

# Dispatch and Call Intake Readiness Checklist - Pilot

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Version	Reason for Change	Date
0.1 – Draft	Created Document	June 2, 2015
0.2 – Draft	Project Team Review & Updates	June 3, 2015
1.0 – Final	Pilot Release	June 10, 2015
1.1 – Draft	Updates	July 16, 2015
2.0 – Final	Pilot Release	July 16, 2015
3.0 – Final	Deployment	September 30, 2015

## Dispatch and Call Intake Readiness Checklist

Congratulations! Your office will transition to the Astea Application on **Monday, October 12th**. In preparation for the transition, we have created the following checklist of items for you in order to prepare for the transition.

### Astea Project Support Contacts

For support with Astea or Astea Mobile please contact the following:

- **Phone** – 317-813-9087 (for urgent usability issues and after hours support)
- **Email** – [ServiceDispatchSupport@sbdinc.com](mailto:ServiceDispatchSupport@sbdinc.com) (the email box is monitored Monday – Friday, 8:00 a.m. to 5:00 p.m. EST).

Dispatch	Call Intake
<ul style="list-style-type: none"> <li>✓ Download and install Astea Back Office <ul style="list-style-type: none"> <li>▪ See “How To” attachment for instructions on how to download and install</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>✓ Download and install Astea Back Office <ul style="list-style-type: none"> <li>▪ See “How To” attachment for instructions on how to download and install</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>✓ Login to Astea <ul style="list-style-type: none"> <li>▪ See “Employee List” attachment with Tech user name</li> <li>▪ Password = <b>Astea123</b> (case sensitive)</li> <li>▪ See “How To” attachment for instructions on how to login</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>✓ Login to Astea <ul style="list-style-type: none"> <li>▪ See “Employee List” attachment with Tech user name</li> <li>▪ Password = <b>Astea123</b> (case sensitive)</li> <li>▪ See “How To” attachment for instructions on how to login</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>✓ Complete the training located at the following URL: <a href="http://iservice.stanleycss.com/astetraining/">http://iservice.stanleycss.com/astetraining/</a></li> </ul>	<ul style="list-style-type: none"> <li>✓ Complete the training located at the following URL: <a href="http://iservice.stanleycss.com/astetraining/">http://iservice.stanleycss.com/astetraining/</a></li> </ul>
<ul style="list-style-type: none"> <li>✓ Change any PINS/FINS ticket that has not already been scheduled to generate a work order</li> </ul>	<ul style="list-style-type: none"> <li>✓ Notify <a href="mailto:ServiceDispatchSupport@sbdinc.com">ServiceDispatchSupport@sbdinc.com</a> of any missing technician credentials or any technician that is no longer with the company</li> </ul>
<ul style="list-style-type: none"> <li>✓ Remove tickets from schedule board that are future dated (Open report of tickets must have been pulled already)</li> </ul>	
<ul style="list-style-type: none"> <li>✓ Reschedule the tickets that were removed, on the morning of Monday, October 12th</li> </ul>	
<ul style="list-style-type: none"> <li>✓ Notify <a href="mailto:ServiceDispatchSupport@sbdinc.com">ServiceDispatchSupport@sbdinc.com</a> of any missing technician credentials or any technician that is no longer with the company</li> </ul>	