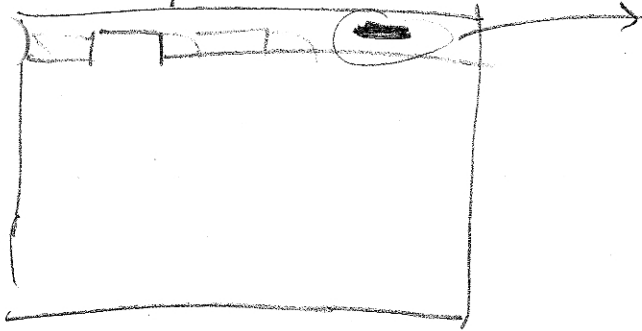


Create a Ticket - Customer doesn't exist

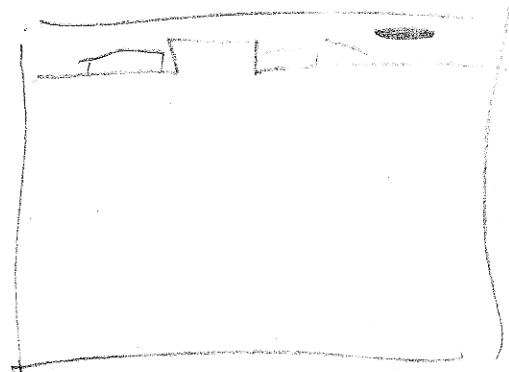
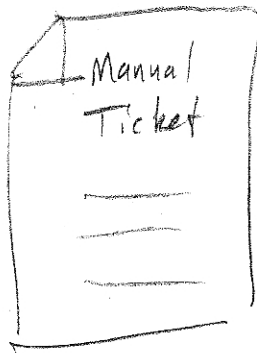
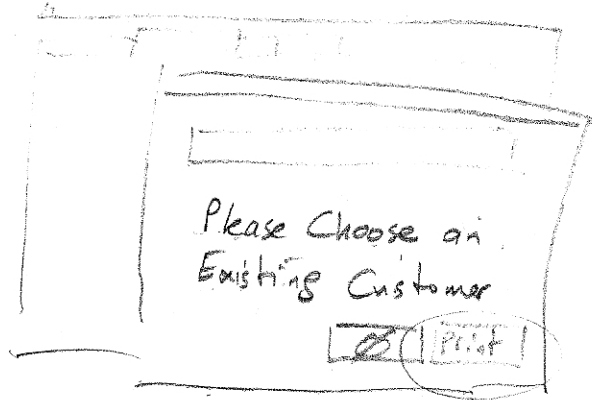
1

1. Any screen



Click 'New Ticket'

2. Select Customer



Return to original screen

Create a
Credit

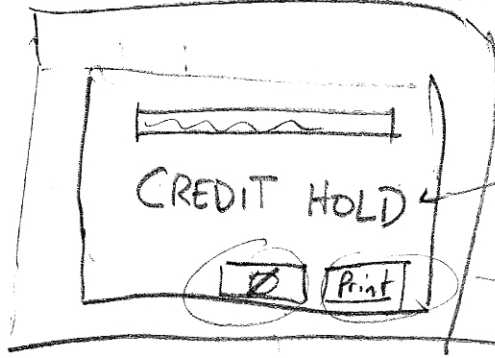
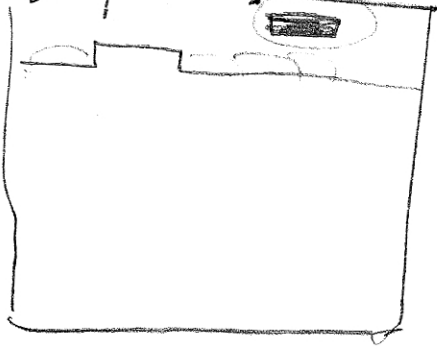
Ticket -

Hold or Prepay = 0

2. Select Customer

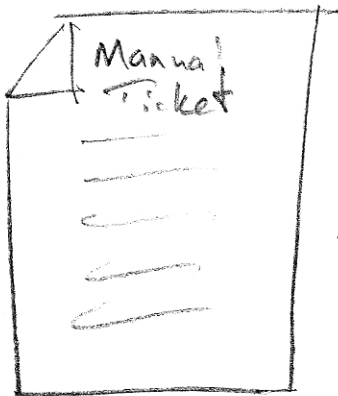
2

1. [Any Screen]

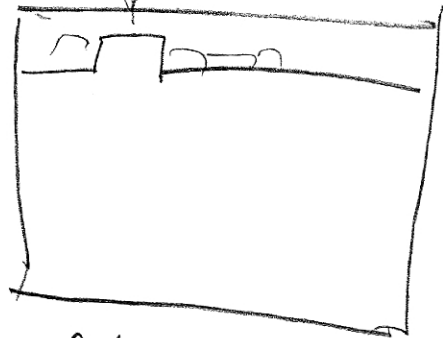


message
appears

from any screen,
click 'new ticket'



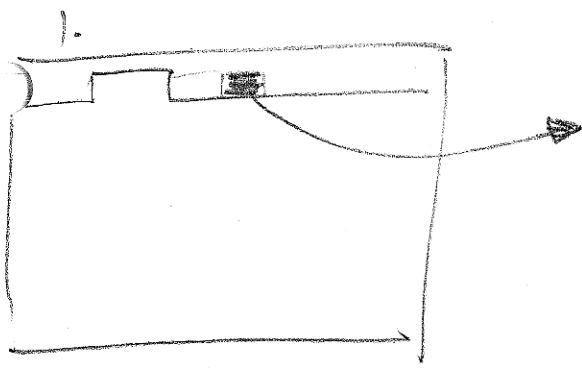
No Print Dialog,
immediate
delivery to
preferred printer



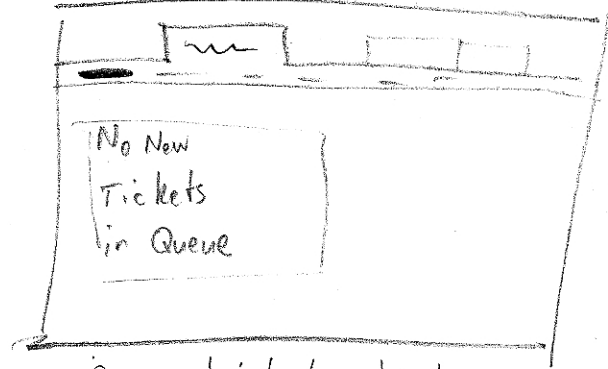
Return control to
original screen

Prepare Ticket for Dispatch (1)

2. No Tickets in Queue



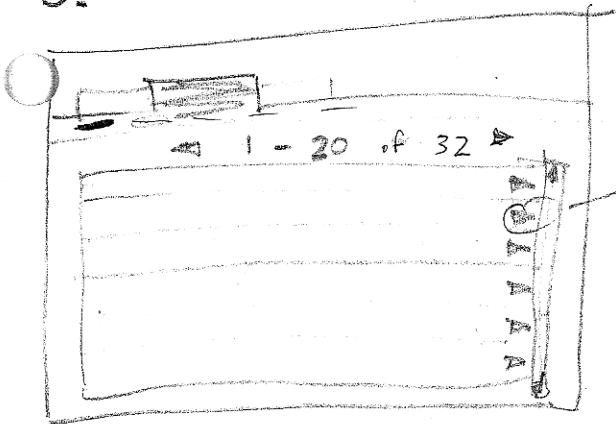
1. With the manager privilege, select "Ticket Queues" Tab



if no tickets display

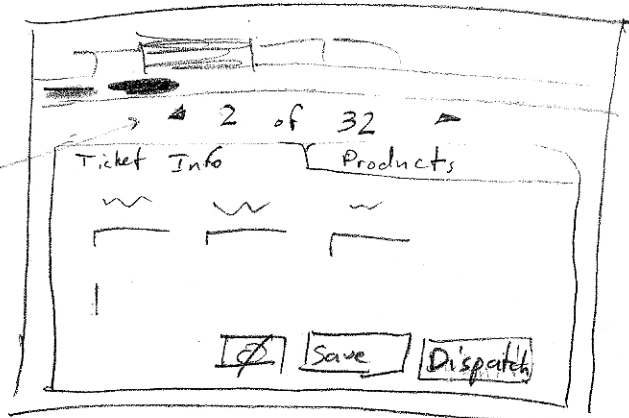
OR →

3. Review Queue / Select Ticket



1. Top item auto-selected
2. Click a row to select
3. Takes you to next tab

4. Review / Edit Ticket Problem



1. Review / Edit Problem Data
2. Review / Edit Manager's Dispatch Note
3. Option to enter solution note & Rate, skill, estimate
4. Option to choose a technician
5. Upon ~~Dispatch~~, Record drops from found set, record number drops by 1, & next record appears
6. Upon Save, record remains in found set
7. cancel reverts record to prior state

Prepare Ticket for Dispatch

(2)

5. Add Product to Ticket

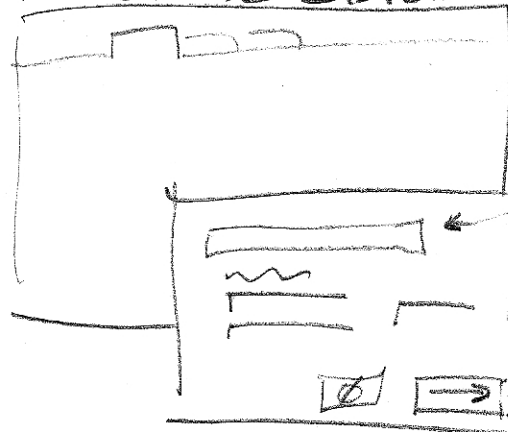
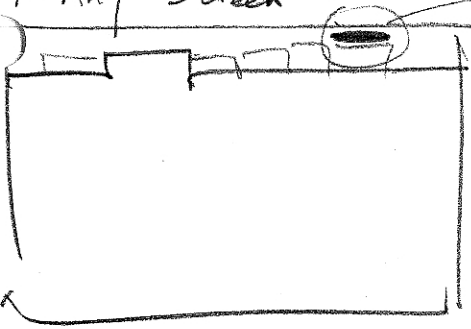
The sketch shows a window titled 'Products' with a header bar containing '2 of 32'. Below the header is a table with several rows. To the right of the table is a '+' button. Below the table are two buttons labeled 'save' and 'dispatch'. An arrow points from the '+' button to the 'dispatch' button.

Option to add Product

1. Select Product from drop down
2. Auto-sets order's status where needed
3. If in stock, select serial # from 2nd drop-down
4. option to edit / enter solution note, rate

Create Ticket - Customer Exits, No Credit Hold (single site) 2. Choose Customer (3)

1. Any Screen



Type Ahead

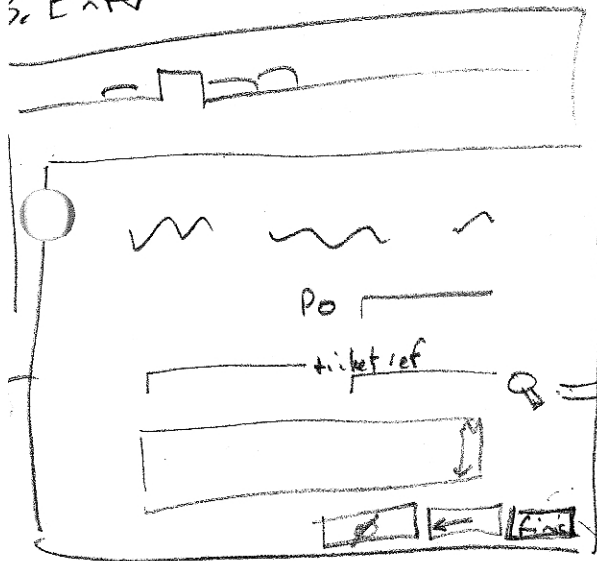
site info
appears
to confirm

1. Confirm customer (and site) info

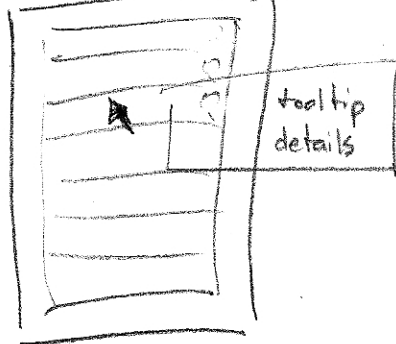
2. confirm contact data

3. ability to edit, replace, or add contact

3. Enter Ticket info



ticket history



tooltip
details

1. Enter Po if required
(“Finish” btn grayed if not right)

2. enter problem data

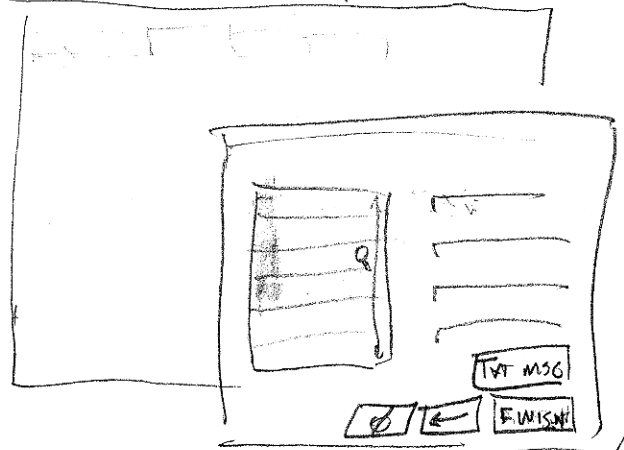
3. if related to prior ticket,
select from history

4 Email Option

5 click [Finish or next]

(button says next if critical,
goes to immediate dispatch)

4. Critical Dispatch



1. Choose Technician

2. Send Txt msg of problem

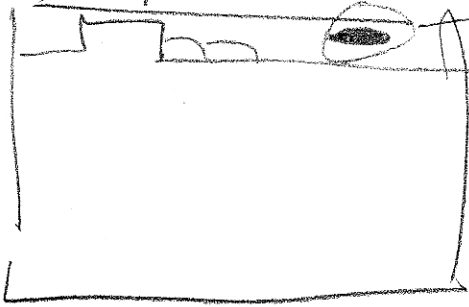
3. Finish → dismiss & return to orig screen

Create a Ticket -

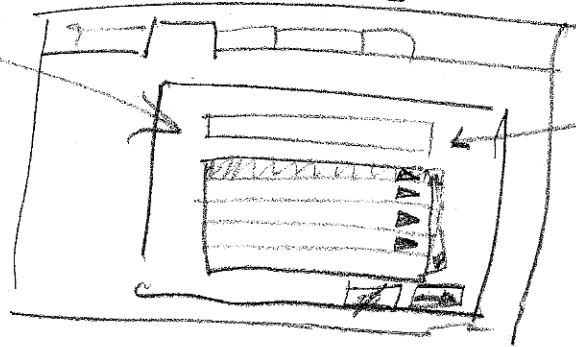
4

Customer Exists, Multi-site

Any Screen



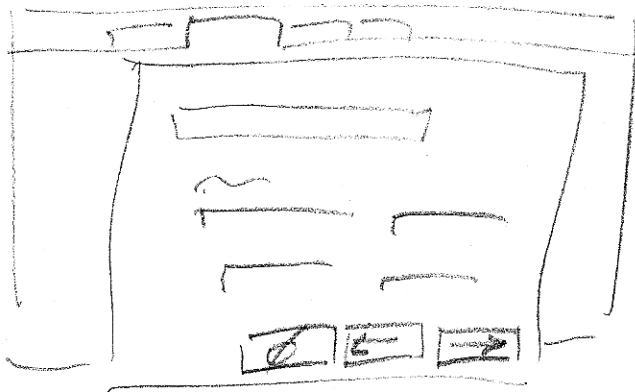
2. Choose Site



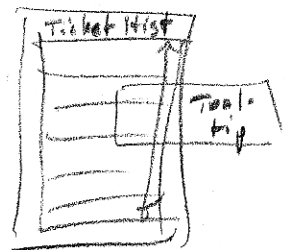
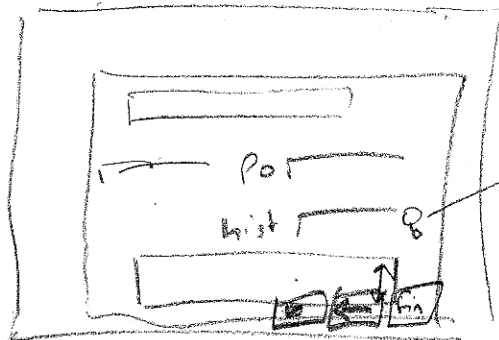
Type Ahead

- 1 Customer's sites appear;
- 2 top one selected;
- 3 Click arrow or enter to choose default
4. click a row to choose alternate site
5. Cancel returns to originating screen

3. Confirm Contact Data



4. enter ticket info



1. Confirm Customer (site) data

2. confirm contact data

3. a bility to edit, replace, or add content

1. Enter Po if required
(Finish btn grayed if not right)

2. enter ticket info

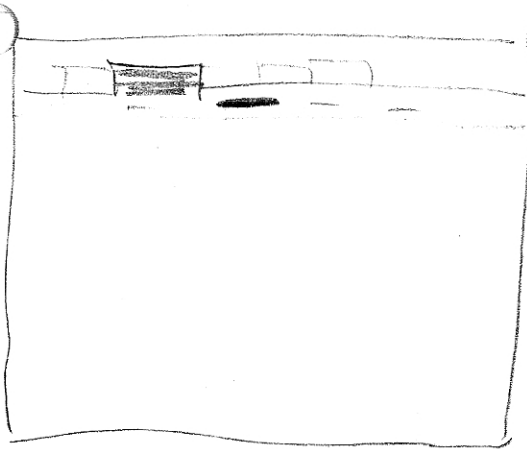
3. if related to prior ticket
select from history

4. email option

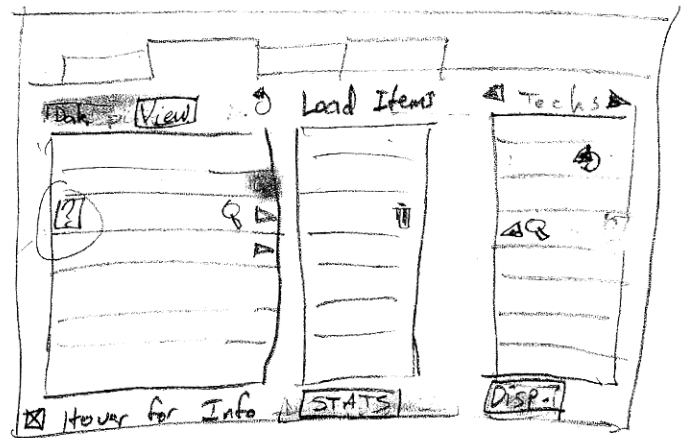
5. Click Finish

Daily Dispatch (Dispatch Multiple Tickets)

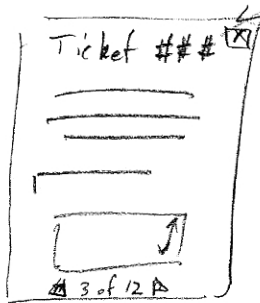
1. Select Ticket / Dispatch



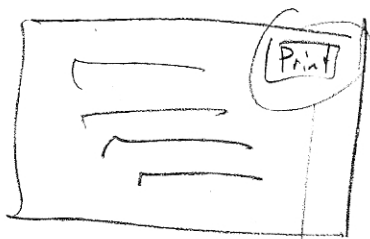
2.



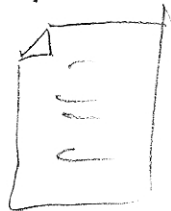
3. Popup
Ticket
Detail



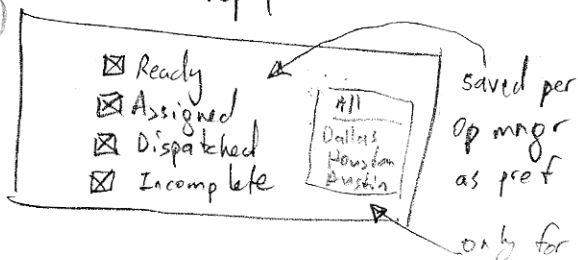
4. Stats Popup



no
print
dialog



5. View Prefs Popup



only for Rudy; others default to their own & don't display this

1. Set Date
2. Review Ready Tickets
3. View List of Techs (Active?)
4. If checked, hover = popup info window
5. [?] or click, load items show, +
move < arrows on opposite side appear
6. < or shift-click, item loads
7. [?] popup info window (or hover, if checked)
8. [Dispatch] - enter as load items, create PDFs of Time sheets, other paperwork, & email to techs.
9. [X] remove load items
10. [Stats] popup window for
11. for selected ticket, prior tech on related ticket shows [?] icon
12. Loaded tickets hilite green
13. [?] on tickets refreshes, dropping loaded tickets

Authorize Time Sheets

①

Time Sheets

Authorize All

☒ Authorized

Technician Updates Time Sheet & Tickets

(1)

www. .com

Tech
Login

www. .com

User
[]
password
[]

Edit/Review (Notes)

Date [] 2 of 8

Begin [] End [] Travel [] Site []

NOTES [] Product Return []

Edit/Review (Products)

Date [] 2 of 8

Begin [] End [] Travel [] Site []

Type [] []
Sub [] []
Prod [] []

Product Return
Returned []

1. Choose a Type, submit w/ &
2. Choose a SubType, submit w/ &
3. Choose a Product, move to list of returned items

Authorize Time Sheets

11

Date: 12/15/06 1 4 3 of 7 Daniel Frost
 [Authorize] [Print]
 Begin End Travel [checkbox]

Begin	End	Travel	[checkbox]

12/15/06 Daniel Frost
 1 of 4
 < side > < ticket > < title >
 Notes Product Return

1. Enter Date (refreshes automatically)
2. Click Arrow to navigate
3. Click [trash] to delete an entry
4. Click [plus] to add an entry
 - makes a new portal row
 - cursor in begin field
5. [magnifying glass] pops window w/ more room for details, + product
6. [red flag] flag if return products entered; click to pop-up

12/15/06 Daniel Frost
 1 of 4
 < side > < ticket >
 Type Subtype Product returned
 [play button]

1. Type + Subtype are type-aheads
2. [envelope icon] move to returned product list

Receive Customer-returned Equipment

①

Ticket NO. _____	
Product	Qty Returned

Close Tickets / Send to Invoicing

1.

The screenshot shows a web application interface. At the top, there's a header with navigation tabs: 'Completed Tickets', 'Billing', 'Timesheet', 'Product', and 'Return Prod'. The 'Completed Tickets' tab is active, showing a list of tickets with columns for 'Ticket no', 'Site', 'Tech', and 'Status'. A 'Status' dropdown menu is open, showing 'Send to Invoicing' as an option. To the right, there's a 'Billing' section with a table for 'Customer Billing Info' and a 'Return Prod' section. A red dot is visible on the 'Return Prod' tab. A note on the right side of the screenshot states: 'Red Dots indicate problem: unauth'd Time sheets, OR unreturned product'.

↓ This marks it for sending to QB that night

2. Timesheet Tab

Timesheet			
Tech	Date	Hrs	Auth
Daniel Frost			☒
Daniel Frost			☒

3. Product

Product	
Product	Price

1. ↗ = split (creates a duplicate record for OT)

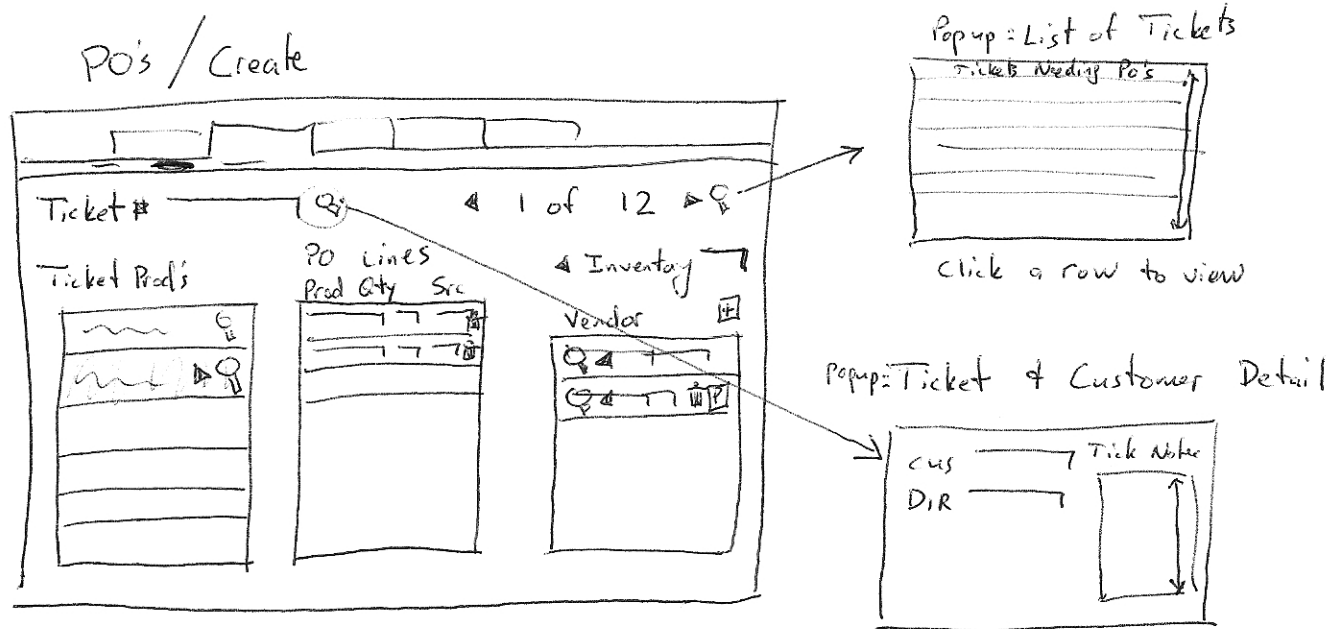
4

Returns	
Exp'd	Returned
2/1/15	7/1/15

Rows w/ unreturned product hilited red

Create PO for Ticket

①



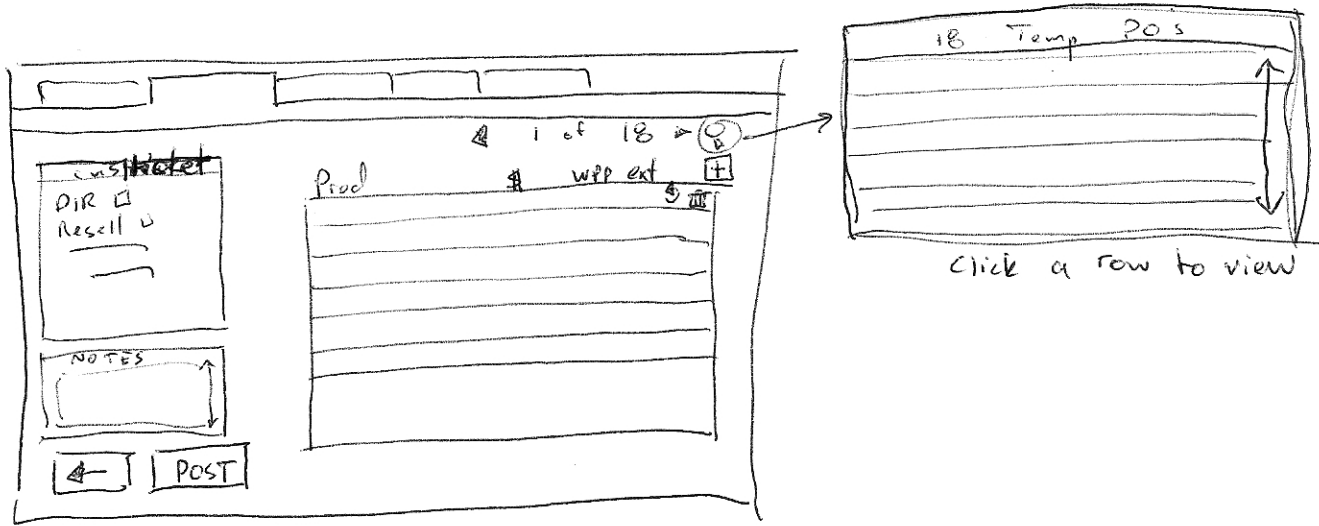
- Navigating to this screen the first time in a session causes a search for tickets needing PO's
- Starts on ticket 1 of found set
- at top left pops a window with ticket & customer details
- at top right pops a list window of ~~ticket~~ tickets in the found set needing PO's
- in ticket or vendor portal shows PO lines for that entity; or appears in the opposite portal, allowing entry of that item into the PO line window
- Inventory (above vendor portal) appears only when ~~a~~ a product line for a ticket is selected, & shows a count for that product in current inventory minus any prior temporary PO lines entered on this screen for other tickets
- Ticket product lines ~~are~~ highlight green when enough items have been allocated
- over vendor adds a new temporary PO header, then a vendor is chosen with a type-ahead list in the portal

Create PO for ticket

(2)

-  is a trash can, it deletes that item. Deleting a 'Vendor' really deletes the temporary PO header, not the vendor, and cascade deletes the PO lines associated with it.
-  Print the temp PO to see what the PO will look like.

Review Temporary PO's, make actual PO



- **Post** = sets as a real PO, + emails or prints per their preference
 - **←** puts this ~~tempary~~ temporary PO back to the ticket + deletes it.
 - ↻ swap for refurb
 - 🔍 popup window of list
 - 🗑 delete this line
 - + add a new line
- } Q = is this necessary on this screen?

Record Vendor Confirmation of PO

A hand-drawn sketch of a software interface. On the left, there are five input fields with labels: 'PO', 'Conf #', 'Conf Date', 'Vend:', and 'Ticket:'. Each label is followed by a horizontal line representing an input field. To the right of these fields is a table. The table has a header row with three columns: 'PO', 'Products', and 'Conf #'. Below the header, there are four rows of data. The first row has 'PO' in the first column, 'Products' in the second, and 'Conf #' in the third. The second row has 'PO' in the first column, 'Products' in the second, and 'Conf #' in the third. The third row has 'PO' in the first column, 'Products' in the second, and 'Conf #' in the third. The fourth row has 'PO' in the first column, 'Products' in the second, and 'Conf #' in the third. A vertical arrow points downwards on the right side of the table, indicating a scrollable list.

PO → Drop down, Type ahead
List of all unconfirmed PO's;
Can also type in any PO

Make Inquiries into PO's without Vendor Confirmation

Unconf'd PO's		
PO	Date	Vendor

PO Date

Vendor Phone

no. inquiries

message

ing history

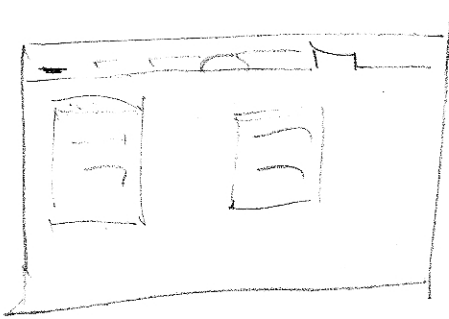
email

message	ing history
date msg	

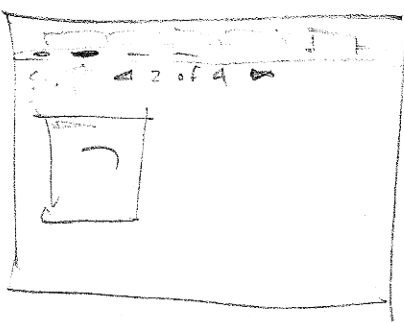
Enter Technician Vacation, Sick, Training Days

Tech	Begin	End
Daniel R	12/4/06	12/6/06

Edit Global Data



Office Locations



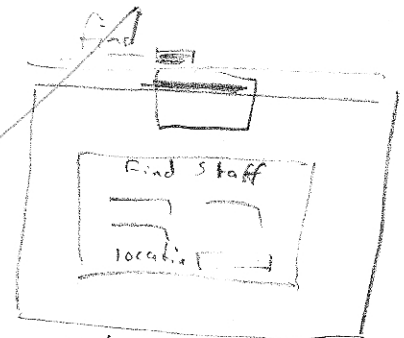
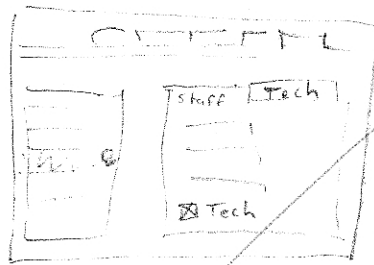
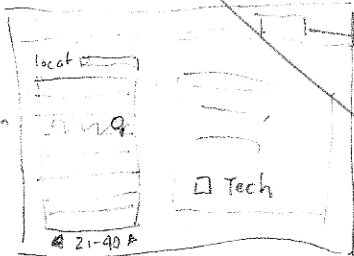
so few,
doesn't need
a list view
or find

Staff

not tech

tech

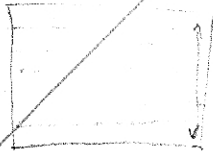
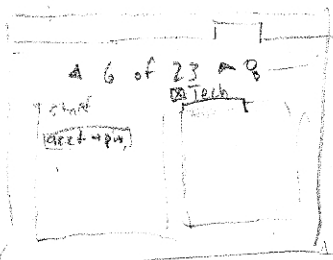
filters
to location
unless
admin;
if admin,
chooser
appears,
can
choose ALL



Find - pops a window
w/ criteria, filters
to logged in person's
location or current
chosen location if
admin

OR

pop up list



tech info appears if
tech is checked

add new +
sort via menu

account + password are
held in DB, but pop a
dialog w/ **** for pw.

Add / Edit Staff

NOT tech

Tech

location

Dan Frost

Details

☐ Technician

< 21 - 40 >

location

Dan Frost

staff Tech

☒ Technician

OR

< 6 of 23 >

☒ Technician

staff info

Tech info

account

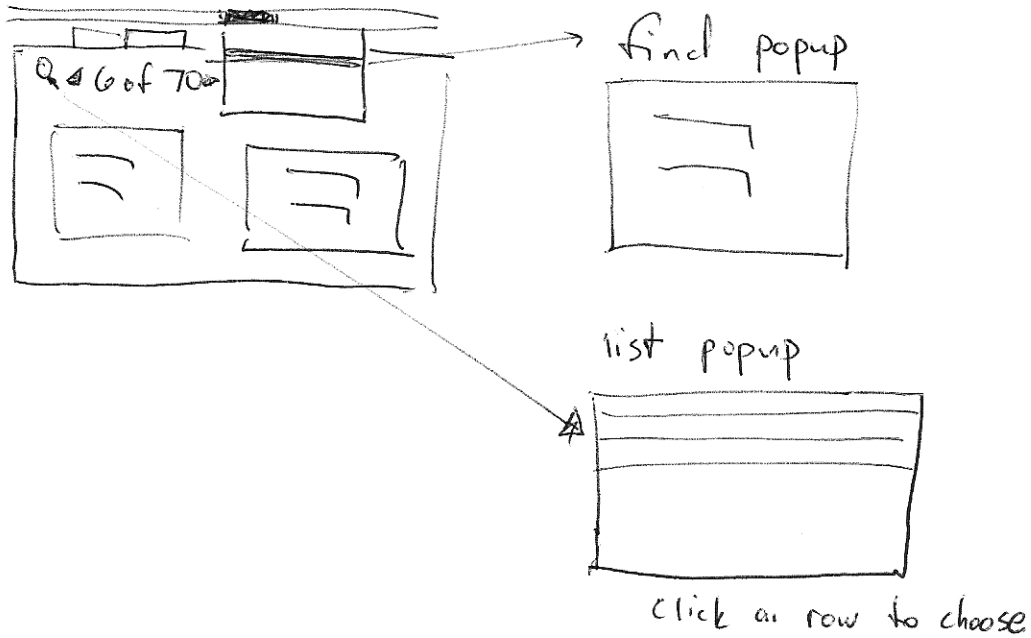
Popup window List

staff

click a Row
to choose

- Tech info appears if Technician is checked
- New, sort, delete via menubar options
- account & password are held in DB, but account pops a modal dialog w "....." for Password

Add / Edit Vendor



Add / Edit Product

