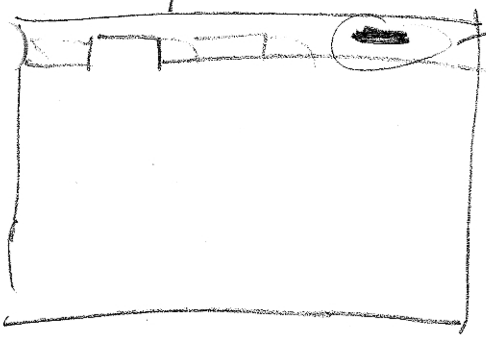
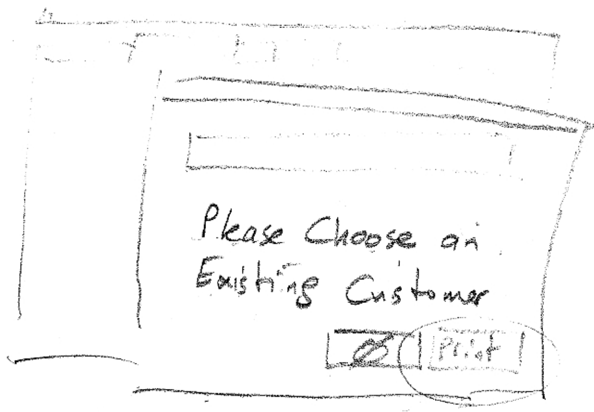
Create a Ticket - Customer doesn't exist

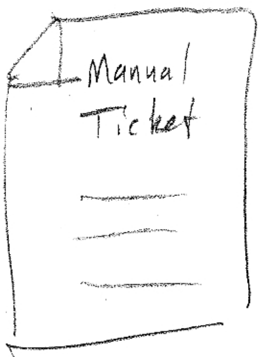
1. Any screen

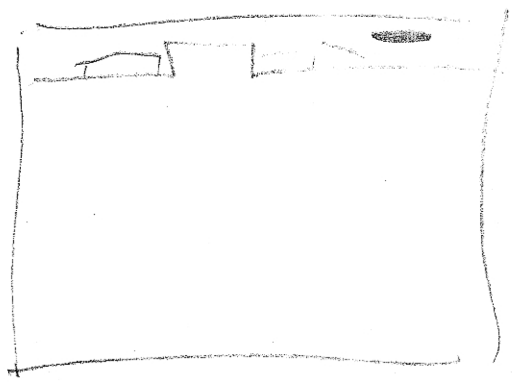


Click 'New Ticket'

2. Select Customer





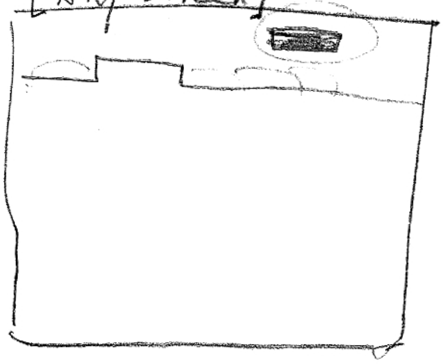


Return to original screen

Create a Ticket

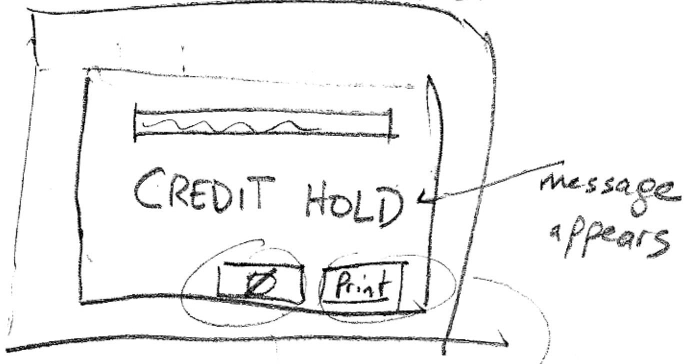
Credit Hold or Prepay = 0

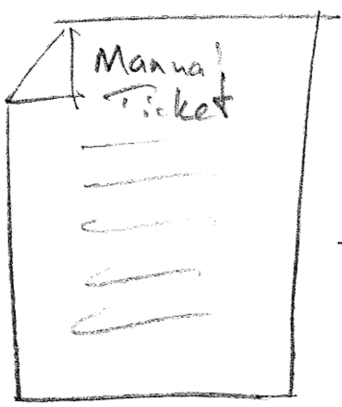
1. [Any Screen]



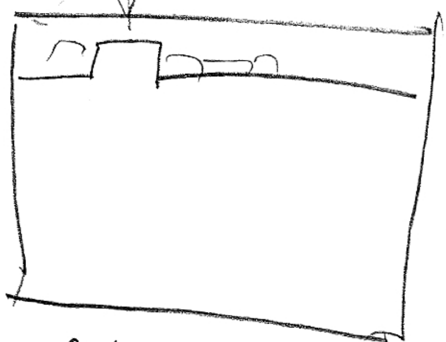
from any sreen, click 'new ticket'

2. Select Customer





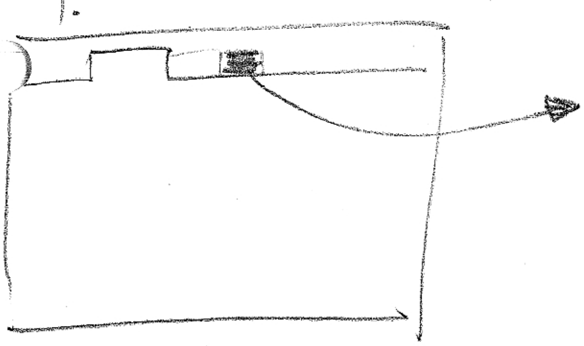
No Print Dialog, immediate delivery to prefered printer



Return control to original screen

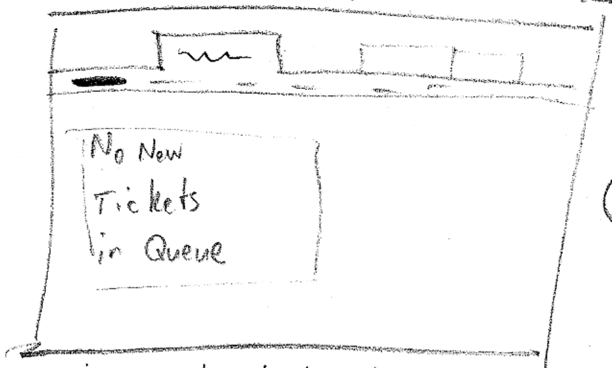
Prepare Ticket for Dispatch

1.



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

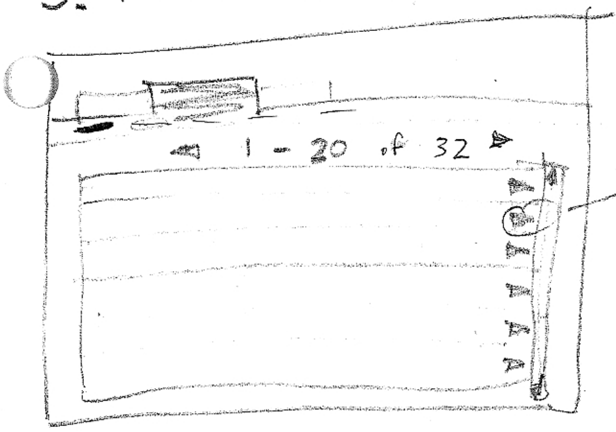
2. No Tickets in Queue



if no tickets display

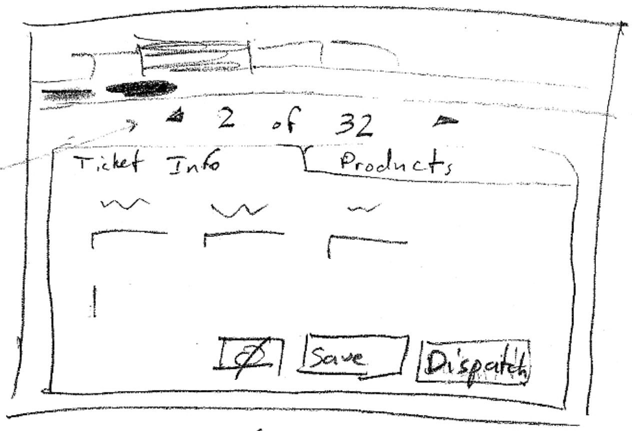
OR →

3. Review Queue / Select Ticket



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

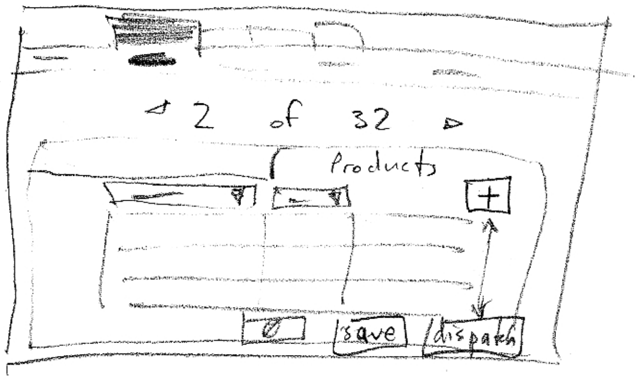
4. Review / Edit Ticket Problem



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 techician
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

5. Add Product to Ticket

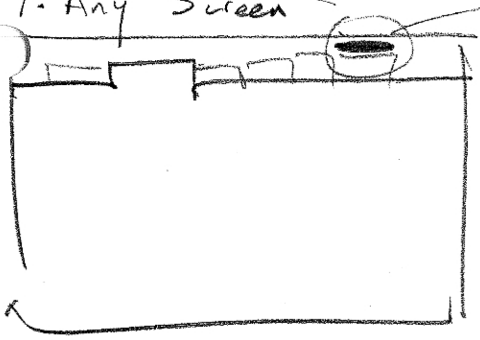


Option to add Product

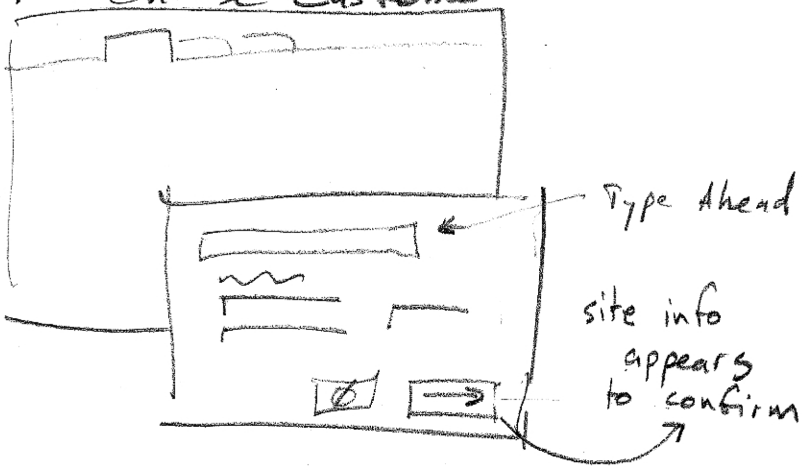
1. Select Product from drop down
2. Auto-sets order's status when needed
3. If in stock, select serial # from 2nd drop-down
4. option to edit / enter solution note, rate

Create Ticket - Customer Exists, No Credit Hold ③
(single site)

1. Any Screen

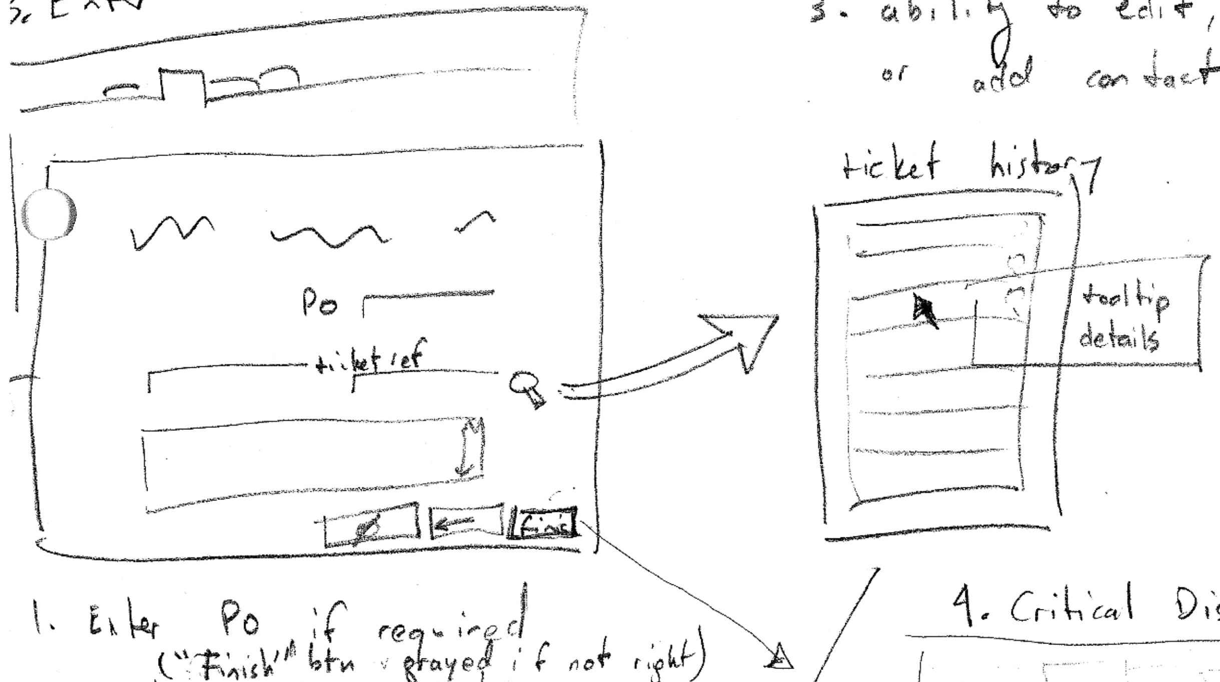


2. Choose Customer



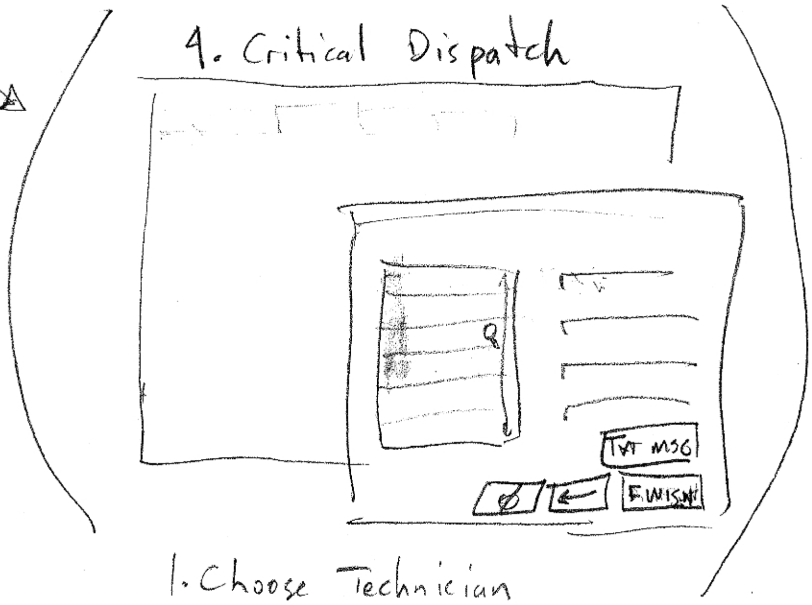
1. Confirm customer (and site) info
2. confirm contact data
3. ability to edit, replace, or add contact

3. Enter Ticket info



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)

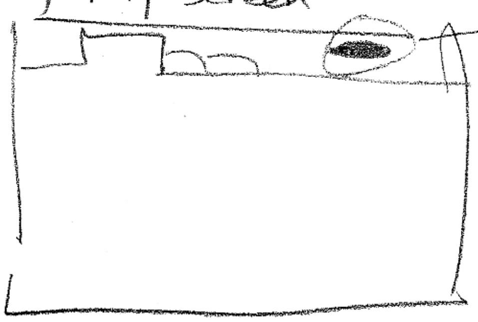
4. Critical Dispatch



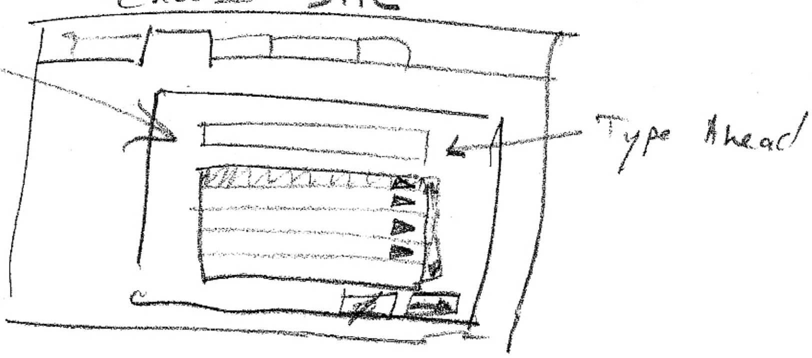
1. Choose Technician
2. Send Txt Msg of problem
3. Finish → dismiss + return to orig screen

Create a Ticket – Customer Exists, Multi-site

1) Any Screen

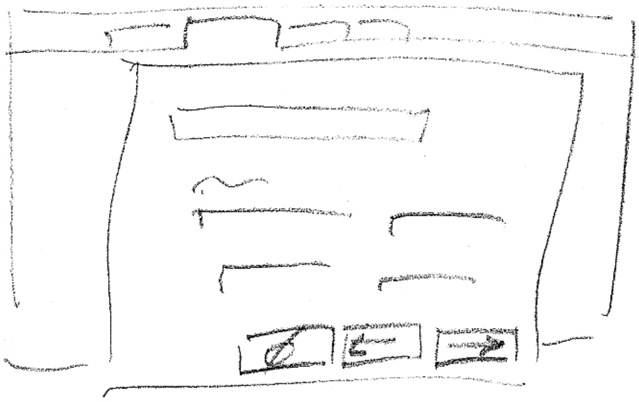


2. Choose Site



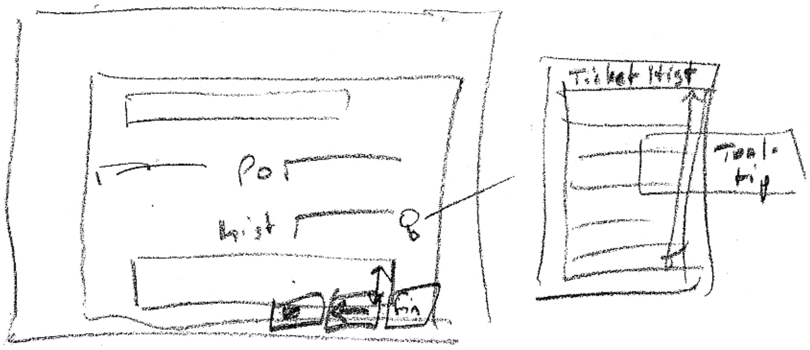
1 Customer's sites appear;
2 top one selected;
3 Click arrow or enter to choose default
4. click a row to choose alternate site
5. Cancel returns to originating screen

3. Confirm Contact Data



1. Confirm Customer (& site) data
2. confirm contact data
3. ability to edit, replace, or add ~~content~~ content

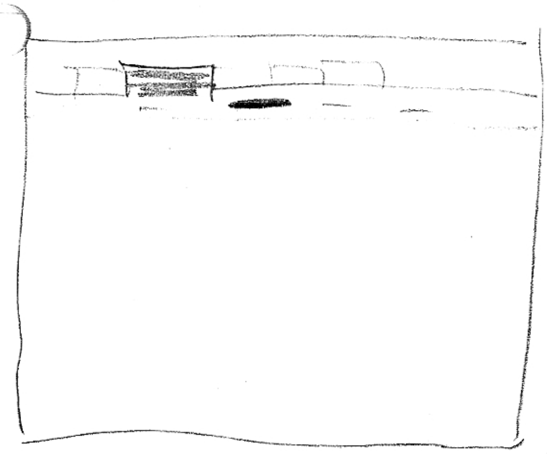
4. enter ticket info



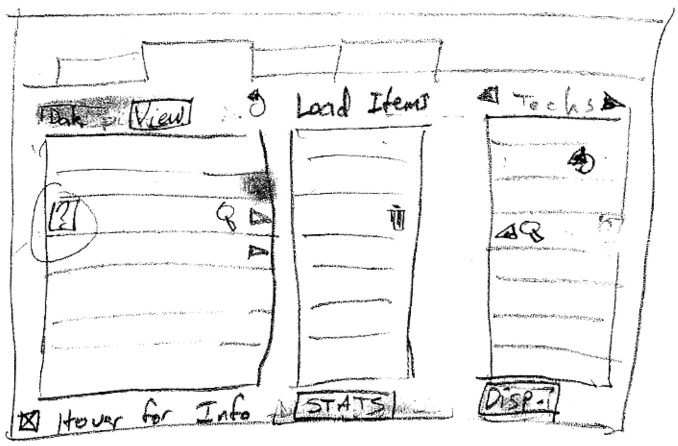
1. Enter PO if required (Finish btn grayed if not right)
2. enter ticket info
3. if related to prior ticket select from history
4. email option
5. Click Finish

Daily Dispatch (Dispatch Multiple Tickets)

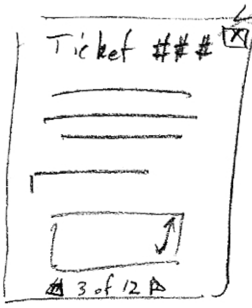
1. Select Ticket / Dispatch



2.

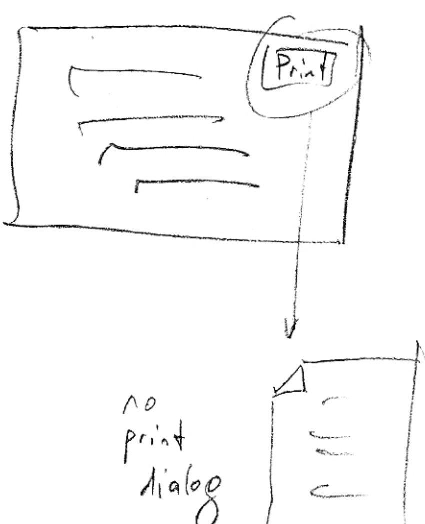


3. Popup Ticket Detail

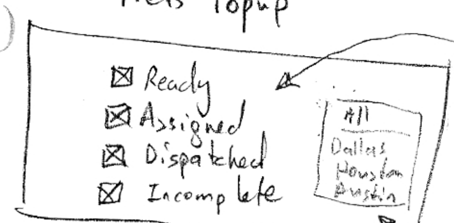


1. Set Date
2. Review Ready Tickets
3. View List of Techs (Active ?)
4. If checked, hover= popup info window
5. [ ] or click, load items show, + move ◁ arrows on opposite side appear
6. ◁ or shift-click, item loads
7. [?] popup info window (or hover, if checked)
8. [Dispatch] – enter as load items, create PDF'S of Time sheets, other paperwork, + email to techs.
9. 🗑 remove load item
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

4. Stats Popup



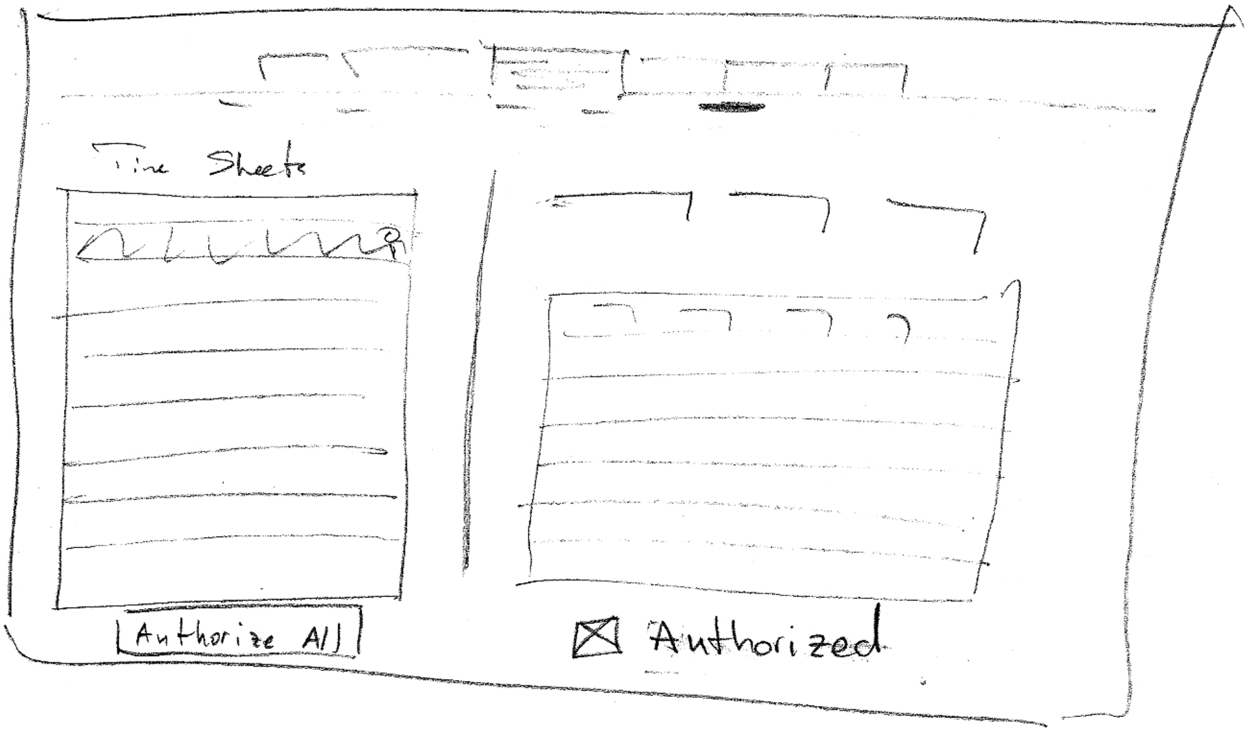
5. View Prefs Popup



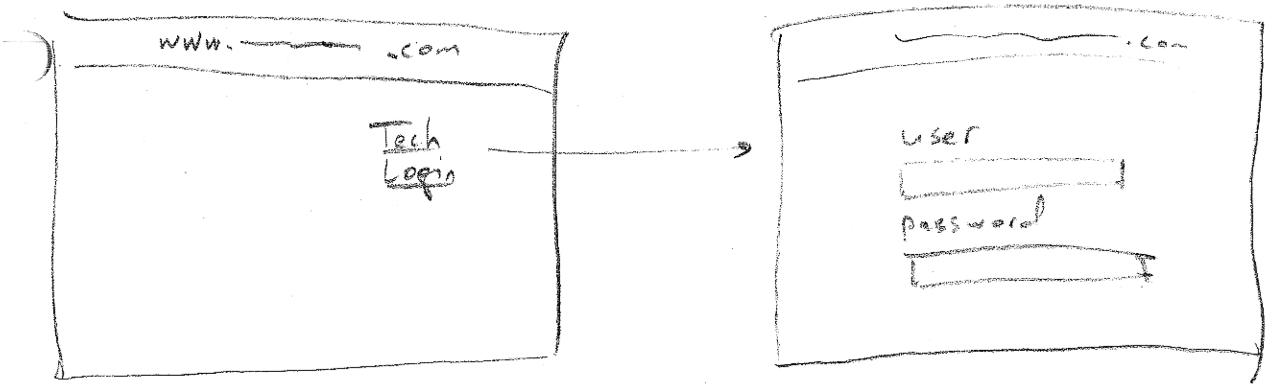
saved per Op mngr as pref

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

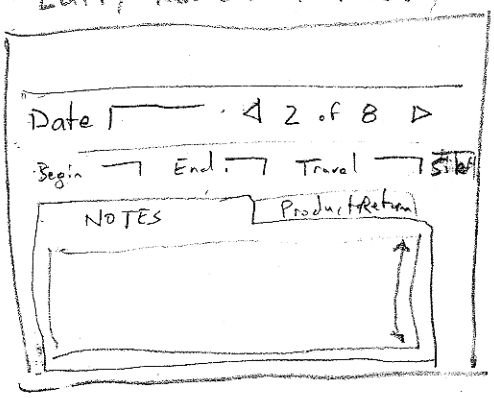
Authorize Time Sheets



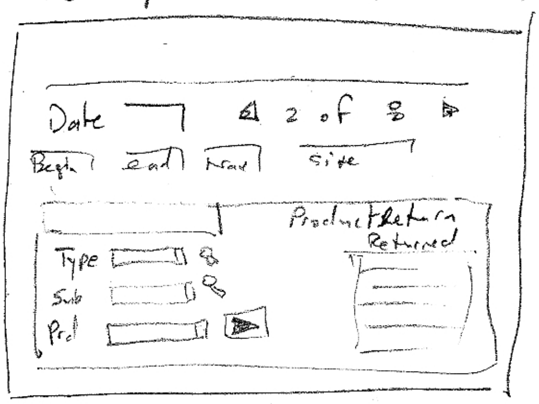
Technician Updates Time Sheet & Tickets



Edit / Review (Notes)

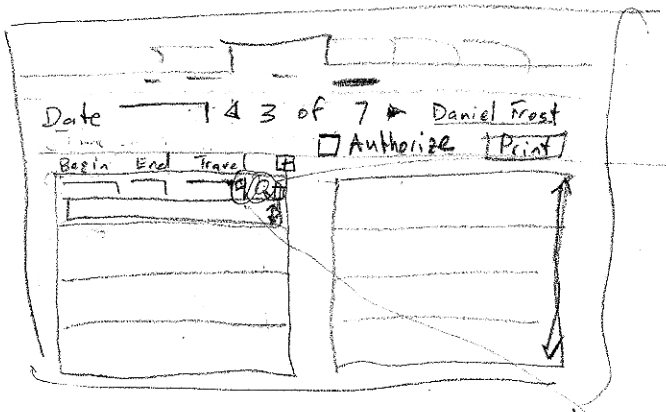


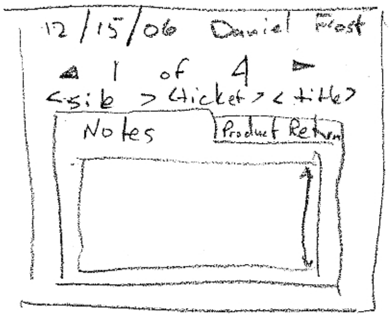
Edit / Review (Products)



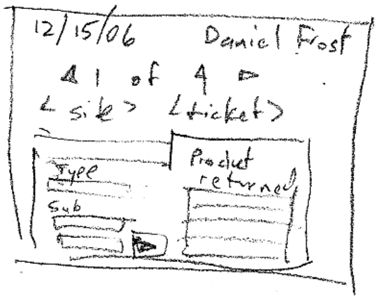
1. Choose a Type, submit w/ 🔍
2. Choose a SubType, submit w/ 🔍
3. Choose a Product, move to list of returned items

Authorize Time Sheets



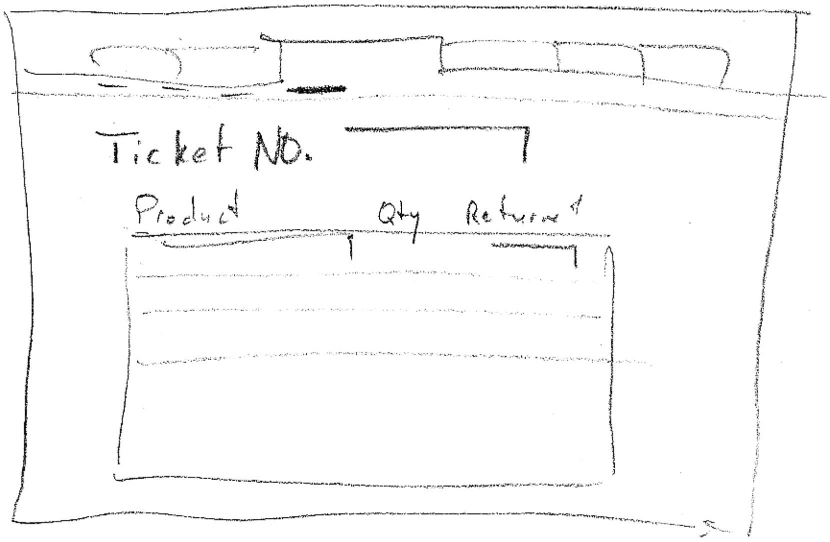


1. Enter Date (refreshes automatically)
2. Click Arrow to navigate
3. Click 🗑 to delete an entry
4. Click ⊞ to add an entry
   - makes a new portal row
   - cursor in begin field
5. 🔍 pops window w/ more room for details, + product
6. ⚑ red flag if return products entered; click to pop-up



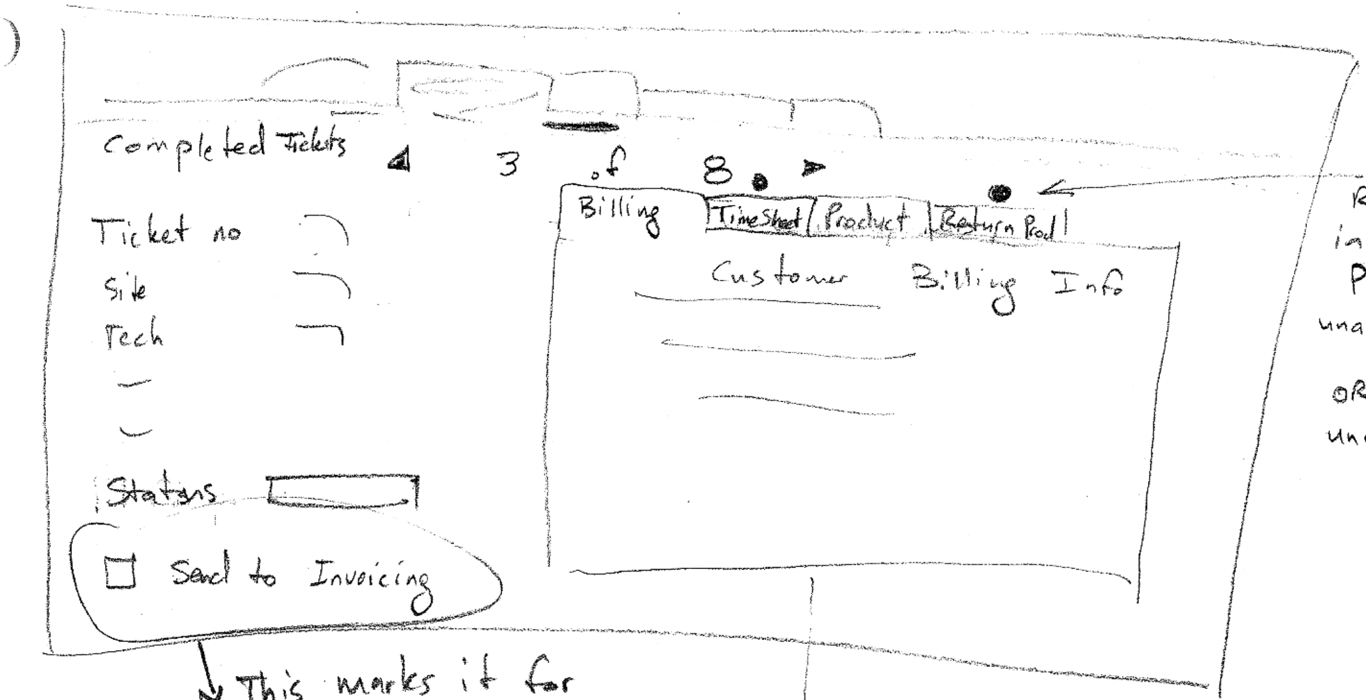
1. Type + Subtype are type-aheads
2. ▶ move to returned product list

Receive Customer-returned Equipment



Close Tickets / Send to Invoicing

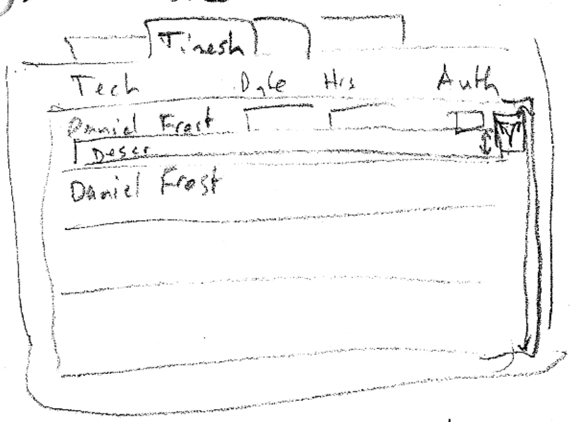
1.



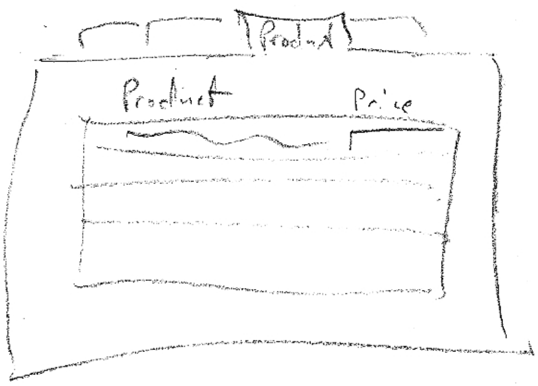
Red Dots indicate problem: unauth'd Time sheets, OR unreturned product

This marks it for sending to QB that night

2. Timesheet Tab

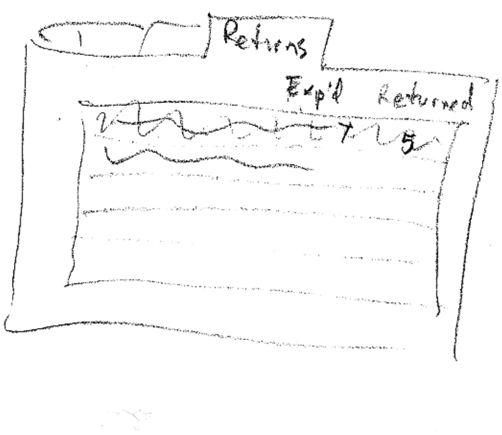


3. Product



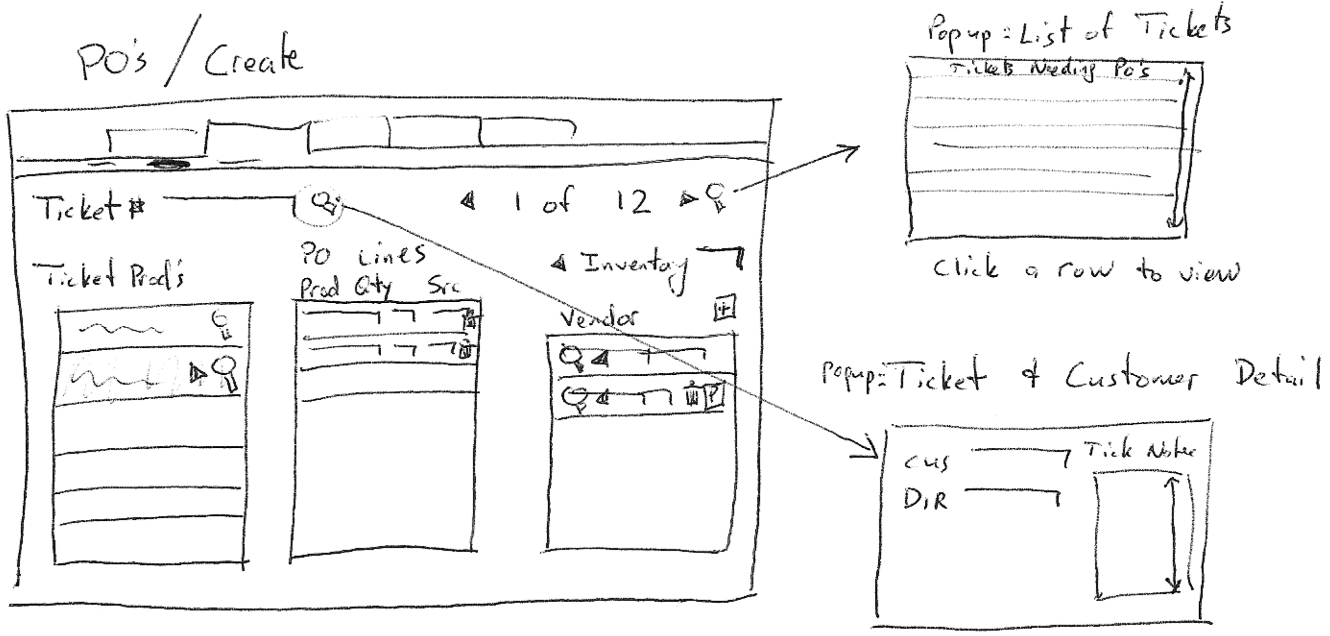
1. ↱ = split (creates a duplicate record for OT

4



Rows w/ unreturned Product hilited red

Create PO for Ticket



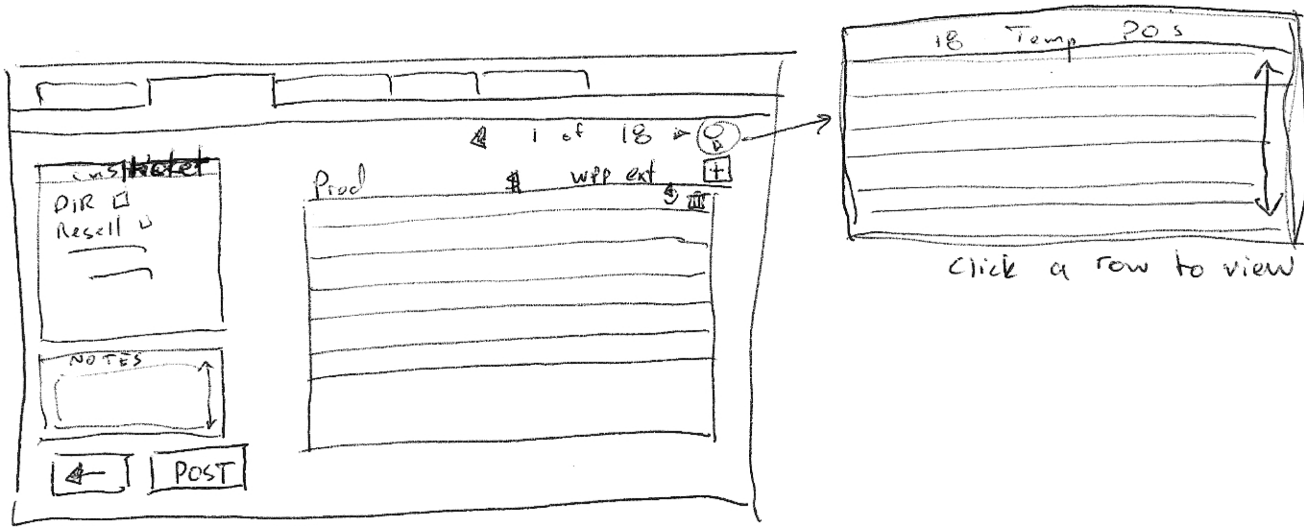
- Navigating to this screen the 1st time in a session causes a search for tickets needing PO's
- Starts on ticket 1 of found set
- 🔍 at top left pops a window with ticket & customer details
- 🔍 at top right pops a list window of ~~tickest~~ tickets in the found set needing PO's
- 🔍 in ticket or vendor 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 product line for a ticket is selected, & shows a count for that product in current inventory minus any prior tempory PO lines entered on this screen for other tickets
- Ticket product lines hilite 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

- 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.

- $\boxed{P}$ Print the temp PO to see what the PO will look like.

Review Temporary PO's, make actual PO

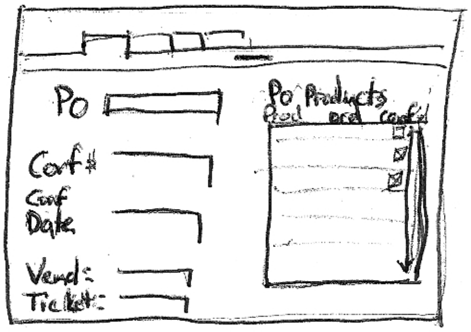


Click a row to view

- Post: sets as a real PO, & emails or prints per their preference
- ← Puts this ~~tempory~~ temporary PO back to the ticket & deletes it.
- ↻ swap for refurb
- popup window of list
- delete this line
- + add a new line

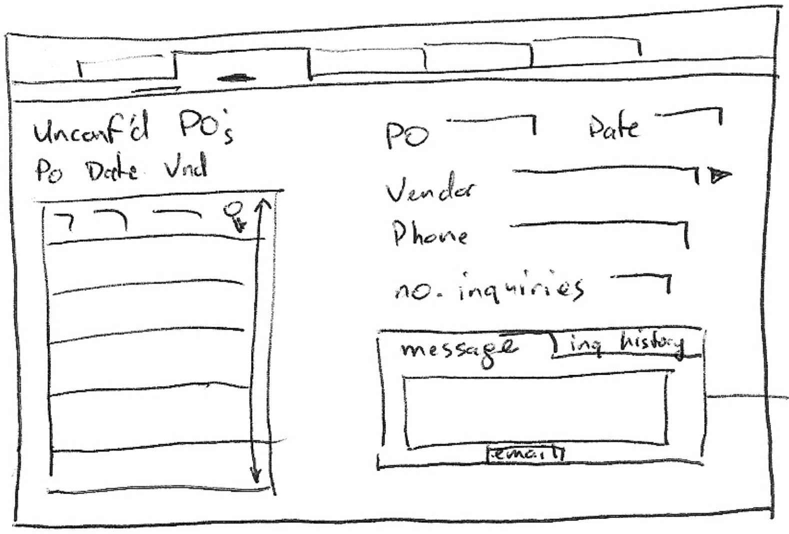
} Q: is this necessary on this screen?

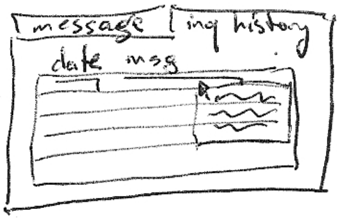
Record Vendor Confirmation of PO



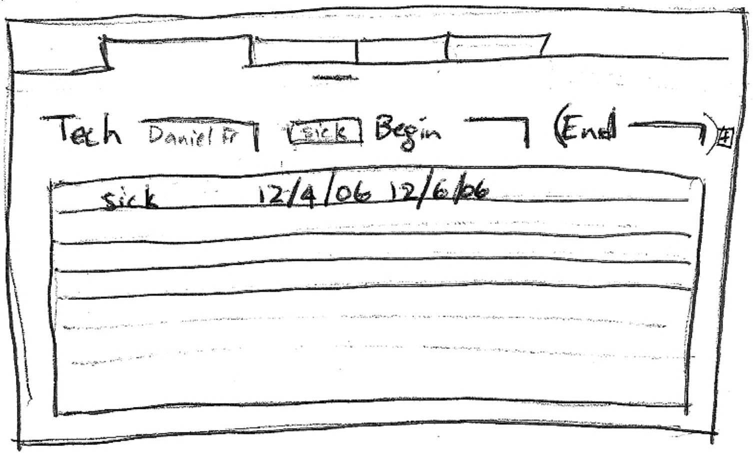
PO → Drop down, Type ahead
List of all unconfirmed PO's;
Can also type in any PO

Make Inquiries into PO's without Vendor Confirmation

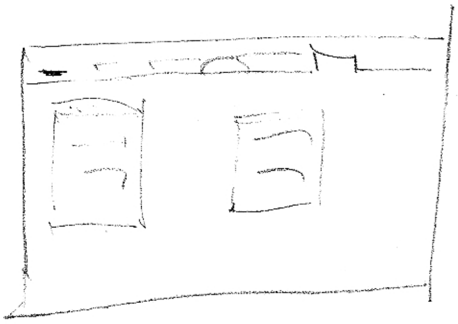




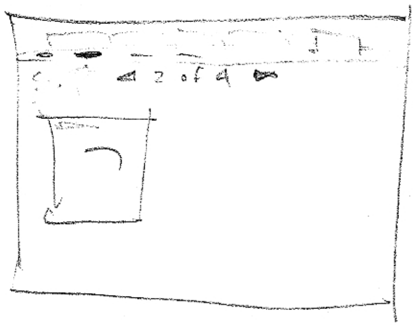
Enter Technician Vacation, Sick, Training Days



Edit Global Data



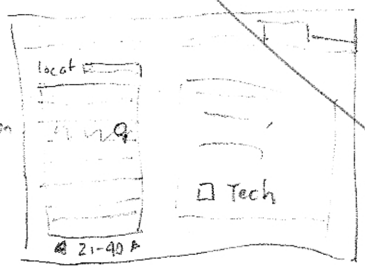
Office Locations



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

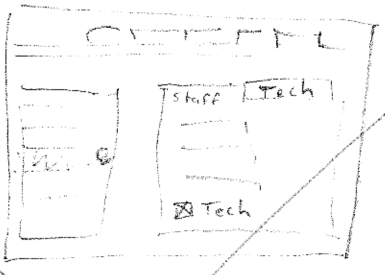
Staff

not tech

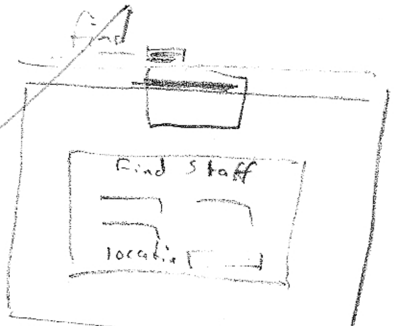


filters to location unless admin; if admin, chooser appears, can choose ALL

tech

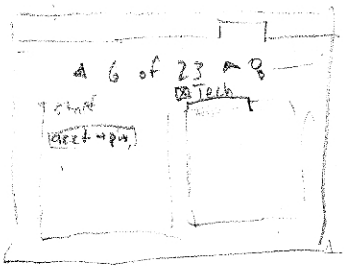


find

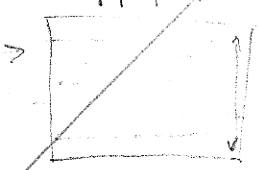


Find - pops a window w/ criteria, filters to logged in person's location or current chosen location if admin

OR



pop up list



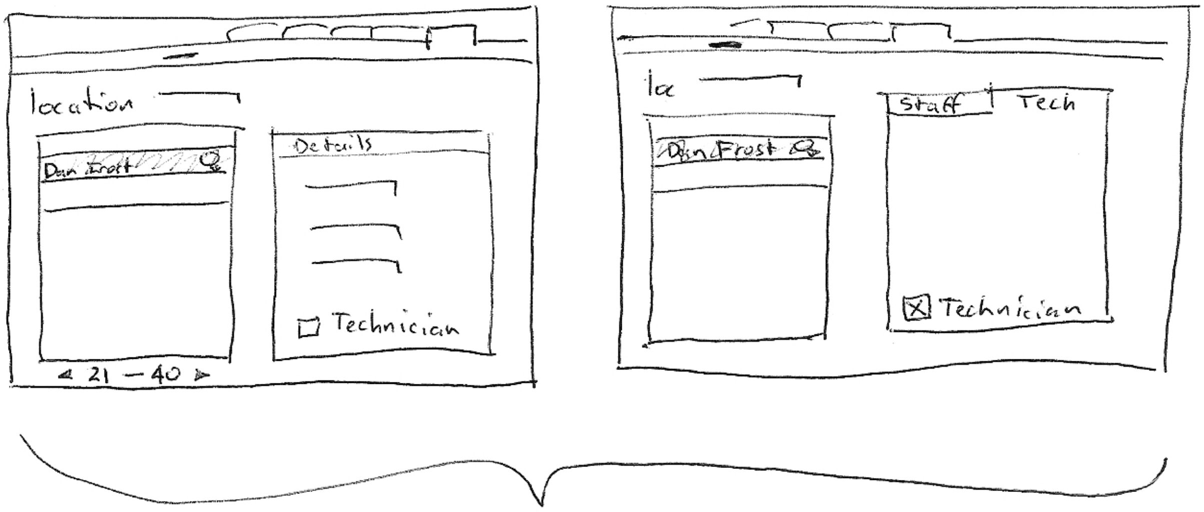
tech info appears if tech is checked

add new + sort via menu

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

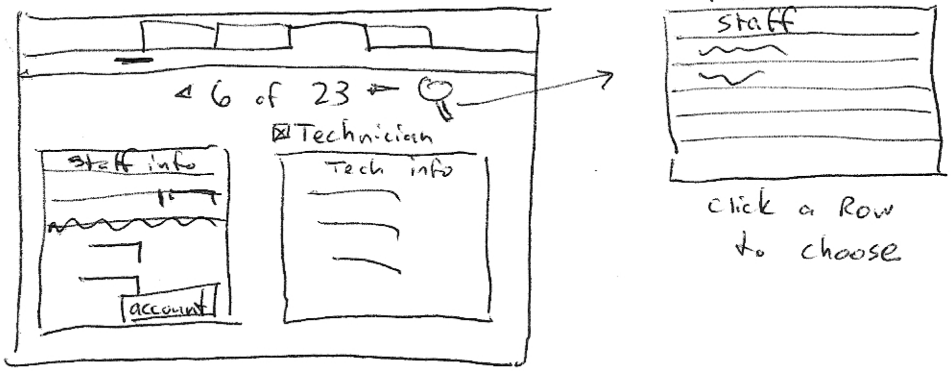
Add / Edit Staff

NOT tech   Tech



OR

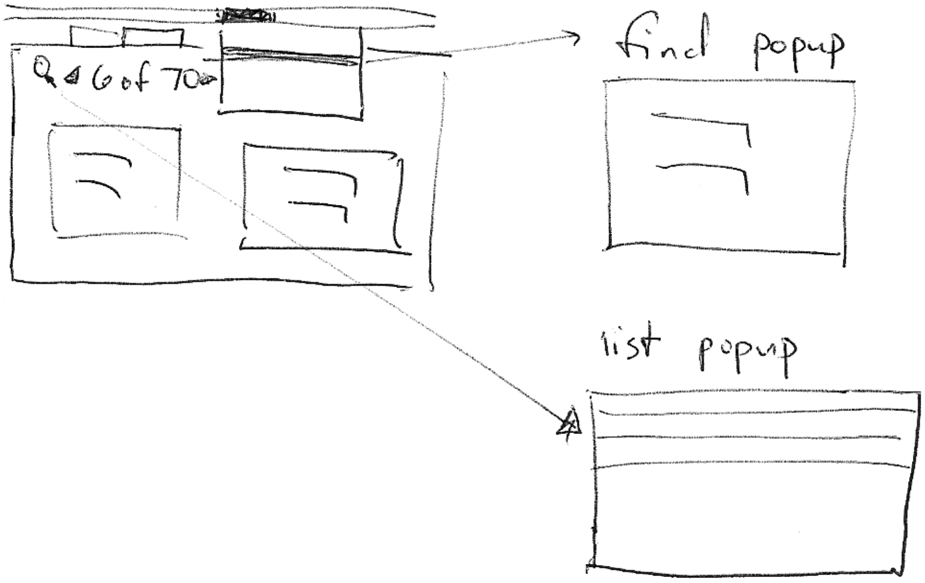
Popup window List



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



Click a row to choose

Add / Edit Product

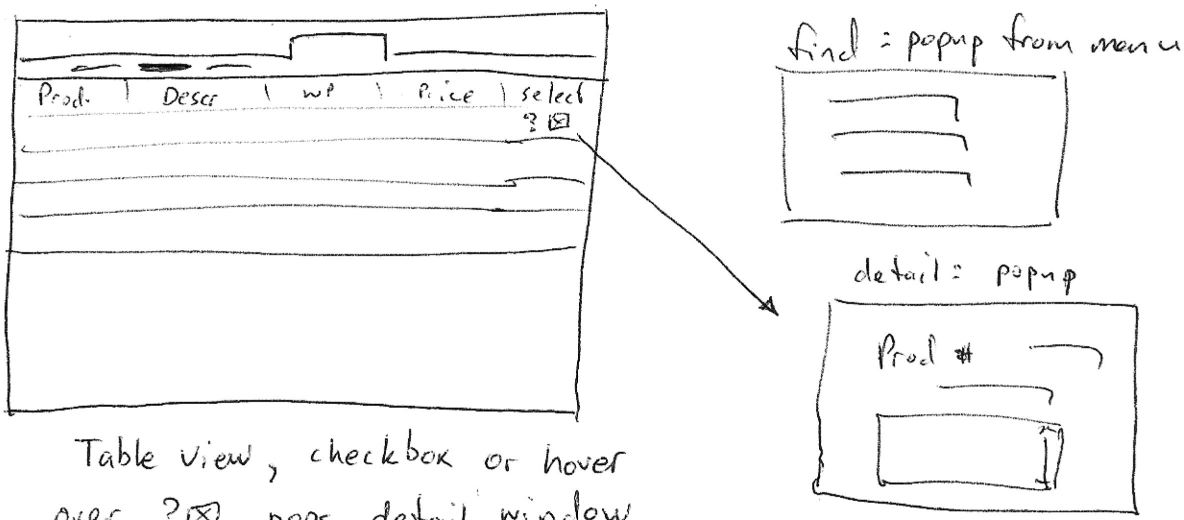


Table view, checkbox or hover over ?☒ pops detail window