

# Service Ticket Dispatch & Creation FAQs

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Version	Reason for Change	Date
1.0 – Draft	Created Document	09/15/2015
2.0	Revisions: SBN Parts fulfilled, Addl Equip Reqd Stop Code; Added: View Picture, Assign Sub Contractors, Allocate Sub Contractors, New Views in QBE	10/8/2015
2.1	Additions: Material Status	12/18/2015

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## How do I check to see if materials need to be fulfilled on mobile?

When closing a service order on your mobile device, it is always good practice to select the Materials tab and verify there are no open materials/parts in a Needed status that will prevent the service order form closing properly. If there are materials in a Needed status, simply open the material line item and change the disposition to Fulfilled, provided that it was used/installed. This not only allows the ticket to close properly and be removed from your mobile device, but it also let's the system to know that it is okay to invoice for the materials/parts.

### How do I fulfill materials in the back office?

When closing a service order it is good practice to select the Materials tab and verify there are no open materials/parts in a Needed status that will prevent the service order from closing properly. If there are materials in a Needed status, simply open the material line item and change the disposition to:

- Fulfilled if the part was used/installed
- Not Used if the part was not used/not installed

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To verify whether or not the service order is closed properly, verify the following from the service order header:

- Status = Resolved
- Labor Stat: = Complete
- Mat. Stat. = Fulfilled

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## Can I update a ticket in SBN to COMP/outdated?

No. Astea tickets should not be updated to COMP/outdated in SBN. The Astea tickets should be closed in Astea. When an Astea ticket is updated to COMP/outdated in SBN, the Astea ticket will not be updated any further. Any new transactions on the Astea ticket (e.g. a technician works another labor activity) will not transfer to SBN.

## Can I cancel a ticket in SBN to HCAN/CCAN?

Yes, providing a technician has not started travel or started work on the ticket. If a technician has started travel, or work, the SBN status should only be updated to UPDT and a note entered in the text box. The ticket would need to be closed in Astea.

## What is the difference between a LABOR activity and an SBN\_PARTS activity?

The LABOR activity is the work related activity associated with a service ticket. It is the activity that should be assigned to technicians. The start travel, start work, and stop work times associated with



the LABOR activity will be displayed in the SBN MISC Log. The SBN work order will reflect a trip/travel charge (if applicable) as well as the appropriate labor charge.

The SBN\_PARTS activity is a part process related activity. It should NOT be assigned to a technician on mobile. The start travel, start work, and stop work times associated with the SBN\_PARTS activity will NOT be displayed in the SBN MISC Log. The SBN work order will NOT reflect a trip/travel charge, nor any labor charge.

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## How is the SBN\_PARTS activity created?

When a technician uses the stop code of ADDL EQUIP REQD, the SBN\_PARTS activity is automatically created. The SBN status is automatically updated to PEND, and the Astea sub category is automatically updated to PEND.

When the part the technician needs is ordered, the Astea sub category should be manually updated to PORD. This will then update the SBN status to PORD.



## How does the SBN\_PARTS activity get fulfilled?

Once the part that was ordered arrives or is otherwise acquired, the Astea sub category should be manually updated to PTIN. This will automatically resolve the SBN\_PARTS activity (SBN\_PROCESS COMPLETE) and automatically create the new LABOR activity. The SBN status will be updated to PTIN.

### Should I assign the SBN\_PARTS activity to a technician?

No

## Why can I not see the SBN\_PARTS activity on the unallocated tab on Dispatch Console to assign to a technician?

The SBN\_PARTS activity is a "non-workable" activity and will not be displayed on Dispatch Console. **It should not be assigned to a technician**. The start travel, start work, and stop work times associated with the SBN\_PARTS activity will NOT be displayed in the SBN MISC Log. The SBN work order will NOT reflect a trip/travel charge, nor any labor charge.

## When a technician needs a part to be ordered, should they add it to their initial ticket?

Yes. When a part needs to be ordered, the technician should add it to the Labor Activity. The quantity should be updated to the number of items needed, the disposition should be changed to Open, and the status will then display as Needed.

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### Why should the technician add the part as "Needed" on the initial ticket?

There is a default "Materials Needed" View in the Service Order QBE. Tickets that have a "Needed" status will be displayed in this view. If the technician does not add the part as needed, the service order will not be displayed in this view.

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When the technician adds the part as "Needed", an email will be sent to the Branch Parts Pending email box indicating that parts need to be ordered.

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When the technician returns to the customer site, the part will automatically be added on the ticket without the technician having to search the part list. The technician can easily update the disposition to Fulfilled, indicating the part has been installed at the customer site.

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Details	Activities	Alarm Testing	Items	Materials	Conta	ct Completion						
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## Why did the labor time not display in SBN for my 2<sup>nd</sup> technician?

Two technicians can be assigned to work the same service order in Astea. When the first technician is complete with their work, they should Stop Work, use the Stop Code of Resolved, and complete the remaining required fields in the closure process. However, the first technician should not select the "Resolved" check mark on the Completion Tab. They should only have the "Remove Service Order" check mark selected.

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When the second technician is complete with their work, they should Stop Work, use the Stop Code of Resolved, and complete the remaining required fields in the closure process. The second technician will select the "Resolved" check mark on the Completion Tab.

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F	Repair		Installation Comple	te			•
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## Why did the customer's signature not display on the service ticket for a multitech ticket?

Two technicians can be assigned to work the same service order in Astea. The last technician to Resolve the ticket should obtain the customer's signature, regardless if the last technician was the "Helper" technician. The last signatures and cause / repair codes will take precedence on the service ticket.



## If a technician working a single tech ticket completes their portion of the work, but the overall work associated with the ticket is not complete, should the technician use the Resolved Stop Code?

No. The Resolved Stop Code is a "Complete" Stop Code. If additional work is still required on the service ticket, the technician should select the drop down arrow for a list of alternate Stop Codes which can be selected.

If a technician working a single tech ticket and used the Resolved Stop Code and selected the Resolved check mark on the completion tab, the service order would be Resolved Complete and the service ticket in SBN would automatically be updated to a COMP status and would be outdated. No additional hours, trip charges, or materials would be able to be added on the service ticket, and lost revenue could occur.

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	Location*	At Site	different Stop Code		C
	Comments				
	Q				
		← ∓			



## A service order is updated to Resolved Complete, but the nightly batch process has not occurred yet. Can the service order be edited by adding another Labor Activity and assigned to a technician?

No. Once the service order is Resolved Complete, the service ticket in SBN would automatically be updated to a COMP status and would be outdated. No additional hours, trip charges, or materials would be able to be added on the service ticket, and lost revenue could occur.

If additional work is needed on a Resolved Complete service order, a new service order should be created for the customer and assigned to the technician.

The nightly batch process will remove the service order in Astea from the Service Order QBE to the Service Order History QBE preventing the service order from being reassigned to a technician.

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SV1509150022 8013810 9/15/201	efink	COMP	EAGLES #211	Resolved	Complete		BR734	Customer called to request service	EXF
SV1509150021 8013809 9/15/201		SCHD	DRURY INN	Open	Not started		BR734	Customer called to request service	EXF
SV1509150020 8013808 9/15/201	efink	SCHD	CHAUTAUQUA AIRLINES	SA on Site	Complete		BR734	Customer called to request service	EXF
SV1509150019 8013807 9/15/201	efink	COMP	BAZBEAUX PIZZA	Resolved	Complete	SBN Processes Complete	BR734	part such and such received Customer called to request se	EXF
SV1509150018 8013805 9/15/201		SCHD	AVON TRANSPORTATION	Open	Not started		BR734	Customer called to request service	EXF

## What stop code should I use?

Description	Incomplete (overall work is not complete, return visit required) vs. Complete	Description
ADD'L EQUIP REQD	Incomplete	Additional equipment is required (parts, lifts, etc.) to complete the service order. Selecting this stop code will automatically create an SBN Parts activity until the part has been acquired. This stop code is used by both Techs and Back Office Users.
ADD'L TECH REQD	Incomplete	An additional tech (SA) is required to complete the service order. Selecting this stop code will automatically create a new labor activity to be scheduled when the second tech (SA) is available. (Note: if two techs (SAs) are required you will manually need to add another labor activity). This stop code is used by both Techs and Back Office Users.
ADDT'L TIME REQD	Incomplete	Additional time is required to complete the service order. Selecting this stop code will automatically create a new labor activity to be scheduled when the tech (SA) is available. This stop code is used by both Techs and Back Office Users.
PNC: CUSTOMER CANCELLED	Complete	The customer calls to cancel the service order BUT the tech (SA) has already started travel or work. Selecting this stop code will require the tech (SA) to resolve the ticket from their mobile device. This stop code is used by both Techs and Back Office Users.
END OF DAY – RETURNING TOMORROW	Incomplete	The tech's (SA) day has ended but will return tomorrow to complete the work/service order. Selecting this stop code will automatically create a new labor activity assigned to the same tech (SA). This stop code is used by both Techs and Back Office Users. This should be used for installation work orders only.



Description	Incomplete (overall work is not complete, return visit required) vs. Complete	Description
INCOMPLETE ACTIVITY	Incomplete	Work was not completed and a tech (SA) may or may not need to return. Selecting this stop code will automatically create a new labor activity ready to be scheduled from Dispatch Console. This stop code is used by both Techs and Back Office Users.
REFER TO INSTALL	Incomplete	The tech (SA) determines the service order should be referred to install. Selecting this stop code will automatically create a new labor activity. Once the PNC assigns/sends the service order to Install, they should fulfill the 2 <sup>nd</sup> labor activity. This stop code is used by both Techs and Back Office Users.
LUNCH	Incomplete	The tech is temporarily stopping work to leave for a lunch break. Selecting this stop code will automatically create a new labor activity assigned to the same tech (SA). This stop code is used by both Techs and Back Office Users.
CUST NOT AVAIL	Incomplete	The customer was not available when the tech arrived at the customer location. Selecting this stop code will automatically create a new labor activity ready to be scheduled from Dispatch Console. This stop code is used by both Techs and Back Office Users.
CUST NOT READY	Incomplete	The customer or customer site was not ready when the tech arrived. Selecting this stop code will automatically create a new labor activity ready to be scheduled from Dispatch Console. This stop code is used by both Techs and Back Office Users.
OFFISTE – RETURNING TODAY	Incomplete	The tech needs to leave the customer site and will return the same day (e.g. pick up part at ADI. Selecting this stop code will automatically create a new labor activity assigned to the same tech (SA). This stop code is used by both Techs and Back Office Users.

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Description	Incomplete (overall work is not complete, return visit required) vs. Complete	Description
RE-ROUTED TO ANOTHER SITE	Incomplete	The tech is re-routed to another site prior to arriving at the original customer site. Selecting this stop code will automatically create a new labor activity ready to be schedule from Dispatch Console. This stop code is used by both Techs and Back Office Users.
CUSTOMER / OTHER RESCHED	Incomplete	The customer or dispatch has rescheduled the service order once it has already been assigned. Selecting this stop code will automatically create a new labor activity ready to be scheduled from Dispatch Console. This stop code is used by both Techs and Back Office Users.
RESOLVED	Complete	The tech was able to complete the work and no additional service is needed for this service order. This stop code is used by both Techs and Back Office Users.
REFER TO SALES	Incomplete	The tech determines there is a new sale potential at this customer site. Selecting this stop code will automatically create a new labor activity. Once the PNC assigns/sends the service order to Sales, they should fulfill the 2 <sup>nd</sup> labor activity. This stop code is used by both Techs and Back Office Users.
SBN PROCESS COMPLETE	Complete	This activity is created automatically by Astea when the service order Subcategory is set to PTIN. The activity is fulfilled and a new labor activity is created and ready to be scheduled from Dispatch Console. This stop code should NOT be used by the Techs or the Back Office Users.



## How do I view pictures the technician attached to the service order?

From the service order, select the attach button, then select the attachment page. This will display a list of attachments associated with this service order, including bulletins, additional customer information, contract and r-code information, customer signatures, and pictures. Select the file name to download the picture.

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	Customer Center		
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My My Home Calendar	🎦 Recently Opened 🔹	Go Back Next 🗙 Stop	
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Assign/Dispatch			
Changes Management			

# If I allocate a Sub Contractor on the Dispatch Console, it disappears from the schedule board, why?

Since a Sub Contractor is an external employee, Astea permits them to manage their own schedule. To avoid the service order from disappearing from the schedule board, always Assign the service order. By doing so, the service order will remain on the schedule board.

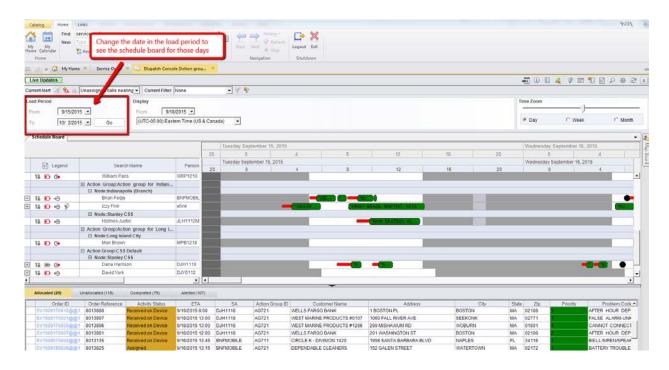
## What happens if I allocate a Sub Contractor on the Dispatch Console by mistake?

The service order can still be accessed through the Service Order QBE. Once the service order is opened, the activity can be Assigned and the service order will display on the Dispatch Console.



## How do I see the schedule board for dates that are not visible?

The date range for the schedule board can be changed by changing the load period. Use the chevron button in the tool bar at the right side to expand this section. Change the date range and the schedule board will display that time frame.



# Should Fire or Preventative Maintenance Inspections be placed on the schedule board?

Yes. All service orders, regardless of the type (Service, Fire Inspection (FINS), or Preventative Maintenance (PINS) should be placed on the schedule board and dispatched to the technicians mobile device.

### What are the exception processes as a result of the transition to Astea?

Since the data in SBN and Astea must remain in synch and changes could be made in either system, exception processes were created in order to address the differences.

#### 1. Ticket Closed or Outdated in SBN Exception Process

**PURPOSE:** The purpose of this exception process is to identify how to troubleshoot and fix service orders that are close or outdated in SBN prior to being closed in Astea.

While most service orders will be created in Astea, there are a few groups that will continue to work in SBN post deployment (such as Monitoring).

**PROBLEM:** IF a service order is closed or outdated in SBN prior to it being closed/resolved in Astea, any updates that are made to that service order in Astea will fail to update SBN.

**EXCEPTION:** The only exception to this "rule" are service orders that are outdated in an HCAN or CCAN status.



#### PROCESS:

- The exception process is triggered when a service order is closed or outdated in SBN prior to it being closed in Astea.
- The exception process will create an exception report that is sent to the Branch to which the customer belongs.
  - The exception report will be generated on an hourly basis, if there is a need.
  - The closed/outdated service order will appear on the exception report for one day.
- The service manager or service coordinator should review the service order to confirm that was appropriately closed (that is should have been closed) and should check Astea for any additional information/updates.
- The service manager or service coordinator should update/close the service order in Astea by 1) updating the Sub Category to match the SBN status, and 2) updating the status of the labor activity, resolving and completing the service order, updating the notes, etc.
- In addition to taking action when the exception report is received, the service manager or service coordinator should be proactive in finding issues such as this by reviewing the Service Order QBE on a regular basis (weekly is suggested) for service orders that have a Sub Category of COMP and a Labor Status of OPEN to ensure that the appropriate updates are made to the service order.

#### 2. Service Order Change Exception Process

**PURPOSE:** The purpose of this exception process is to identify how a user will take action when a service order is updated or changed in Astea after it has been Resolved/Complete.

**PROBLEM:** When creating a new service order, Astea allows call intake to confirm whether or not an open service order already exists identifying the same service issue(s) via the Open Calls button/Lookup.

Because service orders that are Resolved/Completed remain in the Service Order queue until the nightly batch process runs, the potential for call intake to mistakenly use a Resolved/Complete service order when reviewing the Open Calls list is valid. While the potential for this exception exists, call intake can take action to avoid this exception by always reviewing the Service Order & Labor Status in the service order header. If the service order status is Resolved and the Labor Status is Complete, this tells me that this service order is technically resolved and a new service order should be created.

The exception occurs when the synch from Astea to SBN takes place. Once a service order has been Resolved in Astea and; therefore, outdated in SBN it cannot be reopened. Any changes made to the service order at this point in Astea will not be reflected in SBN.

#### **PROCESS:**

- The exception process is triggered when a new labor activity is added or updates are made to the Sub Category or Notes of a Resolved/Complete service order.
- The exception process creates an exception report that is sent to the iService Support Team.
  - The iService Support Team will email the exception report to the applicable branch manager. The exception report will identify the service order and what type of change was made (new labor activity, sub category updates, etc.)
  - The exception reports will be generated on an hourly basis, if there is a need.
- The service manager or service coordinator is responsible for correcting the issues.



- If a new labor activity was created, it must be fulfilled using the Not Done disposition.
- If an update was made to the Sub Category or a note, the information should be reviewed and potentially updated in SBN as well.
- Once the corrections are made, the service order will be removed from future exception reports.
- If a new labor activity was added and it is not corrected by changing the disposition to Not Done after one week of it being left in this status, the iService Support Team will escalate the issue to the area Ops Manger.

#### 3. Address Validation Exception Process

**PURPOSE:** The purpose of this exception process is to identify how to resolve an invalid address that has been imported into Astea.

**PROBLEM:** Astea's ability to display a customer's location on the map, suggest the nearest SA for a service order, and provide turn-by-turn directions to the customer's location is dependent on a validated customer address. The validation process occurs in the Astea back office application.

#### **PROCESS:**

- The exception process is triggered when an address does not validate in Astea.
- The exception process creates an exception report that is sent to the iService Support Team.
- The iService Support Team will in turn, email the exception report to the Branch Part Pending Repair inbox once a week.
- The service manager or service coordinator is responsible for reviewing the address information entered in Astea and then working with the customer to obtain the correct address information.
- Once they service manager or service coordinator has obtained the correct address information, they will follow their normal data update process to notify Order Entry that a correction needs to be made.
  - Once the corrections are made, the issue will be removed from any future exception reports.

#### 4. Customer Does Not Exist in Astea Exception Process

**PURPOSE:** The purpose of this exception process is to define how to enter a service order for a customer that has not been created in SBN.

**PROBLEM:** If a customer does not exist in SBN, it will not be possible to create a service order in Astea until the customer's account is created in SBN (using the proper business process) and the customer synch from SBN to Astea occurs.

#### PROCESS:

- The exception process is triggered when a customer calls to request service and it is discovered that they are not currently a customer in Astea.
- Call intake/dispatch should notify the branch (giving them all of the pertinent customer details) that there is a customer calling to request service that is not in Astea.
- The branch should complete the T&M form and send it to Order Entry.
- Order Entry will use the information on the T&M form to create the customer account in SBN. Astea will be updated once the customer synch from SBN to Astea runs. This synch process runs every 24 hours.

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- Order Entry will notify the branch (and/or call intake/dispatch) that the customer account has been added in SBN. The service order can then be created approximately 24 hours later once the customer synch takes place.
- EXCEPTION: IF the service order needs to be entered immediately, it should be created in SBN.

## What are the new Views in Service Order QBE?

We have recently added 3 new Organization Views in Astea that will help identify tickets that are out of synch between Astea and SBN. These views should be reviewed on a daily basis (morning and evening) for service orders that need to be manually updated in order to get them in a resolved/complete state so the tickets will be put into the Service Order History View in the evening. The views include the following:

- **Review Comp Material Needed** identifies service orders that have a Service order Status of Resolved, a Labor Activity status of Complete, and a Materials status of Needed. The Materials status must be updated to fulfilled in order to resolve the service order complete.
- **Review Labor Not Comp** identifies service orders that have a Service Order status of Resolved and a Labor Activity status other than Complete. The Labor Activity status must be updated to resolve the service order complete.
- Review Sub Category Comp identifies service orders that have a Service Order status
   other the Resolved and a Labor Activity status of Not Started Complete. The Service Order
   status must be updated to Resolved and the Labor Activity status must be updated to
   Complete (if applicable) in order to resolve the service order complete