Remote Service Manager 14.1

Configuration and User Guide

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Introduction

Remote Service Manager (RSM) is a web-based application that allows managers to leverage the real-time information in ECi e-automate® to maximize the efficiency and effectiveness of their teams in the field.

For purposes of definitions, the use of the word Manager used in this guide may also refer to a supervisor, team lead, or other person performing the duties of directing techs in the servicing of equipment. Remote Service Manager may also be referred to as RSM in this guide.

Since RSM is a web-based application, RSM is easily installed on your present RemoteTech Server. Even if you are not currently a RemoteTech user, RSM can be installed on a web server that connects to e-automate. There is not a dependency on RemoteTech for you to enjoy the benefits of RSM. In either case, RSM is added as an application to your existing Internet Information Server (IIS) environment.

Named User Licensing and Support

Remote Service Manager is licensed as a named user subscription. Continued use of RSM is contingent on payment of the monthly or annual billing. Technical Support for RSM is included as part of the customer's support plan currently in effect with DGI. Training is available via monthly videos and webinars. Please contact eacustomercare@ecisolutions.com for support or installation assistance.

Hardware and Software Requirements

Overview

Remote Service Manager[tm] (RSM) is a web application that is installed on your company's web server which in turn connects via TCP/IP to your ECi e-automate®server. RSM is accessed via a web browser by your managers. Browsers on such devices as a Laptop, iPhone, iPad, Android Smartphone, and Android Tablet may be used. Using a browser removes the need to install an "app" on the mobile device. The specifications below are guidelines to assist you with setting up the RSM Server.

RSM does not have a dependency on RemoteTech being in use.

We strongly recommend for security purposes that the RSM software be installed on a separate server and not on your ECi e-automate® server. If your ECi e-automate® environment includes add-on products from Digital Gateway such as e-info[tm] or RemoteTech, RSM may be installed on that same server. As is the case with RemoteTech, RSM connects directly with the ECi e-automate® database. SQL Server is not required to be installed on the web server for RSM.

RSM Software Server Requirements

Digital Gateway recommends that you work with a network professional that has Internet Information Server (IIS) skills to meet the server and network requirements and assist with the installation.

Server Software Requirements

- IIS 6+ (IIS 7+ preferred) and .NET 4.0
- e-automate 7.6 or higher.

- The e-automate server must be accessible by the RSM Server via TCP/IP.
- The e-automate server must be SQL Server 2005 or higher.
- SQL server is not required to be installed on the RSM Server.
- Managers must be able to access the RSM via the Internet.

Client requirements

The following are commonly used devices. All access is via a <u>browser and requires an internet connect via WiFi or cellular service.</u>
- Smart Phone (iPhone, Android).
- Tablet (iPad, Android).
- Computer Workstation or Laptop.
- 1GB data plans are recommended.

Some Fundamentals

Remote Service Manager is manager centric. This means, when a manager logs in he/she is presented with a list of technicians who report to the manager. For example, if a V.P. of Service has two direct reports, and each direct report has four direct reports, then the Service Manager will see all techs who are in the entire organization.

If one of the V.P.'s managers logs in, that manager will see only his team of techs, as configured in e-automate (this is explained later in the guide). While in the calls view, the manager will see only call activity related to their techs' calls. When scheduling, putting calls on hold, and reassigning, the only techs that can be chosen are in that manager's team.

e-automate Setup

Sample Organizational Chart

Let's assume the sample service organization shown below. In e-automate, the organization must be setup to assign each manager or tech to their respective manager. This is important because when a manager logs in and sees their techs' calls, the view is dependent upon each of the techs being assigned to the correct manager in e-automate. The only dependency is the manager field on the tech record. Such things as territory are ignored.
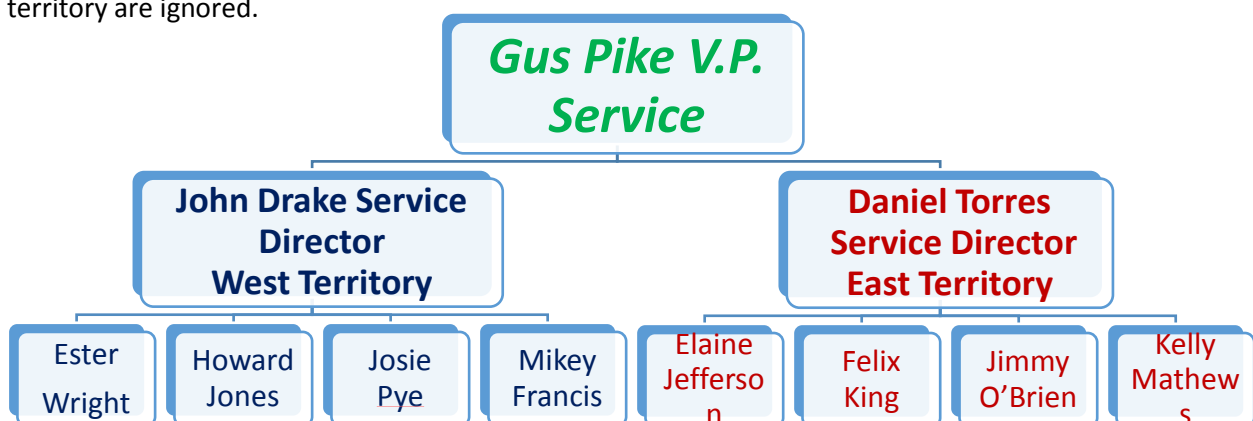
Assigning Technicians to their respective managers.

As we saw in the example of assigning managers, the same setup applies to properly assigning technicians to their manager. Please note that territories are not used to segment or group calls by manager.

Ester, Howard, Josie, & Mikey report to John Drake

Here is the example of assigning technicians to Daniel Torres who is a manager.

Elaine, Felix, Jimmy & Kelly report to Daniel Torres.

A Glossary of icons used in Remote Service Manager

 "Home Button" – the manager can select this icon from anywhere in RSM to return to the technician list.
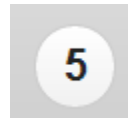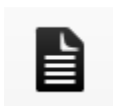
 Places the call on hold

 Takes the call off hold

 Cancels the call

 A number in a circle indicate the number of calls for any filter or group. It is context sensitive.

 Return to the previous view after choosing one of the following icons.

 Map, address of the customer

Phone customer or technician, depending on the view (customer or technician).

Allows you to email the tech or email the customer, depending on the view.

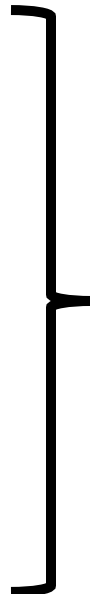Allows you to go the customer's web site.

Notes

Call History

Parts History

Equipment list

Context sensitive. For example:

When viewing tech information, choosing Call History will show or allow search for all of the calls for the techs.

When on the equipment record, choosing Call History will show or allows search for all calls for the equipment.

When viewing the customer, choosing Parts History will show or allow search for all parts used for that customer.

The same logic applies to Notes.

	Open (D, S, P, H)

Filter. Selecting anywhere in the bar will show filtering options.

Filter options

Filter
Open (D, S, P, H)
Rescheduled (D, S, P, H)
Call Back (D, S, P, H)
Call Alert (D, S, P, H)
Dispatched
Scheduled
Pending

	Technician

Group Selection. Selecting anywhere in the box will show additional grouping of your calls.

Group selection options

Group by	
	Technician
	Bill Code
	Call Type
	Customer
	Due Date
	Equipment
	Priority
	Status
	Work Order

This menu bar appears often in RSM. Select anywhere in the entire menu box to toggle the selection to "Off".
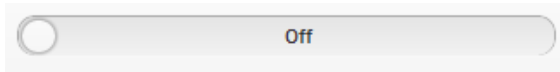
It will then appear as follows. Selecting it again will toggle it back on "On", shown above.

Remote Service Manager Administration and Options

Logging in as an administrator

To access the options in RSM, please login as follows with your e-automate the e-automate admin user id and password, as follows. Your URL to the site will be for example http://yourdomeain/RSM/Account/Login

Information about your installation.

After logging in you will see the following web page. The area in the red box is general information for the administrator to see such things as the version, the users, and the e-automate database to which Remote Service Manager is connected to.

If you click on the [🔑] tab, you will see server information and a list of all RSM users.

Server information

Server
Customer Number   TA00
Product Key   M8TDA-PNOPA-N37VV-47AQB-MH6VL
Licensed Users   5
↻ Refresh License
✖ Deactivate Server

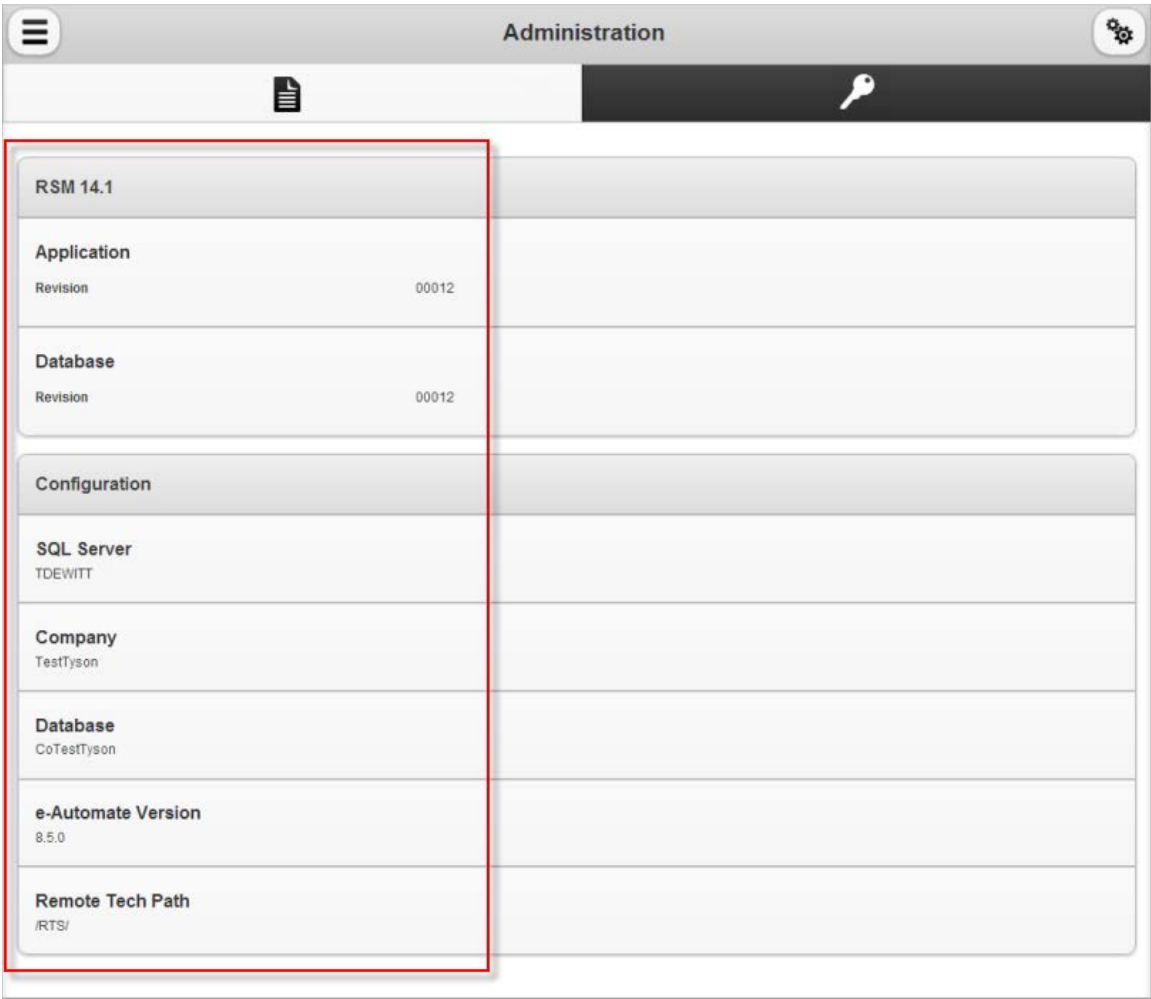| ↻ Refresh License	If you have recently received an updated license key, click this button to activate the updated key.

✖ Deactivate Server	When clicked, the server where RSM is installed is deactived.
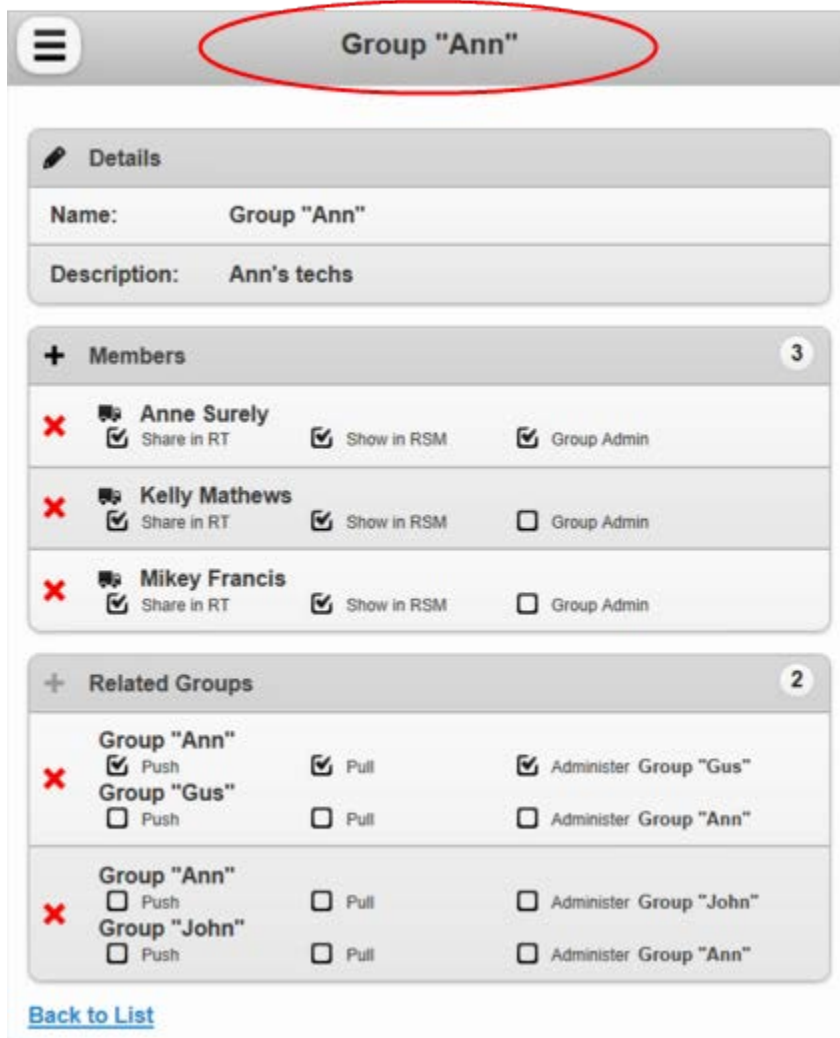
Active RSM Users

Named Users	5
ANN	
DANIEL	
GUS	
JIMMY	
JOHN	

Service Groups

In the Groups area of Remote Service Manager you configure and manage your service teams. Remote Service Manager allows you to give your managers access to view and update/make changes to service call queues for technicians on their own teams as well as technicians outside of their service teams.

You have the ability to create your own groups, however, Remote Service Manager automatically does create groups based on existing service team data in e-automate. For example, if you have Ann listed as a manager for Barney, Gus, and Sue, a service Group is automatically created with Ann as the group admin and Barney, Gus, and Sue as members of the group. The default name given to groups created by the system is *Group "manager name"*. For example the group with Ann as the manager is called *Group"Ann"*.

You can edit the automatically created groups and configure them as appropriate.

You may also create service groups yourself and configure them as appropriate. You can create different groups of technicians, assign them to a manager, and setup a technician's service call accessibility. For example, you may create a group of technicians that are assigned to Bob and another group of technicians that are assigned to Ann. And then for each technician assigned to the group, you determine the following.

- Whether or not you want the technician as the admin for their group. (A group can have more than one admin.)
- Whether or not you want the technician to show up in Remote Service Manager.

- Whether or not you want the technician's queue shared with other techs in Remote Tech depending on the relations you set up between groups.

You can also create relations between groups. This makes it possible for technicians and managers to view service calls for technicians outside of their service group.

Accessing Management Groups

The Multiple Call Management feature is accessed by clicking on the [≡] icon in the upper left corner of the Administration page.
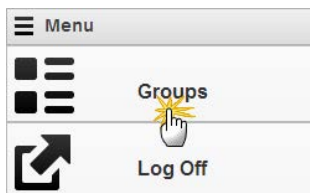
If you are logged into Remote Service Manager as an admin, the menu displays with two available options.

Select the **Groups** option.
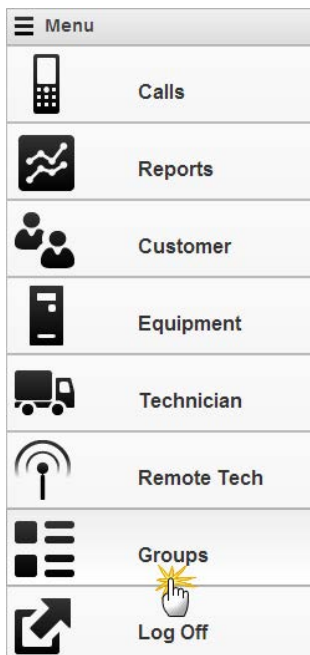
If you are logged into Remote Service Manager as a technician that is assigned the Group Admin right, you have the ability to edit the members and details of the group.

Select the **Groups** option.

How to Create Management Groups

Only an Admin can create new groups. If you are logged in as a manager, you cannot create groups.

Click on the **+** next to **Create Group** icon.

Enter a Name for the management group you are creating as well as a brief description of the group.

Click the button to create the new group.

How to Edit the Name and Description of a Group

To edit the name and/or description of a group, you simply click on the icon next to the **Details** heading.

The Edit Group window displays.

Make appropriate changes and click the **Update** button.

Delete Management Groups

When deleting a Management group, you must do so with caution. When you delete a group all the technicians in the group will be removed from the group and any relations you have set up to other groups will be broken.

Click the ✖ to the left of the group name.

How to Add Employees to Groups and Configure Rights to Assign and ReassignCalls

Select the Management Group you want to configure.

The **Group Details** page displays.

To add technicians to the group, click the **+** next to the **Members** icon.

A list of employees displays. The ![truck icon] indicates the employee is a service technician. Select the individual to add them to the group.

Select the individual to add them to the group.

You may select employees that are not technicians if, for example, the group administrator is not a technician.

Employees added to Ann's Group are listed under the Members region.

Note: In this image Brian Russel does not have the *Share in RT* option and *Show in RSM* option because he is not a service technician in e-automate. Only service technicians have all three options: *Share in RT*, *Show in RSM*, and *Group Admin*.

Once the technicians are assigned to the group, you must determine the following:
- Whether or not you want the technician's queue to be shared in Remote Tech.
- Whether or not you want the technician's to show in Remote Service Manager.
- Which technicians you want as the Group Admin.

When checked, the employee is the group's administrator. The Group Admin can assign the rights to push and pull service calls for their group and any group to which they can administer rights. You would check this box for the Manager of the group of technicians.
Note: For a better explanation of what the push and pull rights do, see the **How to Create Related Groups** topic below.

When checked, the technician will show up in RSM when the Manager logs in. Employees that are not technicians do not have this option.

When checked, the technician's queue can be seen by all other members of the group. Employees that are not technicians do not have this option.
Note: You must have the 'Allow Group View' right enabled in Remote Tech in the Features area. See the Remote Tech Users Guide for more information.

How to Remove Employees from Groups

Click the ![X] to the left of the employee name.

How to Create Related Groups

If, for example, Ann is setup as a manager who manages other managers in e-automate, the system creates the groups for each manager and then creates relations between those groups. Ann is configured with the proper rights to be able to manage the managers under her as well as all technicians under those managers.

You may also create relations between groups yourself. If you want members of one group to be able to view service call queues for members of another group, you may create a relation to the current group.

To create related groups, select the Management Group you want to configure.
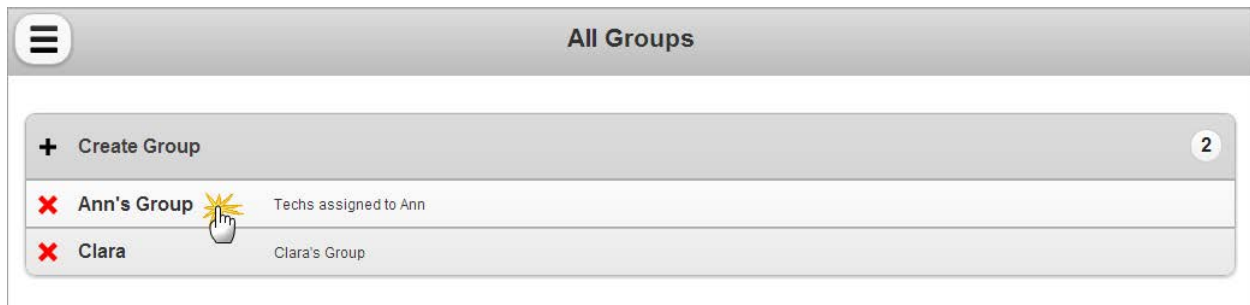
The **Group Details** page displays.
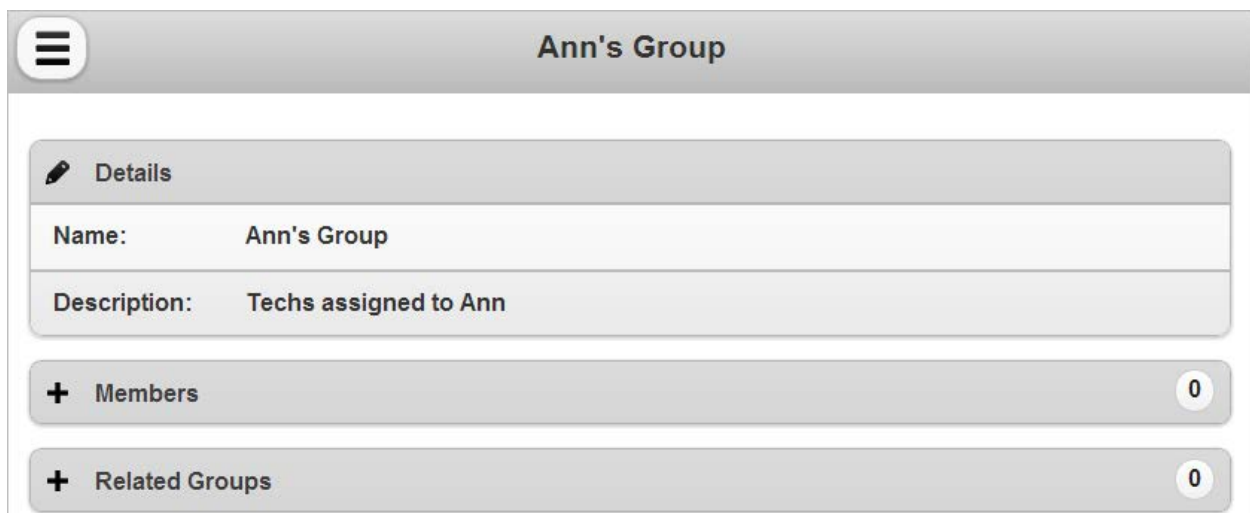
Click the **+** next to the **Related Groups** icon.

A list of all available Groups displays.
Select the Group you want to add as a related group.

The original group and the related group display in the **Related Groups** region.

Once the group relation is created, you must determine how you want the relationship between the two groups to work. You can allow technicians in one group to assign service calls to technicians in the other group and vice versa.

When checked, the technicians assigned to the group can assign calls to technicians in the related group that have the **Show in RSM** checkbox checked. Push rights allow technicians to reassign calls, but not to view call details.

With Push checked, techs in Ann's Group can assign calls to techs in JD's Group.

Pull — When checked, the technicians assigned to the group can view detail for and take service calls from technicians in the related group that have the **Show in RSM** checkbox checked.

With Pull checked, techs in Ann's Group can unassign calls for techs in JD's Group.

Administer — When checked, any member of the group that has Group Admin checked can make changes to the related group such as add technicians to and remove technicians from the group as well as assign Push, Pull and Administer rights.

Ann's Group

Details

Name: Ann's Group

Description: Techs assigned to Ann

+ Members   4

✕	Ann Surely	☐ Share in RT	☐ Show in RSM	☑ Group Admin
✕	Bill Thornton	☑ Share in RT	☑ Show in RSM	☐ Group Admin
✕	Brian Russel			☐ Group Admin
✕	Carson Butler	☑ Share in RT	☑ Show in RSM	☐ Group Admin

Ann has the ability to make changes to JD's group because...

a.) Ann is the Group Admin for Ann's Group and

b.) Administer to JD's group is checked.

+ Related Groups   1

✕	Ann's Group	☐ Push	☐ Pull	☑ Administer JD's group
	JD's group	☐ Push	☐ Pull	☐ Administer Ann's Group

If **Administer** is unchecked for a group and the individual that is the Group Admin can view the related group information, but cannot makes changes to the related group.

When the Admin who is creating the groups unchecks the Administer Group "John" checkbox...

the Group "Ann" /Group "John" relation is viewable, but not editable when Ann (who is the Group Admin) is logged in to RSM.

There are several different ways you can manipulate the Groups feature to meet your specific needs. For example, if you have Gus and Ann who are both managers and you want Ann to be able to cover for Gus if he is out for the day, you would need to give Ann access to his group.

One way to have Ann be an admin of a Gus's group is to add her to Gus's group and then check her Group Admin checkbox. This method allows her to see calls for every technician listed in that group.

However, you may not want Ann to always have access to all those technician's calls. Another way to have Ann be an admin is create group relations between Gus's and Ann's groups. That way, if Ann needs to cover for Gus one day, the Admin may go in and check the Push and Pull checkboxes for the relation.

Updating Remote Service Manager versions or users.

The icon is used to update Remote Service Manager if you add users or we publish information on a new update. We will contact you and let you know to refresh your key to update Remote Service Manager or add the license. The starting point is to select the key icon.

After selecting the key icon, select

 Refresh License

After selecting refresh license your new user(s) will appear at the bottom of the page and/or Remote Service Manager will be updated.

Remote Service Manager Options

Remote Service Manager options are accessed by selecting the gears ⚙ icon.
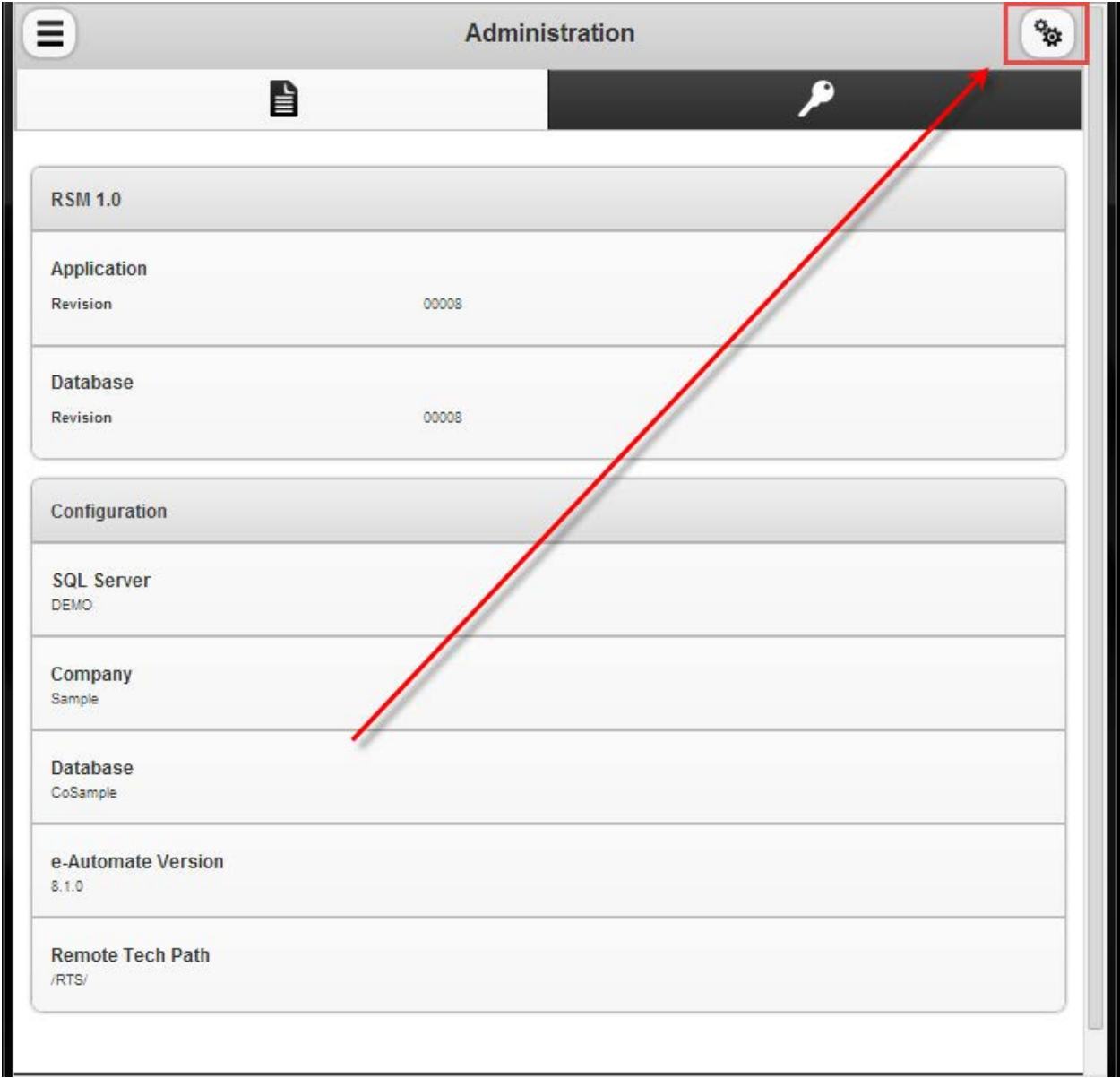
Editing the Options

After selecting the gears icon, you will be presented with the following options page.

These options allow or restrict the user(s) to access various functions. For example, if your company does not allow your manager or supervisors to cancel a call, the administrator can click anywhere in the following menu bar to the immediate right of the Cancel option.
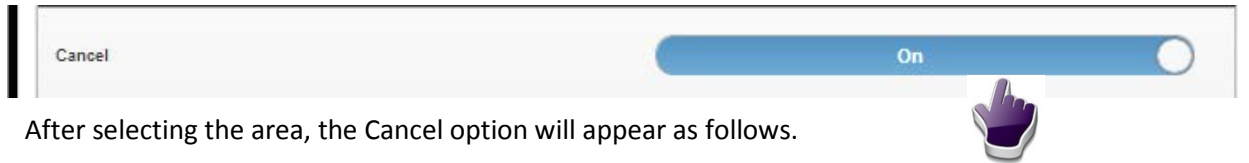
After selecting the area, the Cancel option will appear as follows.

Selecting the menu bar again will toggle it back to

Overview - Logging in

> Use your e-automate User ID and password to log in to Remote Service Manager.

e-automate setup

Each manager and tech is created using e-admin and is given a User ID and password assuming the manager or tech has never had an e-automate login. The manager or tech is then created in e-automate under the People menu.

Logging in

As an example, when the Service Manager, Gus Pike, logs in he will see his entire team and the number of calls assigned to each tech. Each manager logs in with their respective e-automate User ID and password. These credentials are maintained in the Digital Gateway e-admin program. User ID's are not maintained in Remote Service Manager. As an aside, the e-admin and manager permissions in e-admin have no application in Remote Service Manager. When a manager who reports to Gus logs in they will only see their techs.

Please enter your user name and password.

Details	
User name	gus
Password	••••

☐ Remember me?

Log in

Calls

Open (D, S, P, H)

Technician

🔍 Find calls...

AS00 Ann Surely West - West Territory ℹ ☎ ✉		4
BT00 Bill Thornton East - East Territory ℹ		4
CB00 Carson Butler West - West Territory ℹ ✉		3
DT Daniel Torres (Supervisor) East - East Territory ℹ ☎ ✉		0
EJ Elaine Jefferson East - East Territory ℹ ☎ ✉		0
EW Ester Wright		

Technician Unavailability

Remote Service Manager looks at the tech unavailability settings in e-automate to alert the manager that the tech is not available for a certain time period.

This is set in e-automate as follows:
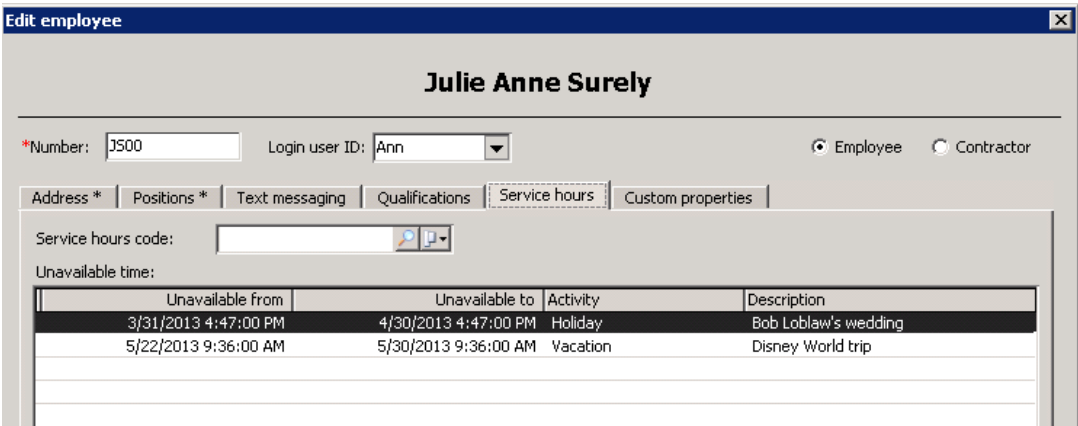
Creating Service Calls

As a service manager you also have the ability to create a service call from within Remote Service Manager.

On the Calls page, sort the calls by customer by clicking the ▤ icon. Select **Customers** from the displayed menu.
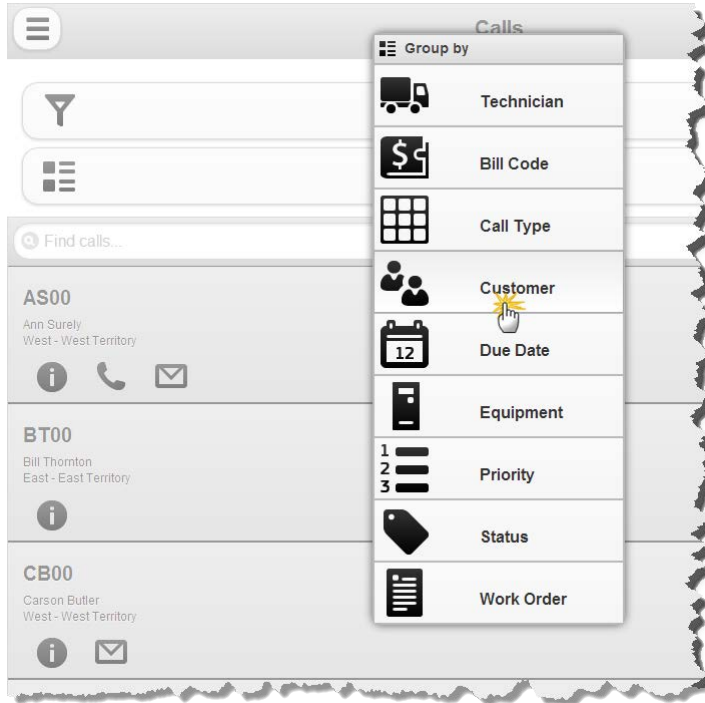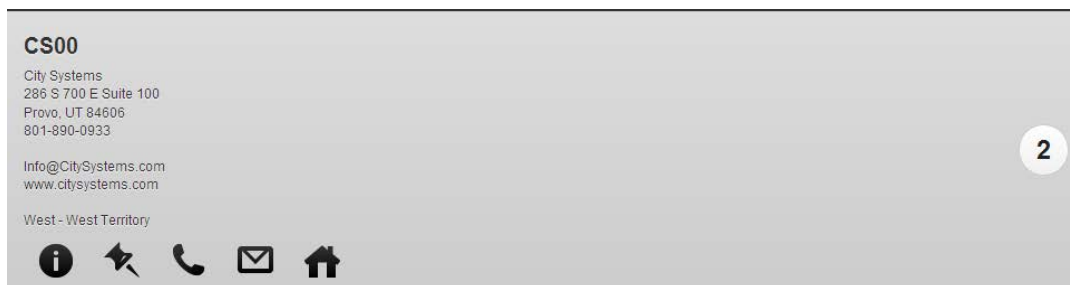

Locate the customer for which you want to create a service call and click on the customer.

Click the ℹ️ icon to display the following options.

Actions

✳	**Create Call**	
⚡	**Address** 286 S 700 E Suite 100 Provo UT, 84606 USA	
📞	**Phone 1** 801-890-0933	
📞	**Phone 2** 801-890-0934	
✉	**Email** Info@CitySystems.com	
🏠	**Website** http://www.citysystems.com	

Click on to open the Create Call page.

Create Call

CS00

City Systems

Equipment

Number ⌄

Technician

Technician   Ann Surely ⌄

Details

Caller

Description

Call Type   108 ⌄

Contract   No Contract ⌄

Cancel   Create

Click in the **Number** field to select the equipment that needs service.

Click in the **Technician** field to select the technician you want to assign to the call.

Enter the appropriate information in the **Details** region.

Caller: name of the person who is called in for service.
Description: Description of the problem.
Call Type: Click in the field to select a call type.
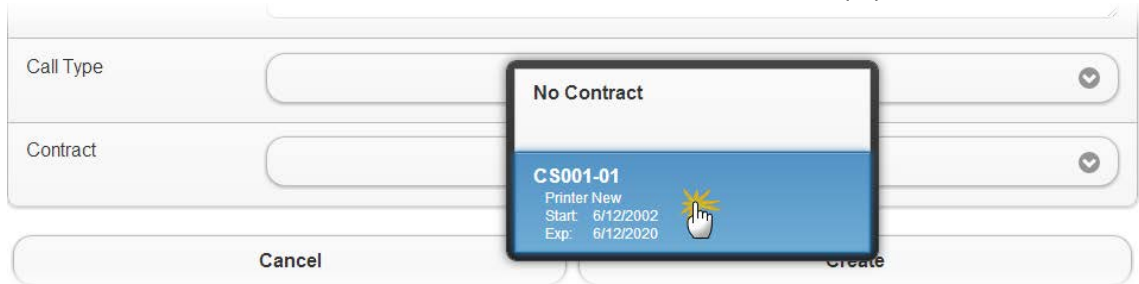
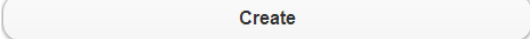**Contract:** Click in the field to select the contract associated with the equipment.

You may select *No Contract* if you do not want to associate a contract with this service call.
Note: If you do not see the Contract field, the ability to select a contract is not enabled. Contact your RSM admin to have the feature enabled.

Click the [Create] button to create the call.

The call is added to the e-automate database and the technicians queue in Remote Tech.

Place On Hold, Schedule, Cancel a Call

Remote Service Manager includes the ability to change the status of calls, as indicated below.

This functionality uses the following rules.

- Set on Hold:
  - Call must be Pending, Scheduled, or On Hold
  - Hold Code must be marked as useable by techs in e-automate.
  - Event logged to call notes
- Release on Hold
  - Call must be On Hold
  - Release from RemoteTech not required
  - Event logged to call notes

- Schedule
  - o Call must be Pending or Scheduled
  - o Can set Estimate Start Date, Schedule, or Unscheduled
- Reassign
  - o Call must be Pending, Scheduled, or On Hold
  - o Assistants are not modified
  - o Event logged to call notes

Set on Hold

Select the Set On Hold Icon.

The On Hold Codes from e-automate are displayed and one may be chosen.

The manager is then prompted to Email the tech. Note that the email option can be selected to toggle to not email the tech. Or choose "Cancel" if the manager has second thoughts and does not want to put the call on hold.

SC1372

Current Status

P (Pending)

New Status

POSS (Pos Special On Hold Code)

Click or tap anywhere in the "Send Email" area here to toggle from "Send Email" to "No Email" and back to "Send Email" . Like a light switch.

Send email

Cancel   Confirm

Note: Sending email is independent of the e-automate feature where a tech can be "emailed" a text message.

Select the On Hold icon to change an on hold code to another type of on hold code. In this example, this call is already on hold. You may select the on hold icon and change it to another on hold status.

SC1244
Feb 18, 2013 11:13 AM
L3 (Level 3)
CP - Copy Quality
G - Gold

Getting a message that the scanner is not a supported device.

NA (Needs Assistance)

Release on Hold

Select the button to release a call that is on hold.

The manager is then prompted to email the tech assigned to the call. Choose confirm to email, or cancel as appropriate. Note that clicking or tapping anywhere in the "Send email" button toggles the button to "no email".

Selecting Schedule/Estimated

Select the Schedule button

Select a date and time for the call.

To utilize a touch screen on a smartphone, tablet, or a touchscreen laptop, the manager may use their finger or stylus (if available).

You use the Schedule/Estimated toggle button to schedule the call or estimate a scheduled time for the call.

The *No email/Send email* toggle button allows you determine whether or not you want an email automatically sent to the technician that informs them they have been scheduled for the call.

Cancelling a Call

To cancel a call, select the button.

Upon selecting the Cancel Button , the manager will be prompted as follows. Please Select "Choose cancel code" and then choose a cancel code.

After choosing the cancel code, the manager may enter any comments about the cancellation. Then, confirm is selected and an email will be sent to the assigned technician. If the selection is made to not send an email, the manager may select anywhere in the oval containing the words "Send email" to choose to not send an email. The button will appear as follows:

Email sent to technicians

As calls are reassigned, placed on hold, scheduled, or cancelled, an email may be sent to the tech(s). The email address used is the one on the tech's record in e-automate.

SC1237 reassigned ▶ Inbox x

info@tech-anyware.com
to me ▾

SC1237 has been reassigned from Felix King to Kelly Mathews

Reassigning Technicians

New location for the Reassignment Icon

The reassign icon is positioned just above the labor, materials, and so on while viewing a call.
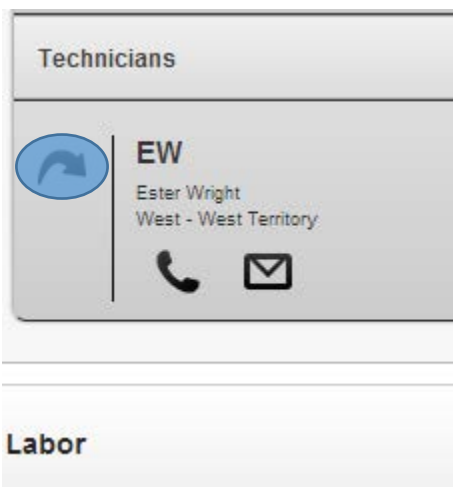
Selecting the reassign icon allows the manager to see his/her team.

Choose the desired technician. In this example Bill Thornton is chosen. Select [**Confirm**] to have the respective technician receive an email informing them of the reassigned call. You can also elect to not email the tech, as described above.

Reassigning to an unavailable technician and using a backup tech

If a reassignment is made to an unavailable technician, the backup technician may be shown if configured in e-automate.

Let's assume that the manager has a situation where Elaine is not available. If the manager assigns the call to Ester, who also is not available, Ester's backup tech, Jimmy, will be suggested as an alternative if configured in e-automate.

A notification will appear showing that the backup technician, Jimmy O'Brien, will be assigned to the call based upon the information in configured in e-automate. Shown in the screenshot below.

Adding an assisting technician to a call

Assisting technician(s) can now be added to a call in three ways.

- The traditional method where the assistant is added by the e-automate dispatcher.
- The primary technician adds the assistant via RemoteTech.
- A manager or supervisor adds an assistant using Remote Service Manager.

Adding an assistant

Locate the call and open it. Scroll down the call until you see the following icon:
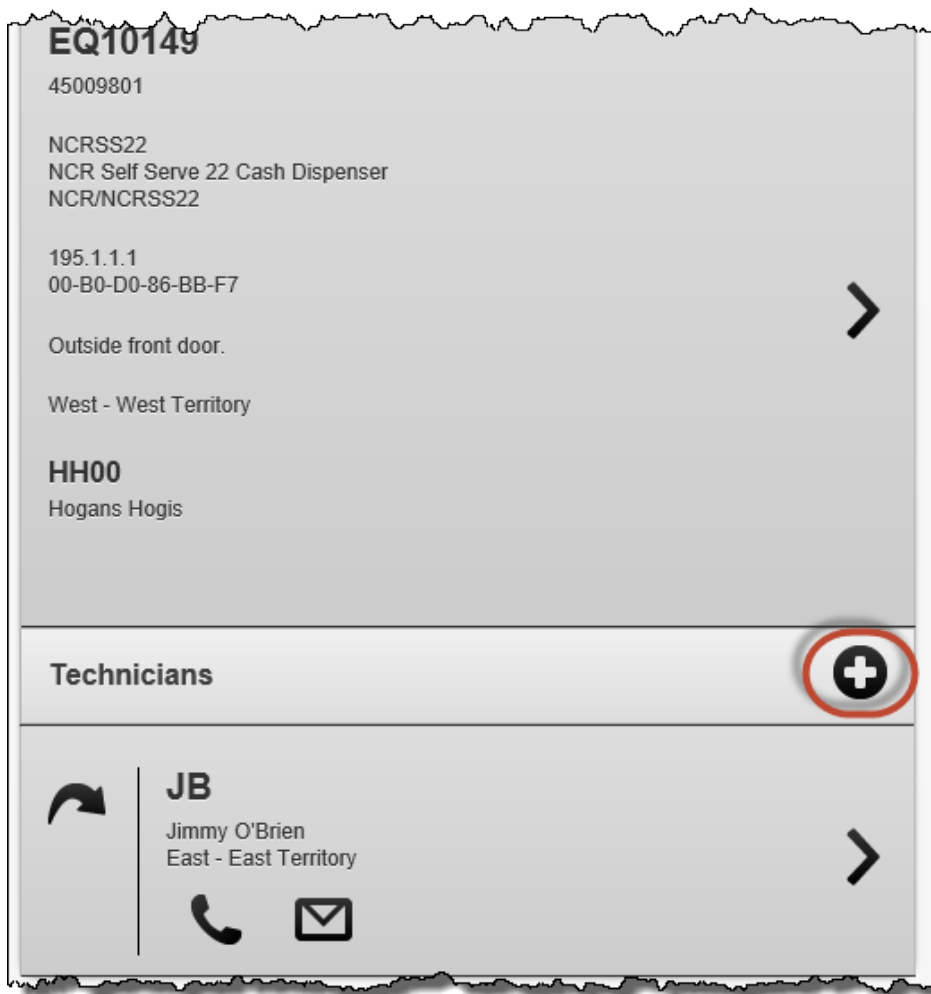
Click on the [+] icon.

Select one or more available technicians by checking the box(s) to the left of the technician(s). Click **Add** at the bottom of the page to add the selected technician(s).

The assisting tech will see the *same* call number in their call in RemoteTech.
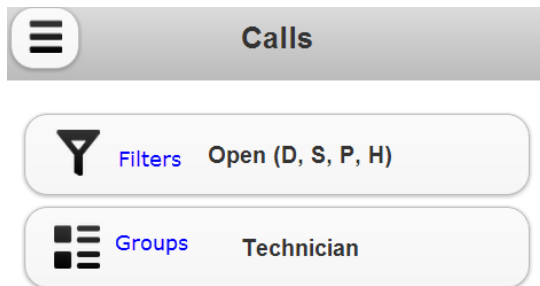

The assisting tech will add their labor and items. The primary tech will add their labor, enter meters, and close the call. That is, each tech gets their own labor and parts usage.

Filters, Grouping, and Searching

Filters and Grouping

Filters and Groups are shown as follows:

Groups
- Call groupings (except status and due date)
    o All call groupings use the grouping as the primary sort (Bill Code – sorted bill code ascending, Customer – customer number ascending, etc.)
    o All call groupings use the status rank as the secondary sort (D = 1, P/S = 2, H = 3)
    o All call groupings use the due date as the tertiary sort
- Status grouping
    o Primary sort: D, S, P, H
    o Secondary sort: On hold code
    o Tertiary sort: Due date
- Due date grouping
    o Primary sort: Due date

Searching
Customer search
- Name
- Number
- Address
- City
- State
- Zip
- Phone 1
- Website
- Territory
- Territory description
- Email address
- Web site
Customer equipment
- Customer Name

- Number
- Serial
- Status
- Condition
- Location remarks
- Territory
- Territory description
- Item
- Model
- Make
- If installed location exists
  - Location address
  - Location city
  - Location state
  - Location zip
- If no installed location exists
  - Customer address
  - Customer city
  - Customer state
  - Customer zip

Customer item history
- Parent number (call or sales order)
- Item
- Item description
- Model
- Make
- Serial
- Agent number (technician or sales rep)
- Agent name

Equipment search
- Customer Name
- Number
- Serial
- Status
- Condition
- Location remarks
- Territory
- Territory description
- Item
- Model
- Make
- If installed location exists

- o Location address
- o Location city
- o Location state
- o Location zip
- If no installed location exists
  - o Customer address
  - o Customer city
  - o Customer state
  - o Customer zip

Equipment item history

- Parent number (call or sales order)
- Item
- Item description
- Model
- Make
- Serial
- Agent number (technician or sales rep)
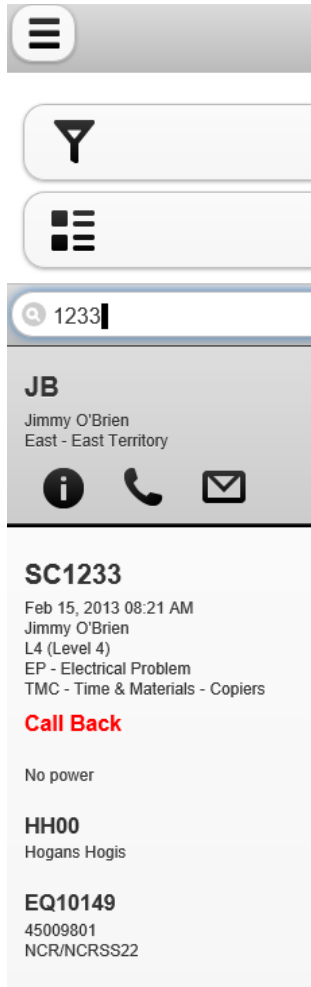- Agent name

Technician search

- Agent number (sales or tech)
- Preferred full name
- Address
- City
- State
- Zip
- Work phone
- Territory
- Territory description

Call Searching Example

Let's find a call for Hogan's Hogis. Here are three ways to find the call.

Search by the call number, customer name, or first part of the equipment number.
Start typing one of the above and the call will appear without having to select a search button.

Searching for Customers, Equipment, and Technicians.

To search for customers, equipment, and technicians when not in the call list, select the ☰ icon in the top left of the page.

The following screen will appear.

When searching for customers and equipment, the manager will be able to see all the customers and equipment in e-automate. If branching is used the manager will only see the customers and equipment in the manager's branch.

Technician search will search for only those technicians that report to the respective logged in manager.
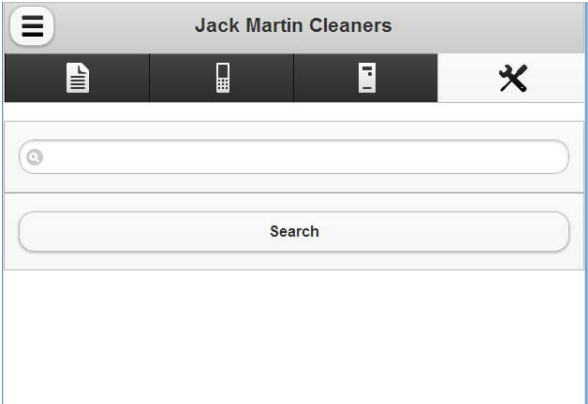
Parts (Item) History

Customer Usage

While viewing the customer, select the [icon] icon to view Item History.
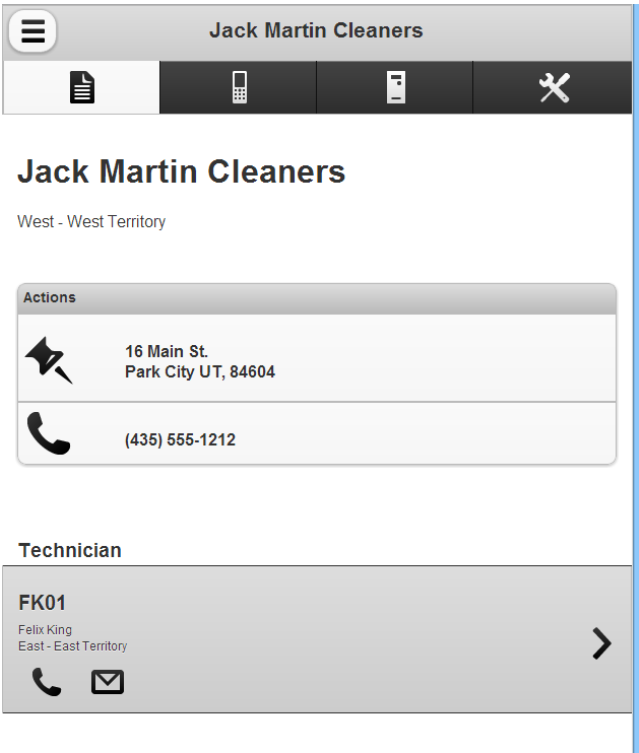
Select [Search] without any search criteria to view all item history for the customer

Customer item history search fields

- Parent number (call or sales order)
- Item
- Item description
- Model
- Make
- Serial
- Agent number (technician or sales rep)
- Agent name

e-automate Notes

A manager may view service call notes. The notes can be viewed in real time if the techs are using RemoteTech. In the following example Donnie, a dispatcher, has included a note on Service Call SC1192 from Daniel, the service manager, exhorting Elaine to hurry along today. Elaine, using RemoteTech, responds while on the call.
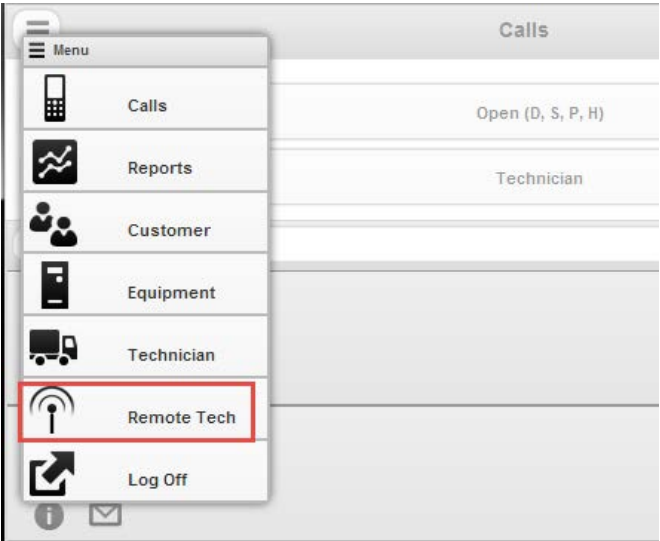
The manager can also see the complete event log from the service call, giving a real time view of the progress of the call.
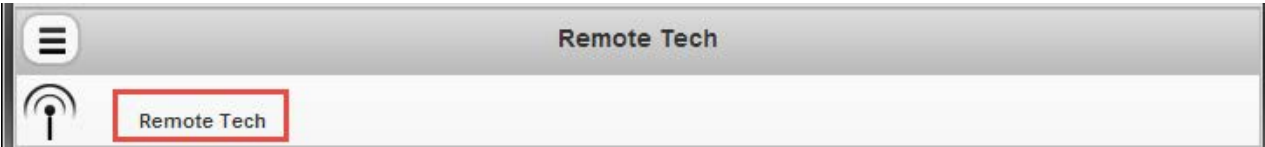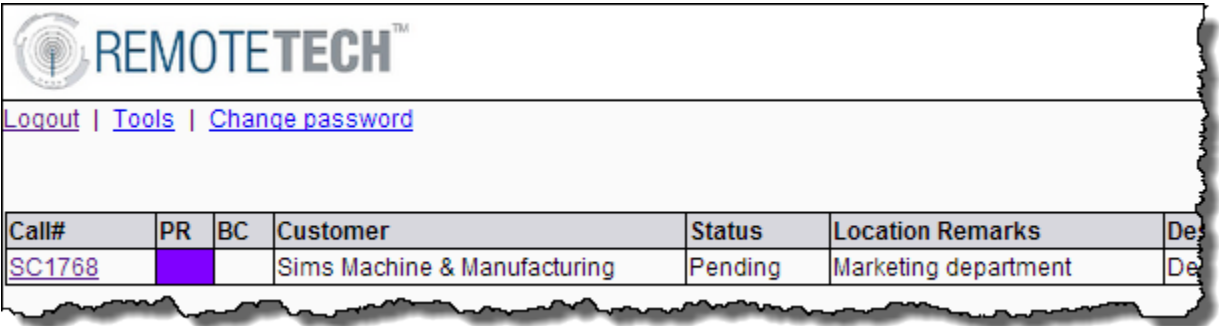
RemoteTech Login

If the manager has a RemoteTech license, the manager can select the RemoteTech menu option which will redirect to the RemoteTech login.

You will be prompted once again to select RemoteTech.

If the manager had previously signed into RemoteTech, the managers RemoteTech call list will be shown.
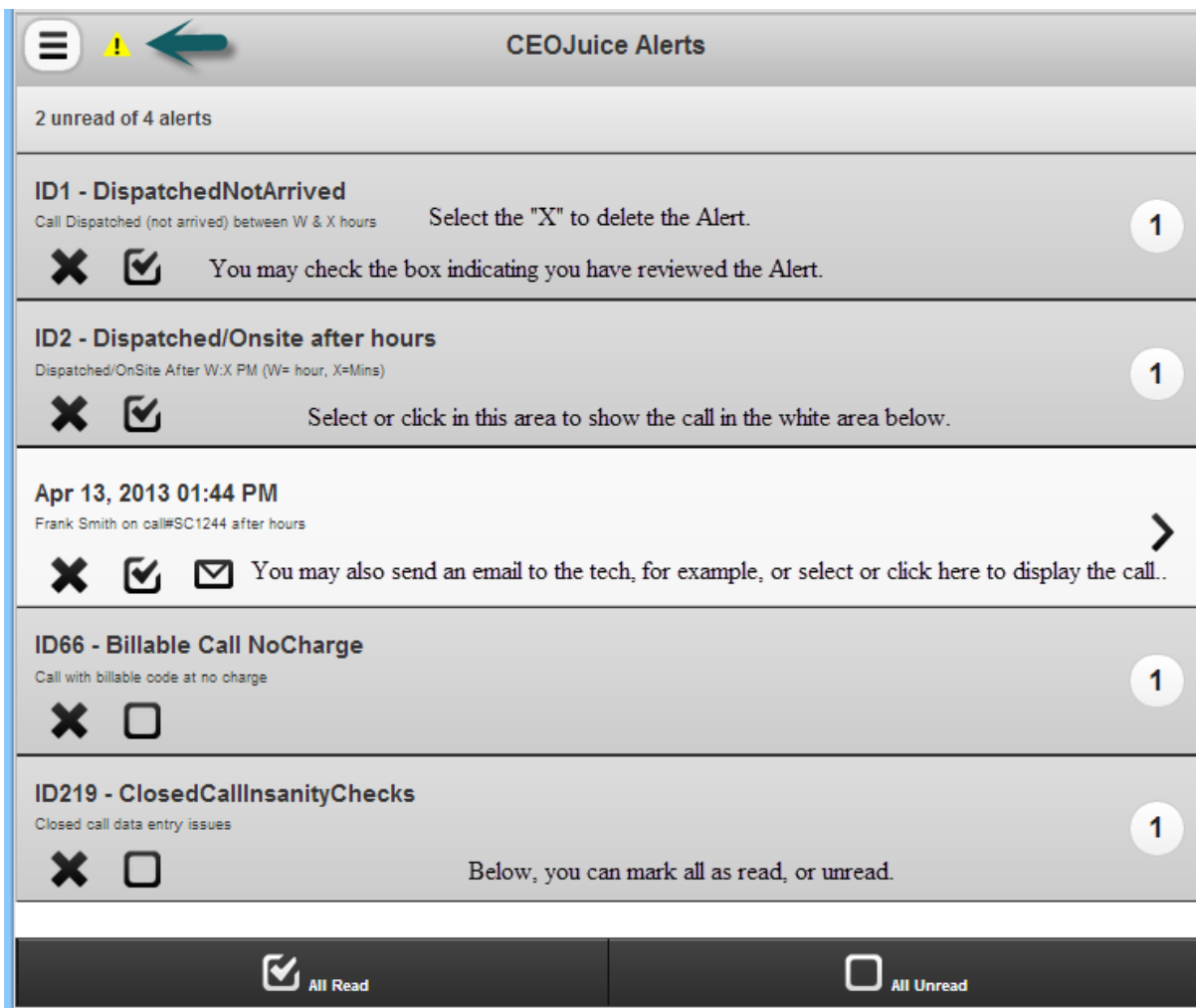
CEO Juice Integration

RSM supports integration with CEO Juice. If you are a CEO Juice customer, please contact CEO Juice at help@ceojuice.com for assistance with configuring your alerts so that they appear in RSM.

Here is a screenshot example of what an RSM user will see when alerts are present in RSM.

The yellow Icon ⚠ indicates that new alerts are available.

Select the Icon to view the Alerts. The following is an example.

The Alerts are linked with the call, so when one drills into the Alert the call information is displayed for subsequent action if required.

Once the alert is read (opened) and any appropriate action is taken, the Alert may be completed by checking the box as show above. Once all alerts are read, the yellow icon will change to the color black. When the manager receives new Alerts the Icon will appear as yellow once again.

Consult with CEO Juice on your options relating to continuing to also receive emails.

Conclusion

For assistance with your installation, please contact Digital Gateway support by sending an email to eacustomercare@ecisolutions.com.

We thank you for being a Remote Service Manage customer.