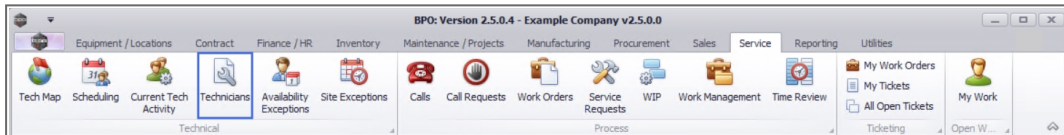We are currently updating our site; thank you for your patience.

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

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**.
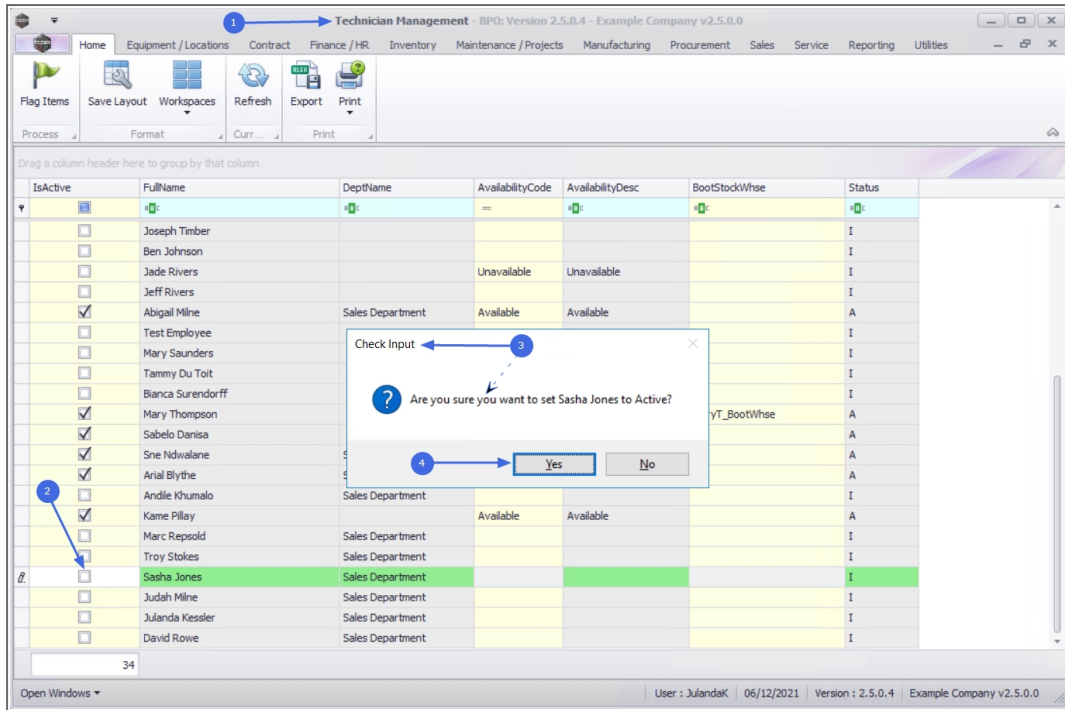
5. The **Is Active** check box will be marked, and the **Status** field will be updated to **A** - Active.

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.
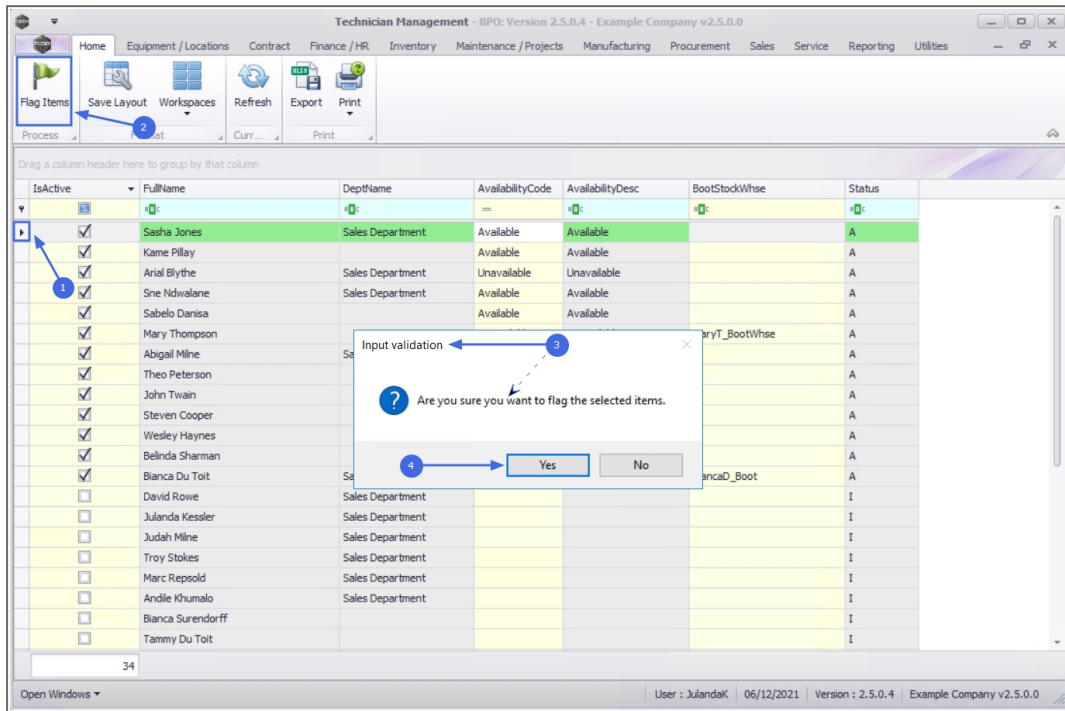   - The example has **Available** selected.
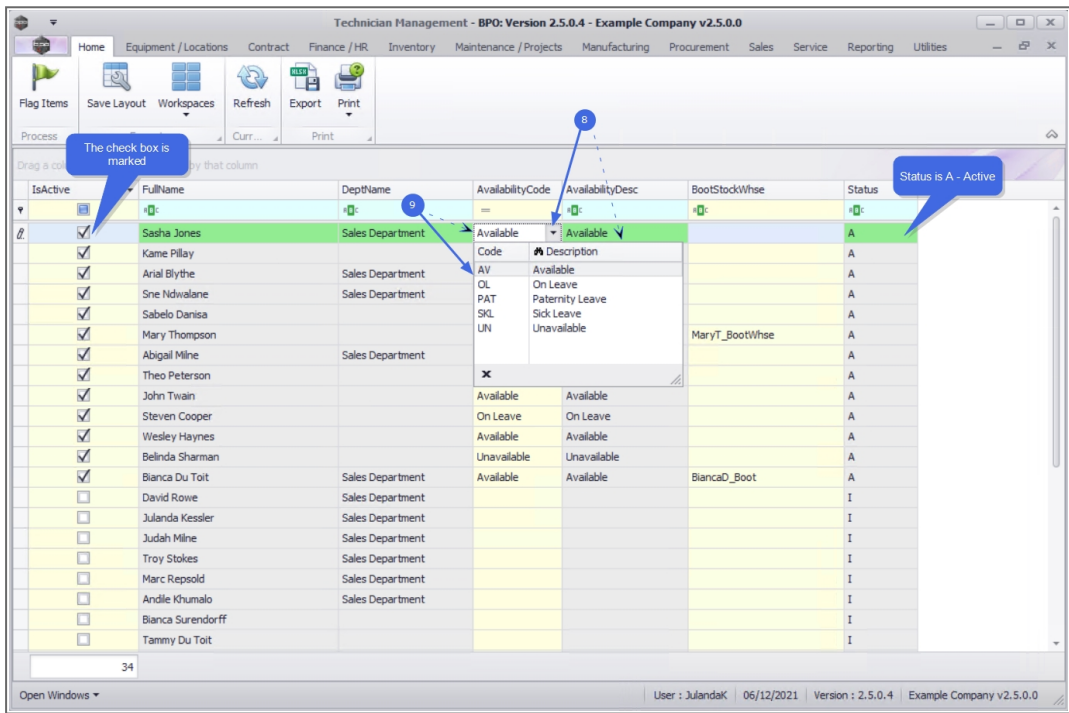
FLAG ITEMS

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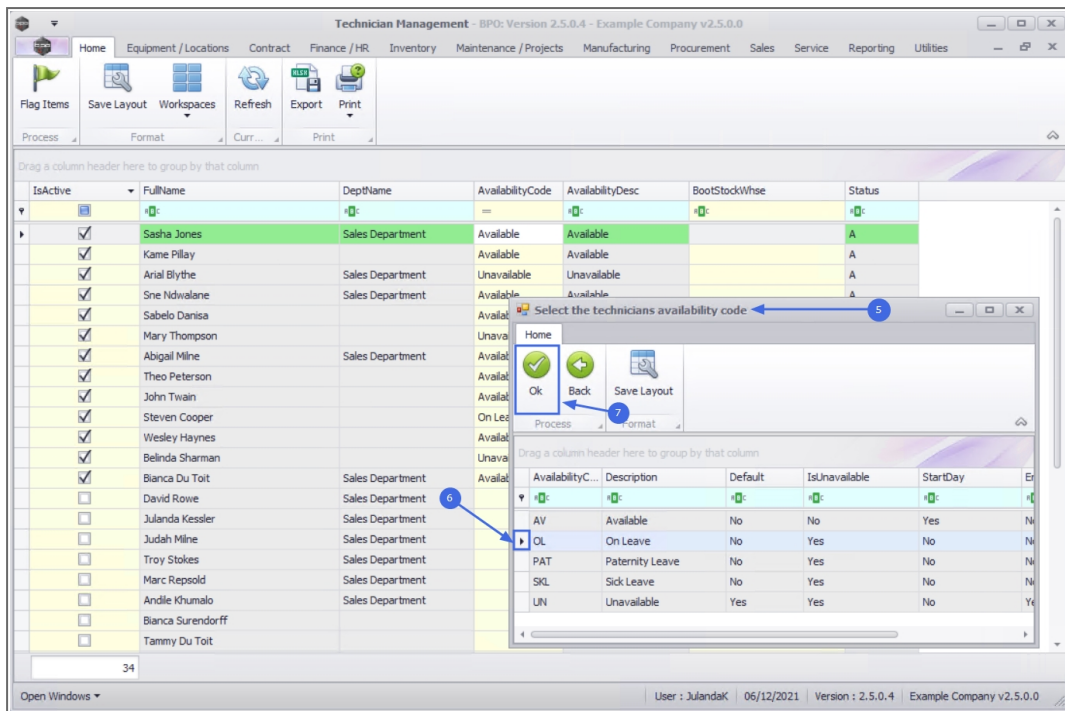
By using either method, the **Availability Description** column will be updated with the code description selected.

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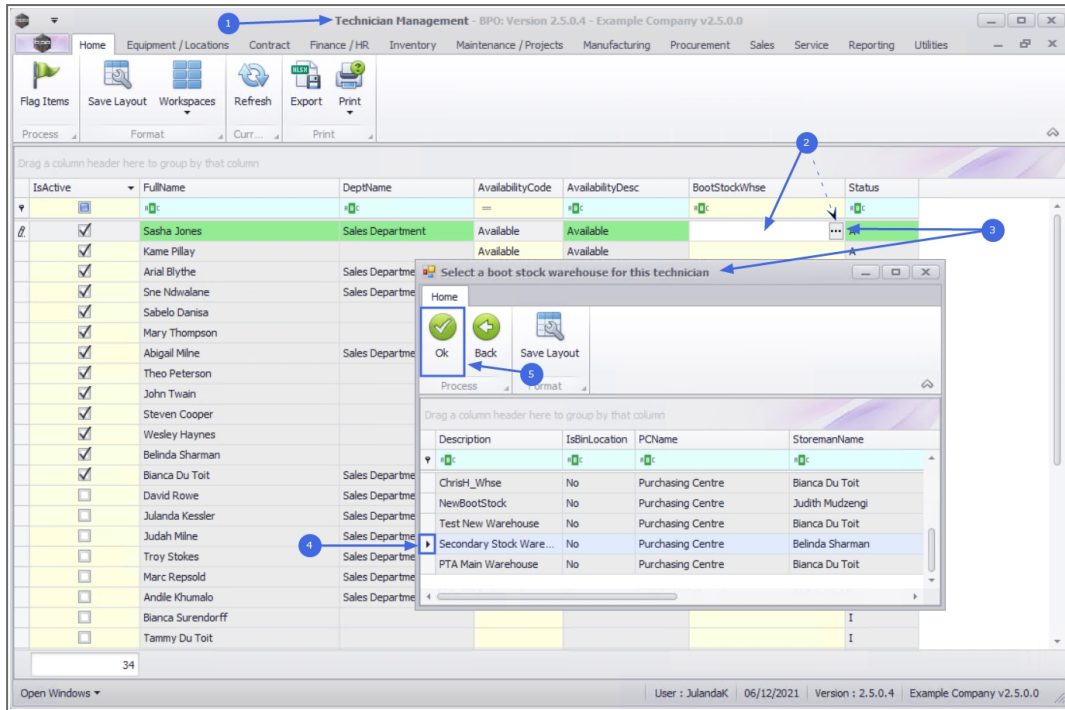
6. The **Boot Stock Warehouse** field will update with the selection you have made.

7. Click on **Close** to close the screen.
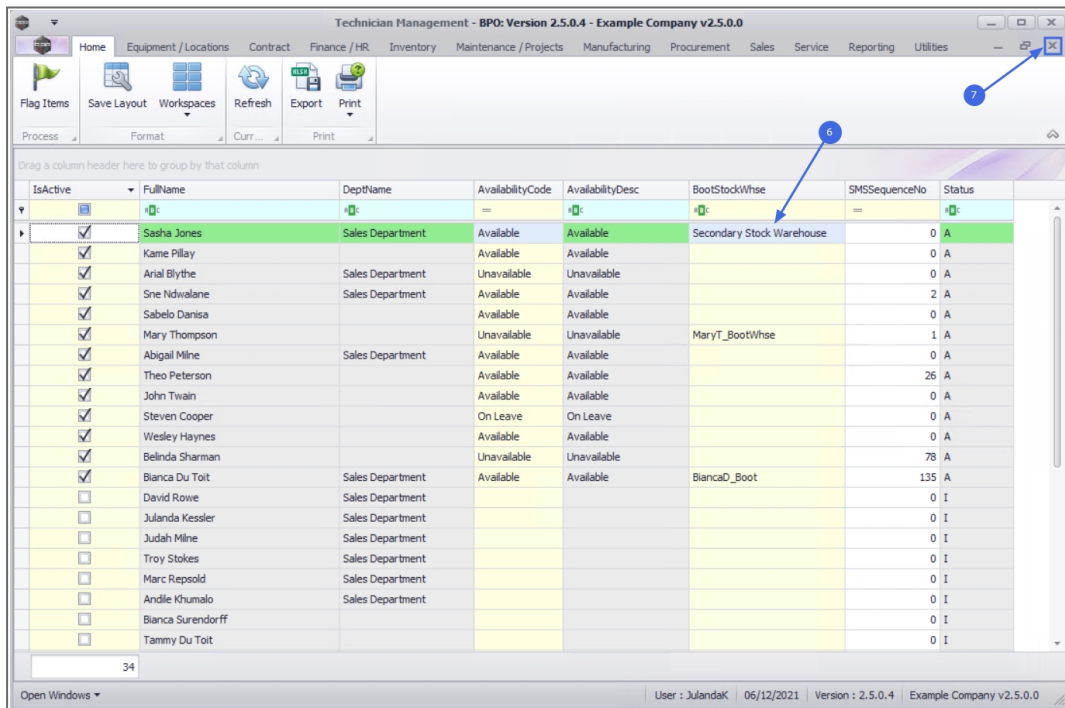
SMS SEQUENCE NO

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**.
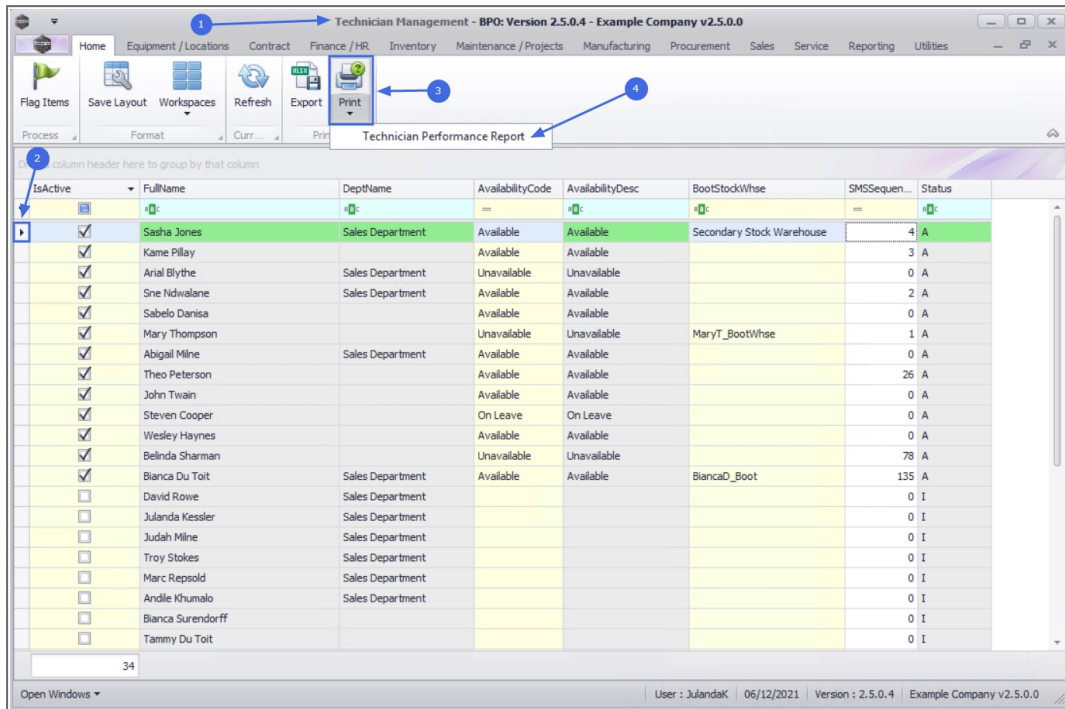
5. When you receive the **Report Generation** message to confirm;

   - **Do you want to print the technician performance report for technician** [technician name]**?**

6. Click on **Yes**.
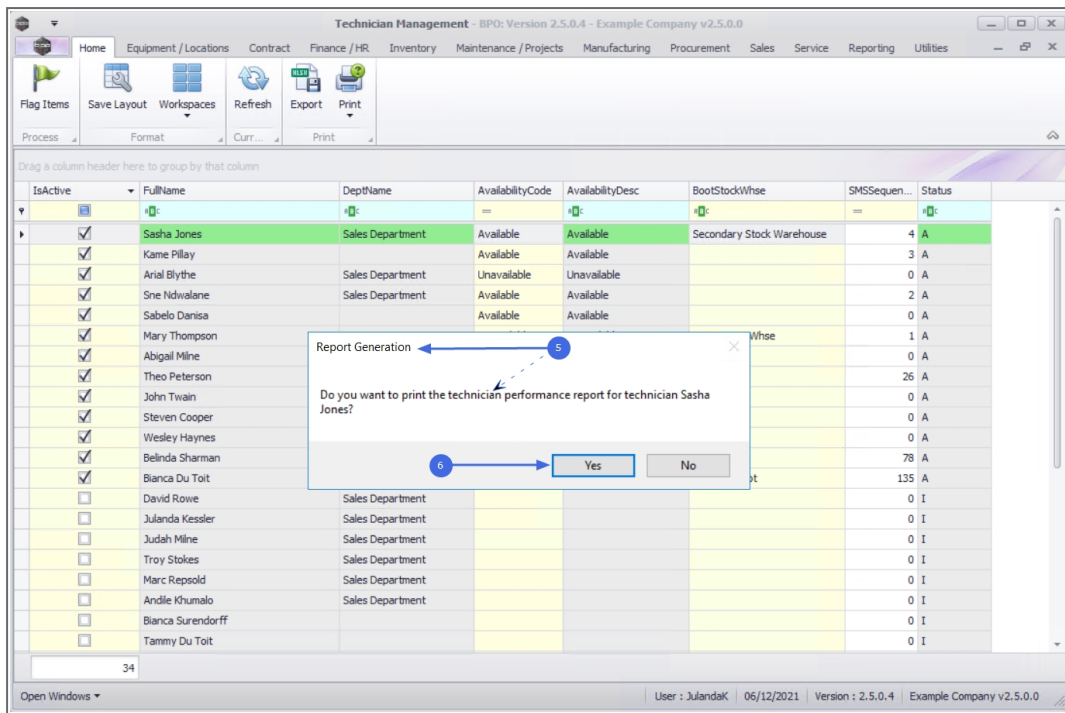
7. The **Required information for report Technician Performance** screen will display;

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**.
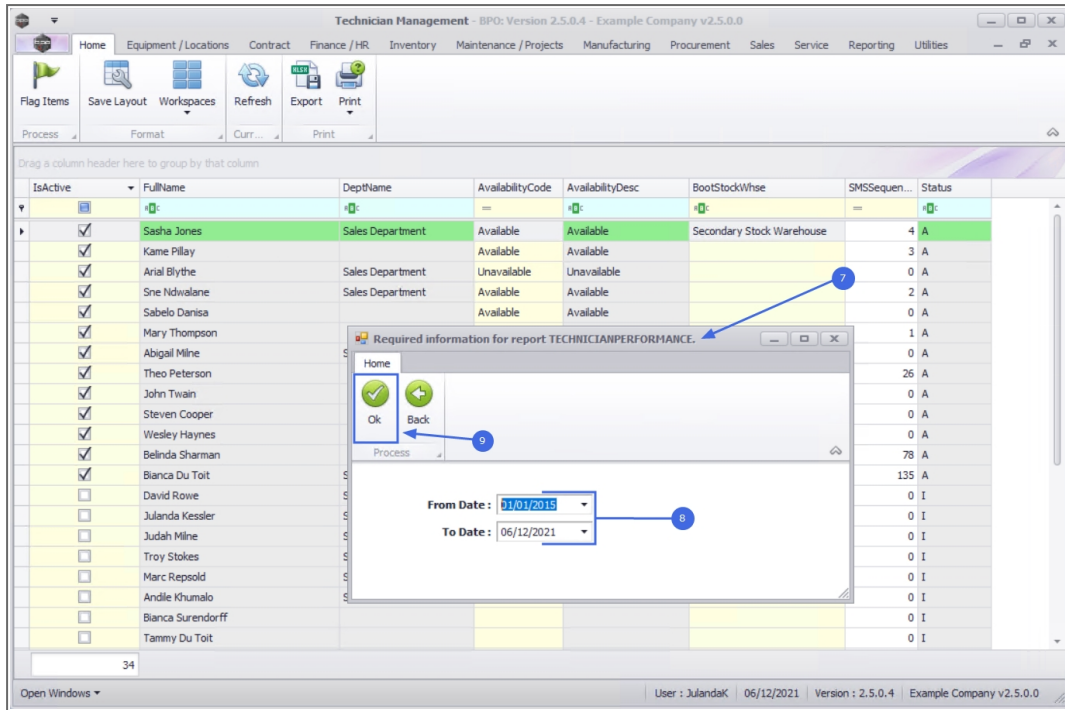
10. The Technician Performance report will display in the **Reports Preview** Screen.

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.

MNU.076.003