STANLEY
Security

Supported Business Scenarios
Service Dispatch and Ticket Creation

Version 3.4
January 22, 2016

Revision History

Version	Date	Author	Description
3.4	1/21/16	E. Fink	Document Updates: Added banking specific scenarios
3.3	11/19/2015	E. Fink	Document Updates: Assigning a Subcontractor from Dispatch Console
3.2	1/11/16	D. Harrison	Added a statement about box sale of parts and whether or not a SO is required.
3.1	9/23/15	D. Harrison	Removed TAC Workflow #1, Document Updates: TAC Workflow #3
3.0	9/1/15	D. Harrison	Document Updates: Updating Existing Service Orders #6, #7, #15, #16, Service Order Creation #19, #20, #21, #22, #23 Added: Updating Existing Service Orders #4, #5
3.0	8/20/15	D. Harrison	Document Updates: Service Order Cancellation: #5, 7, 8 Added: Service Order Cancellation #6
3.0	8/13/15	D. Harrison	Document Updates: Service Order Creation #16, #17, Dispatch Console #17, Outbound Call Initiation #1, #2 Added: Updating Existing Service Orders #7, Dispatch Console Activities #11
2.9	7/31/2015	D. Harrison	Updated Service Order Creation #1.1, 1.2, #24, Dispatch Console #20, 21
2.8	7/22/2015	E. Fink	Drafted 301/302/AST scenario
2.7	7/16/2015	E. Fink	Updated checklist information when cancelling a service order.
2.6	7/13/2015	E. Fink	Document Updates: Added Dispatch Console #17, updated Service Order #19, 20, & 23, and edited Service Order Cancellation #5, 6, 7, and 9.
2.5	7/10/2015	D. Harrison	Document Updates: Edit to Service Order Creation #23
2.4	7/7/2015	D. Harrison	Document Updates: Service Order Cancellation #1, 2, 3, 4, added Service Order Creation #23
2.3	6/28/2015	D. Harrison	Document Updates: Service Order Creation added #19, #20, #21, #22
2.2	06/23/2015	D. Harrison	Document Updates: Service Order Cancellation #1, 2, 3, 4, TAC Workflow #3, Dispatch Console added #3
2.1	06/19/2015	D. Harrison	Document Updates, Service Order #9 and 10
2.0	06/09/2015	D. Harrison	Document Updates
1.0	04/01/2015	R. Stahlke	Document Creation and Updates

Contents

SERVICE ORDER CREATION

Use the following business process steps to create a new Service Order. Separate scenarios exist to review open and closed calls, service bulletins, as well as service instructions.

A Service Order should not be created for a box sale of parts, if the parts are drop shipped to the customer. Rather, the current business process of creating a billable work order in SBN with a work order type of SRVB should be followed. This will avoid confusion of whether or not a technician is needed at the customer site, while creating a billable transaction on the customer's account. *If the parts are not drop shipped, then a Service Order should be created to* ***account for billable travel/labor to the customer****.*

1. SEARCHING FOR AND SELECTING THE CORRECT CID

1.1. Searching for and selecting the correct CID – Site name and Site ID

The following scenario documents the ways a user can search within the Site Name and Site ID fields. At any point after search is selected, the user can select a search result and be returned to the Service Order module.

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select **New**
3	Search the **Search** icon next to the **Site** field
4	Enter a value in the **AKA** field
5	Select **Search**
6	Select **Clear**
7	Enter a value in the **State** field
8	Select **Search**
9	Select **Clear**
10	Enter a value in the **Passcode/Codeword** field
11	Select **Search**
12	Select **Clear**
13	Enter a value in the **CID** field
14	Select **Search**
15	Select **Clear**
16	Close the **Site Company Tree Lookup** screen
17	Search the **Search** icon next to the **Site ID** field
18	Enter a value in the **AKA** field
19	Select **Search**
20	Select **Clear**
21	Enter a value in the **State** field
22	Select **Search**

23	Select **Clear**
24	Enter a value in the **Passcode/Codeword** field
25	Select **Search**
26	Select **Clear**
27	Enter a value in the **CID** field
28	Select **Search**
29	Select **Clear**

1.2. Searching for and selecting the correct CID – Customer name and Customer ID

The following scenario documents the ways a user can search within the Customer name and Customer ID fields. At any point after search is selected, the user can select a search result and be returned to the Service Order module.

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select **New**
3	Search the **Search** icon next to the **Customer** field
4	Enter a value in the **AKA** field
5	Select **Search**
6	Select **Clear**
7	Enter a value in the **State** field
8	Select **Search**
9	Select **Clear**
10	Enter a value in the **Passcode/Codeword** field
11	Select **Search**
12	Select **Clear**
13	Enter a value in the **CID** field
14	Select **Search**
15	Select **Clear**
16	Close the **Site Company Tree Lookup** screen
17	Search the **Search** icon next to the **Customer ID** field
18	Enter a value in the **AKA** field
19	Select **Search**
20	Select **Clear**
21	Enter a value in the **State** field

22	Select **Search**
23	Select **Clear**
24	Enter a value in the **Passcode/Codeword** field
25	Select **Search**
26	Select **Clear**
27	Enter a value in the **CID** field
28	Select **Search**
29	Select **Clear**

2. NO OTHER OPEN OR CLOSED CALLS, SERVICE BULLETIN, OR SERVICE INSTRUCTIONS

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select **New**
3	Enter **Customer Name** in **Customer** field
4	Select the **Search** button
5	Enter the customer's address in the **Address** field
6	Select the **Search** button
7	Select the Customer by selecting the **Company (INS #)**
8	Select the **Search** button next to the **CID** field
9	Select the appropriate **CID** by selecting the CID in the Serial No. column
10	Select the **Search** button next to the **Request Type** field
11	Select the **Service** Request Type by selecting the **S** in the Request Type column
12	Enter the problem into **Description** field
13	Select **Save and New**

3. OPEN CALLS EXIST, DIFFERENT ISSUES

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select **New**
3	Enter **Customer Name** in **Customer** field
4	Select the **Search** button
5	Enter the customer's address in the **Address** field
6	Select the **Search** button
7	Select the Customer by selecting the **Company (INS #)**

8	Select the **Search** button next to the **CID** field
9	Select the appropriate **CID** by selecting the CID in the Serial No. column
10	Select the Open Calls button
11	Confirm that an Open Call does not already exist for the issue
12	Click the Close button to close the Open Calls LookUp page
13	Select the **Search** button next to the **Request Type** field
14	Select the **Service** Request Type by selecting the **S** in the Request Type column
15	Enter the problem into **Description** field
16	Select **Save and New**

4. OPEN CALL FOR SAME ISSUE EXISTS

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select **New**
3	Enter **Customer Name** in **Customer** field
4	Select **Search** button
5	Select the Customer by selecting the **Company (INS #)**
6	Select the **Search** button next to the **CID** field
7	Select the appropriate **CID** by selecting the CID in the Serial No. column
8	Select the **Open Calls** button
9	Confirm that an Open Call for the same issue does already exist
10	Select the open call that pertains to this customer's request
11	Click the **Use This** button to open the call details
12	Verify the Service Order status is **NOT Resolved** and the Labor Status is **NOT Complete.** *If the Service Order status is resolved and labor status is complete, a new service order must be entered, the Resolved Complete service order cannot be used.*
13	Enter the information pertinent to this call in the **New Problem Notes** field
14	Select **Apply**
15	Select **Save**

5. CLOSED CALLS

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select **New**
3	Enter **Customer Name** in **Customer** field

4	Select the **Search** button
5	Enter the customer's address in the **Address** field
6	Select the **Search** button
7	Select the Customer by selecting the **Company (INS #)**
8	Select the **Search** button next to the **CID** field
9	Select the appropriate **CID** by selecting the CID in the Serial No. column
10	Select the **Closed Calls** button
11	Review the closed calls that display by highlight the order and selecting **Details**
12	Once the closed call has been reviewed close the Service Request History dialog screen by clicking on the red X
13	Select the **Search** button next to the **Request Type** field
14	Select the **Service** Request Type by selecting the **S** in the Request Type column
15	Enter the problem into **Description** field
16	Select **Save and New**

6. SERVICE INSTRUCTIONS AND SERVICE ACTION PLAN

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select **New**
3	Enter **Customer Name** in Customer field
4	Select **Search** button
5	Select the **Customer** by Selecting the **Company (INS #)**
6	Verify Service Instructions / Action Plan appears in the pop up screen
7	Select the **Glasses** icon
8	Verify Service Instructions in Comments Viewer - Webpage Dialog screen
9	Verify Service Action Plan in Comments Viewer – Webpage Dialog screen, this information is pre-pended with Service Action Plan
10	Close the Comments Viewer - Webpage Dialog screen
11	Close the Alerts Webpage Dialog screen
12	Complete the remaining Service Order fields

7. VIEWING A CANCELLED CONTRACTS MESSAGE

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select **New**
3	Enter **Customer Name** in Customer field
4	Select **Search** button
5	Select the **Customer** by Selecting the **Company (INS #)**
6	Verify Cancelled Contract appears in the pop up screens
7	Select the **Glasses** icon
8	Verify the Cancelled Contract text in Comments Viewer - Webpage Dialog screen
9	Close the Comments Viewer - Webpage Dialog screen
10	Close the Alerts Webpage Dialog screen
11	Complete the remaining Service Order fields

8. DEFINING SERVICE ORDER CALL TYPE

The following process will also be used for marking a Service Order in Astea with the equivalent of the SBN call type.

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select **New**
3	Enter **Customer Name** in **Customer** field
4	Select the **Search** button
5	Enter the customer's address in the **Address** field
6	Select the **Search** button
7	Select the Customer by selecting the **Company (INS #)**
8	Select the **Search** button next to the **CID** field
9	Select the appropriate **CID** by selecting the CID in the Serial No. column
10	Select the **Down Arrow** next to the **Urgency** field
11	Select the **SBN Equivalent Call Type** from the **Urgency** selection list
12	Select the **Search** button next to the **Request Type** field
13	Select the **Service** Request Type by selecting the **S** in the Request Type column
14	Enter the problem into **Description** field
15	Select **Save and New**

9. UPDATING SERVICE ORDER STATUS

The following process will be used for updating an existing Service Order in Astea with the equivalent of the SBN status. When an additional note is entered in the New Problem Notes field, an alert will be generated. This will prompt the Dispatcher to review the Service Order.

1	Type in **Service Order** in the Find field of the Ribbon
2	Search for the service order created by entering part of the customer name in the **Customer Like** field and clicking **Search**
3	Select the service order by clicking on the hyperlink under the **Request ID** column
4	Select the **List** icon next to the **Sub Category** field
5	Select the **Clear** button, then **Search**
6	Select the **SBN Equivalent Status** from the list by clicking in the **Sub Category ID column**
7	Enter reason for the change and updates to the Service Order in the **New Problem Notes** field
8	Select **Save.**

10. RESETTING THE PRIORITY WHEN NOTES ARE UPDATED

The following process will be used to reset the priority when the Change Description Alert (a note added to a Service Order) is generated and acknowledged.

1	Type in **Dispatch Console** in the **Find** field of the Ribbon
2	Select **Action Groups**
3	Select the **Action Group** associated with the branch, and click **Next**
4	Select the **Chevron** in the Schedule Board Header section
5	Select the **Change Description** Filter
6	Select the **Chevron** in the Schedule Board Header section to Collapse the section
7	Select the **Alerted Tab**
8	Validate the Service Order in which notes were added is displayed in the list of Alerted Service Orders
9	Select the Service Order hyperlink under Service Order ID
10	Highlight the **Priority**, change the number to 1 less than the current priority number (e.g. current priority = 2, change it to 1; current priority = 82, change it to 81)
11	Select the **List** icon next to the Sub Category field.
12	Select **Clear,** then select **Search**
13	Select the appropriate **Sub Category** / SBN Status
14	Select **Submit**
15	Select **Save and Exit**

11. CHANGING THE DEFAULT ACTIVITY DURATION

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select **New**
3	Enter **Customer Name** in **Customer** field
4	Select the **Search** button
5	Enter the customer's address in the **Address** field
6	Select the **Search** button
7	Select the Customer by selecting the **Company (INS #)**
8	Select the **Search** button next to the **CID** field
9	Select the appropriate **CID** by selecting the CID in the Serial No. column
10	Select the **Search** button next to the **Request Type** field
11	Select the **Service** Request Type by selecting the **S** in the Request Type column
12	Enter the problem into **Description** field
13	Select **Save and Continue**
14	Select the **Duration** field, and update the default duration to the desired duration
15	Select **Save and New**

12. VIEWING PANEL LOCATION, TELCO LOCATION, AND TELCO NUMBER

1	Type in **Service Order** in the Find field of the Ribbon
2	Select **New**
3	Enter **Customer Name** in **Customer** field
4	Select the **Search** button
5	Enter the customer's address in the **Address** field
6	Select the **Search** button
7	Select the **Customer** by selecting the **Company (INS #)**
8	Select the **Search** button next to the **CID** field
9	Select the appropriate **CID** by selecting the CID in the Serial No. column
10	Select the **Search** button next to the **Request Type** field
11	Select the **Service Request Type** by selecting the **S** in the **Request Type** column
12	Enter the problem into **Description** field
13	Select the **Paper Clip** next to the Customer header
14	Select **Notes** from the Webpage Dialog box

15	Highlight the note containing the Panel Location, Telco Location, and Telco Number information and select **Zoom**
16	Click the red X to close the Webpage Dialog box
17	Select **Save and New**

13. SELECTING BANKING PROBLEM CODES

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select **New**
3	Enter **Customer Name** in **Customer** field
4	Select the **Search** button
5	Enter the customer's address in the **Address** field
6	Select the **Search** button
7	Select the Customer by selecting the **Company (INS #)**
8	Select the **Search** button next to the **CID** field
9	Select the appropriate **CID** by selecting the CID in the Serial No. column
10	Select the **Search** button next to the **Problem Code** field
11	Select **Clear**, the select **Search**
12	Select the appropriate **Problem Code**, and select **Submit**
13	Select the **Search** button next to the **Request Type** field
14	Select the **Service** Request Type by selecting the **S** in the Request Type column
15	Enter the problem into **Description** field
16	Select **Save and New**

14. SPECIFYING CONTACT NAME

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select **New**
3	Enter **Customer Name** in **Customer** field
4	Select the **Search** button
5	Enter the customer's address in the **Address** field
6	Select the **Search** button
7	Select the Customer by selecting the **Company (INS #)**
8	Enter the contact's name in the **Contact** field

9	Select the **Search** button next to the **CID** field
10	Select the appropriate **CID** by selecting the CID in the Serial No. column
11	Select the **Search** button next to the **Request Type** field
12	Select the **Service** Request Type by selecting the **S** in the Request Type column
13	Enter the problem into **Description** field
14	Select **Save and New**

15. SPECIFYING REQUESTED BY

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select **New**
3	Enter **Customer Name** in **Customer** field
4	Select the **Search** button
5	Enter the customer's address in the **Address** field
6	Select the **Search** button
7	Select the Customer by selecting the **Company (INS #)**
8	Enter the caller's name in the **Requested by** field
9	Select the **Search** button next to the **CID** field
10	Select the appropriate **CID** by selecting the CID in the Serial No. column
11	Select the **Search** button next to the **Request Type** field
12	Select the **Service** Request Type by selecting the **S** in the Request Type column
13	Enter the problem into **Description** field
14	Select **Save and New**

16. VIEWING SUBSCRIBER TYPE

The following process will be used to view the SBN Subscriber Type (Sub Type) in Astea. This field will be view only, and available after the Service Order has been created.

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Search for the service order created by entering part of the customer name in the **Customer Like** field and clicking **Search**
3	Select the service order by clicking on the hyperlink under the Request ID column
4	Under the Product/Item Section, review the SBN Subscriber Type in the **Sub Type** field

17. VIEWING INSTALLATION DATE, INS GROUP 1, INS GROUP 2, AND SERVICE REGION FIELD

The following process will be used to view the SBN Installation Date, Ins Group 1, Ins Group 2, and the Service Region in Astea. These fields will be view only.

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select **New**
3	Enter **Customer Name** in **Customer** field
4	Select the **Search** button
5	Enter the customer's address in the **Address** field
6	Select the **Search** button
7	Select the Customer by selecting the **Company (INS #)**
8	Select the **Search** button next to the **CID** field
9	Select the appropriate **CID** by selecting the CID in the Serial No. column
10	Select the **Search** button next to the **Request Type** field
11	Select the **Service** Request Type by selecting the **S** in the Request Type column
12	Enter the problem into **Description** field
13	Review the SBN Installation Date by clicking on the **Paperclip** icon, then selecting **Attachments**
14	Select **Additional Customer Information,** follow instructions to download (Open)
15	Close the Notepad Dialog Box , Close the Webpage Dialog screen
16	Complete the remaining Service Order fields

18. VIEWING MONITORING STATUS

The following process will be used to view the SBN Monitoring Status (MonStat) in Astea. This field will be view only.

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select **New**
3	Enter **Customer Name** in **Customer** field
4	Select the **Search** button
5	Enter the customer's address in the **Address** field
6	Select the **Search** button
7	Select the Customer by selecting the **Company (INS #)**
8	Select the **Search** button next to the **CID** field

9	Select the appropriate **CID** by selecting the CID in the Serial No. column
10	Select the **Search** button next to the **Request Type** field
11	Select the **Service** Request Type by selecting the **S** in the Request Type column
12	Enter the problem into **Description** field
13	Review the SBN Monitoring Status next to the **Customer** header on the Service Info. Tab
14	Select **Save and New**

19. UPDATE SERVICE ORDER TO REFLECT RESOLVED COMPLETE - SUBCONTRACTOR

The following process will be used to update a service order for a subcontractor when the service order is resolved Complete. The start travel, start work, stop work times are provided.

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Search for the service order created by entering part of the customer name in the **Customer Like** field and clicking **Search**
3	Select the service order by clicking on the hyperlink under the Request ID column
4	Select **Activities**, highlight the appropriate Labor activity, select **Zoom**
5	Enter the **Travel Start Date/Time, Start Date/Time**
6	Select **Fulfilled** as the Disposition, adjust **Completion Date/Time if necessary**
7	Select the **Search** icon next to the **Stop Code** field.
8	Select **Resolved**
9	Select **Apply**
10	Select the **Checklist Summary** tab from Main
11	Open the **Closure Checklist** by selecting the Checklist ID hyperlink
12	Select the **Delete Checklist** button
13	Select the **Resolve** tab from Main
14	Enable the **Resolved** check mark
15	Select the **Search** button next to the **Cause** field
16	Select **Clear** to clear any default search criteria
17	Select **Search** to display the list of Cause codes
18	Select the appropriate **Cause** code
19	Select **Submit**
20	Select the **Search** button next to the **Repair Code** field
21	Select **Clear** to clear any default search criteria

22	Select **Search** to display the list of Repair codes
23	Select the appropriate **Repair** code
24	Select **Submit**
25	Enter notes about the service order in the **New Resolve Text** field
26	Select **Apply**
27	Select **Save**

20. UPDATE SERVICE ORDER TO REFLECT RESOLVED COMPLETE – SUBCONTRACTOR, DURATION BASED

The following process will be used to update a service order for a subcontractor when the service order is resolved Complete. The start travel, start work, stop work times are not provided, only the time worked (duration) is provided. Since no start travel time is provided, **a trip charge will not automatically pass to SBN for billing and must be manually added.**

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Search for the service order created by entering part of the customer name in the **Customer Like** field and clicking **Search**
3	Select the service order by clicking on the hyperlink under the Request ID column
4	Select **Activities**, highlight the appropriate Labor activity, select **Zoom**
5	Change the **Duration** to the amount of time worked by the Subcontractor
6	Select **Running Man**
7	Select **Apply**
8	Select the **Checklist Summary** tab from Main
9	Open the **Closure Checklist** by selecting the Checklist ID hyperlink
10	Select the **Delete Checklist** button
11	Select the **Resolve** tab from Main
12	Enable the **Resolved** check mark
13	Select the **Search** button next to the **Cause** field
14	Select **Clear** to clear any default search criteria
15	Select **Search** to display the list of Cause codes
16	Select the appropriate **Cause** code
17	Select **Submit**
18	Select the **Search** button next to the **Repair Code** field
19	Select **Clear** to clear any default search criteria
20	Select **Search** to display the list of Repair codes

21	Select the appropriate **Repair** code
22	Select **Submit**
23	Enter notes about the service order in the **New Resolve Text** field
24	Select **Apply**
25	Select **Save**

21. UPDATE SERVICE ORDER TO REFLECT RESOLVED INCOMPLETE - SUBCONTRACTOR

The following process will be used to update a service order for a subcontractor when the service order is resolved Incomplete. The start travel, start work, stop work times are provided.

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Search for the service order created by entering part of the customer name in the **Custome**r **Like** field and clicking **Search**
3	Select the service order by clicking on the hyperlink under the Request ID column
4	Select **Activities**, highlight the appropriate Labor activity, select **Zoom**
5	Enter the **Travel Start Date/Time, Start Date/Time**
6	Select **Fulfilled** as the Disposition, adjust **Completion Date/Time if necessary**
7	Select the **Search** icon next to the **Stop Code** field.
8	Select the appropriate incomplete Stop Code
9	Select **Apply,** Select **Back to List**
10	Select the new **Labor** Activity, Select **Zoom**
11	Unselect the **External** checkbox, Select **Apply**
12	Delete the SA (if field is populated), Select **Apply**
13	Select the **Resolve** tab from Main
14	Enter notes about the service order in the **New Resolve Text** field
15	Select **Save/Exit**
16	Validate the service order is displayed in the Dispatch Console in the Unallocated Tab and the Completed Tab

22. UPDATE SERVICE ORDER TO REFLECT RESOLVED INCOMPLETE – SUBCONTRACTOR, DURATION BASED

The following process will be used to update a service order for a subcontractor when the service order is resolved Incomplete. The start travel, start work, stop work times are not provided, only the time worked (duration) is provided. Since no start travel time is provided, **a trip charge will not automatically pass to SBN for billing and must be manually added**

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Search for the service order created by entering part of the customer name in the **Custome**r **Like** field and clicking **Search**
3	Select the service order by clicking on the hyperlink under the Request ID column
4	Select **Activities**, highlight the appropriate Labor activity, select **Zoom**
5	Change the **Duration** to the amount of time worked by the Subcontractor
6	Select **Running Man**
7	Select the **Search Icon** next to the Stop Code field
8	Select **Clear,** select **Search**
9	Select the appropriate incomplete Stop Code
10	Select **Apply,** Select **Back to List**
11	Select the new **Labor** Activity, Select **Zoom**
12	Unselect the **External** checkbox, Select **Apply**
13	Delete the SA (if field is populated), Select **Apply**
14	Select the **Resolve** tab from Main
15	Enter notes about the service order in the **New Resolve Text** field
16	Select **Save/Exit**
17	Validate the service order is displayed in the Dispatch Console in the Unallocated Tab and the Completed Tab

23. CLOSE SERVICE ORDER - REFER TO SALES (RSAL) OR REFER TO INSTALL (RSAL)

The Refer to Sales process is dependent on the technician using the Stop Code of "Refer to Sales" on the mobile device, while the Refer to Install process is dependent upon the technician using the Stop Code of "Refer to Install".

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select the Chevron to display all of the search fields
3	Select the drop down next to the **Last Inc. Stop Code**
4	Select **Refer To Sales (or Refer to Install),** then Select **Search**
5	Select the service order by clicking on the hyperlink under the Request ID column
6	Follow the business process to contact and provide the appropriate team the information surrounding the Refer To Sales service order
7	Review any associated service instruction and close the dialog box
8	Select **Activities**, highlight the Open Labor activity, select **Zoom**
9	Enter your name in the SA field, Select **Not Done** as the Disposition
10	Select **Apply**
11	Select the **Checklist Summary** tab from Main. If the Closure Check list has been completed already, skip to step #15. If the Closure Checklist was not completed during the first labor activity, it must be completed manually (in Astea) for the second labor activity.
12	Select the **Closure Checklist** hyperlink
13	Select the drop down in the **Result** column for question #1. Select the applicable result.
14	Repeat for questions #2 – 4
15	Select the **Main**
16	Select the **Resolve** tab
17	Enable the **Resolved** check mark
18	Select **Search** button next to the Cause field
19	Select **Clear** to clear any default search criteria
20	Select **Search** to display the list of Cause Codes
21	Select **Clear** to clear any default search criteria
22	Select the **OTHR (Other (Describe in Detail))** Cause code
23	Select **Submit**
24	Select the **Search** button next to the **Repair Code** field
25	Select **Clear** to clear any default search criteria
26	Select **Search** to display the list of Repair codes
27	Select the **OTHR (Other (Describe in Detail))** repair code

28	Select **Submit**
29	Enter notes indicating that the service order was referred to sales (or referred to install) in the **New Resolve Text** field
30	Select **Save**

24. VIEWING THE SERVICE ORDER QUEUE FOR AN AST SERVICE ORDER

The following process will be used to review service orders that have been created for an AST account. These service orders should not be scheduled according to current policy; as STANLEY Security does not service these accounts. Should an order be created, business process should be followed to cancel the order.

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select the **AST Branch** View by using the drop down selection
3	If service orders exist in the AST Branch queue, follow **Cancel service order for Franchise Account** on page **25**, and use the **AST Branch View** as opposed to the **Franchise** view as listed in the scenario.

SERVICE ORDER CANCELLATION

Use the following business process steps to cancel a Service Order. Separate scenarios exist for when the Service Order is cancelled at the customer's request, when a duplicate Service Order has been created, and when a Service Order was entered for the wrong customer.

1. CUSTOMER'S REQUEST – TECH HAS NOT STARTED TRAVEL

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Search for the service order created by entering part of the customer name in the **Customer Like** field and clicking **Search**
3	Select the service order by clicking on the hyperlink under the Request ID column
4	Select the **Search** icon next to the Sub Category field.
5	Select **Clear,** then select **Search**
6	Select **CCAN** / Customer Canceled by selecting the hyperlink
7	Select the **Resolve** tab
8	Select the **Search** button next to the **Cause** field
9	Select **Clear** to clear any default search criteria
10	Select **Search** to display the list of Cause codes
11	Select the **CANC (Request cancelled)** Cause code
12	Select **Submit**
13	Select the **Search** button next to the **Repair Code** field
14	Select **Clear** to clear any default search criteria
15	Select **Search** to display the list of Repair codes
16	Select the **WKNC (Work not completed)** repair code
17	Select the **Details** tab
18	Select the **Cancel** tab located under the Details tab
19	Select the **Search** button next to the Cancel Reason field
20	Select **CCAN** by clicking on the hyperlink under the Cancel Reason column
21	Enter a brief description of why the service order is being cancelled in the **Notes** field
22	Select the **Cancel** button
23	Select **Yes** to cancel the service order

2. DUPLICATE SERVICE ORDER

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Search for the service order created by entering part of the customer name in the **Customer Like** field and clicking **Search**
3	Select the service order by clicking on the hyperlink under the Request ID column
4	Select the **Search** icon next to the Sub Category field.
5	Select **Clear,** then select **Search**
6	Select **HCAN** / Stanley Canceled by selecting the hyperlink
7	Select **Apply**
8	Select the **Resolve** tab
9	Select the **Search** button next to the **Cause** field
10	Select **Clear** to clear any default search criteria
11	Select **Search** to display the list of Cause codes
12	Select the **CANC (Request cancelled)** Cause code
13	Select **Submit**
14	Select the **Search** button next to the **Repair Code** field
15	Select **Clear** to clear any default search criteria
16	Select **Search** to display the list of Repair codes
17	Select the **WKNC (Work not completed)** repair code
18	Select the **Details** tab
19	Select the **Cancel** tab located under the Details tab
20	Select the **Search** button next to the Cancel Reason field
21	Select **HCAN** by clicking on the hyperlink under the Cancel Reason column
22	Enter a brief description of why the service order is being cancelled in the **Notes** field
23	Select the **Cancel** button
24	Select **Yes** to cancel the service order

3. SERVICE ORDER ENTERED UNDER WRONG CUSTOMER

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Search for the service order to be cancelled entering part of the customer name in the **Customer Like** field and selecting **Search** icon next to the Customer Like field
3	Select the Customer by selecting the customer name in the **Company** column

4	Select the **Search**
5	Select the **Service Order** to be cancelled from the **Request ID** column
6	Select the **Search** icon next to the Sub Category field.
7	Select **Clear,** then select **Search**
8	Select **HCAN** / Stanley Canceled by selecting the hyperlink
9	Select **Apply**
10	Select the **Resolve** tab
11	Select the **Search** button next to the **Cause** field
12	Select **Clear** to clear any default search criteria
13	Select **Search** to display the list of Cause codes
14	Select the **CANC (Request cancelled)** Cause code
15	Select **Submit**
16	Select the **Search** button next to the **Repair Code** field
17	Select **Clear** to clear any default search criteria
18	Select **Search** to display the list of Repair codes
19	Select the **WKNC (Work not completed)** repair code
20	Select the **Details** tab
21	Select the **Cancel** tab located under the Details tab
22	Select the **Search** button next to the Cancel Reason field
23	Select **HCAN** by clicking on the hyperlink under the Cancel Reason column
24	Enter a brief description of why the service order is being cancelled in the **Notes** field
25	Select the **Cancel** button
26	Select **Yes** to cancel the service order

4. CANCEL SERVICE ORDER FOR FRANCHISE ACCOUNT

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Ensure the **Franchise** view is selected in the **View** drop down
3	Select the service order by clicking on the hyperlink under the Request ID column
4	Select the **Search** icon next to the Sub Category field.
5	Select **Clear,** then select **Search**
6	Select **HCAN** / Stanley Canceled by selecting the hyperlink
7	Select **Apply**

8	Select the **Resolve** tab
9	Select the **Search** button next to the **Cause** field
10	Select **Clear** to clear any default search criteria
11	Select **Search** to display the list of Cause codes
12	Select the **CANC (Request cancelled)** Cause code
13	Select **Submit**
14	Select the **Search** button next to the **Repair Code** field
15	Select **Clear** to clear any default search criteria
16	Select **Search** to display the list of Repair codes
17	Select the **WKNC (Work not completed)** repair code
18	Select the **Details** tab
19	Select the **Cancel** tab located under the Details tab
20	Select the **Search** button next to the Cancel Reason field
21	Select **HCAN** by clicking on the hyperlink under the Cancel Reason column
22	Enter a brief description of why the service order is being cancelled in the **Notes** field
23	Select the **Cancel** button
24	Select **Yes** to cancel the service order

5. CANCEL A SERVICE ORDER: TECH EN ROUTE (TECH CLOSES ON MOBILE)

The following business process will be used to cancel a Service Order in which the technician has started travel to the customer site and the customer is requesting the service call be canceled. This will complete the service order in SBN and give the ability for the service manager to apply a trip charge according to business procedure.

1	Tech has already started travel on mobile. Dispatch contacts tech to let them know the customer canceled.
2	Tech should start work and immediately stop work on mobile
3	Tech should use the stop code **PNC_CUSTOMER CANCELED** on mobile
4	Tech should complete the checklist
5	Tech should enter **Request Cancelled** as the cause code, enter **Work Not Completed** as the repair code
6	Tech should sign **N/A** as the customer signature, and type in **Request Cancelled in the Signed By field**
7	Tech should sign the service request, select the Resolve checkmark and exit the ticket

6. CANCEL A SERVICE ORDER: TECH EN ROUTE (TECH UNABLE TO CLOSE ON MOBILE)

The following business process will be used to cancel a Service Order in which the technician has started travel to the customer site and the customer is requesting the service call be canceled. In this scenario, the technician is unable to complete the ticket on mobile. This will complete the service order in SBN and give the ability for the service manager to apply a trip charge according to business procedure.

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Search for the service order created by entering part of the customer name in the **Customer Like** field and clicking **Search**
3	Select the service order by clicking on the hyperlink under the Request ID column
4	Verify the Order Status is SA In-Route and the Labor Status is Not Started
5	Select the **Dispatch Console Icon** next to the **Action Group** field
6	Locate the Service Order on the Schedule Board, right click, and select **Quick Activity Update**
7	Under Activity Times, select **Start** by enabling the check box in the date and time fields
8	Under Activity Details, update the **Disposition** to Fulfilled
9	Select **List** to display a list of stop codes, then select **CANC** (PNC: Customer Cancelled) stop code by clicking on the hyperlink in the ID column
10	Under Activity Times, select **Completion** by enabling the check box in the date and time
11	Select **Save**
12	Select the **Completed** tab and locate the Service Order
13	Right click on the Service Order, and select **View Order**
14	Select the **Checklist Summary** tab from Main
15	Open the **Closure Checklist** by selecting the Checklist ID hyperlink
16	Complete the Closure Checklist and select **Apply**.
17	Select the **Resolve** tab from Main
18	Enable the **Resolved** check mark
19	Select the **Search** button next to the **Cause** field
20	Select **Clear** to clear any default search criteria
21	Select **Search** to display the list of Cause codes
22	Select the **CANC (Request cancelled)** Cause code
23	Select **Submit**
24	Select the **Search** button next to the **Repair Code** field
25	Select **Clear** to clear any default search criteria

26	Select **Search** to display the list of Repair codes
27	Select the **WKNC (Work not completed)** repair code
28	Select **Submit**
29	Enter notes indicating that the customer cancelled the request in the **New Resolve Text** field
30	Select **Apply**
31	Select **Save**
32	*Since a technician was assigned and the service order dispatched to mobile, in order for the ticket to be removed from the technician's device, they must sign* ***N/A*** *as the customer signature, type in* ***Request Cancelled in the Signed By field,*** *sign the service request, and exit the ticket*

7. CANCEL A SERVICE ORDER: TECH STARTED WORK

The following business process will be used to cancel a Service Order in which the technician has started work at the customer site and the customer is requesting the service call be canceled. In this scenario, the technician is unable to complete the ticket on mobile.

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Search for the service order created by entering part of the customer name in the **Customer Like** field and clicking **Search**
3	Select the service order by clicking on the hyperlink under the Request ID column
4	Verify the Order Status is SA On-Site and the Labor Status is In Process
5	Select the **Dispatch Console Icon** next to the **Action Group** field
6	Locate the Service Order on the Schedule Board, right click, and select **Quick Activity Update**
7	Under Activity Details, update the **Disposition** to Fulfilled
8	Select **List** to display a list of stop codes, then select **CANC** (PNC: Customer Cancelled) stop code by clicking on the hyperlink in the ID column
9	Under Activity Times, select **Completion** by enabling the check box in the date and time
10	Select **Save**
11	Select the **Completed** tab and locate the Service Order
12	Right click on the Service Order, and select **View Order**
13	Select the **Checklist Summary** tab from Main
14	Open the **Closure Checklist** by selecting the Checklist ID hyperlink
15	Complete the Closure Checklist and select **Apply**.

16	Select the **Resolve** tab from Main
17	Enable the **Resolved** check mark
18	Select the **Search** button next to the **Cause** field
19	Select **Clear** to clear any default search criteria
20	Select **Search** to display the list of Cause codes
21	Select the **CANC (Request cancelled)** Cause code
22	Select **Submit**
23	Select the **Search** button next to the **Repair Code** field
24	Select **Clear** to clear any default search criteria
25	Select **Search** to display the list of Repair codes
26	Select the **WKNC (Work not completed)** repair code
27	Select **Submit**
28	Enter notes indicating that the customer cancelled the request in the **New Resolve Text** field
29	Select **Apply**
30	Select **Save**
31	*Since a technician was assigned and the service order dispatched to mobile, in order for the ticket to be removed from the technician's device, they must sign **N/A** as the customer signature, type in **Request Cancelled in the Signed By field,** sign the service request, and exit the ticket*

8. CANCEL A SERVICE ORDER: TECH RESOLVED ORDER AS INCOMPLETE

The following business process will be used to cancel a Service Order in which the technician has resolved the order as incomplete, and the customer wishes to cancel the order for the return trip.

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Search for the service order created by entering part of the customer name in the **Customer Like** field and clicking **Search**
3	Select the service order by clicking on the hyperlink under the Request ID column
4	Select the **Activities** tab
5	Verify there are 2 Labor activities, one is Fulfilled and the other is Open
6	Select the Open Labor activity by clicking on it and click **Zoom**
7	Enter your credentials in the SA field
8	Select the drop down list in the Disposition field
9	Change the disposition to **Not Done**

10	Select **Apply**
11	Select the **Checklist Summary** tab from Main
12	Open the **Closure Checklist** by selecting the Checklist ID hyperlink
13	Complete the Closure Checklist and select **Apply** (only complete if the technician did not complete previously)
14	Select the **Resolve** tab
15	Enable the **Resolved** check mark
16	Select the **Search** button next to the **Cause** field
17	Select **Clear** to clear any default search criteria
18	Select **Search** to display the list of Cause codes
19	Select the **CANC (Request cancelled)** Cause code
20	Select **Submit**
21	Select the **Search** button next to the **Repair Code** field
22	Select **Clear** to clear any default search criteria
23	Select **Search** to display the list of Repair codes
24	Select the **WKNC (Work not completed)** repair code
25	Select **Submit**
26	Enter notes indicating that the customer cancelled the request in the **New Resolve Text** field
27	Select **Apply**
28	Select **Save**

TAC WORKFLOW

Use the following business process steps to complete a Service Order as a TAC team member. TAC will review NSIN Open tickets only. They will not review a ticket that has been allocated or assigned to a technician. NSIN tickets will not display on the Dispatch Console. If TAC cannot resolve over the phone, the Sub Category must be changed to NSVR.

1. TAC REVIEWS SERVICE ORDER QBE

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Ensure the **TAC** view is selected in the **View** drop down
3	Review the Service Order problem descriptions looking for issues that can be resolved over the phone
4	Select the Service Order by selecting the **Request ID** number

2. TAC RESOLVES ISSUE OVER THE PHONE

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Enter **Service Order Number** in **Request ID** field
3	Select **Search** button
4	Select the Customer by clicking the hyperlink under the **Request ID** column
5	Select the **Search** icon next to the Sub Category field.
6	Select **Clear,** then select **Search**
7	Select **HCAN** / Stanley Canceled by selecting the hyperlink
8	Select **Apply**
9	Select the **Activities** tab
10	Select the **Labor** activity then select **Zoom**
11	Type in **Your Name** in the **SA** field
12	Select **Apply**
13	Select the **Details** tab
14	Select the **Cancel** tab located under the Details tab
15	Select the **Search** button next to the Cancel Reason field
16	Select **HCAN** by clicking on the hyperlink under the Cancel Reason column
17	Enter a brief description of why the service order is being cancelled in the **Notes** field
18	Select the **Cancel** button
19	Select Yes to cancel the service order

3. TAC CANNOT RESOLVE ISSUE OVER THE PHONE

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Enter **Service Order Number** in **Request ID** field
3	Select **Search**
4	Select the Service Order by clicking the hyperlink under the **Request ID** column
5	On the **Service Info** tab, enter information regarding the steps taken in the attempt to resolve the issue over the phone in the **New Problem Notes** field
6	Change the **Sub Category** to **NSVR**
7	Select **Apply**, then **Save**

UPDATING EXISTING SERVICE ORDERS

Use the following business process steps to update information on an existing Service Order.

1. UPDATE PROBLEM NOTES

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Enter **Customer Name** in **Customer Like** field
3	Select **Search** button
4	Select the Customer by clicking the hyperlink under the **Request ID** column
5	Enter the information pertinent to why this service order is being updated in the **New Problem Notes** field
6	Select **Apply**
7	Confirm the **Priority** field is incremented by 1
8	Select **Save**
9	Once the updated problem notes have been reviewed, manually set the priority back to the original value

2. UPDATE CONTACT NAMES

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Enter **Customer Name** in **Customer Like** field
3	Select **Search** button
4	Select the Customer by clicking the hyperlink under the **Request ID** column
5	Enter the new contact in the **Contact** field
6	Enter the information pertinent to why this service order is being updated in the **New Problem Notes** field
7	Select **Apply**
8	Confirm the **Priority** field is incremented by 1
9	Select **Save**
10	Once the updated problem notes have been reviewed, manually set the priority back to the original value

3. UPDATING THE DEFAULT ACTIVITY DURATION

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Enter **Customer Name** in **Customer Like** field
3	Select **Search** button
4	Select the Customer by clicking the hyperlink under the **Request ID** column
5	Select the **Activities** tab

6	Select the **Labor** activity, and select **Zoom**
7	Select the **Duration** field, and update the default duration to the desired duration
8	Enter the information pertinent to why this service order is being updated in the **New Problem Notes** field
9	Select **Apply**
10	Confirm the **Priority** field is incremented by 1
11	Select **Save**
12	Once the updated problem notes have been reviewed, manually set the priority back to the original value

4. ADDING A PART TO THE SERVCE ORDER IN BACK OFFICE – PART INSTALLED

The following process will be used to add a part, which has been installed at the customer location, to the service order from the back office.

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Enter **Customer Name** in **Customer Like** field
3	Select **Search** button
4	Select the Customer by clicking the hyperlink under the **Request ID** column
5	Select the **Materials** tab
6	Select **Add**
7	Select **Search** button next to the Product ID field
8	Search for the part by entering a portion of the part number, SBN part number in the Product ID field, or in the Description field. % is the wildcard search
9	Select **Search**
10	Select the part by selecting the hyperlink
11	Change the **Disposition** to **Fulfilled**
12	Select **Apply**

5. ADDING A PART TO THE SERVCE ORDER IN BACK OFFICE – PART NEEDED

The following process will be used to add a part, which needs to be ordered for the customer, to the service order from the back office. After the part is added, the Labor Activity should be resolved as "ADDL EQUIP REQD". This will initiate the Parts Pending Process in back office.

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Enter **Customer Name** in **Customer Like** field
3	Select **Search** button

4	Select the Customer by clicking the hyperlink under the **Request ID** column
5	Select the **Materials** tab
6	Select **Add**
7	Select **Search** button next to the Product ID field
8	Search for the part by entering a portion of the part number, SBN part number in the Product ID field, or in the Description field. % is the wildcard search
9	Select **Search**
10	Select the part by selecting the hyperlink
11	Leave the **Disposition** as **Open**
12	Select **Apply**

6. ACCOUNTING FOR PENDING PARTS AND PARTS RECEIVED – INTERFACE DRIVEN

The interface driven parts pending process is dependent on the technician using the Stop Code of "Add'l Equip Reqd" on the mobile device. Users will be able to manually move the process along. The Materials Needed View will only display Service Orders that have a part that is Open/Needed. If a technician does not add a part on mobile as Open/Needed (or back office user does not add part on the service order), the Service Order will not display in the Materials Needed QBE.

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select the **Materials Needed** view from the View dropdown
3	Review the Service Orders requiring parts to be ordered
4	In SBN, the status of the Service Request is **PEND**. This was updated when the Tech entered the stop code of Add'l Equip Reqd.
5	In Astea, the Service Order sub-category will be updated with a sub-category of **Pending: Parts** via an interface
6	Procure the needed parts using the current parts procurement process
7	In Astea, locate the Service Order from the Service Order QBE, Select the Service Order by clicking the hyperlink under the **Request ID** column
8	Change the **Sub Category** to **Parts on Order** to indicate the parts have been ordered, Select **Save**
9	In SBN, the Service Order will be updated with a status of **PORD** to indicate the parts have been ordered
10	In Astea, locate the Service Order from the Service Order QBE, Select the Service Order by clicking the hyperlink under the **Request ID** column
11	Change update the **Sub Category** to **Parts in** to indicate the parts have been received, Select **Save**
12	In SBN, the Service Order will be updated with a status of **PTIN** to indicate the parts have been received

13	In Astea, type in **Service Order** in the **Find** field of the Ribbon
14	Select the **Materials Needed** view from the View dropdown
15	Review the Service Orders with a sub-category of **Parts in**
16	Select the Service Order by clicking the hyperlink under the **Request ID** column
17	Select the **Activities** tab
18	There are two labor activities (one fulfilled and one is open) and one SBN_Parts activity displayed in the table
19	Select the SBN_Parts activity by clicking on it and click **Zoom**
20	Confirm the **Stop Code** field reflects **SBN Processes Complete** as it was completed by the interface
21	Select **Back to List**

7. ACCOUNTING FOR PENDING PARTS AND PARTS RECEIVED – MANUAL INTERVENTION

The following process will be used when the technician does not use the Stop Code of "Add'l Equip Reqd" on the mobile device. The Materials Needed View will only display Service Orders that have a part that is Open/Needed. If a technician does not add a part on mobile as Open/Needed (or back office user does not add part on the service order), the Service Order will not display in the Materials Needed QBE

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select the **Materials Needed** view from the View dropdown
3	Review the Service Orders requiring parts to be ordered
4	Select the Service Order to be updated by clicking the hyperlink under the **Request ID** column
5	Change the **Sub Category** to **Pending: Parts,** Select **Save**
6	In SBN, the status of the Service Order will be updated to **PEND**
7	Procure the needed parts using the current parts procurement process
8	In Astea, locate the Service Order from the Service Order QBE, Select the Service Order by clicking the hyperlink under the **Request ID** column
9	Change the **Sub Category** to **Parts on Order** to indicate the parts have been ordered, Select **Save**
10	In SBN, the Service Order will be updated with a status of **PORD** to indicate the parts have been ordered
11	In Astea, locate the Service Order from the Service Order QBE, Select the Service Order by clicking the hyperlink under the **Request ID** column
12	Change the **Sub Category** to **Parts in** to indicate the parts have been received, Select **Save**
13	In SBN, the Service Order will be updated with a status of **PTIN** to indicate the parts

	have been received
14	In Astea, type in **Service Order** in the **Find** field of the Ribbon
15	Select the **Materials Needed** view from the View dropdown
16	Review the Service Orders with a sub-category of **Parts in**
17	Select the Service Order by clicking the hyperlink under the **Request ID** column
18	Select the **Activities** tab
19	Validate there is an Open Labor Activity to schedule
20	If there is not an Open Labor Activity, Select **Add** to create a new Labor Activity
21	Select the **Search** icon next to the **Activity** field
22	Select the **Labor** Activity by clicking in the **Activity** column
23	Select **Apply**
24	Select **Save**

8. REVIEWING PANEL LOCATION, TELCO LOCATION, AND TELCO NUMBER

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Enter **Customer Name** in **Customer Like** field
3	Select **Search** button
4	Select the Customer by clicking the hyperlink under the **Request ID** column
5	Select the **Paper Clip** next to the Customer header
6	Select **Attachments** from the Webpage Dialog box
7	Select the hyperlink of the file name containing the Panel Location, Telco Location, and Telco Number information, Select **Open**
8	Click the red X to close the notepad dialog box
9	Select **Save and Exit**

9. REVIEWING AKA, MON STATUS, MON STATUS DATE, SUB TYPE, GROUP #, ADDRESS LINE 2, SBN CUSTOMER AVAILABILITY

The following process will be used to view the AKA, mon status, mon status date, sub type, group #, address line 2, and SBN customer availability in one location within the service order.

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Enter **Customer Name** in **Customer Like** field
3	Select **Search** button
4	Select the Customer by clicking the hyperlink under the **Request ID** column
5	Select the **SLA/Notes** page
6	Review the AKA, mon status, mon status date, sub type, group #, address line 2, and SBN customer availability

10. ASSIGNING A SUB CONTRACTOR NOT ON THE DISPATCH CONSOLE

The following process will be used to assign a Service Order to a subcontractor (individual or company) who is not displayed on the Dispatch Console.

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Enter **Customer Name** in **Customer Like** field
3	Select **Search** button
4	Select the Customer by clicking the hyperlink under the **Request ID** column
5	Select the **Activities** tab
6	Select **Zoom** to view the details of the activity
7	Select the **checkbox** next to External
8	Enter the sub contractor's name (individual or company) into the **Vendor** field and select **Search**
9	Select the sub contractor by clicking on the value in the **Person ID** column
10	Select **Apply**
11	Select **Save**

11. ASSIGN A SERVICE ORDER TO A SUBCONTRACTOR (FROM DISPATCH CONSOLE)

1.	Type in **Dispatch Console** in the **Find** field of the Ribbon
2.	Select **Action Groups**
3.	Select the **Action Group** associated with the branch, and click **Next**
4.	Select the **Unallocated** tab

5.	Right click on the Service Order number to be scheduled, select **View Order**
6.	Review the Service Order for customer availability information, service bulletins, and service instructions
7.	Select a Service Order from the Unallocated tab and while holding the mouse button down, drag and drop the Service Order to the schedule board to assign it to the Subcontractor
8.	Select **Assign** to block out the Subcontractor's time on this schedule board. (Refer to the *Emailing a Service Order to a Sub Contractor* scenario to send the service order details to the sub contractor.)

12. EMAILING A SERVICE ORDER TO A TECH OR SUB CONTRACTOR

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Enter **Customer Name** in **Customer Like** field
3	Select **Search** button
4	Select the Customer by clicking the hyperlink under the **Request ID** column
5	In the **Provider** section of the Service Info tab, select **Service Order** from the **Vendor Form** drop down
6	Select the **Send Form to Vendor** checkbox
7	Enter the email address of the technician or sub contractor in the **Vendor Email** field
8	Select **Apply**
9	Select **Save**

13. UPDATING SUBCATEGORY, EQUIVALENCE OF SBN STATUS

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Enter **Customer Name** in **Customer Like** field
3	Select **Search** button
4	Select the Customer by clicking the hyperlink under the **Request ID** column
5	Select the **List** icon next to the **Sub Category** field
6	Select the **Clear** button, then **Search**
7	Select the **SBN Equivalent Status** from the list by clicking in the **Sub Category ID column**
8	Enter the information pertinent to why this service order is being updated in the **New Problem Notes** field
9	Select **Apply**
10	Confirm the **Priority** field is incremented by 1

11	Select **Save**
12	Once the updated problem notes have been reviewed, manually set the priority back to the original value

14. MANUALLY VIEWING SERVICE INSTRUCTIONS / ACTION PLAN

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Enter **Customer Name** in **Customer Like** field
3	Select **Search** button
4	Select the Customer by clicking the hyperlink under the **Request ID** column
5	Select the **Red Triangle** icon located next to the **Customer** section header
6	Select the Glasses icon next to the **Service Instructions / Action Plan** text
7	Verify Service Instructions / Action Plan in Comments Viewer - Webpage Dialog screen
8	Close the Comments Viewer - Webpage Dialog screen
9	Close the Alerts Webpage Dialog screen
10	Select **Save**

15. ACCOUNTING FOR POTH, PRMA, TFIX, AND PREP SBN STATUSES

The following process will be used to track an incomplete Service Order that has a status of POTH, PRMA, TFIX, or PREP.

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Locate the Service Order in question
3	Select the Service Order by clicking on the **Request ID**
4	Update the **Sub-category** on the Service Order to **POTH, PRMA, TFIX, or PREP**
5	Address the reason behind the POTH, PRMA, TFIX, or PREP status per current process
6	Once the reason for the status has been addressed, update the **Sub-category on** the Service Order to **PTIN** to indicate the Service Order is ready to be scheduled
7	Select **Save**

16. UPDATING THE CALL TYPE OF A SERVICE ORDER

The following process will be used by the Banking team to update the call type of a service order. Tickets created by EDI/OT2 do not always include the call type. When the call type is not included (left blank) the subcategory in Astea will default to CUSR-Customer Request for Service. Banking should review the CUSR type tickets and update the subcategory based on the Short Description.

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Filter by WELLS% in the Customer field, CUSR in the Urgency Field, and SEC% in the Short Description field. Select Search. This will return all service orders that have CUSR as the call type, with Wells as the customer, and SEC beginning in the Short Description.
3	Review the Problem Description.
4	Select the Service Order that needs to be updated by clicking on the **Request ID**

5	Select the appropriate call type from the **Urgency** drop-down list. **Note:** updating the call type/Urgency will potentially change or update the Priority of the service order as well.
6	Select **Save**

17. SETTING FOLLOW UP DATE AND TIME FOR BANK CUSTOMERS

The following process is used by the Banking team to set a follow up date and time on an incomplete service order for reporting purposes. The SBN Schedule Date and Time in SBN will only be updated with the Follow Up Date and Time for BANK customers. This only occurs when an incomplete stop code is used, the subcategory is changed from UPDT to another status, and a Follow Up Date and Time are entered. If there is a labor activity that is allocated/assigned, the allocated/assigned labor activity ETA date and time will populate the Scheduled Date/Time field in SBN.

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Locate the Service Order in question
3	Select the Service Order by clicking on the **Request ID.** Under Activities there should be one labor activity that has an incomplete stop code and either one labor activity that is unallocated/unassigned or an open SBN Parts activity.
4	View the **SBN Scheduled Date** and **SBN Scheduled Time**. The value is NULL.
5	View the **Follow Up Date** and **Follow Up Time**. The value is NULL.
6	In SBN, view the **Sched Date.** The value is NULL.
7	In Astea, change the **Sub-category** on the Service Order to a status **other than Update** (e.g. **AVIS**). If the sub category was PEND, that status does not need to be changed.
8	Select the **Calendar** button next to the **Follow-Up Date** field. Select a date.
9	Select the **drop down** in the **Follow-Up Time** field. Select a time.
10	Select **Save**
11	In SBN, the Schedule Date and Time field is updated with the Follow-Up Date and Follow-Up Time information for BANK customers only.

18. SETTING A SERVICE ORDER AS WCAL AND SETTING CALL BACK DATE AND TIME

The following process will be used to track a Service Order that is awaiting a return call from the customer. This should be used for NON-BANK customers only, as the Follow-Up Date and Follow-Up Time fields are used for different purposes for BANK customers. The Follow-Up Date and Follow-Up Time fields will not update SBN for NON-BANK customers.

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Locate the Service Order in question
3	Select the Service Order by clicking on the **Request ID**
4	Update the **Sub-category** on the Service Order to **WCAL** to indicate an attempt has

	been made to contact the customer
5	Select the **Calendar** button next to the **Follow-Up Date** field. Select a date.
6	Select the **drop down** in the **Follow-Up Time** field. Select a time.
7	Enter a Note in the **New Problem Notes** field
8	Select **Save**
9	Type in **Service Order** in the **Find** field of the Ribbon
10	Select the WCAL view, select **Search**
11	Service Orders with a Sub-category of WCAL are displayed. The list is sorted by oldest Follow-Up Date

EMOC WORKFLOW

Use the following business process steps to create an EMOC Service Order, update an existing Service Order (EMOC to business hours, business hours to EMOC), and track an attempt to contact the on-call technician.

1. CREATE EMOC SERVICE ORDER

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select **New**
3	Enter **Customer Name** in **Customer** field
4	Select the **Search** button
5	Enter the customer's address in the **Address** field
6	Select the **Search** button
7	Select the Customer by selecting the **Company (INS #)**
8	Select the **Search** button next to the **CID** field
9	Select the appropriate **CID** by selecting the CID in the Serial No. column
10	Select the **Search** button next to the **Request Type** field
11	Select the **Service** Request Type by selecting the **S** in the Request Type column
12	Select **EMOC** in the **Sub Category** field
13	Enter the problem into **Description** field
14	Select **Save and New**

2. UPDATE BUSINESS HOURS TO EMOC SERVICE ORDER

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Enter **Customer Name** in **Customer Like** field

3	Select **Search** button
4	Select the Service Order to upgrade to EMOC by clicking on the Service Order in the **Request ID** field
5	On the Service Info tab, select **EMOC** in the **Sub Category** field
6	Enter notes in the **New Problem Notes** field to reflect what the Service Order was upgraded
7	Select **Apply**
8	Confirm the **Priority** field displays **81 High: EMOC – Emergency**
9	Select **Save and Exit**

3. UPDATE EMOC TO BUSINESS HOURS SERVICE ORDER

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select **EMOC** from the View drop down menu
3	Locate the Service Order to be downgraded from EMOC to a business hours Service Order
4	Select the Service Order by clicking on the Service Order number in the **Request ID** field
5	On the Service Info tab, remove **EMOC** in the **Sub Category** field
6	Enter notes in the **New Problem Notes** field to reflect what the Service Order was down graded
7	Select **Apply**
8	Confirm the **Priority** field displays 1
9	Select **Save and Exit**

4. TRACK ATTEMPT TO CONTACT TECH ON EMOC SERVICE ORDER

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select **EMOC** from the View drop down menu
3	Enter **Customer Name** in **Customer Like** field
4	Select **Search** button
5	Select the Customer by clicking the hyperlink under the **Request ID** column
6	Select the **Service Info** tab
7	Enter notes in the **New Problem Notes** field to reflect that an attempt has been made to contact the on-call technician.
8	Update the **EMOC Call Time** date and time to the appropriate values for the next call attempt

9	Select **Apply**
10	Select **Save and Exit**

5. SCHEDULE EMOC SERVICE ORDER BY PRESSING ICON NEXT TO NODE

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select **EMOC** from the View drop down menu
3	Enter **Customer Name** in **Customer Like** field
4	Select **Search** button
5	Select the Customer by clicking the hyperlink under the **Request ID** column
6	Select the **Service Info** tab
7	Enter notes in the **New Problem Notes** field to reflect that the on-call technician has been contacted
8	Select **Apply**
9	Select the **Dispatch Console** icon next to the **Node** field
10	Select the **Unallocated** tab
11	Select a Service Order from the Unallocated tab and while holding the mouse button down, drag and drop the Service Order to the schedule board allocating it to your mobile user (Service Agent)
12	Select **Allocate** to reserve the time slot for that tech
13	When appropriate right click on the allocated service order and select **Assign** to send the Service Order to the tech's mobile device

6. UPDATE SERVICE ORDER FROM EMOC TO EMTP

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select **EMOC** from the View drop down menu
3	Enter **Customer Name** in **Customer Like** field
4	Select **Search** button
5	Select the Customer by clicking the hyperlink under the **Request ID** column
6	Select the **Service Info** tab
7	Enter notes in the **New Problem Notes** field to reflect that the on-call technician has been contacted
8	Select the **List** icon next to the **Sub Category** field
9	Select the **Clear** button, then **Search**
10	Select the **EMTP** status from the list by clicking in the **Sub Category ID** column
11	Select **Apply**
12	Confirm the **Priority** field is incremented by 1
13	Select **Save**
14	Once the updated problem notes have been reviewed, manually set the priority back to the original value

DISPATCH CONSOLE ACTIVITIES

Use the following business process steps to complete activities including allocate a Service Order to a tech, assign a Service Order to a tech, un-assign / un-allocate a Service Order, and update a Service Order for a tech or sub-contractor to reflect statuses of en route, on site, and off site (complete or incomplete Service Order).

1. ALLOCATE AND ASSIGN A SERVICE ORDER TO A TECHNICIAN

1	Type in **Dispatch Console** in the **Find** field of the Ribbon
2	Select **Action Groups**
3	Select the **Action Group** associated with the branch, and click **Next**
4	Select the **Unallocated** tab
5	Right click on the Service Order number to be scheduled, select **View Order**
6	Review the Service Order for customer availability information, service bulletins, and service instructions
7	Select a Service Order from the Unallocated tab and while holding the mouse button down, drag and drop the Service Order to the schedule board allocating it to your mobile user (Service Agent)
8	Select **Allocate** to reserve the time slot for that tech
9	When appropriate right click on the allocated service order and select **Assign** to send the Service Order to the tech's mobile device

2. UN-ASSIGN A SERVICE ORDER, TECHNICIAN

The following process should be used to un-assign a service order for a Technician, not a Sub Contractor.

1	Type in **Dispatch Console** in the **Find** field of the Ribbon
2	Select **Action Groups**
3	Select the **Action Group** associated with the branch, and click **Next**
4	Locate the allocated Service Order on the schedule board, select it, and right click
5	Select **Un-assign Activity**
6	Select **Unallocated Tab**
7	Validate the Service Order is listed in the Unallocated list and that it is no longer on the tech's mobile

3. UN-ASSIGN A SERVICE ORDER, SUB CONTRACTOR

The following process should be used to un-assign a service order for a Sub Contractor.

1	Type in **Dispatch Console** in the **Find** field of the Ribbon
2	Select **Action Groups**
3	Select the **Action Group** associated with the branch, and click **Next**
4	Locate the allocated Service Order on the schedule board, select it, and right click
5	Select **View Activity**
6	Unselect the **External Checkbox**
7	Select **Apply**
8	Select **Service Info** page
9	Select the **List** icon next to the **Sub Category** field
10	Select the **Clear** button, then **Search**
11	Select appropriate status/Sub Category
12	Select **Save**
13	Validate the Service Order is listed in the Unallocated list

4. UN-ALLOCATE A SERVICE ORDER

1	Type in **Dispatch Console** in the **Find** field of the Ribbon
2	Select **Action Groups**
3	Select the **Action Group** associated with the branch, and click **Next**
4	Locate the Service Order on the schedule board for the technician, right click, and select **Unallocate**
5	Confirm the Service Order is removed from the list of allocated Service Orders and now appears on the **Unallocated** tab

5. REASSIGN SERVICE ORDER TO A DIFFERENT DAY

1	Type in **Dispatch Console** in the **Find** field of the Ribbon
2	Select **Action Groups**
3	Select the **Action Group** associated with the branch, and click **Next**
4	Locate the allocated Service Order on the schedule board, select it, and right click
5	Select **Unassign Activity**
6	Confirm the Service Order was recalled/removed from the tech's mobile device
7	Select the **Unallocated** tab
8	Select the Service Order you just removed from the schedule board and while holding the mouse button down, drag and drop the Service Order to the schedule board assigning it to a tech for anytime the following day
9	Select **Allocate**
10	When appropriate, locate the allocated Service Order on the schedule board, select it, and right click
11	Select **Assign**
12	Confirm the Service Order was dispatched by verifying it appears in on the tech's work list

6. DISPATCH A SERVICE ORDER TO TWO TECHS

1	Type in **Dispatch Console** in the **Find** field of the Ribbon
2	Select **Action Groups**
3	Select the **Action Group** associated with the branch, and click **Next**
4	Select the **Unallocated** tab
5	Right click on the Service Order number to be scheduled, select **View Order**
6	Review the Service Order for customer availability information, service bulletins, and service instructions
7	Navigate back to the **Dispatch Console** tab in the Astea browser

8	Locate the appropriate Service Order, right click on the **Order ID**, and select **View Activity**
9	Create a new labor activity for the additional tech by selecting **Add**
10	Select the **Search** option next to the **Activity** field
11	Select the **Labor** activity
12	Select **Apply**, then **Save**
13	Navigate to the **Dispatch Console** tab
14	Select the first labor activity for the Service Order from the Unallocated tab and while holding the mouse button down, drag and drop the Service Order to the schedule board allocating it to the first mobile user (Service Agent)
15	Select **Allocate** to reserve the time slot for that tech
16	Select the second labor activity for the Service Order from the Unallocated tab and while holding the mouse button down, drag and drop the Service Order to the schedule board allocating it to the second mobile user (Service Agent)
17	Select **Allocate** to reserve the time slot for that tech
18	When appropriate right click on the allocated service order and select **Assign** to send the Service Order to the first tech's mobile device
19	When appropriate right click on the allocated service order and select **Assign** to send the Service Order to the second tech's mobile device

7. RE-DISPATCH A SERVICE ORDER PREVIOUSLY MARKED AS INCOMPLETE

1	Tech completes the Service Order on the mobile device using an incomplete stop code
2	Type in **Dispatch Console** in the **Find** field of the Ribbon
3	Select **Action Groups**
4	Select the **Action Group** associated with the branch, and click **Next**
5	Select the **Unallocated** tab
6	Right click on the Service Order number to be scheduled, select **View Order**
7	Review the Service Order for customer availability information, service bulletins, and service instructions
8	Select the **Dispatch Console** module tab
9	Select the Service Order, and while holding the mouse button down, drag and drop the Service Order to the schedule board allocating it to another service agent
10	Select **Allocate**
11	Select **Assign**
12	Confirm the Service Order was dispatched by verifying it appears in that service technician's work list

8. UPDATE SERVICE ORDER TO REFLECT TECH AS EN ROUTE, THEN ON SITE

1	Type in **Dispatch Console** in the **Find** field of the Ribbon
2	Select **Action Groups**
3	Select the **Action Group** associated with the branch, and click **Next**
4	Locate the Service Order on the schedule board, right click, and select **Quick Activity Update**
5	Under Activity Travel, select **Start Travel** by enabling the check box in the date and time fields (adjust the time to reflect the actual time the tech started travel)
6	Select **Save**
7	When appropriate, right click on the Service Order on the schedule board, and select Quick Activity Update
8	Under Activity Times, select **Start** by enabling the check box in the date and time fields (adjust the time to reflect the actual time the tech started travel)
9	Select **Save**

9. UPDATE SERVICE ORDER TO REFLECT TECH RESOLVED COMPLETE

1	Type in **Dispatch Console** in the **Find** field of the Ribbon
2	Select **Action Groups**
3	Select the **Action Group** associated with the branch, and click **Next**
4	Locate the Service Order on the schedule board, right click, and select **Quick Activity Update**
5	Under Activity Details, update the **Disposition** to Fulfilled
6	Under Activity Details, update the **Stop Code** to **Resolved**
7	Under Activity Times, select **Completion** by enabling the check box in the date and time fields (adjust the time to reflect the actual time the tech started travel)
8	Select **Save**
9	Select the **Completed** tab and locate the Service Order
10	Right click on the Service Order, and select **View Order**
11	Select the **Checklist Summary** tab from Main
12	Open the **Closure Checklist** by selecting the Checklist ID hyperlink
13	Select the **Delete Checklist** button
14	Select the **Resolve** tab from Main
15	Enable the **Resolved** check mark
16	Select the List icon next to the **Cause** field

17	Select the appropriate **Cause Code**
18	Select **Submit**
19	Select the List icon next to the **Repair Code** field
20	Select the appropriate **Repair Code**
21	Select **Submit**
22	Enter resolution notes into the **New Resolve Text** field
23	Select **Apply**
24	Select **Save**

10. CREATE, EDIT, DELETE A PRIVATE APPOINTMENT FOR A TECH

1	Type in **Dispatch Console** in the **Find** field of the Ribbon
2	Select **Action Groups**
3	Select the **Action Group** associated with the branch, and click **Next**
4	From the Schedule Board, select the name of the service agent for which you wish to create a private appointment and right click
5	Select **Add Private Appointment**
6	Verify that the **Appointment** radio button is selected
7	Select **Search** button to the right of the **Activity ID** field
8	Select **PTO** (Paid Time Off) by clicking on the hyperlink located under the Activity column
9	Select a **Start Date and Time** and **End Date and Time** using the pop up calendars to the right of the fields, add start time and end time as well
10	Confirm the correct technician appears in the **Assign To** field.
11	Enter details about the Private Appointment in the **Subject** field
12	If applicable, enter additional comments and details about the Private Appointment in the Description field
13	Select **Save**
14	Confirm the Private Activity was scheduled by verifying it appeared on both the **Schedule Board** and on your mobile device under **Private Activity**
	Edit Activity
1	From the Schedule Board, locate the service agent and private appointment you wish to delete and right click on the private appointment
2	Select **View Task/Appointment**

3	Change the **Start Date** and **End Date** using the pop up calendars to the right of the fields, change start time and end time as well
4	Select **Save**
5	Select the **Dispatch Console** tab
6	Confirm the private activity was modified by verifying it was removed from both the **Schedule Board** and on your mobile device under **Private Activity**
	Delete Activity
1	From the Schedule Board, locate the service agent and private appointment you wish to delete and right click
2	Select **View Task/Appointment**
3	Select **Delete**
4	Select **Yes**
5	Select the **Dispatch Console** tab

11. CREATE AND DELETE A WORK EXCEPTION FOR A VENDOR

The following process will be used to create a work exception (block time on the schedule board) for a vendor.

1	Type in **Dispatch Console** in the **Find** field of the Ribbon
2	Select **Action Groups**
3	Select the **Action Group** associated with the branch, and click **Next**
4	Locate the Vendor on the schedule board, right click, and select **Display Vendor Service Agent**
5	Select the **Vendor Services** page
6	Select the **Work Exceptions** tab
7	Select the **Add** button (for an entire day proceed to step 8, for a portion of a day, proceed to step 17)
	To Block an Entire Day
8	Select the **Calendar** button next to the Start Date
9	Select the date
10	Select the **Calendar** button next to the End Date
11	Select the **Drop Down** under the Action column
12	Select **Not Working,** then Select **Apply**
13	To verify the date is blocked on the Schedule Board, type in **Dispatch Console** in the

	Find field of the Ribbon
14	Select **Action Groups**
15	Select the **Action Group** associated with the branch, and click **Next**
16	Locate the Vendor on the schedule board for the applicable date. The date should be “grey” for that date.
	To Block a Portion of the Day (define the work times only)
17	Select the **Calendar** button next to the Start Date
18	Select the date
19	Select the **Calendar** button next to the End Date
20	Select the **Drop Down** under the Action column
21	Select **Working**
22	Select the **Clock** button next to the Start Time
23	Select the time
24	Select the **Clock** button next to the End Time
25	Select **Apply**
26	To verify the correct times are blocked on the Schedule Board, type in **Dispatch Console** in the **Find** field of the Ribbon
27	Select **Action Groups**
28	Select the **Action Group** associated with the branch, and click **Next**
29	Locate the Vendor on the schedule board for the applicable date. The time the Vendor is available to work is “white” for the time designated and is “grey” for the time the Vendor is not available to work.
	To Delete Blocked Time
30	Type in **Dispatch Console** in the **Find** field of the Ribbon
31	Select **Action Groups**
32	Select the **Action Group** associated with the branch, and click **Next**
33	Locate the Vendor on the schedule board, right click, and select **Display Vendor Service Agent**
34	Select the **Vendor Services** page
35	Select the **Work Exceptions** tab
36	Highlight the applicable row, Select **Delete**
37	To verify the time block is deleted on the Schedule Board, type in **Dispatch Console** in the **Find** field of the Ribbon

38	Select **Action Groups**
39	Select the **Action Group** associated with the branch, and click **Next**
40	Locate the Vendor on the schedule board for the applicable date. The Vendor time is displayed as “white” for the time block that was deleted.

12. UPDATE SERVICE ORDER ACTIVITY DURATION

1	Type in **Dispatch Console** in the **Find** field of the Ribbon
2	Select **Action Groups**
3	Select the **Action Group** associated with the branch, and click **Next**
4	Locate the Service Order on the schedule board, right click, and select **Quick Activity Update**
5	Under Activity Times, update the **Duration** field to the appropriate duration
6	Select **Save**

13. VIEW TECHNICIAN’S ROUTE ON THE MAP BOARD

The following process will be used to view Technician’s route for the last 8 hours.

1	Type in **Dispatch Console** in the **Find** field of the Ribbon
2	Select **Action Groups**
3	Select the **Action Group** associated with the branch, and click **Next**
4	Select the Technician on the Schedule Board
5	Right click, then select **Display SAs Location**
6	Right click, then select **Display SAs Route for the Last 8 Hours**
7	Select the **Chevron** in the Lower Right section of the Map Board
8	Select the **Eraser** to clear the map board

14. VIEW TURN BY TURN DIRECTIONS TO THE CUSTOMER SITE

The following process will be used to view turn by turn directions to the Technician’s next call, as well as send it to their device. The Technician can always use Google Maps as well.

1	Type in **Dispatch Console** in the **Find** field of the Ribbon
2	Select **Action Groups**
3	Select the **Action Group** associated with the branch, and click **Next**
4	Select the **Service Order** on the schedule board
5	Right click, then select **Display Turn By Turn Directions**

6	Select **To This Location From SAs Current Location**
7	On the Lower portion of the Map Board, select the **up arrow or drag the Cross-Bow** up to display the Turn By Turn Directions
8	Select **Save,** this will send an Attachment to the Technician on the Service Order (on mobile, select the service order, on the Details page select the Paperclip icon, select the attachment, select Download, select View)
9	Select the **Chevron** in the Lower Right section of the Map Board
10	Select the **Eraser** to clear the map board

15. VIEW SERVICE ORDER LOCATION AND 5 NEAREST TECHNICIANS

The following process will be used to view the location of an Unallocated Service Order on the Map Board, and then display the 5 nearest Technicians.

1	Type in **Dispatch Console** in the **Find** field of the Ribbon
2	Select **Action Groups**
3	Select the **Action Group** associated with the branch, and click **Next**
4	Select the **Unallocated** tab
5	Select a Service Order and right click
6	Select **Display Activity Location**
7	On the Map Board, Right Click on the Service Order icon
8	Select **Display the Location of 5 Nearest SAs**
9	Select the **Chevron** in the Lower Right section of the Map Board
10	Select the **Eraser** to clear the map board

16. VIEW SUGGESTED SERVICE AGENT

The following process will be used to suggest the nearest Technician based on Current Location.

1	Type in **Dispatch Console** in the **Find** field of the Ribbon
2	Select **Action Groups**
3	Select the **Action Group** associated with the branch, and click **Next**
4	Select the **Unallocated** tab
5	Select a Service Order and right click
6	Select **Suggest SA**
7	Select your mobile user (Service Agent) by clicking in the corresponding option box
8	Select **Allocate**
9	Locate the Allocated Service Order on the schedule board, select it, and right click

10	Select **Assign**
11	Confirm the Service Order was dispatched and appears in the work list of your mobile device

17. DISPATCH A SERVICE ORDER FOR A BRANCH OTHER THAN THE TECH'S HOME BRANCH

The following process will be used to dispatch a Service Order to a Technician that is a shared resource between branches. The Technician must have security access for both branches.

1	Type in **Dispatch Console** in the **Find** field of the Ribbon
2	Select **Action Groups**
3	Select the **Action Group** associated with the branch, and click **Next**
4	Validate an Action Group is displayed for the Technician's that are primary to the branch
5	Validate an Action Group is displayed for the Technician that is a shared resource. The Action Group will be listed under their primary Node.
6	Select the **Unallocated** tab
7	Select a Service Order, drag and drop it onto the schedule board for the Technician that is not primary to the branch
8	Select **Allocate**
9	Locate the Allocated Service Order on the schedule board, select it, and right click
10	Select **Assign**
11	Confirm the Service Order was dispatched and appears in the work list of your mobile device
12	Type in **Dispatch Console** in the **Find** field of the Ribbon
13	Select **Action Groups**
14	Select the **Action Group** associated with the primary branch of the Technician, and click **Next**
15	Verify that the Service Order is displayed on the Schedule Board

18. DISPLAY MULTIPLE TIME ZONES

1	Type in **Dispatch Console** in the **Find** field of the Ribbon
2	Select **Action Groups**
3	Select two **Action Groups**, one associated with the branch, and one in another time zone, and click **Next**
4	Right click on the Date toolbar on the Schedule Board and select **Show Customer and Local Timescale**
5	Select a service order from the **Unallocated** tab and confirm the times changes on the schedule board for the customer

19. VIEW ALERTED SERVICE ORDERS

1	Type in **Dispatch Console** in the **Find** field of the Ribbon
2	Select **Action Groups**
3	Select the **Action Group** associated with the branch, and click **Next**
4	Select the **Alerted** tab
5	To filter the types of alerts displayed, select the appropriate alert type from the **Current Alert** drop down

20. CREATE A NEW SERVICE ORDER FROM DISPATCH CONSOLE

1	Type in **Dispatch Console** in the **Find** field of the Ribbon
2	Select **Action Groups**
3	Select the **Action Group** associated with the branch, and click **Next**
4	Select the **Create New Service Order** icon
5	Complete the necessary Service Order fields as you normally would

21. ASSIGN AN SA TO 301 OR 302 BRANCH

The following process will be used to dispatch a Service Order to a Technician for branch 301 or 302. Only US and Canadian customers will be available in Astea for service order creation. All non-US and non-Canadian customers that require service should have the service request entered in SBN.

As current process, US or Canada service orders will appear in Astea, but cannot be sent to the Technicians mobile device, and instead should be scheduled from the Labor Activity within the service order. This will enable the service order to be displayed on the schedule board for the assigned Technician without having to create a private appointment.

1	Type in **Dispatch Console** in the **Find** field of the Ribbon
2	Select **Action Groups**
3	Select the **301 and 302** Action Groups, and click **Next** (you will notice there are no Technicians displayed)
4	Select the **Unallocated** tab
5	Open a service order by selecting the corresponding **Request ID** hyperlink
6	Select the **Activities** tab
7	Select the labor activity and select **Zoom**
8	Select the lookup button to the right of the **SA** field
9	Select the SA you wish the associate with or assign to this service order

10	A warning message is displayed that the selected SA is not assigned to this Node. Select **Yes**
11	Select **Apply**
12	To confirm the service order is displayed on the technician's schedule, type in **Dispatch Console** in the **Find** field of the Ribbon
13	Select **Action Groups**
14	Select the Action Group for the primary branch of the Technician that the service order was assigned.
15	Validate the service order displays on the schedule board for the Technician assigned at the date and time it was scheduled.
16	Validate the Action Group ID displays AG301 (or AG302) for the service order.

22. LOCATE A SERVICE ORDER FOR 301 OR 302 BRANCH TO UPDATE

The following process will be used to locate a Service Order for a Technician that was assigned an order for branch 301 or 302.

As current process, US or Canada service orders will appear in Astea, but will not be sent to the Technicians mobile device. A back office user will need to update the service order for the Technician.

1	Type in **Dispatch Console** in the **Find** field of the Ribbon
2	Select **Action Groups**
3	Select the **Primary Action Group for the Assigned Technician**, and click **Next**
4	Locate the Service Order on the schedule board, right click, and select **Quick Activity Update**
5	Follow the process outlined in **Update service order to reflect tech as en route, then on site** on page 50 and **Update service order to reflect tech resolved complete** on page 50.

VIEW ALARM LOG, ZONE, AND ACTION PLAN INFORMATION

1. NEW SERVICE ORDER

The following process will be used to view the SBN alarm log, zone list, and action plan information in Astea.

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select **New**
3	The Alarm Zones, Alarm Log, and Call List buttons appear greyed out on the New Service Order module tool bar
4	Enter **Customer Name** in **Customer** field

5	Select **Search** button
6	Select the Customer by Selecting the **Company (INS #)**
7	The Alarm Zones, Alarm Log, and Call List buttons appear active on the New Service Order module tool bar once the customer is selected
8	Select the **Zones** button to view the zones associated with the customer
9	Close the **Zone** screen by pressing the red X
10	Select the **Alarm Log** button to view the alarm log associated with the customer
11	Close the **Alarm Log** screen by pressing the red X
12	Select the **Action Plan** button to view the action plans associated with the customer
13	Select **Plan Details** to view the details of the selected action plan
14	Close the **Action Plan** screen by pressing the red X

2. **EXISTING SERVICE ORDER**

The following process will be used to view the SBN alarm log, zone list, and action plan information in Astea.

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Locate the Service Order in question
3	Select the Service Order by clicking on the **Request ID**
4	Select the **Zones** button to view the zones associated with the customer
5	Close the **Zone** screen by pressing the red X
6	Select the **Alarm Log** button to view the alarm log associated with the customer
7	Close the **Alarm Log** screen by pressing the red X
8	Select the **Action Plan** button to view the action plans associated with the customer
9	Select **Plan Details** to view the details of the selected action plan
10	Close the **Action Plan** screen by pressing the red X

OUTBOUND CALL INITIATION

1. **NEW SERVICE ORDER**

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Select **New**
3	Enter **Customer Name** in Customer field
4	Select **Search** button

5	Select the Customer by Selecting the **Company**
6	Select the **Phone** icon
7	Verify the phone number in the Windows Dialer
8	Verify the call is placed

2. EXISTING SERVICE ORDER

1	Type in **Service Order** in the **Find** field of the Ribbon
2	Locate the Service Order in question
3	Select the Service Order by clicking on the **Request ID**
4	Select the **Phone** icon
5	Verify the phone number in the Windows Dialer
6	Verify the call is placed