# Cheat Sheet – Back Office Users

# Table of Contents

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# Updating Service Order Status for Subcontractors

## Example: Updating a service order for a Subcontractor that completed work – Resolved

Performing the following will result in the following statuses:
- Order Status = Resolved
- Labor Activity Status = Complete
- Material Status (Mat. Stat.) = Fulfilled

| Action |
|---|
| 1. **Labor Activity** (Activities tab) <br><br> • Enter or select the following: <br><br>      - **Start (Travel)** date and time – if applicable, enter the actual travel time <br><br>      - **Start (Work)** date and time – enter the date and time the tech started work <br><br>      - **Disposition –** select Fulfilled <br><br>      - **Completion** date and time – enter the date and time the tech stopped work <br><br>      - **Stop Code** – select the applicable Complete stop code <br><br> • Select **Apply** <br><br> **NOTE:** You can either manually enter the date and time or you can select the date and time from the calendar and time selection buttons to the right of each field. |
| 2. **Materials** <br><br> • If there are Materials (Mat. Stat = to Needed) <br><br>      - Select each line item and Fulfill them appropriately by updating the **Disposition** (if installed = Fulfilled; if not used = Not Used). <br><br> • Select **Apply** |
| 3. **Work Order Check List** <br><br> • Open the **Closure Checklist** by selecting the hyperlink under the Checklist ID column <br><br> • Select the **Delete Checklist** button <br><br> • Select **Apply** |
| 4. **Resolve** (Resolve tab) <br><br> • Enter or select the following information: <br><br>      - **Cause** – select the cause code(s) that best describes the cause of the problem <br><br>      - **Repair Code** – select the repair code(s) that best describe how the problem was repaired <br><br>      - **New Resolve Text** – summarize the issue and the steps needed or taken to repair the issue <br><br> • Click in the **Resolve** option box to enable the check mark. <br><br> • Select **Save**. |

## Example: Updating a service order for a Subcontractor that completed work – Incomplete

Performing the following will result in the following statuses:
- Order Status = Incomplete
- Labor Activity Status = Partially Completed

| Action |
|---|
| 1. **Labor Activity** (Activities tab)<br><br> • Enter or select the following:<br><br>  - **Start (Travel)** date and time – if applicable, enter the actual travel time<br><br>  - **Start (Work)** date and time – enter the date and time the tech started work<br><br>  - **Disposition –** select Fulfilled<br><br>  - **Completion** date and time – enter the date and time the tech stopped work<br><br>  - **Stop Code** – select the applicable Incomplete stop code<br><br> • Select **Back to List**<br><br> • Select the new **Open** labor activity and select **Zoom**.<br><br> • Remove the check mark from the **External** option box.<br><br> • If the SA field is populated, remove the SA.<br><br> • Select **Apply**<br><br>**NOTE:** You can either manually enter the date and time or you can select the date and time from the calendar and time selection buttons to the right of each field. |
| 2. **Resolve** (Resolve tab)<br><br> • Enter or select the following information:<br><br>  - **New Resolve Text** – summarize the issue and the steps needed or taken to repair the issue<br><br> • Select **Save**. |

**NOTE:** because travel times are not provided and stamped in Astea, a trip charge will not automatically pass to SBN for invoicing purposes. In the following two scenarios, trip charges must be added manually.

## Example: Updating a service order for a Subcontractor that completed work – Resolved & Duration Based

Performing the following will result in the following statuses:
- Order Status = Resolved
- Labor Activity Status = Complete
- Material Status (Mat. Stat.) = Fulfilled

| Action |
|---|
| 1. **Labor Activity** (Activities tab)<br><br>• Enter or select the following:<br><br>   - **Duration** - select the total number of hours worked<br><br>   - **Running Man –** select the Running Man icon located to the right of the Disposition field<br><br>   - **Start & Completion** dates and times – if necessary update the start and completion dates and times.<br><br>• Select **Apply**<br><br>**NOTE:** You can either manually enter the date and time or you can select the date and time from the calendar and time selection buttons to the right of each field. |
| 2. **Materials**<br><br>• If there are Materials (Mat. Stat = to Needed)<br><br>   - Select each line item and Fulfill them appropriately by updating the **Disposition** (if installed = Fulfilled; if not used = Not Used).<br><br>• Select **Apply** |
| 3. **Work Order Check List**<br><br>• Open the **Closure Checklist** by selecting the hyperlink under the Checklist ID column<br><br>• Select the **Delete Checklist** button<br><br>• Select **Apply** |
| 4. **Resolve** (Resolve tab)<br><br>• Enter or select the following information:<br><br>   - **Cause** – select the cause code(s) that best describes the cause of the problem<br><br>   - **Repair Code** – select the repair code(s) that best describe how the problem was repaired<br><br>   - **New Resolve Text** – summarize the issue and the steps needed or taken to repair the issue<br><br>• Click in the **Resolve** option box to enable the check mark.<br><br>• Select **Save**. |

## Example: Updating a service order for a Subcontractor that completed work – Incomplete & Duration Based

Performing the following will result in the following statuses:
- Order Status = Incomplete
- Labor Activity Status = Partially Completed

| Action |
|---|
| 1. **Labor Activity** (Activities tab)<br><br>    &bull;  Enter or select the following:<br><br>        -  **Duration** -  select the total number of hours worked<br><br>        -  **Running Man –** select the Running Man icon located to the right of the Disposition field<br><br>        -  **Start & Completion** dates and times – if necessary update the start and completion dates and times.<br><br>        -  **Stop Code** – select the applicable Incomplete stop code<br><br>    &bull;  Select **Back to List**<br><br>    &bull;  Select the new **Open** labor activity and select **Zoom**.<br><br>    &bull;  Remove the check mark from the **External** option box.<br><br>    &bull;  If the SA field is populated, remove the SA.<br><br>    &bull;  Select **Apply**<br><br>**NOTE:** You can either manually enter the date and time or you can select the date and time from the calendar and time selection buttons to the right of each field. |
| 2. **Resolve** (Resolve tab)<br><br>    &bull;  Enter or select the following information:<br><br>        -  **New Resolve Text** – summarize the issue and the steps needed or taken to repair the issue<br><br>    &bull;  Select **Save**. |

# Cancelling Service Orders

**NOTE**: cancelled tickets will be removed immediately from the Service Order module and moved to the Service Order History module. At this point the ticket can no longer be update and expenses cannot be added.

## Example: Cancel – Customer calls to cancel & SA has not started Travel

| Action |
|---|
| 1. **Service Order Info.**<br><br>    • Verify the following:<br><br>       - Order Status = Open<br><br>       - Labor Status = Not Started<br><br>       - Mat. Stat. = Null<br><br>    • Select the **Sub Category** look up button and choose **CCAN**. |
| 2. **Resolve** (Resolve tab)<br><br>    • Enter or select the following information:<br><br>       - **Cause** – select **CANC** – Request Cancelled<br><br>       - **Repair Code** – select **WKNC** – Work Not Completed<br><br>       - **New Resolve Text** – summarize the reason the service order is being cancelled<br><br>    • Select **Save**. |
| 3. **Cancel** (Cancel tab)<br><br>    • Enter or select the following information:<br><br>       - **Cancel Reason** – select **CCAN**<br><br>       - **Notes** – summarize the reason the service order is being cancelled<br><br>    • Select **Cancel**<br><br>    • Select **Yes**. |

### Example: Cancel – Duplicate service order mistakenly created

| Action |
|---|
| 1. **Service Order Info.**<br><br>    • Verify the following:<br>       - Order Status = Open<br>       - Labor Status = Not Started<br>       - Mat. Stat. = Null<br>    • Select the **Sub Category** look up button and choose **HCAN**. |
| 2. **Resolve** (Resolve tab)<br><br>    • Enter or select the following information:<br>       - **Cause** – select **CANC** – Request Cancelled<br>       - **Repair Code** – select **WKNC** – Work Not Completed<br>       - **New Resolve Text** – summarize the reason the service order is being cancelled<br>    • Select **Save**. |
| 3. **Cancel** (Cancel tab)<br><br>    • Enter or select the following information:<br>       - **Cancel Reason** – select **HCAN**<br>       - **Notes** – summarize the reason the service order is being cancelled<br>    • Select **Cancel**<br>    • Select **Yes**. |

**Example: Cancel – Service order entered under the wrong customer**

| Action |
| --- |
| 1. **Service Order Info.** <br><br> &bull; Verify the following: <br>     - Order Status = Open <br>     - Labor Status = Not Started <br>     - Mat. Stat. = Null <br> &bull; Select the **Sub Category** look up button and choose **HCAN**. |
| 2. **Resolve** (Resolve tab) <br><br> &bull; Enter or select the following information: <br>     - **Cause** – select **CANC** – Request Cancelled <br>     - **Repair Code** – select **WKNC** – Work Not Completed <br>     - **New Resolve Text** – summarize the reason the service order is being cancelled <br> &bull; Select **Save**. |
| 3. **Cancel** (Cancel tab) <br><br> &bull; Enter or select the following information: <br>     - **Cancel Reason** – select **HCAN** <br>     - **Notes** – summarize the reason the service order is being cancelled <br> &bull; Select **Cancel** <br> &bull; Select **Yes**. |

### Example: Cancel – Franchise account requests to cancel service order

| Action |
| --- |
| 1. **Service Order Info.**<br><br>    • Verify the following:<br>       - Order Status = Open<br>       - Labor Status = Not Started<br>       - Mat. Stat. = Null<br>    • Select the **Sub Category** look up button and choose **HCAN**. |
| 2. **Resolve** (Resolve tab)<br><br>    • Enter or select the following information:<br>       - **Cause** – select **CANC** – Request Cancelled<br>       - **Repair Code** – select **WKNC** – Work Not Completed<br>       - **New Resolve Text** – summarize the reason the service order is being cancelled<br>    • Select **Save**. |
| 3. **Cancel** (Cancel tab)<br><br>    • Enter or select the following information:<br>       - **Cancel Reason** – select **HCAN**<br>       - **Notes** – summarize the reason the service order is being cancelled<br>    • Select **Cancel**<br>    • Select **Yes**. |

## Closing Service Orders for Service Technicians

**NOTE**: Ideally the Stanley service technicians should be closing service orders on their mobile devices regardless of the reason. The following scenarios should only be used when the Stanley service technician is unable to close the service order on their mobile.

### Example: Closing – Customer calls to cancel a service order after the SA is in route

Performing the following will result in the following statuses:
- Order Status = Resolved
- Labor Activity Status = Complete
- Material Status (Mat. Stat.) = Fulfilled

| Action |
| --- |
| 1. **Quick Activity Update** (Dispatch Console)<br><br>• Right click on the service order and select **Quick Activity Update**.<br><br>• Enter or select the following:<br><br>   - **Start (Work)** date and time – enter the date and time the tech started work<br><br>   - **Disposition –** select Fulfilled<br><br>   - **Completion** date and time – enter the date and time the tech stopped work<br><br>   - **Stop Code** – select **CANC** (PNC: Customer Cancelled)<br><br>• Select **Apply**<br><br>**NOTE:** You can either manually enter the date and time or you can select the date and time from the calendar and time selection buttons to the right of each field. |
| 2. **Materials**<br><br>• If there are Materials (Mat. Stat = to Needed)<br><br>   - Select each line item and Fulfill them appropriately by updating the **Disposition** to **Not Used**<br><br>• Select **Apply** |
| 3. **Work Order Check List** (Service Order module)<br><br>• Open the **Closure Checklist** by selecting the hyperlink under the Checklist ID column<br><br>• Complete the **Closure Checklist** by answering all of the questions<br><br>• Select **Apply** |
| 4. **Resolve** (Resolve tab)<br><br>• Enter or select the following information:<br><br>   - **Cause** – select **CANC** – Request Cancelled<br><br>   - **Repair Code** – select **WKNC** – Work Not Completed<br><br>   - **New Resolve Text** – summarize why the service order is being cancelled<br><br>• Click in the **Resolve** option box to enable the check mark.<br><br>• Select **Save**. |

## Example: Closing – Customer calls to cancel a service order after the SA has started work

Performing the following will result in the following statuses:
- Order Status = Resolved
- Labor Activity Status = Complete
- Material Status (Mat. Stat.) = Fulfilled

| Action |
|---|
| 1. **Quick Activity Update** (Dispatch Console)<br><br>• Right click on the service order and select **Quick Activity Update**.<br><br>• Enter or select the following:<br><br>    - **Disposition –** select Fulfilled<br><br>    - **Completion** date and time – enter the date and time the tech stopped work<br><br>    - **Stop Code** – select **CANC** (PNC: Customer Cancelled)<br><br>• Select **Apply**<br><br>**NOTE:** You can either manually enter the date and time or you can select the date and time from the calendar and time selection buttons to the right of each field. |
| 2. **Materials**<br><br>• If there are Materials (Mat. Stat = to Needed)<br><br>    - Select each line item and Fulfill them appropriately by updating the **Disposition** to **Not Used**<br><br>• Select **Apply** |
| 3. **Work Order Check List** (Service Order module)<br><br>• Open the **Closure Checklist** by selecting the hyperlink under the Checklist ID column<br><br>• Complete the **Closure Checklis**t by answering all of the questions<br><br>• Select **Apply** |
| 4. **Resolve** (Resolve tab)<br><br>• Enter or select the following information:<br><br>    - **Cause** – select **CANC** – Request Cancelled<br><br>    - **Repair Code** – select **WKNC** – Work Not Completed<br><br>    - **New Resolve Text** – summarize why the service order is being cancelled<br><br>• Click in the **Resolve** option box to enable the check mark.<br><br>• Select **Save**. |

## Example: Closing – Customer calls to cancel a service order with at least one fulfilled labor activity and one open labor activity

Performing the following will result in the following statuses:
- Order Status = Resolved
- Labor Activity Status = Complete
- Material Status (Mat. Stat.) = Fulfilled

| Action |
|---|
| 1. **Labor Activity** (Activities tab) <br><br> • Select the **Open** labor activity and select **Zoom**. <br><br> • Enter or select the following: <br><br>    - **Disposition** = Not Done <br><br>    - **SA** – enter your user ID <br><br> • Select **Apply** |
| 2. **Materials** <br><br> • If there are Materials (Mat. Stat = to Needed) <br><br>    - Select each line item and Fulfill them appropriately by updating the **Disposition** (if installed = Fulfilled; if not used = Not Used). <br><br> • Select **Apply** |
| 3. **Work Order Check List** (Service Order module) <br><br> • Open the **Closure Checklist** by selecting the hyperlink under the Checklist ID column <br><br> • Complete the **Closure Checklis**t by answering all of the questions <br><br> • Select **Apply** |
| 4. **Resolve** (Resolve tab) <br><br> • Enter or select the following information: <br><br>    - **Cause** – select **CANC** – Request Cancelled <br><br>    - **Repair Code** – select **WKNC** – Work Not Completed <br><br>    - **New Resolve Text** – summarize why the service order is being cancelled <br><br> • Click in the **Resolve** option box to enable the check mark. <br><br> • Select **Save**. |

# Parts Pending Process

## Example: Parts pending process – automated (interface driven)

The parts pending process is dependent on the Stanley service technician:

- Adding the parts to the mobile device in and Open Disposition (Status = Needed). This displays the service order in the Materials Needed View notifying the back office users that the parts procurement process is necessary. If the Stanley service technician does not add parts on the mobile device as Open/Needed the service order will not appear in the Materials Needed View and the back office user will need to add the parts to the service order.

- Selecting the stop code "Add'l Equip Reqd." This initiates an interface driven (automated) process in Astea that keeps the service order off of the Dispatch Console while the parts are ordered and shipped. If the Stanley service technician does not use the stop code "Add'l Equip Reqd" the automated or interface driven process is broken and the back office user will have to complete the process manually.

| Action |
|---|
| 1. **Service Order QBE**<br><br>• Apply the **Materials Needed** view and select the applicable service order (Sub Category = PEND)<br><br>• Complete your normal parts procurement process to order the requested parts |
| 2. **Service Order Info.**<br><br>• As the parts procurement process takes place/advances, update the Sub Category accordingly:<br><br>   - Parts Ordered = PORD<br><br>   - Parts In = PTIN |

## Example: Parts pending process – manual intervention

If the Stanley service technician does not use the stop code of "Add'l Equip Reqd" on their mobile device when completing a service order that needs parts ordered the automated Astea process is broken and will require the back office users to complete the process manually.

| Action |
|---|
| 1. **Service Order QBE**<br><br>&bull; Apply the **Materials Needed** view and select the applicable service order (Sub Category = PEND)<br><br>&bull; Complete your normal parts procurement process to order the requested parts |
| 2. **Service Order Info.**<br><br>&bull; As the parts procurement process takes place/advances, update the Sub Category accordingly:<br><br>  - Parts Ordered = PORD<br><br>  - Parts In = PTIN |
| 3. **Labor Activity** (Activities tab)<br><br>&bull; Select **Add**<br><br>&bull; Select the Lookup icon to the right of the **Activity** field and select **Labor**<br><br>&bull; Select **Apply** |

## Example: Adding a part to the service order from the back office – part installed (fulfilled)

The following process should be used to add a part/material to a service order, via the back office, once it has been installed at a customer site.

| Action |
|---|
| 1. **Materials**<br><br>    • Select **Add**<br><br>    • Enter or select the following information:<br><br>        - **Product ID -** select the Lookup icon to the right of the **Product ID** field. Search for and select the applicable part/material (% is the wild card and can be used before and after a partial # or description)<br><br>        - **Quantity** – select the applicable part/material quantity<br><br>        - **Disposition** – select **Fulfilled**<br><br>    • Select **Apply** |

## Example: Adding a part to the service order from the back office – part needed (open)

The following process should be used to add a part/material to a service order, via the back office, once that is needed to complete work at a customer site.

| Action |
|---|
| 1. **Materials**<br><br>    • Select **Add**<br><br>    • Enter or select the following information:<br><br>        - **Product ID -** select the Lookup icon to the right of the **Product ID** field. Search for and select the applicable part/material (% is the wild card and can be used before and after a partial # or description)<br><br>        - **Quantity** – select the applicable part/material quantity<br><br>        - **Disposition** – select **Open**<br><br>    • Select **Apply** |