

Service Technician Cheat Sheets

DRAFT

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The following process details how to close a multi tech service order from each service technician's mobile device. One service technician (Tech #2) should always finish their service order last. They will be the technician to Resolve (close) the service order. All other service technicians should complete their service orders prior to the last service technician (Tech #2) following their normal closure process and simply removing the service order from their mobile device.


Completing a Multi Tech Service Order – Complete (Resolved Stop Code)

Step #	Action	Tech
1.	Select Stop Work .	Tech #1 & #2
2.	Select a complete Stop Code .	Tech #1 & #2
3.	Complete the Work Order Checklist .	Tech #1 & #2
4.	Select the appropriate Cause & Repair codes.	Tech #1 & #2
5.	Enter Resolve Notes .	Tech #1 & #2
6.	Select the Customer Signature button and obtain the customer's signature.	Tech #1 & #2
7.	Select the Technician Signature button and enter your signature.	Tech #1 & #2
8.	Select the Resolved check mark (NOTE: the option to Resolve the service order will only appear when a complete stop code is selected).	Tech #2 ONLY
9.	Select the Running Man .	Tech #1 & #2


Completing a Multi Tech Service Order – Incomplete (Incomplete Stop Code)

Step #	Action	Tech
1.	Select Stop Work .	Tech #1 & #2
2.	Select an incomplete Stop Code .	Tech #1 & #2
3.	Select the appropriate Cause & Repair codes.	Tech #1 & #2
4.	Enter Resolve Notes .	Tech #1 & #2
5.	Select the Technician Signature button and enter your signature.	Tech #1 & #2
6.	Select the Running Man to simply remove the service order from your device.	Tech #1 & #2

Adding parts to a service order – Parts Needed

Step #	Action
1.	Select the Materials tab.
2.	Select the Add () button, search for the part, select it, and select Post .
3.	Update the Quantity, if necessary.
4.	Select the Disposition drop down and select Open .
5.	Select Save . Repeat steps #2 – #5 for each part that needs to be ordered/added.
6.	Select the Activities tab and Stop Work .
7.	Select the stop code ADDL EQUIP REQD .
8.	Select the Completion tab.
9.	Select the Tech Signature button and enter your signature.
10.	Select the Running Man icon.

Adding parts to a service order– Parts Installed

Step #	Action
1.	Select the Materials tab.
2.	Select the Add () button, search for the part, select it, and select Post .
3.	Update the Quantity, if necessary.
4.	Select the Disposition drop down and select Fulfilled .
5.	Select Save . Repeat steps #2 – #5 for each part that needs to be fulfilled.
6.	Select the Activities tab and Stop Work .
7.	Select the appropriate stop code. If the work is done, select Resolved. If additional work is required, select an incomplete stop code (please refer to the Stop Codes cheat sheet).
8.	Select the Completion tab and complete the closure steps as necessary (indicated on the Check Status tab).
9.	Select the Running Man icon.

Fulfilling parts needed once parts are in and upon the tech's second trip to the customer location – Parts Installed

Step #	Action
1.	Select the Materials tab.
2.	Open the first Needed part by selecting the part name/description.
3.	If necessary, update the quantity of each part to indicate the actual number installed.
4.	Select the Disposition drop down and select Fulfilled .
5.	Select Save . Repeat steps #2 – #5 for each part that needs to be fulfilled.
6.	Select the Activities tab and Stop Work .
7.	Select the appropriate stop code. If the work is done, select Resolved. If additional work is required, select an incomplete stop code (please refer to the Stop Codes cheat sheet).
8.	Select the Completion tab and complete the closure steps as necessary (indicated on the Check Status tab).
9.	Select the Running Man icon.