

## SouthWare Remote Service Tech Quick Reference - Technician

- **To Login and View Today's Service Orders**

Click on the appropriate link or bookmark as set up by your administrator(1) and enter your name/password. This will display your list of assigned service orders for today.

- **To List Other Service Orders**

On the List page you may click on "Next 7 Days" or "All Dates" to see your other open assignments.

- **To View a Service Order**

Click on the service order number or name to display the "View" screen. This shows info about the service call including any text and parts/labor already on the service order.

- You can access this screen at any time when working with a service order by clicking on the "View" link at the top of the page. Any info you have added will display on the page.

- **To Return to Your List of Service Orders**

Click on the "List" link at the top of the page.

- **To Add Parts/Labor/Text to the Current Service Order**

Click on the "Add" link at the top of the page. This provides three tabs for Parts, Labor, and Text:

- **Parts** - To add a part enter the part number and move to the next field. If a serial number is required the screen will ask for it. Enter the quantity used. Then click on "Add this Part" to submit the info. A message will indicate if the info is valid. You can then enter more parts as needed.
  - To Find a part number you may enter a partial number or key work and click the "Find" button. This will display a list of matching items. You can then click on the Item ID to return to the Parts screen with that item number already filled in.
- **Service** - To add service/labor you select the appropriate code from the list, enter the quantity, and click on "Add this Service" to submit the info.
- **Text** - To add text comments enter the text and click on "Add this Text".

- **To Review Customer/Equipment Info**

Click on the "Customer" link at the top of the page. This provides three tabs for review:

- **Summary** - This displays general info for the customer for the current service order and a list of current contracts in effect.
- **S/Os** - This allows you to access other service orders for the customer. Links include Last 7 Days, Last 30 Days, or all service orders since a date you enter. When you display a list of service orders you can then zoom to see the details recorded with the service work.
- **Equipment** - This allows you to review other equipment for the customer. You may list All Customer Equipment, Equipment on the Contract for this service order, and Equipment not on a Contract. If you use service tags you may also enter a service tag # to find. You can zoom to see details on any piece of equipment including the option to view past service calls for that item only.

- **To Review/Change the Equipment Item for a Service Order**

In the "View" page you may see the equipment assigned to the service call.

- Click on the equipment ID/description to review details of that item including past service calls.
- Click on the "Edit" link to change the item. This displays a page with a list of valid customer equipment for this customer. Chose an item and click on "Change Equipment on S/O" to submit the change. This changes the equipment for all parts/labor on the service order.

- **To Finish a Service Call**

After you have submitted all data click on the "Finish" link at the top of the page. Then select the status (default of "Finished"). You may also enter a Note if needed. Then click on "Update" to submit the change. You can then return to the List for the next service order (when you change the status the service order will no longer be on your list).

## **SouthWare Remote Service Tech Quick Reference - Manager or Office Operator**

- **To Make a Service Order Appear on Tech's List**  
Simply assign the technician and scheduled date to the service order and make sure the service order meets the status conditions specified for the Technician List (see Administrator Setup tab). The next time the tech displays his list the service order will appear.
  
- **To Review What Service Orders a Tech is Seeing**  
In the Administrator portal use the "Tech Simulator" tab to display the current list for each tech and see the same screens/data he sees on his unit.
  
- **To Remove a Service Order from a Tech List**  
To remove a service order from a Tech's list simply reassign the service order or change its status to one that is not displayed on the List. You should also e-mail or call the tech to make sure he is not already en route to that customer.