

We are currently updating our site; thank you for your patience.

HUMAN RESOURCES

AVAILABILITY CODES

You must set up availability codes, e.g. **Unavailable**, **Available** in order to set up a **Technician List**.

You can schedule call workload, by assigning a technician and then using the **Start** and **End** work function on the call screen. This requires the technician to notify the call centre when work has **begun** and **ended**. Time taken to complete the work will be automatically calculated.

Alternatively, if you use **Tech Connect**, when the technician starts his day on his mobile device, his status will move from **Unavailable** to **Available**. The following default set up is a <u>must</u> (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 or End Day

Using these function will give you the ability to pull the **Activity** report on the call screen, in order to see which technicians are available to assign to a new call; and to see who is currently working on assigned calls. Also, for clients who use **Tech Connect**, the technician's **GPS** location is stored. You can view their last known location from the **Activity** screen.

Ribbon Access: Configurator > Human Resources > Availability Codes





The **Availability Codes** listing screen will be displayed.

• Here you can view the availability codes currently on the system.

ADD AN AVAILABILITY CODE

• Click in the first **editable** field in the **final row** to **'activate'** it.

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AVAILABILITY CODE DETAILS

- Now you can type in the details of the new availability code.
 - Availability Code: Type in the availability code.
 - **Description:** Type in the availability description.
 - **Default:** Click in this check box if you wish this to be the **default** code.
 - Note: Only <u>one</u> code should be set as default, and this is normally the Unavailable availability code.
 - **Is Unavailable:** Click in this check box if you wish this to be an **Is Unavailable** code.



- **Start Day:** Click in this check box if you wish this to be a **Start Day** code.
- End Day: Click in this check box if you wish this to be an End Day code.
- [°] **Status:** This will auto populate with **A** Active.

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- In this image, a new **Unavailability** code has been created:
 - $^\circ$ **OL** On Leave

SAVE AVAILABILITY CODE

- Press Tab or Enter on your keyboard.
- An **Update** message box will pop up asking;
 - Are you sure you want to save changes to this Availability Code?
- Click on Yes.

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• The new availability code will be **saved** and a **new row** will be created in the **Availability Codes** data grid.



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