

## Service Technician Cheat Sheet

### Is this work order complete and accurate?

#### **Service Pledge**

Arrive on-time at our jobsites  
Call ahead to confirm every appointment  
Thoroughly review the work to be performed with our customer before starting  
Maintain an orderly jobsite free of hazards and clutter  
Clean-up after ourselves daily  
Draft a thorough plan for any return trips  
Inform the customer of when we shall return to complete the job  
Always review the work we've done with the customer upon completion  
Make our customer aware of any items needing future attention  
Thank the customer for choosing Encore Electric!

#### **From Service Coordinator**

Site Contact Info (Check for Accuracy)  
Accurate Work Summary  
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

#### **To Account Manager & Service Supervisor**

Scope changes  
Scope related questions  
Turnover, Job walk?

#### **To Service Supervisor**

Methods, code, and safety questions.  
As-builts

#### **Contact Information**

Work order contact note correct?  
Double check that site contact is correct with priority and description  
Who is the first call?  
Updated site/or customer contact sent to PA in 100% Complete Notes.

#### **To Project Accountant**

Daily Notes  
**100% Work Complete** and a brief summary of work completed for invoice. Update customer/site contact information  
Customer specific forms  
Material cost  
CC or Cash expenses Purchases added to non-stock materials  
PO's - Complete cost to vendor  
Labor info in Field Connect  
Dispatch Status - Finished meaning assignment finished not full work order finished  
Updated Site/Customer contact information  
subcontractor cost

#### **Field Connect**

Working offline? upload data  
Review assignments  
Read all notes and attachments  
Enter labor  
Enter stock and non-stock material  
Dispatch status - Finished or Go back  
Daily Summary Notes-  
Work complete  
100% Complete note when all assignments and work order is complete  
Work Ordered Notes  
Task% of work complete for each bullet point in proposal in work ordered notes  
T&M - customer signature on Customer Survey form

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### 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.