Account Manager Cheat Sheet
Is this work order complete and accurate?

Spectrum

Contact Information

Work order contact note

Double check that site contact is correct with priority and description

Who is the first call?

Site setup needed - Send form to PA

Customer setup needed - Send form to PA

Work Summary

Anything that affects scheduling

250 Character Max

Brief scope - 10 words or less -

Number of technicians (2 techs 1 day, 1 tech 2days)

Long lead times

Lift?

Special hours

Who supplies material?

Who installs material?

Any other special requirements above a standard service call

Start date if known

Budget

Hours

Dollars

T&M (Max?)

Site Notes

Directions

FYI - Any site specific information (redundant do we want to use?)

Documents to attach to work order

Drawings

Product Data Sheets

Quotes

Proposal

Executed contract

Change orders

Client PO

Is every relevant document uploaded?

Parts list

General idea of non-quoted material

Work Ordered Notes

Detailed scope description

Copy from proposal for tech visibility

Site specific information

Any special requirements.

Access codes, Covid, Check in, Containment,

User Defined Fields

C&A WO - Are all fields complete and accurate? (Populates Unschedulable Dashboard)

Category -

PE -

Quanity - number of hours

Supervisor -

Turnover - (Populates Unschedulable Dashboard)

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Is this work order complete and accurate?

Not Spectrum

Turnover Meeting
Update turnover status in UDF
Manpower needs
Contacts
MOP's
Shutdowns
Quoted material (long lead items)
Engineering requirements
Subcontract needs
Energized work
Labor hours estimated - Number of techs needed for build

Accounting
Subcontract Information if necessary
Changes in scope from the proposal if flat rate
Customer PO's (when required). No ustomer PO delays billing.
Accounts receivable support
More AM followup
Customer Setup Form
Site setup form

Project Review Checklist (Pre-award)
Signed Proposal
Estimate Attached
Design Build
Engineering Firm
Drawings Attached
Electronic Dwgs Available
Sub-Contract Required
Insurance Cert. Required
Any Special Equipment
List Equipment
Additional Information
Hot Work Required? If Yes, Reason.
Has handoff meeting with estimator been completed?
Is job scope clearly defined?
Has salesperson provided additional info required?
If no, what additional info is required?
Project assigned to:

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Is this work order complete and accurate?

Dispatch Statuses

Unassigned indicates ready to schedule by the service coordinator.

Manager needs attention from a service supervisor or service manager to determine what is required to perform the work. This could be anything such as permits, drawings, subcontractors, long lead material items, or any other special requirements.

NeedsParts parts need to be ordered before the work can be scheduled. Once the parts have been ordered it can be put in **PartsOrderd** status until the parts arrive. When the parts arrive the work order is put into **Unassigned** status if nothing else is required to schedule the work.

Cust Hold customer has put the work on hold for some reason.

Scheduled is used when a customer requires a specific date for the work to be performed.

Assigned is used when an assignment has been created for the work order and is assigned to a technician in Field Connect.

Go Back a return trip is needed to complete assignment. This keeps the assignment on the tech's assignment list in field connect and keeps the work order open in spectrum. This status requires the tech communicating to the service coordinator what they are going back for and when. The service coordinator is responsible for putting **Go Back** work orders in the proper dispatch status after communicating with the tech.

Finished is used in when an individual assignment is finished in Field Connect and when all assignments have been finished in Spectrum. Putting an individual assignment in finished removes the assignment from the tech's assignment list in field connect. The tech should not put assignment in finished status unless that individual assignment is finished. Unfinished assignments should be put in **Go Back** status.

There can be multiple assignments for one work order. If the last assignment for a work order is put in finished status, the entire work order is automatically put into **Finished** status in Spectrum. When all assignments are in finished status, the entire work order is in **Finished** status and the technician has entered the 100% complete notes, the project accountant knows they can bill the work order.

%Billing is used by project accountant when progress billing a work order. Progress billing is when a work order can be billed as the work is being done instead of a lump sum when the work is complete. This is determined case by case and is typically based on the value of the contract.

WO Recvd is used by the project accountant to show that an invoice has been sent to the customer.

Completed is used by the project accountant when all invoices have been paid and all is cost accounted for to close the work order.