

Setting Up a Site Visit in AutoTask

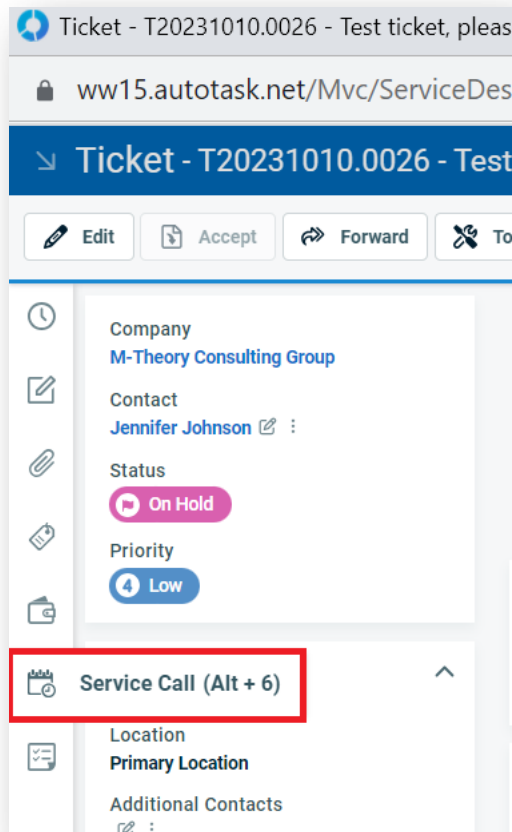
Page | 1

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. *This step is not optional.* The address displayed in the ticket is the location that the technician will be visiting. It **must** 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.

A screenshot of the "Assignment" form in AutoTask. The form has a white background with a grey border. At the top, it says "Assignment" with a small upward arrow. Below this, there's a "Queue" section with a button labeled "Level I Support". The "Primary Resource (Role)" section shows a blue square with "JJ" and the name "Jennifer Johnson" with a small edit icon and "(Service Desk)". The "Secondary Resources (Role)" section is highlighted with a red rectangular box; it shows a blue square with "SV" and the name "Sarkis Vartanian" with a small edit icon and "(Service Desk)". Below this, there's a "Co-managed Visibility" section with the word "Visible". At the bottom, there's a "Work Type" section with the word "Maintenance".

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.

New Service Call

Save & Close Save & New **Generate Statement of Work** Cancel Enter Speed Code or Select Form Template

T20231010.0026 - Test ticket, please disregard
M-Theory Consulting Group

Schedule a New Service Call for this Ticket...

☒ Create a NEW service call

Time and Date of Service Call

Start Date * 10/10/2023 Start Time * 08:00 AM End Date * 10/10/2023 End Time * 09:00 AM

Hours remaining to be scheduled for this ticket: 0.00

Resources

☐ Johnson, Jennifer (Primary)
☒ Vartanian, Sarkis

Person Making Service Call

Description:

Details about service call (remember to include contact name/information!)

Status: New

Location: Primary Location

The actual, physical address where the service call will take place

Add this Ticket to a Scheduled Service Call for this Company...

Select the service call(s) that you want to add this task or ticket to.

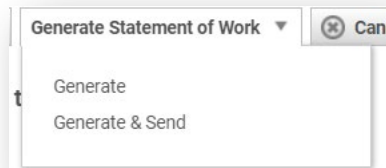
☒ Limit to Start Date + 30 days from Today's Date

Start Date	End Date	Priority	Scheduled Resource	Status	Location
There are no scheduled service calls available for this company .					

Select this only after all other boxes have been completed and all data is filled in

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.

A screenshot of the "Send Statement of Work" form. The form has a title "Send Statement of Work" at the top. Below the title are two buttons: "Send" and "Preview Attachment". The "Preview Attachment" button is highlighted with a red box. To the right of these buttons is a red text note: "<--The actual statement is sent as an attachment. Preview it here." Below the buttons is a "To" field with a red text note: "Email addresses may be entered manually or selected from the contacts list". To the right of the "To" field are "Cc" and "Bcc" labels. Below the "To" field is a "Template" dropdown menu with the selected option "Statement of Work - Generated (HTML)". Below the "Template" dropdown is a "Subject" field with the text "Statement of Work: Service Call - [Account: Name] ([Service Call: Start Date])". Below the "Subject" field is a large text area labeled "Additional Email Text" with a red text note: "Any text placed in this box will be sent to the recipients". Below the "Additional Email Text" field is a "Send Email From" dropdown menu with the selected option "Use notification template's setting". At the bottom left of the form is a button labeled "Edit Default Settings" with a red box around it. To the right of this button is a red text note: "<--More Stuff".

"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

GENERAL INFORMATION

Company
M-Theory Consulting Group
1820 Industrial St
Suite 270
Los Angeles, California 90021
213.785.8058

Date
10/10/2023
Start Date/Time
10/10/2023 08:00 AM PST
End Date/Time
10/10/2023 09:00 AM PST

Location
Primary Location
1820 Industrial St
Suite 270
Los Angeles, California 90021
213.785.8058

Description

SCHEDULED WORK

T20231010.0026 - Test ticket, please disregard

Location
Primary Location

Status
On Hold

Contact
Jennifer Johnson

Resource(s)
Sarkis Vartanian

Contact Phone
213.785.8058

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

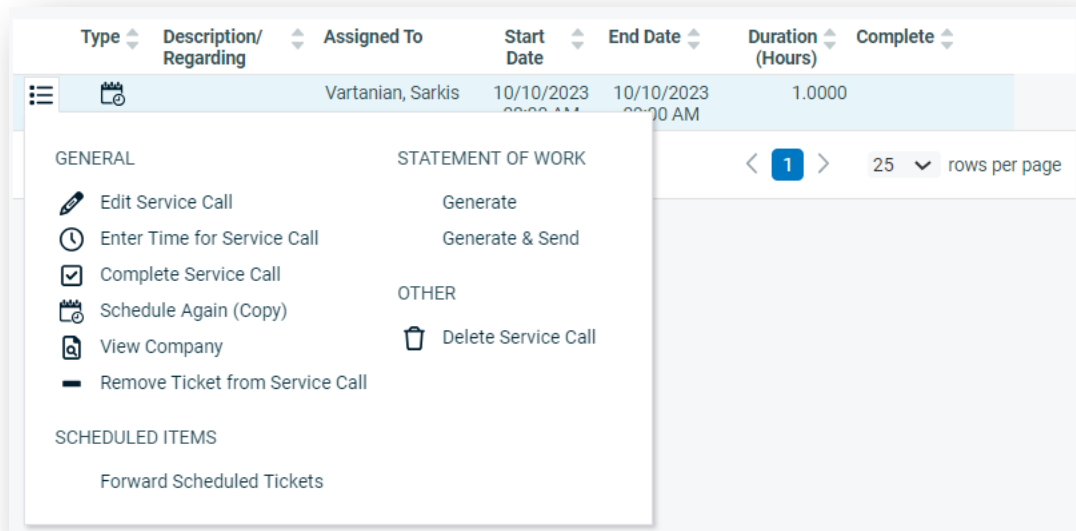
Quantity	Rate	Description	Price

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:

The screenshot displays the AutoTask interface with four tabs at the top: 'Activity', 'Attachments (0)', 'Charges & Expenses (0)', and 'Service Calls & To-Dos (1)'. The 'Service Calls & To-Dos (1)' tab is highlighted with a red rectangular box. Below the tabs, there is a row of buttons: 'New Time Entry' (with a clock icon), 'New Note' (with a notepad icon), 'New Attachment' (with a paperclip icon), and a refresh icon. Below these buttons is a text entry area with a blue square containing 'JJ' on the left, a text box with the placeholder 'Add a note...' in the center, and a 'Minutes' button on the right. Below the text entry area are two checkboxes: 'Show System Notes' (checked) and 'Show Billing Data' (unchecked). At the bottom, there is a 'Filter' button with a funnel icon, a search box with the placeholder 'Search...', and a dropdown menu labeled 'Newest First with Escalation' with a downward arrow.

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.
- 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:
 - All customer signatures must have been obtained as described above. **This is required!**
 - Make sure that the ticket has been stamped with the amount of time spent upon the visit.
 - Make sure that any extra notes have been added, such as mileage, parts used, customer notes, or the like.
 - 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.

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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!