

HOW TO USE THE AUTOTASK HARDWARE TEMPLATE AND PACKING SLIP



USING THE AUTOTASK HARDWARE TEMPLATE

WHY LOG A TICKET?

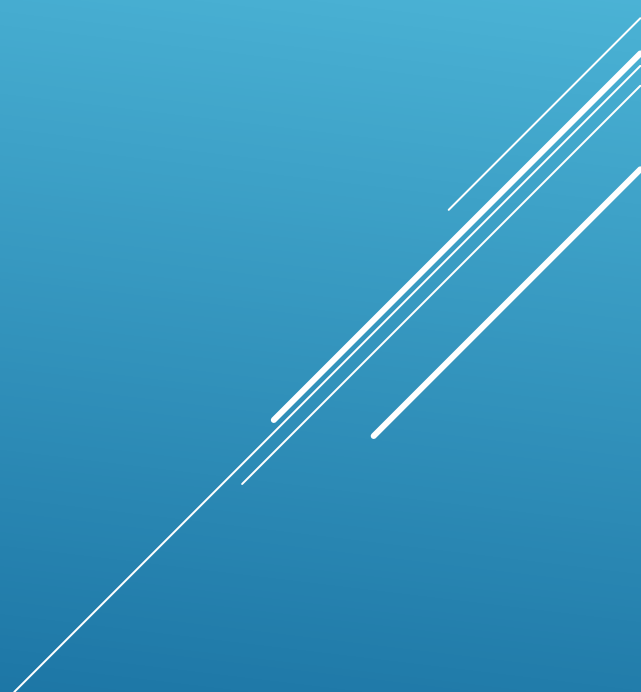
- ▶ All work is tracked via a ticket
 - ▶ Multiple agents can update so everyone can see progress
 - ▶ The E78 hardware request has a checklist to follow
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- Several white lines of varying lengths and angles are positioned in the bottom right corner of the slide, creating a modern, abstract graphic element.

THE HARDWARE SHIPPING CHECKLIST AND THE HARDWARE SHIPPING FORM:

The hardware shipping checklist appears in the ticket and details a checklist that describes the steps to be taken during the hardware processing sequence.

The hardware shipping form is separate from the checklist. This form must be completed, printed, signed, and placed in the box for the customer's review, once the hardware has been received.

Lets discuss the Hardware Shipping Form first:



WHICH FORM DO I PICK?

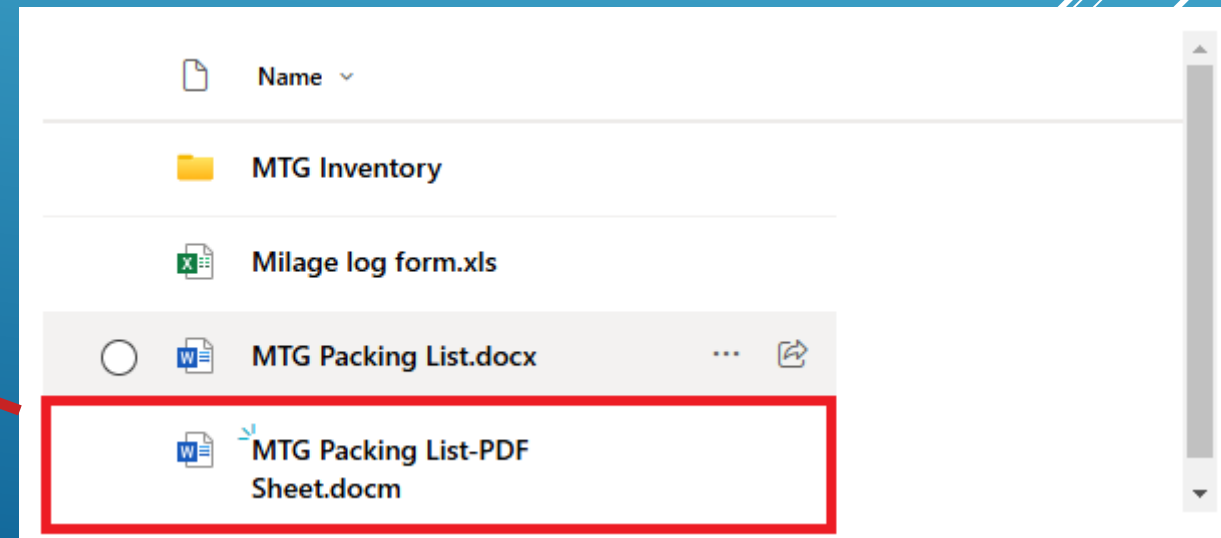
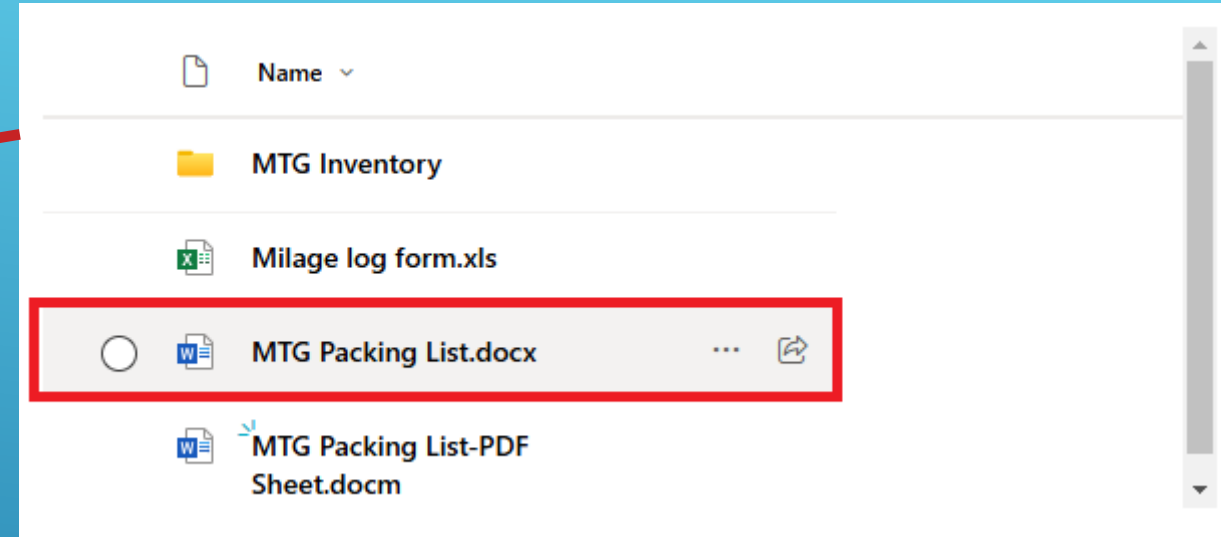
There are two forms available from the Service Desk Sharepoint Site:

MTG Packing List:

If you select this option, you will need to creating the packing list by choosing to manually save the completed form to PDF format.

MTG Packing List PDF Sheet:

If you select this option, you will be prompted to create the PDF packing list automatically.



THE HARDWARE SHIPPING FORM:

Here is an example of the hardware shipping form. Pictures of the shipped item are included, and the item specifics can be listed in the top section.

This form is signed and printed, then placed in the box for the customer to review upon receipt.

The electronic version of the form is also uploaded to the hardware shipping ticket.

This form can be downloaded from [This sharepoint site](#).



Date:	11/20/2024	Device Model:	Dell Latitude 3400
Customer:	Green Pastures	Serial# or Service Tag#:	DCXXX100
Name of the user:	Happy Framers	Ticket#:	T20241101.0005
Email of the user:	no@email.com	Tech Specifications:	15.6 inch, 32GB RAM, 512GB SSD. HDMI & USB ports
Phone # of the user:	111-222-4444		
Ship to Address:	1 Farm Rd., Mountain, AG 99999		
Quality Control By:	Qualito Control	Carrier & Tracking No.	FedEX 00011123
Approved by Signature:			

Items in shipment

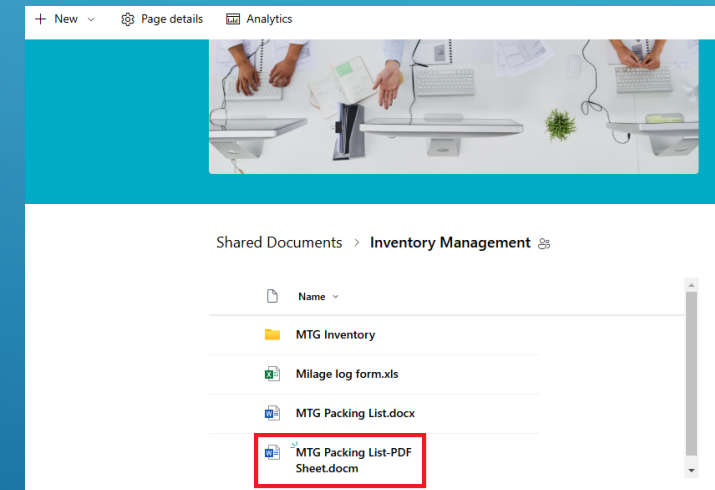
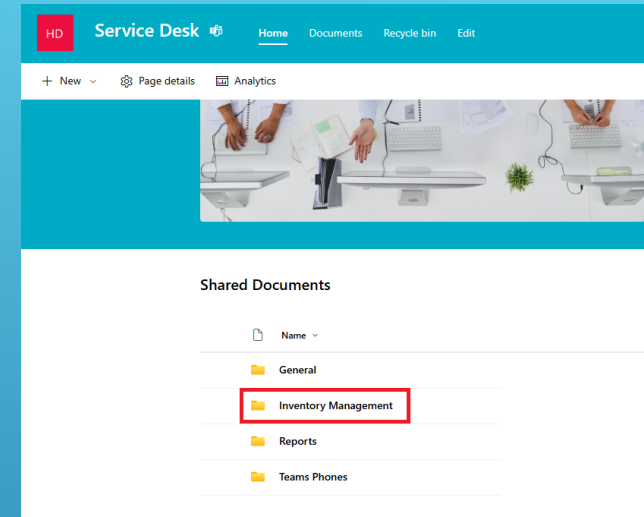
☒ Dell laptop	☒ Power cord
☒ Power adaptor	



MTG PACKING LIST PDF SHEET: PART TWO

From the Sharepoint site, scroll down to the Shared Documents area. Several folders are available here.

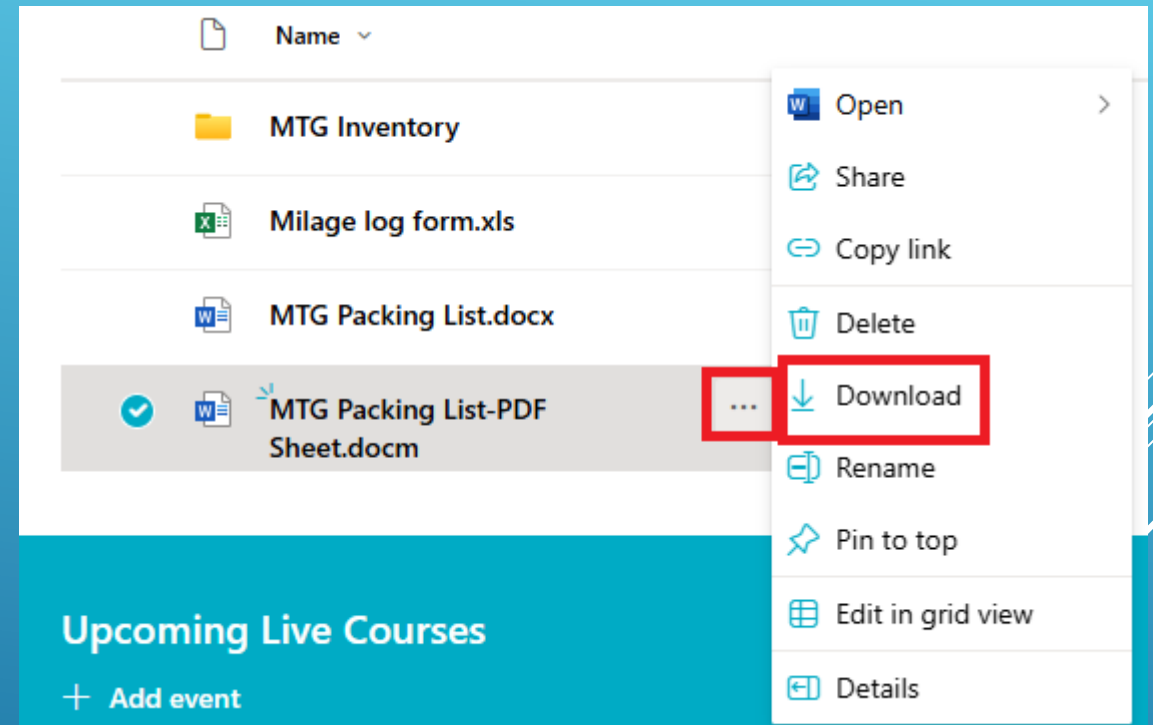
Select the Inventory Management folder.



MTG PACKING LIST PDF SHEET: : PART THREE

Do not open this document on the Sharepoint site.

Instead, click the three dots to **download** a copy of the file to your local computer. Once downloaded, open the file in Word.



MTG PACKING LIST PDF SHEET: : PART FOUR

Do not open this document on the Sharepoint site.

Instead, click the three dots to **download** a copy of the file to your local computer. Once downloaded, open the file in Word.

Fill out all fields as indicated.



Date:	Type in or select today's date	Device Model:	Type in model
Customer:	Type in customer/company name	Serial# or Service Tag#:	Type in serial or service tag No.
Name of the user:	Type in user's name	Ticket#:	Type in ticket number
Email of the user:	Type in user's email address	Tech Specifications:	Type in device specs.
Phone # of the user:	Type in user's phone No.		
Ship to Address:	Type in the address (street [with Suite/Apt # if applicable], city, state, zip code) where the device will be shipped to		
Quality Control By:	Type in quality controller's name	Carrier & Tracking No.	Type in carrier & tracking #
Approved by Signature:			

Items in shipment

☐ Type in hardware & check the box on the left	☐ Type in hardware & check the box on the left
☐ Type in hardware & check the box on the left	☐ Type in hardware & check the box on the left
☐ Type in hardware & check the box on the left	☐ Type in hardware & check the box on the left



Date:	11/20/2024	Device Model:	Dell Latitude 3400
Customer:	Green Pastures	Serial# or Service Tag#:	DCXXX100
Name of the user:	Happy Framers	Ticket#:	T20241101.0005
Email of the user:	no@email.com	Tech Specifications:	15.6 inch, 32GB RAM, 512GB SSD, HDMI & USB ports
Phone # of the user:	111-222-4444		
Ship to Address:	1 Farm Rd., Mountain, AG 99999		
Quality Control By:	Qualito Control	Carrier & Tracking No.	FedEX 00011123
Approved by Signature:			

Items in shipment

☒ Dell laptop	☒ Power cord
☒ Power adaptor	



MTG PACKING LIST PDF SHEET: : PART FIVE

Do not choose “save” on this document.

Hit the X instead.

You will be prompted to create the PDF packing slip.

Once created, the packing slip will be placed in the box for the customer to see. The PDF version of this document is to be uploaded to the ticket.

Let’s discuss the shipping request template next.

The screenshot shows the 'MTG Packing List-PDF Sheet' application. The form contains the following information:

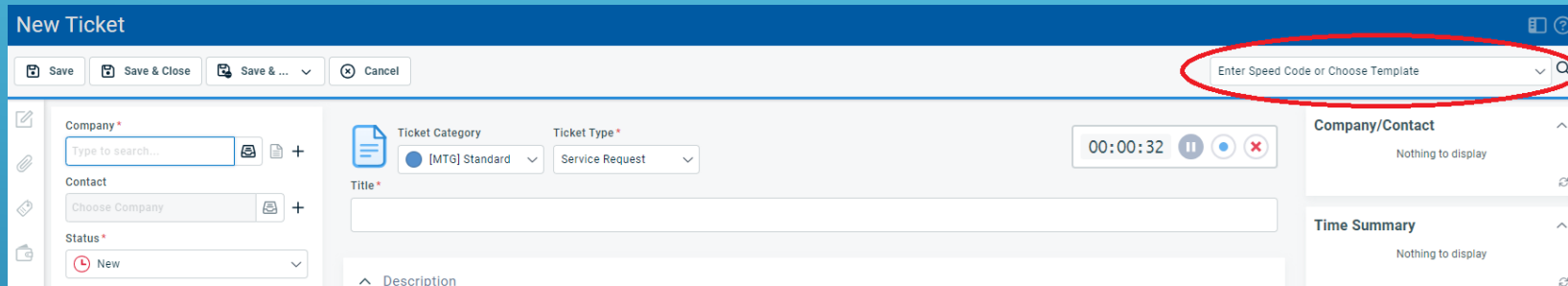
Date:	11/21/2024	Device Model:	ABC123
Customer:	M Theory	Serial# or Service Tag#:	123456789
Name of the user:	Jennifer	Ticket#:	T11111111.3333
Email of the user:	no@o.com	Tech Specifications:	ABC456
Phone # of the user:	555555555		
Ship to Address:	1313 Mockingbird Lane		
Quality Control By:	Jennifer	Carrier &	5555555
Approved by Signature:			

Below the form is a section titled 'Items in shipment' with a table containing three rows, each with a checkbox and the text 'Type in hardware & check the box on the left'.

A modal dialog box is open in the center, asking: 'Save as printable pdf file? The document will close. Do you want to create pdf packing list sheet to put in the shipping box?'. It has 'Yes' and 'No' buttons. A red arrow points from the 'Share' button in the top right corner of the application window to the modal dialog.

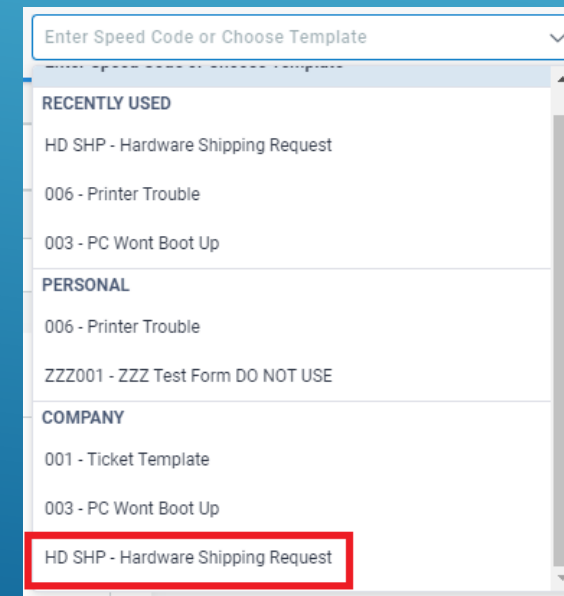
HOW TO ACCESS THE SHIPPING REQUEST TEMPLATE:

- ▶ Use the template drop down menu in the upper right hand corner:



The screenshot shows the 'New Ticket' form. At the top right, there is a dropdown menu labeled 'Enter Speed Code or Choose Template' which is circled in red. Below the header, there are fields for 'Company', 'Contact', 'Status', 'Ticket Category', 'Ticket Type', and 'Title'. The 'Ticket Type' is set to 'Service Request'. There is also a timer showing '00:00:32'.

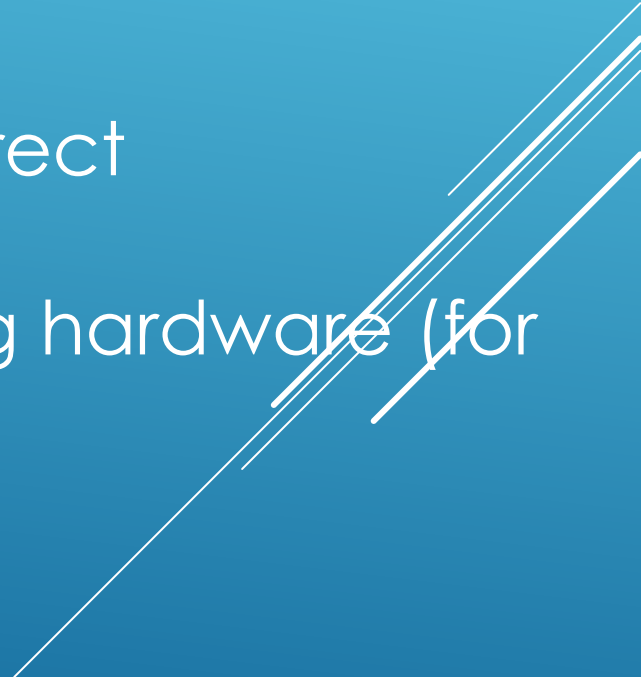
- ▶ Select "Hardware Shipping Request"
- ▶ This will populate the ticket with a premade checklist. If your ticket already displays the premade checklist, continue to the next step.



The screenshot shows the dropdown menu that appears when the 'Enter Speed Code or Choose Template' button is clicked. The menu is divided into sections: 'RECENTLY USED', 'PERSONAL', and 'COMPANY'. Under 'RECENTLY USED', there are two items: 'HD SHP - Hardware Shipping Request' and '006 - Printer Trouble'. Under 'PERSONAL', there are two items: '006 - Printer Trouble' and 'ZZZ001 - ZZZ Test Form DO NOT USE'. Under 'COMPANY', there are three items: '001 - Ticket Template', '003 - PC Wont Boot Up', and 'HD SHP - Hardware Shipping Request'. The 'HD SHP - Hardware Shipping Request' item at the bottom is highlighted with a red box.

THE HARDWARE SHIPPING CHECKLIST:

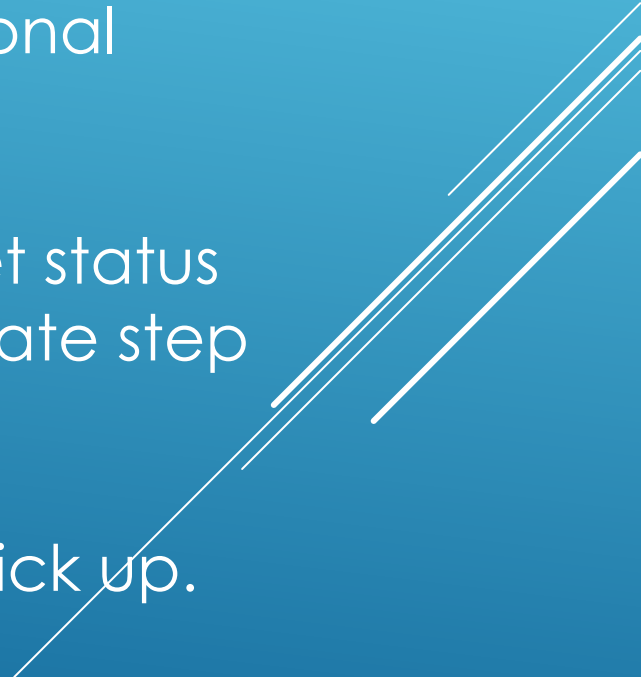
PART ONE

- Check for duplicate/additional requests for the same hardware: merge duplicate tickets as needed
 - Verify Shipping Address listed in ticket is correct
 - Verify if request needs additional supporting hardware (for example, cables)
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- A series of white diagonal lines of varying lengths and thicknesses, located in the bottom right corner of the slide, creating a modern, abstract graphic element.

THE HARDWARE SHIPPING CHECKLIST CONTINUED: PART TWO

- Test and clean any refurbished equipment; make sure it is clean and all components work. Note ticket that hardware has been tested and cleaned.
- Download the Hardware Form (MTG Packing List) from SharePoint Site
- Complete one form for each hardware type. Be sure to include all photos and all supporting hardware (cables etc.)
- Print and sign form. Place a copy of the signed form in the box (on top, so the customer will see the form first upon opening the box.)

THE HARDWARE SHIPPING CHECKLIST CONTINUED: PART THREE

- Scan and upload form and all photos to the ticket as attachments.
 - Update ticket with tracking information and additional relevant notes.
 - Make sure that customer has been notified of ticket status (this can be done by CCing them in the ticket update step above.)
 - Set completed/packed box out for the carrier to pick up.
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- A series of three parallel white diagonal lines are positioned in the bottom right corner of the slide, extending from the bottom edge towards the right edge.

THE HARDWARE SHIPPING CHECKLIST CONTINUED: PART FOUR

- Place Ticket in "waiting Customer" status
 - Once box has been delivered, follow up with customer to make sure that hardware was delivered and is working.
 - Update ticket once the customer has confirmed that hardware has arrived, has been installed, and is working
 - Place ticket in "completed" status.
- 
- A series of three parallel white diagonal lines in the bottom right corner of the slide, extending from the middle of the right edge towards the bottom left.

QUESTIONS? LEAVE A COMMENT!

