

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

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

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- 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.



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- 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.

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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.

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- 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.



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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.



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- 6. The **Boot Stock Warehouse** field will update with the selection you have made.
- 7. Click on **Close** to close the screen.

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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.

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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.

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- 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.



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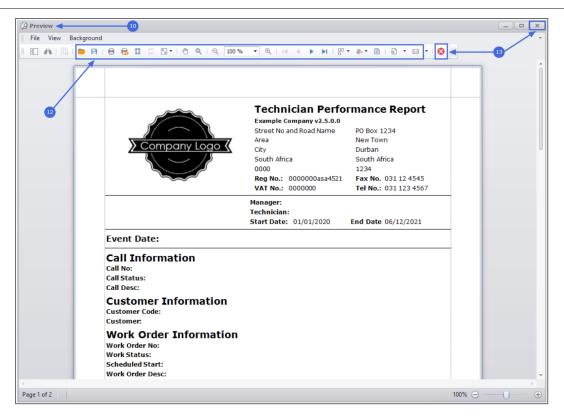
- The Required information for report Technician Performance screen will display;
- 8. Specify the **period** you wish to generate the report for by,
 - Click to type in the **From Date**, or use the down **arrow** the select the date using the calendar function.
 - Click to type in the **To Date**,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



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- 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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