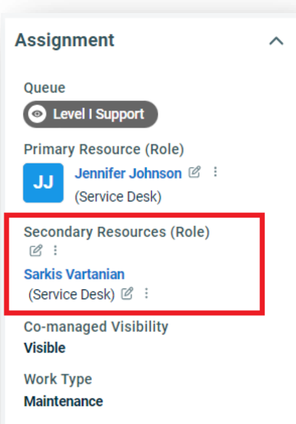
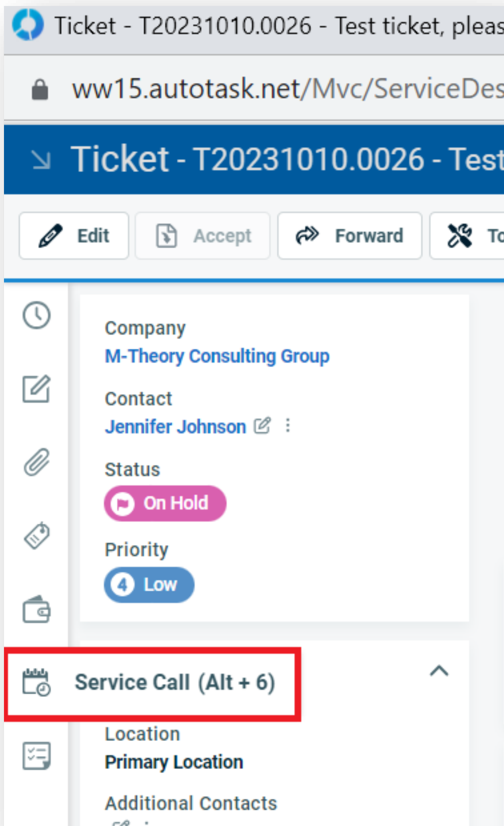
When it is necessary to schedule an onsite service visit for a client, take the following steps in AutoTask.

1. Document a ticket that describes the problems that the customer is experiencing. Use all standard processes when logging the ticket. A service call cannot be entered until the ticket has been saved, and a ticket number has been generated.
2. Before scheduling the service call, verify the street address that has been selected for the ticket is the actual location where the service call is needed. *<u>This step is not optional.</u>* The address displayed in the ticket is the location that the technician will be visiting. It ***<u>must</u>*** be correct.
    a. If the service call will need to take place at another location, make corrections prior to setting up the Service Call in AutoTask.
    b. If the service call will need to take place at a location that is not listed, alert your manager or supervisor. They will be able to send the information over to the AutoTask administrators to have the location added. (You will need to make the appropriate notes in the ticket in the meantime.) You will need to include;
        i. Name of office (if applicable)
        ii. Street address/Suite number of office
        iii. City, State, Zip
        iv. Phone (for receptionist or front desk)
3. If you are scheduling a call for a technician other than yourself, place the name of the technician who will be making the service call in the “secondary resources” box.

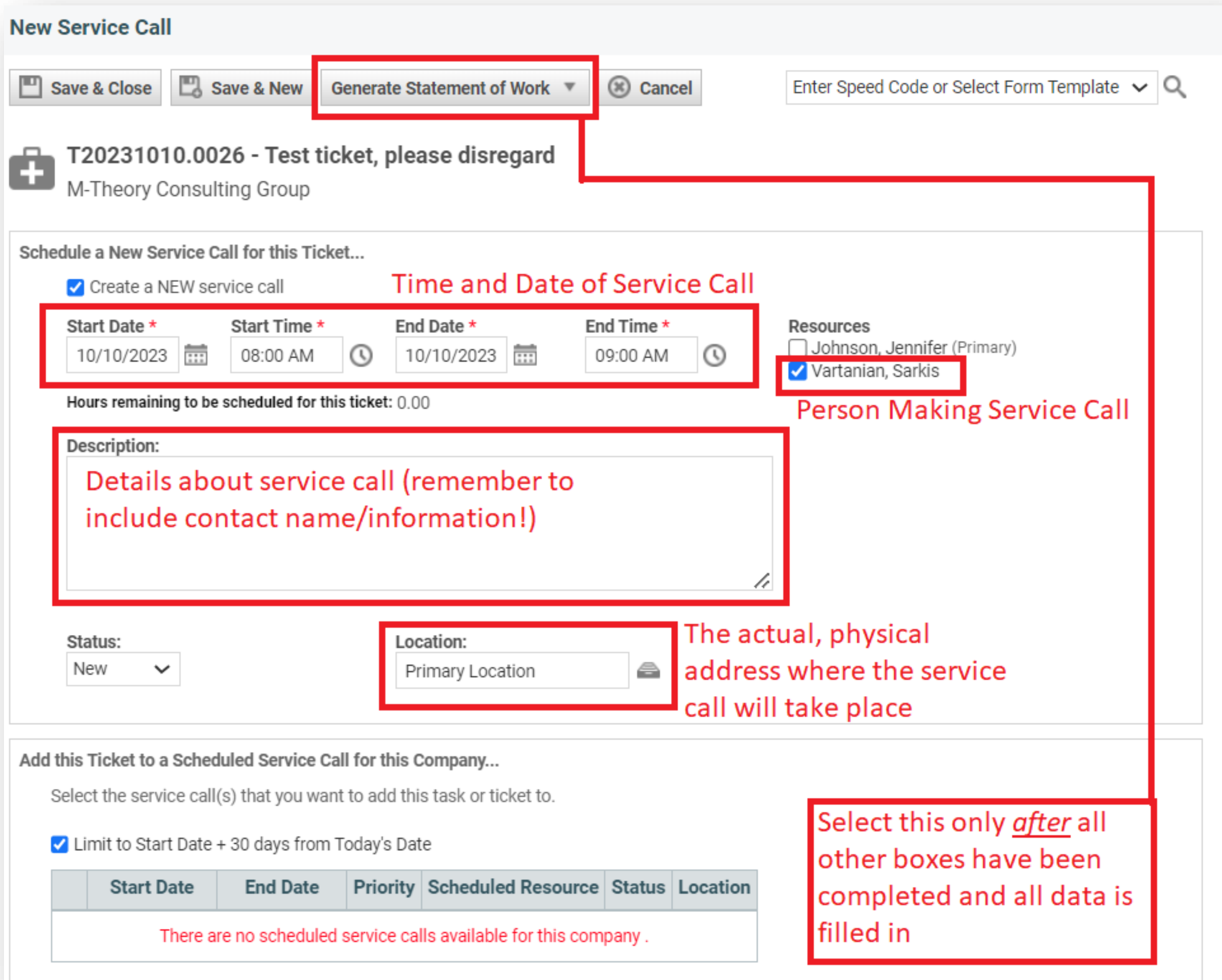


4. Finally, make certain that you have included information about the person onsite (name and contact phone number) who will be working with the technician, to sign them on and off the property. The on-site technician *must* check with the customer upon arrival to and departure from the site, as well as obtaining all required signatures.

5. Once all necessary information is available, select the "Service Call" button.

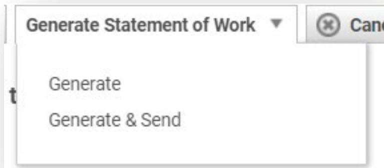


6. The Service Call window opens.

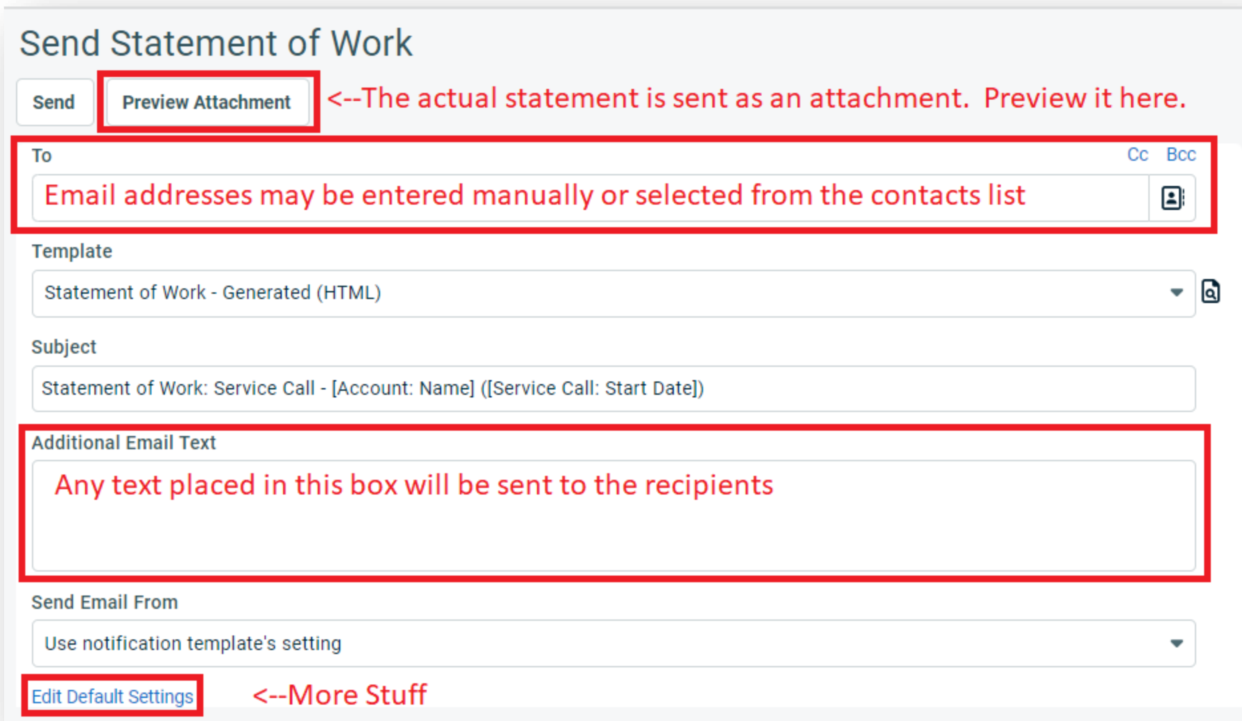


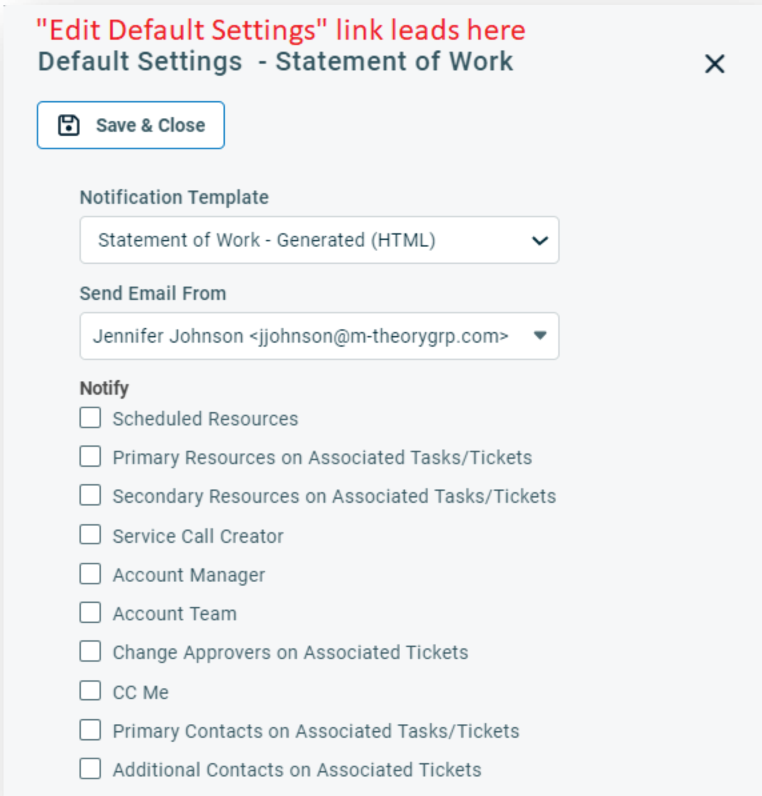
7. Once all boxes have been completed, click the “Generate Statement of Work” button.

8. Use “Generate” if you would like to generate a form that can be printed and signed off by the customer. Use ‘Generate and Send” if you would like to email the form to the customer as an attachment.



9. Selecting “Generate and Send” brings up a screen where you can enter email addresses and insert any additional email text that may be desired.




"Edit Default Settings" link leads here
Default Settings - Statement of Work
Save & Close
Notification Template
Statement of Work - Generated (HTML)
Send Email From
Jennifer Johnson <jjohnson@m-theorygrp.com>
Notify
Scheduled Resources
Primary Resources on Associated Tasks/Tickets
Secondary Resources on Associated Tasks/Tickets
Service Call Creator
Account Manager
Account Team
Change Approvers on Associated Tickets
CC Me
Primary Contacts on Associated Tasks/Tickets
Additional Contacts on Associated Tickets

10. The Statement of Work:

Statement of Work

Send Close

Statement of Work

M-THEORY

GENERAL INFORMATION

Company
M-Theory Consulting Group
1820 Industrial St
Suite 270
Los Angeles, California 90021

213.785.8058

Location
Primary Location
1820 Industrial St
Suite 270
Los Angeles, California 90021

213.785.8058

Description

Date
10/10/2023

Start Date/Time
10/10/2023 08:00 AM PST

End Date/Time
10/10/2023 09:00 AM PST

SCHEDULED WORK

T20231010.0026 - Test ticket, please disregard

Location
Primary Location

Contact
Jennifer Johnson

Contact Phone
213.785.8058

Status
On Hold

Resource(s)
Sarkis Vartanian

Description
Testing some dispatch items today. This is another ticket that may stay open for several days. Please disregard this test ticket.

MILES & TIME

Date	Drive Start Miles	Drive Arrive Miles	Total Miles	Drive Start Time	Drive Arrive Time	Total Drive Time	Work Start Time	Work End Time	Total Work Time

PARTS

Quantity Out	Quantity In	Part Number	Vendor	Description	Serial Number	Price

BILLABLE LABOR

Quantity	Rate	Description	Price

Customer Signature ______________________ Date ______________

11. From this screen, the Statement of Work can be printed out so that it can be signed by the customer.

    a. Reminder: the proper signatures *must* always be collected on *each and every site visit*. ***This is a requirement!***

    b. The technician must specify:

        i. How much time the site visit took (Note: AutoTask is equipped with a timer that can keep track of this)

        ii. The exact work that was performed

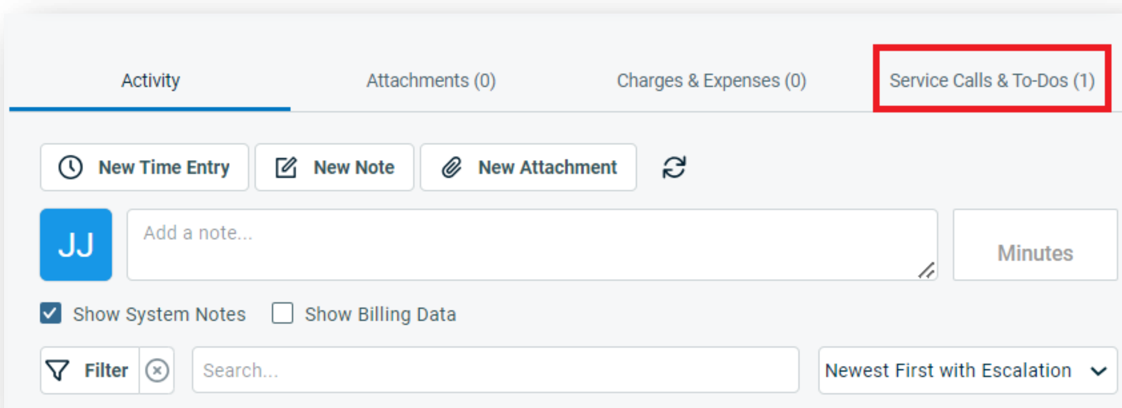
        iii. Any hardware replacements or installations

        iv. Verify with the customer that all work has been completed to their satisfaction

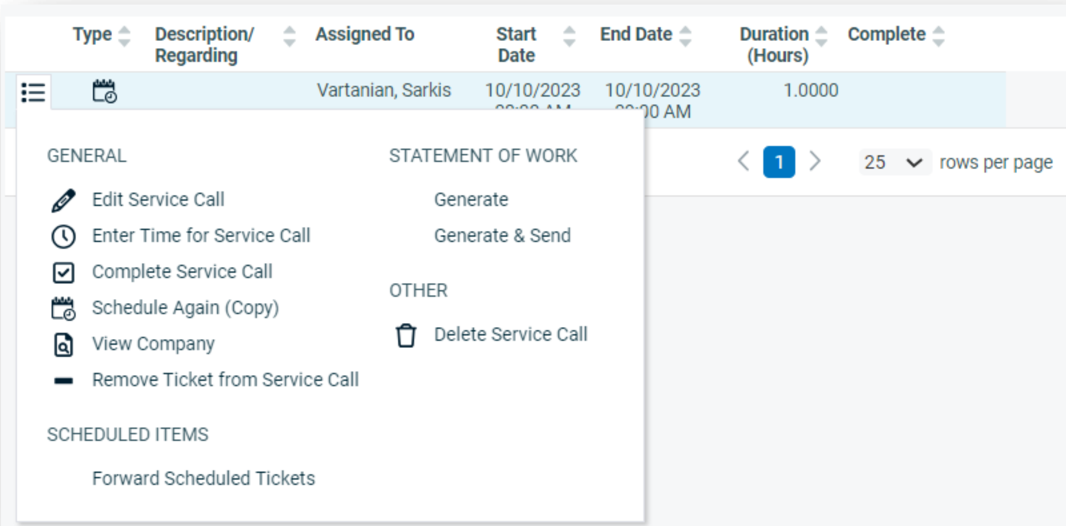
        v. The customer ***must*** sign off that the site visit is complete and all work is finished

    c. If there is a situation where a site visit must be extended over multiple days in order to correct a specific issue, the technician will still need to keep track of what work was performed on each day. The technician must still check in and out with the customer upon arriving to and departing from the site each day. *Under no circumstances* may the technician enter a site if the customer is not aware of their presence, or leave if the customer is not aware that they are departing for the day. The final signature of "Work Completed" can be collected on the final day when everything has been finished.

12. To see any current service calls that are associated with the ticket, select the "Service Calls & To-Dos" tab just above the note entry box:



13. This tab displays all service calls associated with the ticket. Hover over the three-line icon to display a menu with selections for the specific service call.



Completing your service call

14. To complete your service call, select "Complete service call" from the popup menu.

    a. ***Important***: when you do this, the service call will be placed into "Complete" status. *No further warnings or pop up messages will be displayed before the service call status is updated*. Before taking this step, make sure the following items have been completed:

        i. All customer signatures *must* have been obtained as described above. ***This is required!***

        ii. Make sure that the ticket has been stamped with the amount of time spent upon the visit.

        iii. Make sure that any extra notes have been added, such as mileage, parts used, customer notes, or the like.

    b. *Finally, take a moment to make certain that IT Glue has been updated with any information that was obtained during the service call.* Examples include: updated passwords, device configurations, pictures of server rooms or patch closets, and the like. If, during your visit, you had to obtain a piece of information to complete your work, upload that information to IT Glue so it will be available for the next technician/visit.

15. *Only after the service call has been placed in completed status* may the ticket itself be completed and closed.

    a. *Important note:* Completing a ticket *will not* mark the service call as completed. The service call is its own separate entity, and must be marked as complete *prior to closing the ticket*. Otherwise, the service call will continue to be "active," even if the visit was concluded, and the originating ticket closed. (This would reflect incorrectly on reporting, making it appear as if service calls weren't being handled by the technician to whom they had been assigned.)

That's it! You have finished your service call. Congratulations!