

# Technician Installer Portal

The purpose of this portal/app is to provide a simple way for technicians doing installation work to use a phone (or tablet) browser to:

- View scheduled install work
- See what items are to be installed
- Record when they start/stop work on a service order
- Capture a customer signature
- Update finish status for a service order (including entering notes if needed)

This portal is a subset of the SouthWare Mobile Tech portal and doesn't allow any data entry except for signature and finish status/notes. It is designed to be easily usable on the smaller screen of a phone.




Mobile Tech Feature Comparison		
Feature	Mobile Tech Portal	Tech Installer
Designed for use on phone browser		✓
View list of assigned service orders	✓	✓
View header/address info for service order	✓	✓
View line items on service order	✓	✓
Specify stop/start time for service work	✓	✓
Capture customer signature	✓	✓
Update finish status for service order (with notes)	✓	✓
Capture Tech GPS Position (optional)	✓	✓
Add line items for parts and labor	✓	
Add/Change equipment	✓	
View equipment and service order history	✓	
View customer info	✓	
Accept payment and enter miscellaneous charges	✓	
Enter Text	✓	
Review/add notes and extended data	✓	
View Summary and E-Mail Summary of service work	✓	
Today's Map	✓	
Review/Enter Time Tracking Info	✓	

## Access and Use

### To Access the Portal

The Technician Installer portal is packaged within the NetLink request of "MTTECHINSTALLER". When the technician calls this request it will ask for login info. It will then display today's service orders assigned to the tech.

### SO List

S/O List - Bill (3)		
	SERVICE ORDER#	SCHED DATE
	00100007473	03/30/17
	00100005115	03/30/17
	00100007480	03/30/17

Total Records: 3

SO Tab

S/O List - Bill (3)		S/O#: 00100005115	
SO	Lines	Sign	Finish
<a href="#">Refresh Page</a>			
<b>Scheduled</b>	03/30/17	4:30P	(Estimate: 0 hrs 30 min)
	<input type="button" value="Resume"/>		
<b>Customer</b>	<b>Betty Hines (#4)</b> 7243 Cotton Street		
	Highland , AL 89778		
<b>Contact</b>	Betty Hines 205-776-2342		
<b>Contract#</b>	4		
<b>PO</b>			
<b>Tech</b>	Bill		
<b>Equipment</b>	C1190 1		
<b>Problem</b>	PM Preventive Maintenance		
<b>Phone</b>	205-776-2342		
<b>Comments</b>	<div style="border: 1px solid gray; padding: 5px;">                     Credit S/O# 00100000052                 </div>		

When the tech selects a service order the service order tab will display.

Lines Tab

S/O List - Bill (3)		S/O#: 00100005115	
SO	Lines	Sign	Finish
ITEM NUMBER	QTY	U/M	DE
100	1.000	EA	
100-TAN	1.000	EA	
100-BLUE	1.000	EA	
100	1.000	EA	
100-TAN	1.000	EA	
100-BLUE	1.000	EA	

Line #	80	Qty	1.000 EA
Item	100-BLUE	-B/O	.000 EA
747 Swingline Desk Stapler		Price	21.95000 EA
7 1/4" long			
Color: Blue			

The Lines tab shows the service order line items for the installation. When you highlight a line some additional info for the line item is displayed below the list.

Sign Tab

S/O List - Bill (3)		S/O#: 00100005115		
SO	Lines	Sign	Finish	

[Refresh Page](#)



I acknowledge that this work was done:  
*Type your name*

*Draw your signature* [Clear](#)

**Submit Signature**

The Sign Tab provides for capturing the signature of the customer. After saving the signature you will see the captured signature and have the option to recapture if necessary.

## Finish Tab

S/O List - Bill (3)		S/O#: 00100005115			
SO	Lines	Sign	Finish		
<b>Note:</b>					
<div style="border: 1px solid #ccc; height: 80px;"></div>					
<input type="checkbox"/> Note should automatically display for billing/dispatch oper					
<div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0; background-color: #e6f2ff; text-align: center;"> <b>Finished</b></div>					
<div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0; background-color: #e6f2ff; text-align: center;"> <b>Not Complete</b></div>					

The Finish Tab allows the tech to mark the service order as complete OR indicate that the work was not completed. It also allows the tech to record a note about the service order and optionally have this be a warning note others who view the service order.

If the tech marks the service order as not completed he has the option of leaving the service order on his list for later access.

## Technical Notes

- New Install container of mttechinstaller – creates layout and tabs
  - SO List
  - SO #
- SO List – uses standard mttechsolist, but called with install\_mode=Y
- SO Header View – new page mttechinstso (copied subset of mttechsomain)
  - Includes tabs for SO #
    - SO
    - Lines
    - Sign
    - Finish
  - Includes line items as part of initial load (not separate page)
    - Uses new RM format MTSOINSL
    - Shows more details for a line via the mttechinstsolin request
  - With option to Start
- Signature screen – uses standard mttechsosign
  - Confirm screen mttechsosignvw modified to show buttons that will fit on phone screen
- Finish button – uses standard mttechsofinish, but called with install\_mode=Y to rearrange screen to fit on phone