# TECHCONNECT

## INTRODUCTION AND INDEX

Tech Connect is a field service solution that runs on any Android device (phone / tablet) that can be used by businesses to send and receive information from the field based operative. This will update the BPO back office system as soon as the device has connectivity to the internet and the server.

The integration between the BPO server and the device is a live link, and there is no need for making calls and sending SMS's to the field technician. The application runs on the hand held device so that means if the tech is not on the internet, the information he downloaded previously will still be on the application, and it will work. If he saves some information then it will update the server as soon as he has connectivity.

As the call centre assigns jobs to the technician, he receives them on the handheld device. If he rejects the request this is fed back to the call centre to assign another technician. If he accepts the work is assigned to him. When he is ready to start the job he clicks on start travel.

Any time the technician starts a job and ends a job the system tags his *GPS* co-ordinates, and sends them to the server. This information is presented on a *GIS* interface. The information is sent to a *GIS* application like *Google Earth*, so that an office bound user can see the information on a *GIS* interface.

The technician will be able to check stock levels and record stock usage on the device. These will be linked to the live stock levels on the server.

The technician will be able to record his time spent on the job on the device. This will be calculated by the system taking the difference between the start

time and the end time. He will also be able to record mileage on the system, and this can be verified to an estimation based on *GPS* information stored on the device. Finally he will be able to record other expenses incurred on the device.

## BASICS

- Open App
- Initial Log in
- Log in | Change Account | Exit
- Configuration
    - Configuration - Boot Stock Database
    - Configuration - Parts Database
    - Configuration - Services Database
- Times
    - Update Time Comments
- Travel
    - Travel Entry
- Expenses
    - Add an Expense
- Settings

## ENVIRONMENT

- Tech Connect
- Start Day
- End Day
- My Time
- Online / Offline Mode
- View Calls by Date
- Syncing and Refreshing
- Assigned Calls / Projects

## WORK FLOW

# WORK OPTIONS

- [Expenses](#) | [Add an Expense](#)
- [Save Image to Work Order](#) | [Image Source - Camera](#) | [Image Source - Gallery](#)
- [Add A Meter Reading](#)
- [More Call Options](#)
  - [Information / Call Notes](#)
  - [Prior Calls](#)
  - [View Time](#) | [Update Time Comments](#)
  - [Site Parts](#)
    - Parts Audit
      - [Mark A Part As Missing](#)
      - [Add A Missing Part](#)
    - [Swap Outs](#)
  - [Prior Part Requests](#)

## CONFIGURATION NOTES

- *The Auto Accept Call Assignment*[Company Configuration](#) flag must be set to *No*.
  - The Technician will Accept the Call on *TechConnect*
  - If employees in the same company <u>don't use</u>*TechConnect*, then the Call [Force Accept](#) option should be used to accept the call.
- A **7** day [Shift](#) must be configured - this defines the company's working hours and is required for **SLA Monitoring**.
- [Availability Codes](#) must be configured. *Start* and *End Day* availability codes must be defined.
  - *AVA*: Available - *Start Day*.
  - *UNA*: Unavailable - Is *Unavailable*, Is *Default* and *End Day*.

- All employees using **TechConnect** must be configured as active Technicians, and before first use on the device, the availability code should be set to Unavailable (this is to prevent Call Centre from assigning calls to Technicians who have not selected **Start Day** on their device and are therefore **Unavailable**.

- The Technician must have the correct Craft / Site assignment in order to be assigned to the call.

- Technicians who use **boot stock** will need a warehouse and bin configured (**1**stock warehouse with **1** bin per technician), and this warehouse must be linked to the Technician.

- The **travel rate code** configured must be set to **STD**, so that the travel logged on **TechConnect** is saved to Work Order travel.

- An Expense Allocationcode **TVCH** must be configured in seg-mented ledger environments, so that the travel logged from **TechConnect** can be linked the with the correct Travel Radii (Travel Zone) code.

- If the technician will be logging other expenses on **TechConnect**, these Expense Allocations and Expense Types also need to be configured.

- The following **Static Data** codes are required:

  - Work Order Rectification Codes - code to be selected by the Technician when work is ended as **Resolved**. This indicates successful completion of the work, e.g. Equipment Serviced.

  - Call Pending Reason Codes - code to be selected by the Technician when work is ended as **Unresolved**. This indicates work cannot continue due to company reasons, e.g. Expert Required / Parts on Order.

  - Call on Hold Reason Codes - code to be selected by the Technician when work is ended as **Unresolved**

*(Client)*. This indicates work cannot continue due to client reasons, e.g. Awaiting Quote Confirmation / Client Unavailable.

- If the *Meter Reading Required* <span style="color:red">Company Configuration</span> flag is set to *Yes*, the technician must update the meter readings on the call before the work can be ended.
- If you are starting to use *TechConnect* on an active *BPO* database, ensure there are no *Calls in Progress* (make sure these are *Completed* or *Closed*).

## ADDITIONAL INFORMATION

- A technician can only have *1*active assignment at a time. Multiple calls can be assigned to the technician, but he can only *accept*one at a time.
- A technician can <u>only</u> have *1* assignment on the <u>same</u> work order.
- Calls should <u>not</u> be closed off whilst a technician is working on them in *TechConnect*. Wait until the Technician does one of the following actions:
  - *Rejects* the Call (call moves to *New* status)
  - *Ends Work* as *Resolved* (call moves to *Complete* status)
  - *Ends work* as *Unresolved* (call moves to *Pending* status)
  - *Ends work* as *Unresolved Client* (call moves to *Hold* status)

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