

Mobile Tech Portal – Create S/O Line Items for Travel Time Tracking

When you use Tech Time Tracking in the Mobile Tech portal you have the option to automatically generate a service order line item for the travel time recorded by the technician. You may use this line item for billing, cost tracking, or both.

Activating Travel Line Items

This option is activated by the following options in the “Tech Tracking” tab of the Enter Service Order portal’s “SO Config” tab:

The screenshot shows a configuration window with the following options:

- Track multiple techs per S/O?**
- Create S/O Line Items for Travel?**
- Travel Service Code (To/From Time)** TRAVEL (Travel Time)
- Skip Travel Lines on Invoice?**
- Tracking Code for Travel** Travel

Below these options is a section labeled "Time Tracking Codes" with a table.

Create S/O Line Items for Travel?

Check this box to have the tech portal automatically create service order line items to track the technician time spent traveling. Each time a tech accesses a service order and clicks on the Start or Resume button the portal will display a window to confirm the travel time. Confirmation generates a service order line item to reflect the actual time spent traveling (via a Time Entry type service code). In the next field you must specify the service code to use.

-Travel Service Code

Here you may select the service code to use for Travel time line items generated. The drop down list shows only service codes that have the Units Entry Method of “T” for Time entry (From/To). The service code setup determines any pricing/costing for the service order line item. For example, if you are using this feature only to track cost you should set up a service code with:

- No price
- Time entry type
- Cost based on Tech

- Skip Travel Lines on Invoice?

Check this box to have the generated travel line items flagged to skip printing on the invoice. This will set the “Skip on Invoice” flag in the service order line to “S” for Skip (the flag can be viewed in field 13 “Other Info” on the line item screen in SV-01-01-03).

Tracking Code for Travel

The default code for travel time is “Travel”. You may use a different code if desired as long as it exists as a Time Tracking option. If you change this code after you start recording tracking info then previous travel time will have the old code and subsequent travel will get the new code.

In the Mobile Tech Portal

When you access a service order in the mobile tech portal and press the Start or Resume button the page will display the following window if this feature is activated:

Confirm Travel Time

Tracking Code Travel

Service Code TRAVEL

Confirm the travel time to this service order:

11/17/17 0814 to 11/17/17 830 CST

Travel Hours .27

Continue

Travel Hours

Confirm or enter the travel time to be recorded for this service order:

- The start time defaults to the time of the most recent time tracking record entered today for the technician. If there is no default you must specify the start time for travel.
- The end time defaults to current system time, and the computed hours is the difference between these times.

When you Press Continue

1. The page generates a travel line item on the service order using the info from the configuration options.
2. If you (the technician) properly recorded a Travel time tracking record before accessing this service order (i.e. the most recent Time Tracking was travel) then no additional Time Tracking records are needed. If you forgot or did not enter a travel time tracking record then the page will create a travel time tracking record for the primary technician on the service order so that Time Tracking will be accurate.
3. The travel confirmation window is closed so you may continue editing the service order.