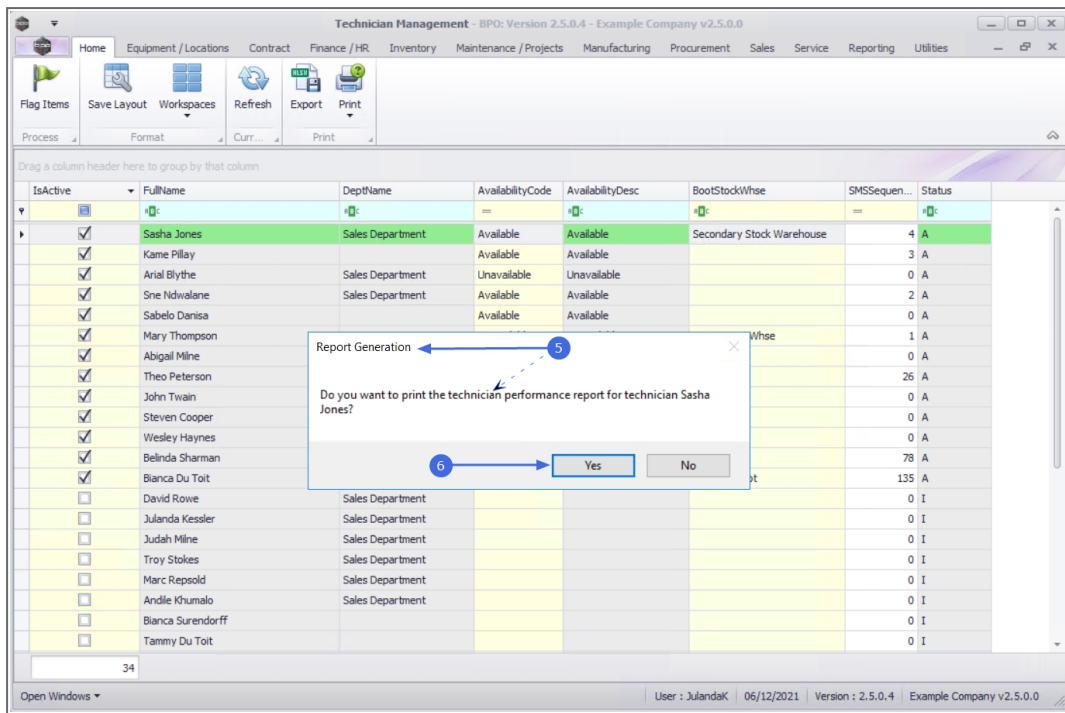2. Click in the *row* of the Technician whose performance report you wish
   to generate.

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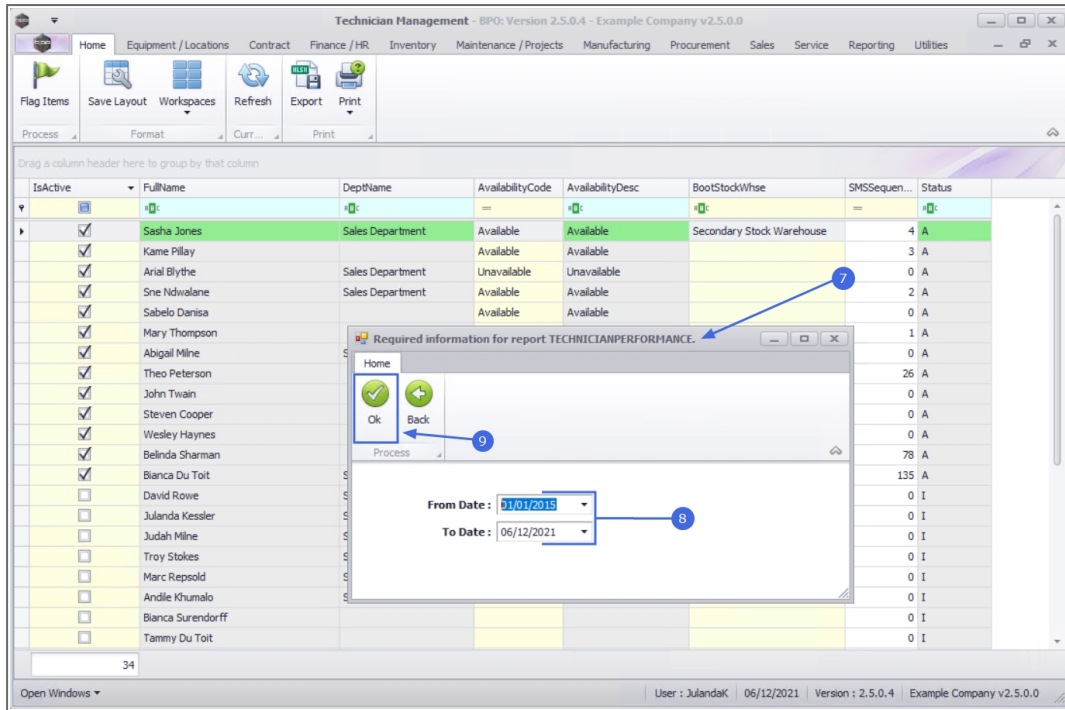4. Click on *Technician Performance Report*.

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.

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