

Service Manager Cheat Sheet

Is this work order complete and accurate?

General

Proposal received
Turnover meeting
Is a permit needed?
Do we need stamped drawings?
Are there any subcontracts needed?
MOP and shutdowns
Energized work?
Are the parts ordered? (PO Written)
Have the parts been delivered?
Ready to schedule and assign a tech
Upload all documents to Spectrum for the tech
Work completed in the field
Are there any close out documents for the customer?
Work Order Finished with 100% Complete Billing Statement

From Account Manager

Proposal received
Turnover meeting
Drawings/pictures
Do we need stamped drawings?
Are there any subcontracts needed?
MOP and Shutdowns
Energized work?

To Service Coordinator

WO# / Dates / Jobsite / Who
Ready to schedule and assign a Tech

To Service Technician

Upload all documents to Spectrum for the Tech
Work Completed in the Field

To Project Accountant

Are there any Close Out Documents for the Customer?
Work Order Finished w/ 100% Billing Statement

Forecasting

Upcoming work
Manpower meeting
Turnover
Material lead times

Documentation

PE delegation
Submittals
Purchase orders
Material tracking
RFI's
Permits
Subcontracts
Reports
Dispatch status
Coordination

To Project Engineer

Is a permit needed?
Are the Parts Ordered? (PO Written)
Are the parts long lead items?
Have the parts been delivered?
Clear task request in addition to email chains with background conversations.
"Please do x"
Priority of WO (emergency, urgent, normal, GC with schedule)
Subcontractors required
Submittals required
Submittal specifics such as: top or bottom fed on gear submittals
Other GC requirements
Explanation of scope
Shutdown/energized work requirements
Accurate wo status (Needs parts, Parts ordered etc.)
Special equipment requirements
Prefab requirements/opportunities
Engineering/design requirements, create drawings?

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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.