

Service Coordinator Cheat Sheet

Is this work order complete and accurate?

Schedule Work Order

Is there a Work Summary? Any relevant scheduling information.
Have parts been ordered for the job?
Have parts arrived? Where are they (will call, prefab, lakewood)?
Accurate quote and hours (if applicable).
Best guess on estimated hours to complete WO.
Detailed and clear scope entered into Work Ordered Notes
Estimate attached proposal letter attached
All applicable vendor quotes attached
Onsite contact and phone number
Turnover has happened if applicable

To Service Technician

Assign WO on Ipad (Field Connect)
Site Contact Info (Check for Accuracy)
Customer Contact Info
Accurate Work Summary & Work Ordered Notes (Spectrum)
Special requirements:
Lift, After Hours, etc.
Estimated Hours for scheduling
Of Techs (T&M and Flat) (Spectrum) (Email)
Work Ordered Notes: detailed scope and job specific information
Access codes, COVID, check in, containment, special requirements

From Account Manager

Site Contact Info
Customer Contact Info
Accurate Work Summary (Spectrum)
Special requirements:
Lift, After Hours, etc.
Estimated Hours for Scheduling
of Techs (T&M and Flat) (Spectrum)

Work Ordered Notes: detailed scope and job specific information
Access codes, COVID, check in, containment, special requirements

Forecasting

Upcoming work
Manpower meeting
Material lead times

Documentation in spectrum

Submittals
Purchase orders
Material tracking
RFI's
Permits
Subcontracts
Reports
Dispatch status
Misc. Admin
Coordination

From Service Manager

Manpower meeting needs
Dates Requested
Name, WO #
Requested Techs
Upcoming Work
Review ENTIRE work order ensure ready to schedule.
Summary, Hours, Parts,
Material tracking, Dispatch status, etc.
Ready to schedule?

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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.