



Remote Tech User Guide

v. 14.1





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Logging in

Before you can login to Remote Tech you must first have an e-automate login and password. If you do not have an e-automate login and password, contact your system administrator. With a name and password you can access the functionality of Remote Tech by logging in. You access the login page by navigating on your device to the Remote Tech login page. If you do not know the web address for your login page, contact your system administrator.

1. On your internet capable device, launch the web browser.
2. Using your devices functionality type the URL for your Remote Tech Server.

Note: The login page for Remote Tech for access using the remote phone or laptop is [login.aspx](#).

REMOTE TECH™

User:

Password:

Company:


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3. In the **User** field, enter your user ID.
Note: You receive your user ID from your system administrator.
4. In the **Password** field enter your password.
5. In the **Company** field, enter the company name to which you want to login.
Note: This field is provided to you by your system administrator. This is the name of your e-automate database.
6. Click [**Login**] to login to Remote Tech.

Change Password

You can change your Remote Tech password using the **Change password** link found on the main call page above the service call list.






[Logout](#) | [Tools](#) | [Change password](#)

Call#	PR	BC	Customer	Status	Location	Remarks	Description	Make/Model	Est. Start	Address
SC1296			Paper Shack	Pending	Back office.		Blank areas on the pages	Sharp-SH-TX190	2/3/2014 15:47	1730 Beck St, Salt Lake City
SC1782			Bonneville Business Machines	Pending			Won't print	IBM-IBMKBYD	3/11/2014 13:28	5251 Cove Canyon Dr., Park City
SC1809			City Systems	Pending	Purchasing Department		Thick black line showing up on the left side of all copies.	Canon-CN-PR5002	4/15/2014 10:00	286 S 700 E Suite 100, Provo
SC1499			Bank of National Fork	On Hold (I-SVR)	Accounting dept.		Incomplete Remarks - Won't work	Sharp-SharpMX-2310U	6/26/2013 10:00	33 E Main St, American Fork
SC1402			Cummings Engine	On Hold (WP)	Out in the shop. See Fred to gain access to the machine.		Paper jam, again.	Sharp-SH-PR5000	11/25/2013 14:32	3650 N University Ave #200, Provo

1. From the main Remote Tech call list page, click **Change password**. The change password page displays.



Old password:

New password:

Confirm password:

2. In the **Old password** field, enter your current password.
3. In the **New password** field, enter your new password.


Note: If your system administrator has turned on strong passwords, your password must be a minimum of eight characters and contain at least one character from three of the four following groups, uppercase letters, lowercase letters, numbers, and the following symbols: #, \$, %, &.
4. In the **Confirm password** field, re-enter the same password you entered in the **New password** field.
5. Click **[OK]** to save your password and return to the main call list page.

Technician Call List

The technician call list displays a list of all service calls assigned to you. The call list also provides access to the **Logout** link, **Tools** link, and **Change password** link. In the call list section, Remote Tech displays the service call number as a link as well as call information as



configured by your system administrator. For additional information about a call, click the call number link to begin work on the call or view additional information.




[Logout](#) | [Tools](#) | [Change password](#)

Click on the call # to view service call detail.


Call#	PR	BC	Customer	Status	Location	Remarks	Description	Make/Model	Est. Start	Address
SC1296			Paper Shack	Pending	Back office.		Blank areas on the pages	Sharp-SH-TX190	2/3/2014 15:47	1730 Beck St, Salt Lake City
SC1782			Bonneville Business Machines	Pending			Won't print	IBM-IBMKBYD	3/11/2014 13:28	5251 Cove Canyon Dr., Park City
SC1809			City Systems	Pending	Purchasing Department		Thick black line showing up on the left side of all copies.	Canon-CN-PR5002	4/15/2014 10:00	286 S 700 E Suite 100, Provo
SC1499			Bank of National Fork	On Hold (I-SVR)	Accounting dept.		Incomplete Remarks - Won't work	Sharp-SharpMX-2310U	6/26/2013 10:00	33 E Main St, American Fork
SC1402			Cummings Engine	On Hold (WP)	Out in the shop. See Fred to gain access to the machine.		Paper jam, again.	Sharp-SH-PR5000	11/25/2013 14:32	3650 N University Ave #200, Provo

If you have been given the proper rights, you can also view service calls for other technicians. The **Calls for** field, displays the technicians for whom you can view service calls. The technicians are divided into two groups: My Groups and Related Groups. The My Groups section displays all technicians that are assigned to any of the same groups to which the logged in technician is assigned. The Related Groups section displays all technicians that are assigned to any groups that have a relation to any of the groups to which the logged in technician is assigned.

You will only see these sections if you have been given the rights to reassign calls to these groups. The Groups are defined in the Remote Service Manager.

									
Logout Tools Change password									
<div>My Groups: Techs that belong to the same Groups as the logged in technician.</div>									
<div>Related Groups: Techs that belong to groups that have a relation to any of the groups to which the logged in technician is</div>									
<div>Calls for: Anne Surely</div>									
Call#				Status	Location	Remarks	Description	Make/Model	
SC1296			Paper Shack	Pending	Back office.		Blank areas on the pages	Sharp-SH-TX190	
SC1782			Bonneville Business Machines	Pending			Won't print	IBM-IBMKBYD	
SC1809			City Systems	Pending	Purchasing Department		Thick black line showing up on the left side of all copies.	Canon-CN-PR5002	
SC1499			Bank of National Fork	On Hold (I-SVR)	Accounting dept.		Incomplete Remarks - Won't work	Sharp-SharpMX-2310U	
SC1402			Cummings Engine	On Hold (WP)	Out in the shop. See Fred to gain access to the machine.		Paper jam, again.	Sharp-SH-PR5000	





[<< Calls](#) | [Close call](#)
[Summary](#) | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | [Labor](#) | [Notes](#) | [Exchange Equipment](#)

Schedule

Est. Start:
8/20/2012 08:11

Labor:

Dispatch	3/13/2014 22:23
Arrive	3/14/2014 13:31
Depart	[click to depart call]
Remarks:	
Notes:	

Call Summary:

Technician:	Anne Surely	Reassign
Call#:	SC1048	
Status:	P	
Call received:	8/17/2012 15:11	
Due by:	8/20/2012 08:11	
Description:	Copies have a splatter.	
Caller:	Richard	
Call type:	CopyQuality	
Sales rep:	Robin Weathers -- 215 -- Robin@example.com	
Contract#		
Bill code:	TMC	
Terms:	2/10	
Priority:	Level3	
Make/Model:	CN-PR5002	
Serial#:	85747658697	
Equipment#:	EQ10000	
Install date:	2/1/1999	
Warranty date:	8/1/1999	
IP address:		
MAC address:		
Eq. primary note:	Equipment Remarks	
Location remarks:		
Contact:	Anne	
Customer#:	CS00	
Customer:	City Systems	
Address:	286 S 700 E Suite 100	
City:	Provo	
State:	UT	
Zip:	84606	
Phone:	801-621-3004	
Email:	Info@CitySystems.com	
Work order#:	33	
PO#:	CS000001	
History:	History	
Map:	Map	

Call Summary Page

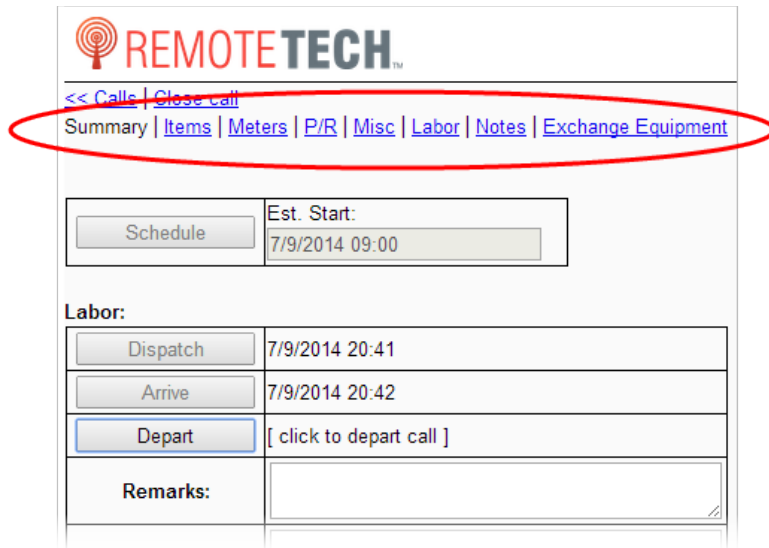
From the Call Summary Page you can view the service call information as well as perform all service call tasks. From the Call Summary page you can do the following.

- Schedule Calls
- Dispatch Calls
- Arrive Calls
- Depart Calls
- Reassign Calls
- Edit the Call Description



From the Call Summary page, you have access to following areas.

- **Items:** Where you record materials used on the service call.
- **Meters:** Where you record meter readings.
- **P/R:** Where you assign problems and records to the service call.
- **Misc:** Where you record miscellaneous charges added during the service call.
- **Labor:** Where you add labor performed on the service call.
- **Notes:** Where you enter any notes associated with the service call.



REMOTE TECH

[<< Calls](#) | [Close Call](#)

Summary | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | [Labor](#) | [Notes](#) | [Exchange Equipment](#)

Schedule	Est. Start: 7/9/2014 09:00
--------------------------	-------------------------------

Labor:

Dispatch	7/9/2014 20:41
Arrive	7/9/2014 20:42
Depart	[click to depart call]
Remarks:	

Tools

Item Lookup


You use the item lookup to research items in your company's e-automate database. You can determine which warehouses have stock of an item and how many are in each warehouse. The search functionality is a flexible search that allows you to enter any value that is associated with an item number and return any item that meets the criteria. When searching, Remote Tech searches your e-automate database in the following fields:

- Item number
- Item description
- Vendors number
- Past vendor numbers stored in the vendor history

How to use Item Lookup

1. From the Remote Tech main call page, click the **Tools** link.






[Logout](#) | [Tools](#) | [Change password](#)

Call#	PR	BC	Customer	Status	Location	Remarks	Description	Make/Model	Est. Start	Address
SC1296			Paper Shack	Pending	Back office.		Blank areas on the pages	Sharp-SH-TX190	2/3/2014 15:47	1730 Beck St, Salt Lake City
SC1782			Bonneville Business Machines	Pending			Won't print	IBM-IBMKBYD	3/11/2014 13:28	5251 Cove Canyon Dr., Park City
SC1809			City Systems	Pending	Purchasing Department		Thick black line showing up on the left side of all copies.	Canon-CN-PR5002	4/15/2014 10:00	286 S 700 E Suite 100, Provo
SC1499			Bank of National Fork	On Hold (I-SVR)	Accounting dept.		Incomplete Remarks - Won't work	Sharp-SharpMX-2310U	6/26/2013 10:00	33 E Main St, American Fork
SC1402			Cummings Engine	On Hold (WP)	Out in the shop. See Fred to gain access to the machine.		Paper jam, again.	Sharp-SH-PR5000	11/25/2013 14:32	3650 N University Ave #200, Provo

The tools page displays.

	
Item Lookup	
Call Lists	
Manage Inventory	
Fax Test	
Create Call	
Invoice Info	
Time Entry	
Administer RT	
<< Calls	

- Click [**Item Lookup**] to open the Find Item page.

	
Search	<input type="text"/>
<div style="border: 1px solid #ccc; height: 80px; margin: 5px 0;"></div>	
<< Cancel	




3. In the **Search** field enter your search criteria.

Note: You can use item numbers, description, vendor numbers, or past vendor numbers. You can also enter a search to display all items in your company database available to the service module (inventory items with service codes).

4. Click [**Search**] to execute your search or [**< Cancel**] to return to the Tools page.


5. Remote Tech displays all items from the e-automate database that matches your search criteria.

Note: The item numbers that display may not be the number you entered in the search. For example, if you searched using a historical vendor number, Remote Tech can identify the current item number associated with the historical number and Remote Tech displays the current item number assigned in e-automate.

				
Actions	Item	Available	Description	Category
View	006R01551	50	Black Toner for WorkCentre 5325/5845	Supply
View	007K17071	47	Xerox 6010 Drive Assembly Motor	Part
View	0700019	30	Xerox Part	Supply
View	106R01510	93	Black Toner Cartridge Xerox Phaser 6700	Supply
View	120E31603	15	Xerox 6700 ADC Sensor	Part
View	1657B004BA-YT	133	Yellow Toner Cartridge for Canon imageRUNNER C1022	Supply
View	1658B004BA-MT	88	Magenta Toner Cartridge for Canon imageRUNNER C1022	Supply
View	1659B004BA-CT	93	Cyan Toner Cartridge for Canon imageRUNNER C1022	Supply
View	1660B004AA	228	Drum - Canon Image Runner C1022	Supply
View	1660B004BA-BT	-1	Black Toner Cartridge for Canon imageRUNNER C1022	Supply
View	7626A001AA	185	Yellow Toner Cartridge for Canon imageRUNNER c5180	Supply
View	7627A001AA	134	Magenta Toner Cartridge for Canon imageRUNNER	Supply

6. To view the details associated with an item, click the blue **View** link to the left of the item to view item detail.





Item:	006R01551
Description:	Black Toner for WorkCentre 5325/5845
Category:	Supply
Available:	50
Price:	125.00

Item	Warehouse	Description	Available
006R01551	*P	*Provo	50

OK

7. Review the item information displayed.
8. Click [**OK**] to return to the Tools page. To perform another search click [**Item Lookup**].

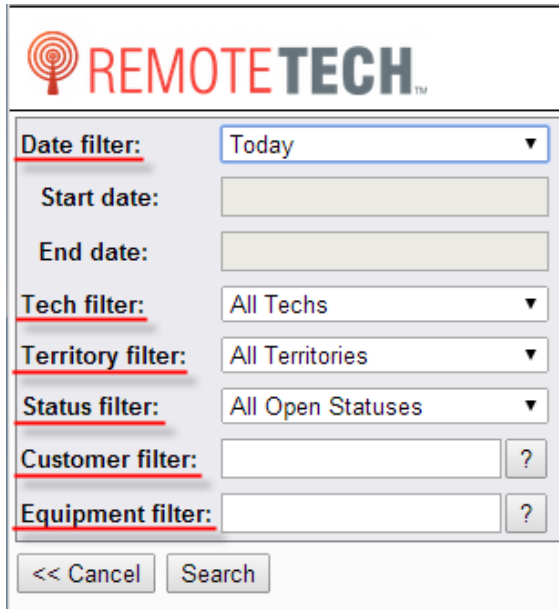
Call Lists

You use the Call List tool to search for, view service calls, and reassign calls based on your administrative options. Service calls can be reassigned from one tech to another tech according to the rights you have been given as long as:

- The call is not dispatched
- There are no materials on the service call
- The call is not on hold.

You can also use the call list to view more historical calls associated with equipment than the standard link on the service call offers. The standard history link on a service call shows you the history on previous service calls on the equipment assigned to the service call. The maximum number of service calls that will display is defined by your admin.

When using the Call Lists tool you can filter by different criteria to find calls that are of interest to the technician. The call list filter uses the following criteria:

The screenshot shows the Remote Tech filter interface. It includes the following fields and options:

- Date filter:** A dropdown menu currently set to "Today".
- Start date:** An empty text input field.
- End date:** An empty text input field.
- Tech filter:** A dropdown menu currently set to "All Techs".
- Territory filter:** A dropdown menu currently set to "All Territories".
- Status filter:** A dropdown menu currently set to "All Open Statuses".
- Customer filter:** An empty text input field with a search icon (?) to its right.
- Equipment filter:** An empty text input field with a search icon (?) to its right.
- At the bottom, there are two buttons: "<< Cancel" and "Search".

- **Date filter:** With the date filter you can choose to filter *All Dates* or select a date range. When filtering by date, Remote Tech uses the date the call was created for open calls and the close date for invoiced calls.

- **Tech filter:** You use this filter to select the technician or group by which you want to filter service calls.

- **Territory filter:** You use this filter, to view all service calls within a specific territory. Remote Tech filters calls by the territory assigned to the equipment on the service call. When there are calls in the console that have unknown equipment, they are displayed when all territories are displayed but not when you identify a specific territory. You can also look


for calls that are in your territory by using the **My Territory** filter, this uses the territory assigned to your technician record in e-automate.

- **Status filter:** You use this filter to view calls that are assigned a specific status.
- **Customer filter:** You use this filter to view all service calls for a specific customer. You can either enter the customer number in the provided field or search for the customer. To search for the customer click on the (...) button to the right of the filter.
- **Equipment filter:** You use this filter to view all service calls for a specific piece of equipment. You can either enter the equipment number in the provided field or search for the piece or equipment. To search for the equipment click on the (...) button to the right of the filter. The search allows you to search in the following fields: **Equipment number**, **Serial number**, **Make**, **Model**, **Item**, **Item description**, **Customer number**, **Customer name**, and **Location remarks** (if checked).


How to use Call Lists

1. From the Remote Tech main page, click the **Tools** link to navigate to the tools page.



									
Logout Tools Change password									
Call#	PR	BC	Customer	Status	Location Remarks	Description	Make/Model	Est. Start	Address
SC1296			Paper Shack	Pending	Back office.	Blank areas on the pages	Sharp-SH-TX190	2/3/2014 15:47	1730 Beck St, Salt Lake City
SC1782			Bonneville Business Machines	Pending		Won't print	IBM-IBMKBYD	3/11/2014 13:28	5251 Cove Canyon Dr., Park City
SC1809			City Systems	Pending	Purchasing Department	Thick black line showing up on the left side of all copies.	Canon-CN-PR5002	4/15/2014 10:00	286 S 700 E Suite 100, Provo
SC1499			Bank of National Fork	On Hold (I-SVR)	Accounting dept.	Incomplete Remarks - Won't work	Sharp-SharpMX-2310U	6/26/2013 10:00	33 E Main St, American Fork
SC1402			Cummings Engine	On Hold (WP)	Out in the shop. See Fred to gain access to the machine.	Paper jam, again.	Sharp-SH-PR5000	11/25/2013 14:32	3650 N University Ave #200, Provo

- Click [**Call Lists**] to open the filter configuration page.

	
Item Lookup	
Call Lists	
Manage Inventory	
Fax Test	
Create Call	
Invoice Info	
Time Entry	
Administer RT	
<< Calls	

- To define the date filter, do one of the following.
 - In the **Date filter** field, use the dropdown menu to select the appropriate date filter.
 - To define a custom filter, in the **Date filter** field, use the dropdown menu to select *Custom*. Then enter the beginning and end dates of the desire date range. Remote Tech uses the date the call was created for open calls and the close date for invoiced calls.



4. In the **Tech filter** field, use the dropdown menu to select the technician or group by which you want to filter service calls. The Tech filter is organized into the following three sections

- **Quick Filters:** The logged in technician can select from *All Techs* or *Management Team*. When filtering by *Management Team*, Remote Tech displays calls that are assigned to technicians that share the same manager as the logged in technician.

- **Groups:** The logged in technician can select from *My Groups* (shared groups to which the technician belongs), *My Related Groups* (all groups for which the technician has rights to push and pull calls), *Pull Calls From* (all technicians from which the logged in technician has the right to take calls), and *Push Calls To* (all technicians to which the logged in technician has the right to reassign calls).

Note: Grouping must be enabled for the *My Group* section to display. Groups are configured by your manager in the Remote Service Manager application.

- **Technicians:** The logged in technician can select from any individual technician.



- To define the **Territory filter**, use the drop down menu in the provided field to select a territory for which you want to view all service calls.

The screenshot shows the REMOTE TECH logo at the top. Below it are several filter fields: Date filter (set to Custom), Start date, End date, Tech filter (set to All Techs), Territory filter, Status filter, Customer filter, and Equipment filter. The Territory filter dropdown menu is open, showing a list of options: All Territories, My Territory, NS - North Salt Lake, NU - North Utah County, OA - Out of Area, S - Salt Lake, SSL - South Salt Lake, and SU - South Utah County. A yellow starburst icon is next to the 'All Territories' option, which is highlighted in blue. At the bottom left are '<< Cancel' and 'Sea' buttons.

- To define the **Status filter** use the dropdown menu field, use the drop down menu to select a status assigned to service calls you want to view.

The screenshot shows the same REMOTE TECH filter interface as the previous one. In this view, the Status filter dropdown menu is open, showing a list of status options: All Open Statuses, All Statuses, C - Cleared, CMP - Completed, D - Dispatched, H - On Hold, I - Invoiced, OKB - OK to Invoice, P - Pending, S - Scheduled, and X - Canceled. A yellow starburst icon is next to the 'All Open Statuses' option, which is highlighted in blue. The other filter fields remain the same as in the previous screenshot. At the bottom left are '<< Cancel' and 'Sea' buttons.



7. In the **Customer filter** field, do one of the following:
 - Enter the customer number assigned to call(s) for which you are searching.

The screenshot shows a dialog box with the following fields and controls:

- Date filter:** A dropdown menu set to "Custom".
- Start date:** An empty text input field.
- End date:** An empty text input field.
- Tech filter:** A dropdown menu set to "All Techs".
- Territory filter:** A dropdown menu set to "All Territories".
- Status filter:** A dropdown menu set to "All Open Statuses".
- Customer filter:** An empty text input field with a red arrow pointing to it.
- Equipment filter:** An empty text input field.
- Buttons:** "<< Cancel" and "Search" at the bottom.

- If you do not know the customer number for which you are searching, do the following:
 - a. Click [?] to lookup customer information.

This screenshot is identical to the previous one, but the red arrow points to the question mark icon located to the right of the Customer filter input field.

- b. In the **Customer Search** field enter search criteria and click [**Search**].

Note: This search allows you to look for a value or a portion of a value by using a *contains* search. If the value you enter in the field is found in the customer number field, customer name field, or the address field, Remote Tech returns a list of matching customers from which you can select.



REMOTE TECH[™]

Search

<< Cancel

- c. From the resulting list, in the **Actions** column, click **Choose** next to the appropriate customer to add the customer number to the Call List search for **Customer**. If your search results with an empty list, click [**Cancel**] to return to the Call List filter criteria and repeat this step with different criteria.

REMOTE TECH[™]

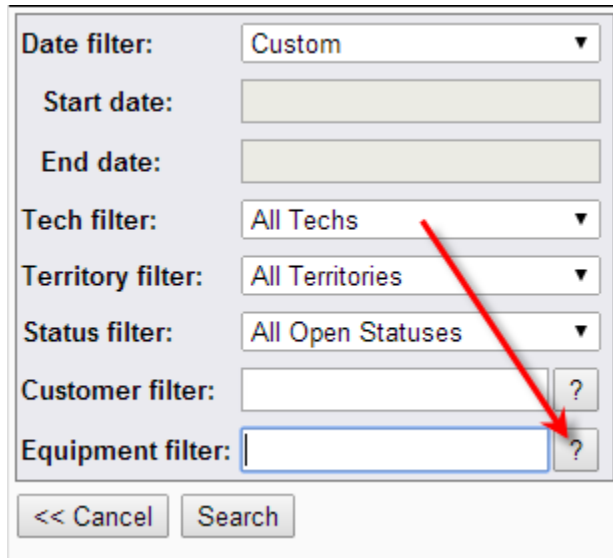
Actions	Customer Number	Customer Name	Customer Address	Primary Phone	Second Phone	Email Address	Website
Choose	CS00	City Systems	286 S 700 E Suite 100 Provo UT 84606	801-621-3004	801-621-3005	Info@CitySystems.com	www.citysystems.com
Choose	CC00	Cost Copy	455 W Center Provo UT 84601	801-621-3005			
Choose	CS01	Crawford, Steele & Company	365 E 600 S Provo UT 84606	801-621-3200			
Choose	CE00	Cummings Engine	3650 N University Ave #200 Provo UT 84604	801-327-7941			
Choose	CC01	Cummins Computers	1745 S State St Provo UT 84604	801-324-9211			
Choose	CH00	Cutler, Heath & Jones	2279 Mountain Vista Ln Provo UT 84606	801-189-0296			
Choose	EB00	East Baptist	150 N 700 W Provo UT 84606	801-872-6848			

8. You are returned to the filter window with the customer number of the customer you chose populated in the **Customer filter** field.



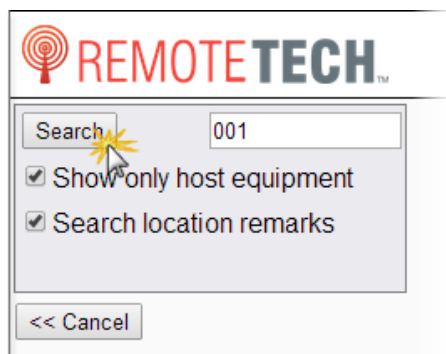
9. In the **Equipment** field, do one of the following:
 - Enter the equipment number assigned to call(s) in which you are searching.

- If you do not know the equipment number for which you are searching, do the following:
 - a. Click [?] to lookup customer information.


- b. In the search field enter search criteria.

Note: This search allows you to look for a value or a portion of a value by using a *contains* search. If the value you enter in the search field is found in any of the following fields, Remote Tech returns a list of matching equipment. Fields searched are **Equipment Number, Serial Number, Make, Model, Item, Item Description, Customer number, or Customer name**. This filter will allow you to search equipment **Location remarks** if the checkbox is checked.



- c. To narrow the search further, you may select one or both of the following checkboxes.
- **Show only the host equipment:** When checked Remote Tech will generate a list of only host equipment that meet your search criteria.
 - **Search location remarks:** When checked, Remote Tech will search the location marks field on the equipment record in e-automate for your search criteria.
- d. Click [**Search**].
- e. From the resulting list, in the **Actions** column, click **Choose** next to the appropriate equipment to add the equipment number to the Call List search for **Customer**.



								
Actions	Equipment Number	Serial Number	Make	Model	Item	Item Description	Customer Number	Customer Name
Choose	EQ10000	85747658697	Canon	CN-PR5002	CN-PR5002	Canon Printer 5052	CS00	City Systems
Choose	EQ10018	85747658675	Toshiba	5001	TMFP-5001	Toshiba 5001	AREA51	Area 51 Expeditions
Choose	EQ10027	191919188	HP	PR5003	PR5003	HP 5003 Printer	CS01	Crawford, Steele & Company
Choose	EQ10001	85747658801	Sharp	SH-PR5000	SH-PR5000	SHARP PRINTER 5000	CE00	Cummings Engine
Choose	EQ10002	123654	Canon	CO335	CO335	335 Copier	WILDMKT1	Wild Marketing

- f. You are returned to the filter window with the equipment number of the equipment you chose populated in the **Equipment filter** field.



Date filter:

Start date:

End date:

Tech filter:

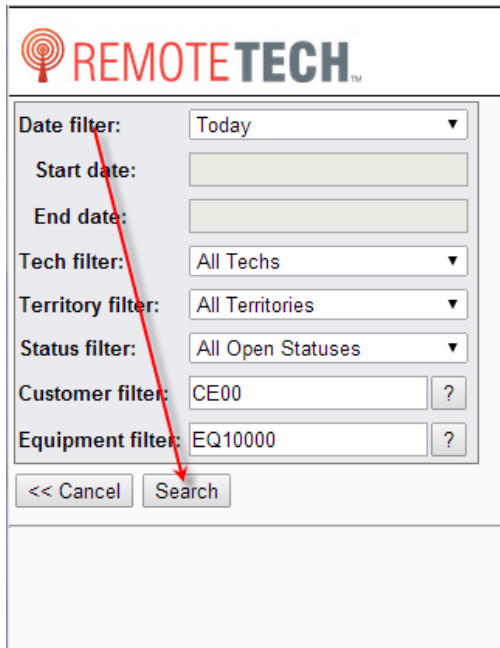
Territory filter:

Status filter:

Customer filter:

Equipment filter:

10. Click [**Search**] to look for service calls matching the search criteria you defined.



REMOTE TECH

Date filter: Today ▼

Start date:

End date:

Tech filter: All Techs ▼

Territory filter: All Territories ▼

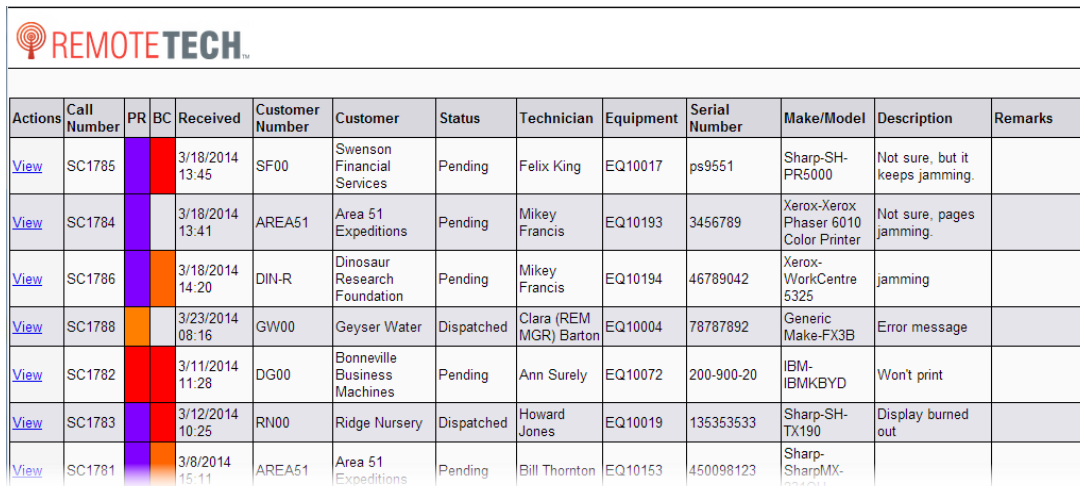
Status filter: All Open Statuses ▼

Customer filter: CE00 ?

Equipment filter: EQ10000 ?

<< Cancel Search

Remote Tech displays calls that match your search criteria.




Actions	Call Number	PR	BC	Received	Customer Number	Customer	Status	Technician	Equipment	Serial Number	Make/Model	Description	Remarks
View	SC1785			3/18/2014 13:45	SF00	Swenson Financial Services	Pending	Felix King	EQ10017	ps9551	Sharp-SH-PR5000	Not sure, but it keeps jamming.	
View	SC1784			3/18/2014 13:41	AREA51	Area 51 Expeditions	Pending	Mikey Francis	EQ10193	3456789	Xerox-Xerox Phaser 6010 Color Printer	Not sure, pages jamming.	
View	SC1786			3/18/2014 14:20	DIN-R	Dinosaur Research Foundation	Pending	Mikey Francis	EQ10194	46789042	Xerox-WorkCentre 5325	jamming	
View	SC1788			3/23/2014 08:16	GW00	Geyser Water	Dispatched	Clara (REM MGR) Barton	EQ10004	78787892	Generic Make-FX3B	Error message	
View	SC1782			3/11/2014 11:28	DG00	Bonneville Business Machines	Pending	Ann Surely	EQ10072	200-900-20	IBM-IBMKBVD	Won't print	
View	SC1783			3/12/2014 10:25	RN00	Ridge Nursery	Dispatched	Howard Jones	EQ10019	135353533	Sharp-SH-TX190	Display burned out	
View	SC1781			3/8/2014 15:11	AREA51	Area 51 Expeditions	Pending	Bill Thornton	EQ10153	450098123	Sharp-SharpMX-234001		


11. Do one or more of the following:

- If your search resulted in no calls, click [**<< Cancel**] to return to the Tools list.
- To view more information about a service call listed, do the following:
 - a. In the **Actions** column, click **View**.



					
Actions	Call Number	PR	BC	Received	Customer Number
View	SC1785			3/18/2014 13:45	SF00
View	SC1784			3/18/2014 13:41	AREA51
View	SC1786			3/18/2014 14:20	DIN-R
View	SC1788			3/23/2014 08:16	GW00
View	SC1782			3/11/2014 11:28	DG00
View	SC1783			3/12/2014 10:25	RN00
View	SC1781			3/8/2014 15:11	AREA51

Remote Tech takes you to the Call Summary page that displays information about the call. For information on how to navigate the Summary page, see the **Call Summary Page** topic above.

	
Assistants: There are currently no assistants on this call...	
Labor: There are currently no labor records on this call...	
Call Summary:	
Technician:	Felix King Reassign
Call#:	SC1785
Status:	P
Call received:	3/18/2014 13:45
Due by:	3/18/2014 14:45
Description:	Not sure, but it keeps jamming.
Caller:	Kelly -- 801-896-3271 --
Call type:	CP
Sales Rep:	Billy Randolph -- (801) 349-0912 -- bonnevillebusiness@gmail.com
Contract#	
Bill code:	TMC
Terms:	COD
Priority:	L3
Make/Model:	SH-PR5000



- b. Click **[OK]** to return to the **Tools** list.

Event: Call Reassign Status: Pending Technician: Howard Jones Application: Remote Tech	EVENT	Howard	5/11/2014 15:58	Howard	5/11/2014 15:58
Event: Call Reassign Status: Pending Technician: Ann Surely Application: Remote Tech	EVENT	Ann	5/11/2014 15:58	Ann	5/11/2014 15:58
Event: Call Edit Status: Pending Technician: Howard Jones	EVENT	admin	5/8/2014 12:54	admin	5/8/2014 12:54
Event: Call Create Status: Pending Technician: Howard Jones	EVENT	admin	5/8/2014 12:53	admin	5/8/2014 12:53

Email work order summary

Email:

[Preview](#)

Manage Inventory - Field Transfer

The Field Transfer option is accessed from the Manage Inventory area of Remote Tech. Your system administrator determines whether or not the *Field transfer* option is available as an action when you click **[Manage Inventory]**.

Item Lookup

Call Lists

Manage Inventory

Fax Test

Create Call

Invoice Info

Time Entry

Administer RT

<< Calls

Action: Field transfer

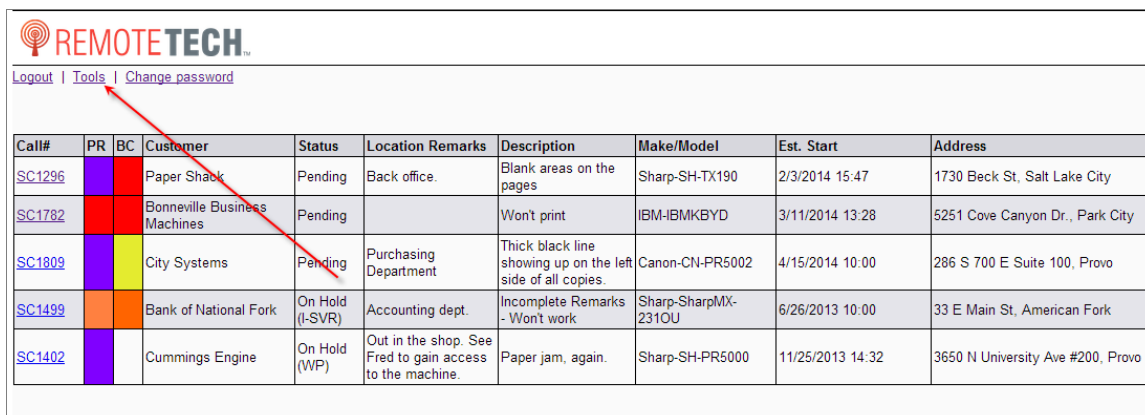


If you need an inventory item that you do not have you can use field transfer to obtain the item from another technician in the field. You can search for inventory items you need in other technicians stock by using the item number used in e-automate. If you do not have the item number you must first lookup the item number. You use the [?] search to determine the item number. When searching for an item number you can use a portion of the item number, a portion of the manufacturer's number, or a portion of the historical manufacturer's number. You can also enter a portion of the item description in the search field to determine the e-automate item number.

Once you have determined the item number, you can request a transfer from another technician. This request displays as a link on the requesting technician's Call List labeled, **# part transfer requests...** When the technician clicks on this link, Remote Tech displays a page with two sections, one section identifies **Field transfers from your stock** and a second section identifies **Field transfers to your stock**. Each technician uses this page on their own device to view requests for stock as well as the request status for requests that they have made from other technicians. Technicians can also access this page by using the **Manage Inventory** button and selecting the action, *Field transfer list*. See additional information in the Manage Inventory – Field Transfer List section.

Requesting a Field Transfer


1. From the Call List, click the **Tools** link to navigate to the tools page.



Call#	PR	BC	Customer	Status	Location Remarks	Description	Make/Model	Est. Start	Address
SC1296			Paper Shack	Pending	Back office	Blank areas on the pages	Sharp-SH-TX190	2/3/2014 15:47	1730 Beck St, Salt Lake City
SC1782			Bonneville Business Machines	Pending		Won't print	IBM-IBMKEYD	3/11/2014 13:28	5251 Cove Canyon Dr., Park City
SC1809			City Systems	Pending	Purchasing Department	Thick black line showing up on the left side of all copies.	Canon-CN-PR5002	4/15/2014 10:00	286 S 700 E Suite 100, Provo
SC1499			Bank of National Fork	On Hold (I-SVR)	Accounting dept.	Incomplete Remarks - Won't work	Sharp-SharpMX-2310U	6/26/2013 10:00	33 E Main St, American Fork
SC1402			Cummings Engine	On Hold (WP)	Out in the shop. See Fred to gain access to the machine.	Paper jam, again.	Sharp-SH-PR5000	11/25/2013 14:32	3650 N University Ave #200, Provo


2. Click [**Manage Inventory**] to access the Inventory Management page.





Item Lookup
Call Lists
Manage Inventory
Fax Test
Create Call
Invoice Info
Time Entry
Administer RT
<< Calls

3. In the **Action** field, use the drop down menu to select *Field transfer*.



Action:

Field transfer ▼

Field transfer

Field transfer list

Inventory Request

Warehouse Transfer

<< Cancel



4. Click [**Continue >>**]. You are redirected to the following page.

5. Do one of the following:
 - If you know the item number, in the **Item** field type the item number and click [**OK...**] to look for available warehouses containing the item.
 - If you do not know the item number, do the following:
 - a. Click [**?**] to search for the item number.

- b. In the search field, enter search criteria and click [**Search**]. You can also leave the field blank and simply click [**Search**] to display a list of all items.


Note: You can enter a portion of an item number, a portion of the item description, or the manufacturer's number recorded in your e-automate system. You can also




use a historical manufacturer's number (if you are tracking these historical manufacturer's numbers in your e-automate database).

- c. Remote Tech displays a list of items matching your criteria. If there are more than 20, you can click **Next >>** to see additional items. If there are no items matching your criteria, Remote Tech reports and you can click [**<< Cancel**] to return to the item field.
- d. Based on the items displayed determine which item you want to transfer and in the **Actions** column, click **View** to see warehouse details about the item.



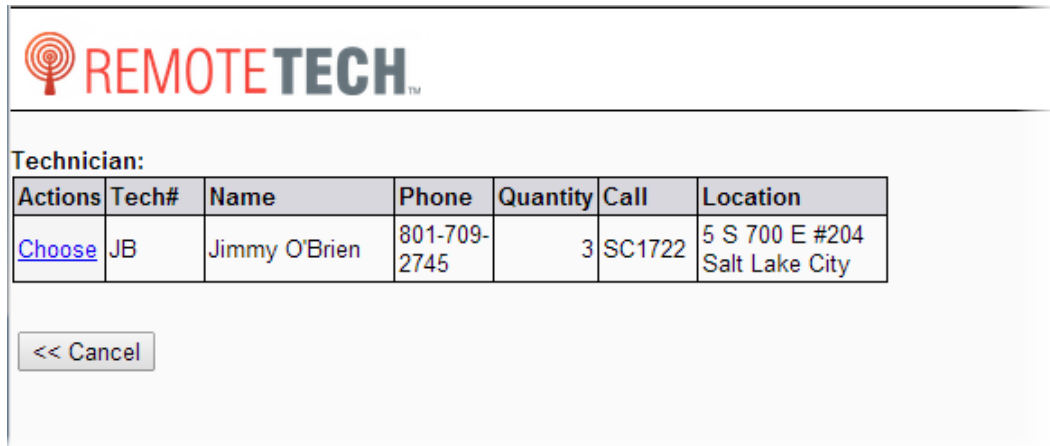
				
Actions	Item	Available	Description	Category
View	0250A002AA	28	Canon D2 Staples 2000/Ctg 3 Ctgs/Box	Supplies
View	11111	0	Drum	Accessories
View	168168	102	Developer	Supplies
View	16819	493	Ink	Supplies
View	1968168	297	Staples	Supplies
View	257JH2	33	Paper	Supplies
View	34-1233	123	Supply item	Supplies
View	549816	38	Toner Cartridge	Supplies
View	549816-R	28	Refurbished Toner Cartridge	Supplies
View	55-55342	53	Panel assembly	Parts
View	7626A001AA	38	Yellow Toner Cartridge for Image Runner c5180	Supplies
View	7627A001AA	52	Magenta Toner Cartridge for imageRUNNER c5180	Supplies
View	7628A001AA	76	Cyan Toner Cartridge imageRUNNER c5180	Supplies
View	7629A001AA	82	Toner Cartridge imageRUNNER c5180	Supplies
View	88-34511	67	Board	Parts
View	94168	31	Toner	Supplies
View	A-1887	104	Wheel	Parts

Warehouse details display.

			
Item:	006R01551		
Description:	Black Toner for WorkCentre 5325/5845		
Category:	Parts		
Available:	50		
Price:	125.00		
Item	Warehouse	Description	Available
006R01551	*P	*Provo	50
<input type="button" value="OK"/>			



- e. Click [**OK**] to select the item. This returns you to the item field with your selected item number listed in the **Item** field.
- f. Click [**OK...**] to display a list of available warehouses for the selected item number.



REMOTE TECH

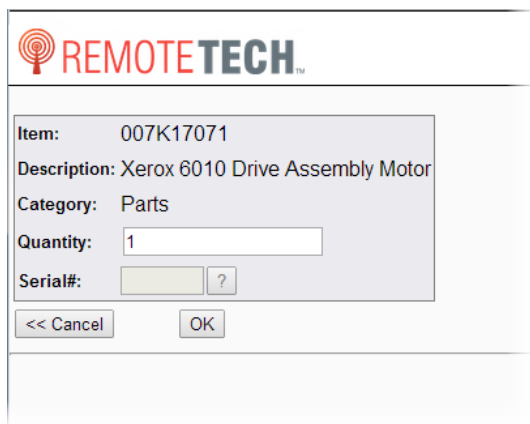
Technician:

Actions	Tech#	Name	Phone	Quantity	Call	Location
Choose	JB	Jimmy O'Brien	801-709-2745	3	SC1722	5 S 700 E #204 Salt Lake City

<< Cancel

- g. In the **Actions** column, click **Choose** next to the technician warehouse from which you want to request the item.

The following page displays.



REMOTE TECH

Item: 007K17071

Description: Xerox 6010 Drive Assembly Motor

Category: Parts

Quantity:

Serial#: ?

<< Cancel OK

- h. In the **Quantity** field, enter the quantity you want to request.
 - i. If the item is serialized, enter the **Serial #** or lookup the serial number using the search [?].
 - j. Click [**OK**] to request the transfer or click [<< **Cancel**] to return to the Tools List.
- Note:** When you request an item using Remote Tech field transfer, e-automate creates a Transfer Order in the e-automate database from the technicians warehouse to your warehouse.

- To cancel the field transfer, click [<< **Cancel**].

Transferring, Editing, or Canceling a Field Transfer

If another technician requests a transfer from you, use these steps to respond.

1. Once the field transfer request for inventory from your warehouse has been entered in Remote Tech, your Call List displays **# part transfer requests...** Click on the **# part transfer request** to view the request.
2. In the **Field transfers from your stock** section, do one of the following:



- To transfer the requested item(s), click the **Transfer** link. Remote Tech transfers the item(s) to the requesting technician's warehouse. Contact the technician and make arrangements to physically transfer the part.
- To modify the quantity of items requested, click the **Edit** link. Make necessary changes and click [OK]. Once you have made changes, click the **Transfer** link to transfer the modified amounts. Contact the technician and make arrangements to physically transfer the part.
- To deny the transfer, click the **Cancel** link. This removes the request from your screen and displays a canceled request in the requesting technicians screen. The canceled request displays to the denied tech for 48 hours.

Manage Inventory – Field Transfer List

When another technician has requested inventory from your stock you see a link at the top of the service call list in red, **# part transfer requests...** where the number sign indicates the number of request from your inventory. You can also access this Transfers list page using the **Manage Inventory** button or the link. On the Transfer page you can transfer the items requested from your stock, edit the transfer and transfer fewer items that requested or cancel the transfer and not transfer any of the requested items.

On the Transfer page Remote Tech displays two sections, **Field transfers from your stock** and **Field transfers to your stock**. In the section, **Field transfers to your stock**, technicians can review the status of transfers they have requested from other technician's warehouses. If a technician cancels a request of yours, the canceled request is listed in this section with a status of **Canceled** for 48 hours. If a request is approved, the request is removed and the two technicians then make arrangements to meet and perform the physical transfer of goods. You use the following instructions to handle **Field transfers from your stock**.

Transferring, Editing, or Canceling a Field Transfer

If another technician requests a transfer from you, use these steps to respond.

1. Once the field transfer request for inventory from your warehouse has been entered in Remote Tech, your Call List displays **# part transfer requests...** Click on the **# part transfer request** to view the request.
Note: You can also access the Transfers page by clicking on the **Tools** link, clicking **[Manage Inventory]**, in the **Actions** field, selecting *Field transfer list* and clicking **[Continue >>]**.
2. In the **Field transfers from your stock** section, do one of the following:
 - To transfer the requested item(s), click the **Transfer** link associated in the same row for the item you want to transfer from your inventory. Remote Tech transfers the item(s) in the e-automate database and the receiving tech is immediately responsible. Contact the technician and make arrangements to physically transfer the part.
Note: If the item is serialized, you must use the **Edit** link to identify the serial number you are relieving from your inventory.
 - To modify the quantity of items requested, click the **Edit** link. Make necessary changes and click [OK]. Once you have made changes, click the **Transfer** link to transfer the



modified quantities. Contact the technician and make arrangements to physically transfer the part.


- To deny the transfer, click the **Cancel** link. This removes the request from your screen and displays a canceled request in the requesting technicians screen. The canceled request displays to the denied tech for 48 hours.

Manage Inventory – Inventory Request

If enabled, you can use the inventory request functionality to identify items you want transferred to your inventory. You identify the items you want transferred to your inventory and inventory personnel using e-automate specify the warehouse if approved from which to pull the inventory and complete the transfer. You use this functionality to identify items you want in your stock based on anticipated needs but do not necessarily have a specific need on a service call.

Submitting an Inventory Request

- From the Call List, click the **Tools** link.

									
Logout Tools Change password									
Call#	PR	BC	Customer	Status	Location Remarks	Description	Make/Model	Est. Start	Address
SC1296			Paper Shack	Pending	Back office.	Blank areas on the pages	Sharp-SH-TX190	2/3/2014 15:47	1730 Beck St, Salt Lake City
SC1782			Bonneville Business Machines	Pending		Won't print	IBM-IBMKBYD	3/11/2014 13:28	5251 Cove Canyon Dr., Park City
SC1809			City Systems	Pending	Purchasing Department	Thick black line showing up on the left side of all copies.	Canon-CN-PR5002	4/15/2014 10:00	286 S 700 E Suite 100, Provo
SC1499			Bank of National Fork	On Hold (I-SVR)	Accounting dept.	Incomplete Remarks - Won't work	Sharp-SharpMX-2310U	6/26/2013 10:00	33 E Main St, American Fork
SC1402			Cummings Engine	On Hold (WP)	Out in the shop. See Fred to gain access to the machine.	Paper jam, again.	Sharp-SH-PR5000	11/25/2013 14:32	3650 N University Ave #200, Provo

The Tools page displays.



REMOTE TECH[™]

Item Lookup
Call Lists
Manage Inventory
Fax Test
Create Call
Invoice Info
Time Entry
Administer RT
<< Calls

2. Click [**Manage Inventory**] to access the Inventory Management page.
3. In the **Action** field, use the drop down menu to select *Inventory Request*.

REMOTE TECH[™]

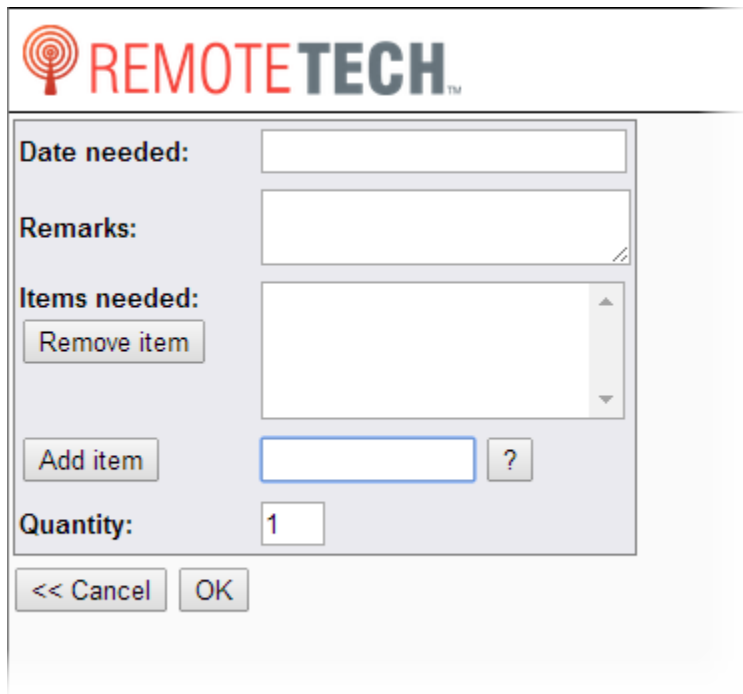
Action: Field transfer ▼

- Field transfer
- Field transfer list
- Inventory Request

<< Cancel



4. Click [**Continue >>**]. The following page displays.



The screenshot shows the REMOTE TECH web interface for creating an inventory request. The form includes the following fields and controls:

- Date needed:** A text input field.
- Remarks:** A text area with a small icon in the bottom right corner.
- Items needed:** A list box containing items. To its left is a "Remove item" button.
- Add item:** A button located below the "Items needed" list box.
- Search:** A text input field with a "?" button to its right, used for searching items.
- Quantity:** A text input field with the number "1" entered.
- Navigation:** At the bottom are "<< Cancel" and "OK" buttons.

5. In the **Date needed** field, type the date you are requesting the item or items be transferred to you.

6. In the **Remarks** field, enter optional remarks as needed.

7. In the field adjacent to the **Add item** button, enter the item number of the item you want to request.

Note: If you do not know the item number you can click [**?**] to look up the item number. In the field adjacent to the **Search** button, type your search criteria and click [**Search**]. Remote Tech displays item numbers matching your search criteria. Click Choose to select an item. The

search field searches in item number, vendor number, historical vendor number, and item description.

8. In the **Quantity** field, type the quantity you want transferred to your inventory.
9. Click [**Add item**] to add the item number to the list of items needed.
Note: If you want to remove any items, highlight the item in the **Items needed** region and click [**Remove item**].
10. Repeat steps 7 – 9 to add additional items to the inventory request.
11. When you have completed entering items, click [**OK**] to create the inventory request and submit it to e-automate.

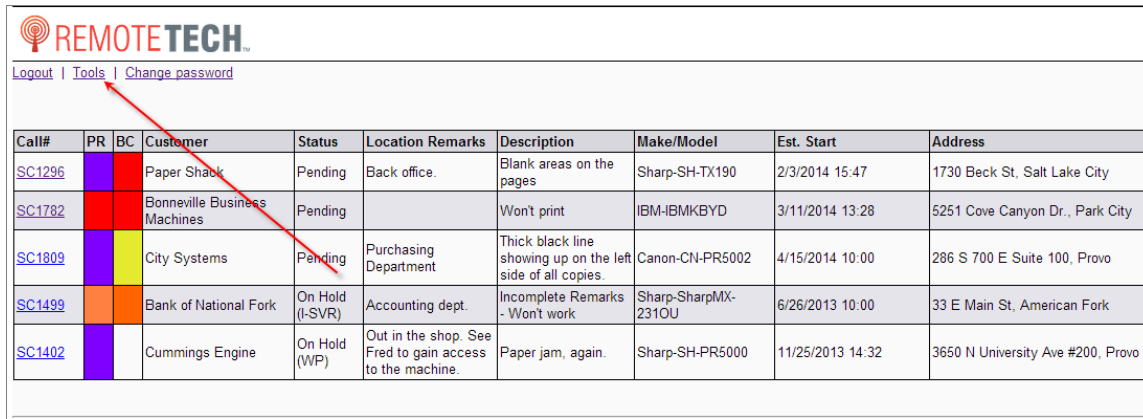
Manage Inventory – Warehouse Transfer

You use this feature to transfer inventory from customer configured warehouses and company warehouses. Customer warehouse and company warehouse transfers are two different options that can be configured by your system administrator. If one or both are configured for a technician the Warehouse transfer action is available when the technician clicks [**Manage Inventory**]. Transferring using a customer onsite warehouse is only allowed when a technician is dispatched to the service call and the customer warehouse is associated with the equipment on the service call, the customer identified in the equipment location field, the equipment customer, or the service call customer. If you are transferring from a company warehouse, you can select from available warehouses and you do not have to be assigned or dispatch to a service call to transfer from company warehouses if enabled.



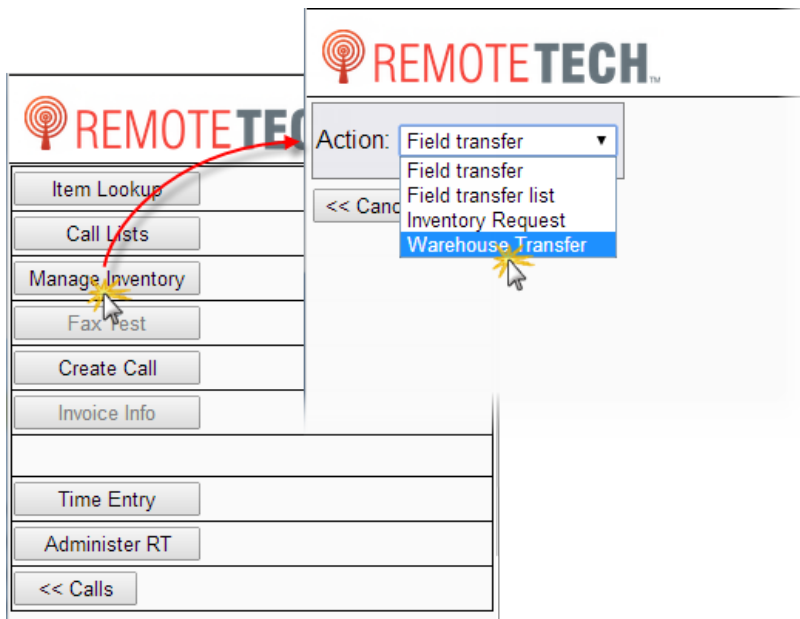
How to Transfer Inventory


1. From the Call List, click the **Tools** link to navigate to the tools page.



Call#	PR	BC	Customer	Status	Location Remarks	Description	Make/Model	Est. Start	Address
SC1296			Paper Shack	Pending	Back office.	Blank areas on the pages	Sharp-SH-TX190	2/3/2014 15:47	1730 Beck St, Salt Lake City
SC1782			Bonneville Business Machines	Pending		Won't print	IBM-IBMKBYD	3/11/2014 13:28	5251 Cove Canyon Dr., Park City
SC1809			City Systems	Pending	Purchasing Department	Thick black line showing up on the left side of all copies.	Canon-CN-PR5002	4/15/2014 10:00	286 S 700 E Suite 100, Provo
SC1499			Bank of National Fork	On Hold (I-SVR)	Accounting dept.	Incomplete Remarks - Won't work	Sharp-SharpMX-2310U	6/26/2013 10:00	33 E Main St, American Fork
SC1402			Cummings Engine	On Hold (WP)	Out in the shop. See Fred to gain access to the machine.	Paper jam, again.	Sharp-SH-PR5000	11/25/2013 14:32	3650 N University Ave #200, Provo

2. Click [**Manage Inventory**]. The Action page displays.





Action: Field transfer ▼

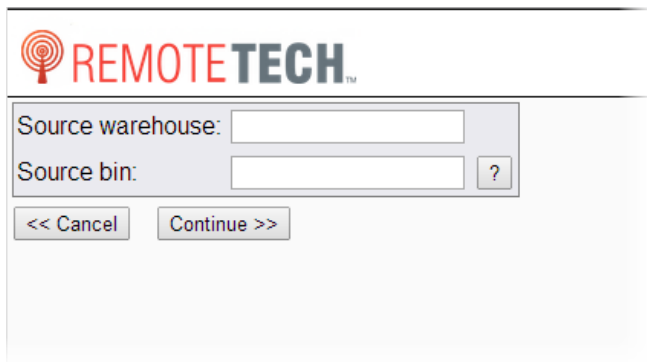
- Field transfer
- Field transfer list
- Inventory Request
- Warehouse Transfer

Item Lookup
 Call Lists
 Manage Inventory
 Fax Test
 Create Call
 Invoice Info
 Time Entry
 Administer RT
 << Calls

3. In the **Action** field, use the drop down menu to select *Warehouse Transfer*.



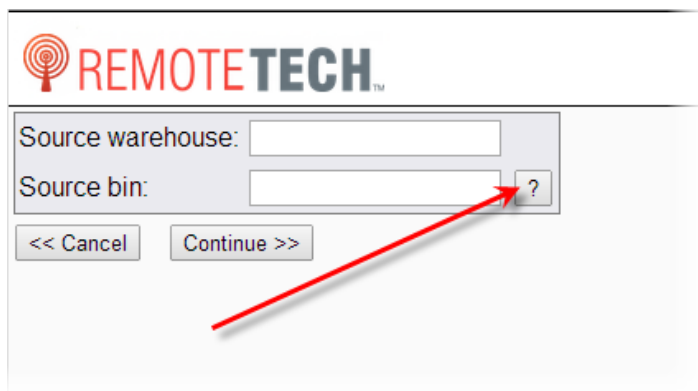
4. Click [**Continue >>**].



5. In the **Source warehouse** field, enter the name of the warehouse from which you want to transfer inventory.

Note: If you do not know the name of the warehouse, skip to step 6.

6. To identify the source bin, do one of the following.
 - In the **Source bin** field type the name of the bin.
 - Use the search functionality to locate a bin and the warehouse to which it is assigned, do the following:
 - a. Click the [?] to navigate to the bin search.




- b. In the search field, enter a portion of the bin name and click [**Search**] to display a list of bins that match your search criteria or leave the field blank and click [**Search**] to display a list of all warehouses.






A list of bins display.

					
Actions	Warehouse	Bin	WH Desc	Bin Desc	Stock type
Choose	*P	A1	*Provo	A1	Standard
Choose	*P	A2	*Provo	A2	Standard
Choose	*P	B1	*Provo	B1	Standard
Choose	*P	B2	*Provo	B2	Standard
Choose	*P	C1	*Provo	C1	Standard
Choose	*P	C2	*Provo	C2	Standard
Choose	*P	Canon	*Provo	Canon	Standard
Choose	*P	D1	*Provo	D1	Standard
Choose	*P	D2	*Provo	D2	Standard
Choose	*P	Defective	*Provo	Defective Bin	Defective
Choose	*P	DS	*Provo	Drop Ship Bin	Unavailable
Choose	*P	E1	*Provo	E1	Standard

- c. From the list of bins, locate the bin you want and click the **Choose** link located under the **Actions** column. The **Source warehouse** and **Source bin** fields are populated.

	
Source warehouse:	<input type="text" value="*P"/>
Source bin:	<input type="text" value="A1"/> <input data-bbox="860 1344 885 1375" type="button" value="?"/>
<input data-bbox="349 1396 470 1438" type="button" value=" << Cancel "/> <input data-bbox="503 1396 641 1438" type="button" value=" Continue >> "/>	

7. Click [**Continue >>**]. The **Destination warehouse** and **Destination bin** fields display.



REMOTE TECH

Source: *P - A1
Destination: AnnWH - Anne Bin

Add item ? 1

There are not currently any items on this transfer...

<< Cancel Transfer

8. To identify the items you want to transfer, do the following:
 - a. Type the item number into the field adjacent to the **Add item** button, if you do not know the item number, do the following:
 - i. Click [?] to navigate to the item search.

REMOTE TECH

Source: *P - A1
Destination: AnnWH - Anne Bin


Add item ? 1

There are not currently any items on this transfer...

<< Cancel Transfer

- ii. In the search field, enter a portion of the item number, a portion of the manufacturer's number, or a portion of the historical manufacturer's number. You can also enter a portion of the item description in the search to determine the e-automate item number.
 - iii. Click [**Search**] to search for the item number. Click [**<< Cancel**] to cancel the search.
 - iv. If your search contains the satisfactory results, locate the item you want to transfer and in the **Actions** column, click **Choose**.






Actions	Item	Available	Description	Category
Choose	0700019	23	Xerox Part	Supplies
Choose	168168	85	Developer	Supplies
Choose	DP800X5R7UV69	32	Ricoh Part	Parts
Choose	RCC	40	Red Connector Cable	Supplies
Choose	S100	17	Konica Minolta Part	Parts
Choose	sample part	21	Sample Part	Parts

<< Cancel

This returns you to the Transfer page and populates the item you choose in the item field.




Source: *P - A1
 Destination: AnnWH - Anne Bin

Add item ? 1

There are not currently any items on this transfer...

<< Cancel Transfer

- b. In the quantity field, enter the quantity you want to transfer to yourself.



Source: *P - A1
 Destination: AnnWH - Anne Bin

Add item ? 1

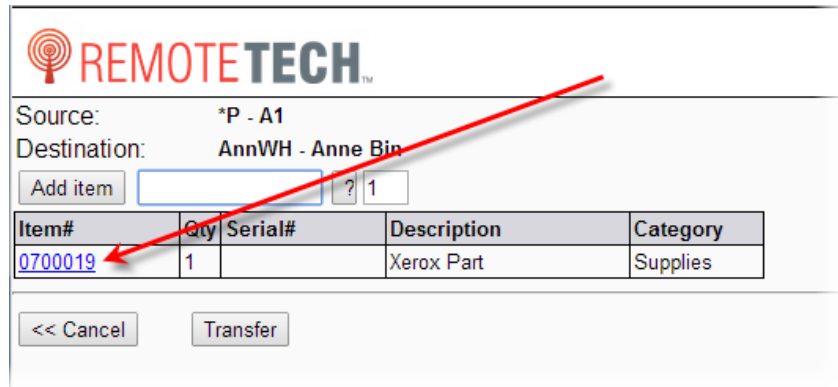
There are not currently any items on this transfer...

<< Cancel Transfer

- c. Click **[Add item]** to add the identified item to the transfer.



- d. Repeat the above steps to add additional items to the transfer.
- e. To remove or modify the quantity of an item, do the following:
 - i. In the **Item #** column, click the item number you want modified.



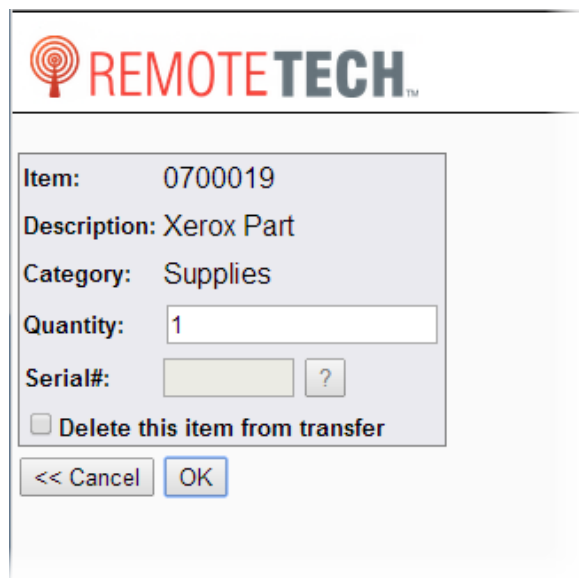
Source: *P - A1
Destination: AnnWH - Anne Bin

Add item ? 1

Item#	Qty	Serial#	Description	Category
<u>0700019</u>	1		Xerox Part	Supplies

<< Cancel Transfer

Item details display.



Item: 0700019
Description: Xerox Part
Category: Supplies
Quantity:
Serial#: ?
☐ Delete this item from transfer
<< Cancel OK

- ii. To add or remove quantity without completely removing the item, in the **Quantity** field, enter the appropriate quantity.
 - iii. If the item is serialized, in the **Serial #** field, enter the serial number or use the search to identify the serial number.
 - iv. To completely remove the item from the transfer, check the **Delete this item from transfer** checkbox.
 - v. Click [OK] to save your changes or [<< Cancel] to return to the items page.
9. To transfer the identified items, click [Transfer]. To cancel the transfer, click [<< Cancel].

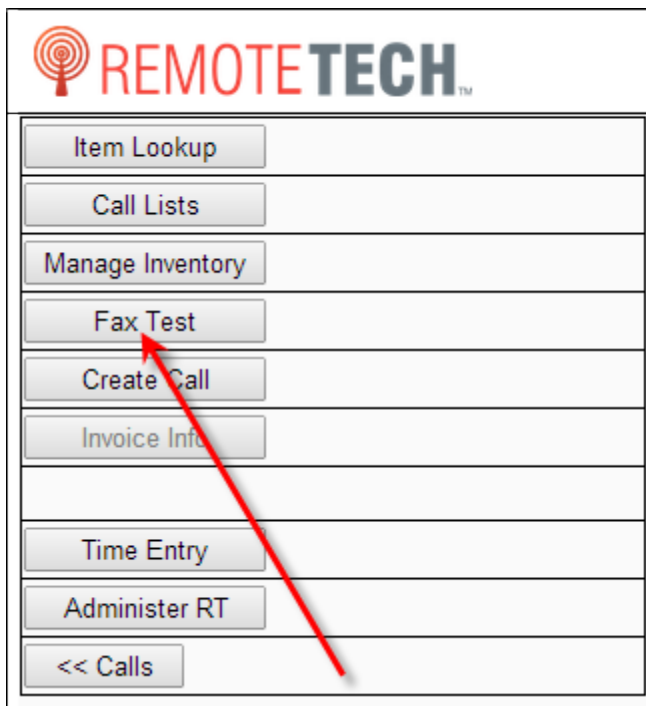


Fax test

When working on a fax machine you can use the Fax Test tool to request a fax be sent to a fax machine in which you are working. You can request a short or a long fax. The short fax should typically be configured to be one page or less and the long fax can be multiple pages, typically two. In order for this functionality to work, e-agent must be setup for fax testing. Talk to your system administrator and see e-agent help for additional information.

Requesting a Test Fax

1. From the Remote Tech main page, click the **Tools** link to navigate to the tools page.
2. Click [**Fax Test**] to open the fax test page.



The following page displays.

The screenshot shows the Fax Test form. It has a header with the Remote Tech logo. Below the logo, there are three fields: 'Fax number:' with a text input box, 'Fax type:' with a dropdown menu showing 'Short', and two buttons: '<< Cancel' and 'OK'.

3. In the **Fax number** field, enter the fax number for the fax machine you are testing.
4. In the **Fax type** field use the drop down menu to select either a **Short** or **Long** fax.



- Click [**OK**] to submit your test fax request. Click [**<< Cancel**] to return to the Tools List.

Note: When the Fax Test is configured and running, e-agent looks for short or long faxes every minute, if faxes are being sent through the configured fax software.

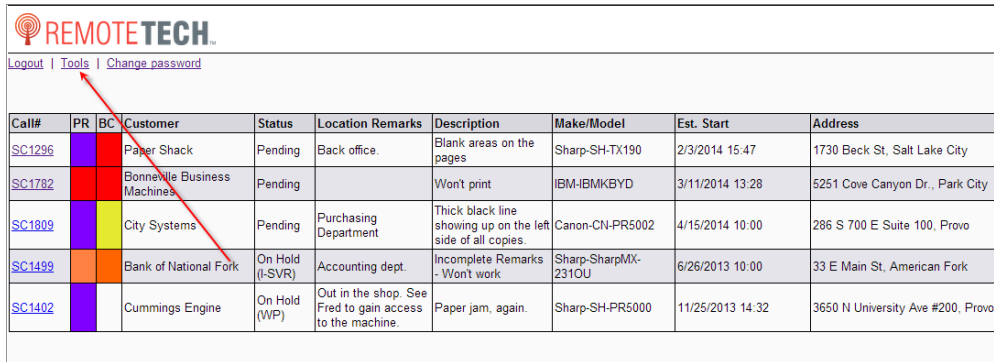
Create Call

If your system administrator allows you to create service calls in the field, Remote Tech displays the **Create Call** button on the tools list. You use this button to create service calls in the field.

When creating service calls you are required to create a call using the equipment number assigned to the equipment. If you do not know the equipment number you can look up the number using information about the customer, serial number, make, model, item, and item description.

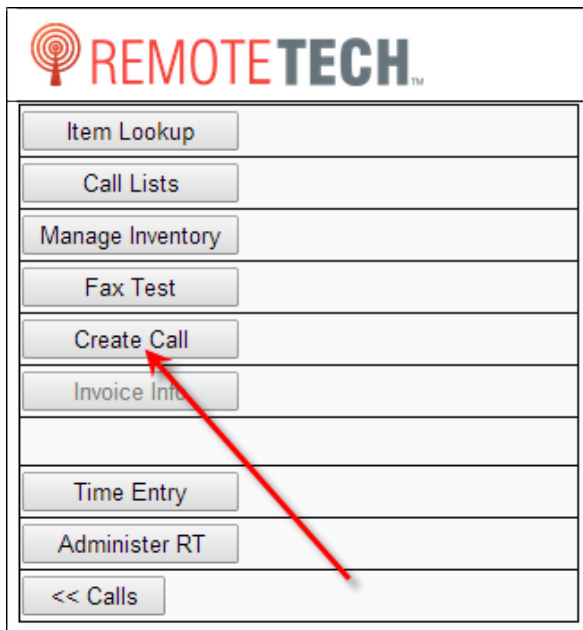
How to Create a Service Call

- From the Remote Tech main page, click the **Tools** link to navigate to the tools page.



Call#	PR	BC	Customer	Status	Location Remarks	Description	Make/Model	Est. Start	Address
SC1296			Paper Shack	Pending	Back office.	Blank areas on the pages	Sharp-SH-TX190	2/3/2014 15:47	1730 Beck St, Salt Lake City
SC1782			Bonneville Business Machines	Pending		Won't print	IBM-IBMKBYD	3/11/2014 13:28	5251 Cove Canyon Dr., Park City
SC1809			City Systems	Pending	Purchasing Department	Thick black line showing up on the left side of all copies.	Canon-CN-PR5002	4/15/2014 10:00	286 S 700 E Suite 100, Provo
SC1499			Bank of National Fork	On Hold (i-SVR)	Accounting dept.	Incomplete Remarks - Won't work	Sharp-SharpMX-2310U	6/26/2013 10:00	33 E Main St, American Fork
SC1402			Cummings Engine	On Hold (WIP)	Out in the shop. See Fred to gain access to the machine.	Paper jam, again.	Sharp-SH-PR5000	11/25/2013 14:32	3650 N University Ave #200, Provo

- Click [**Create Call**] to open the create call page.



REMOTE TECH™	
Item Lookup	
Call Lists	
Manage Inventory	
Fax Test	
Create Call	
Invoice Info	
Time Entry	
Administer RT	
<< Calls	



The following page displays.

REMOTE TECH

Equipment: ?

-- OR --

Customer: ?

Equip. Desc:

Model: ?

Serial Number:

☐ Create equipment on invoice

Call type: CopyQuality - Copy Quality ▼

Caller:

Description:

<< Cancel Continue

3. You can identify the equipment being serviced by any of the following.
 - **Equipment:** To identify by equipment you can simply enter the equipment number in the **Equipment** field,



REMOTE TECH

Equipment: ?

-- OR --

Customer: ?

Equip. Desc:

Model: ?

Serial Number:

☐ Create equipment on invoice

Call type: CopyQuality - Copy Quality ▼

Caller:

Description:

<< Cancel Continue

or if you do not know the equipment number, you can search for the equipment using part of the equipment number. To search do the following:

- a. Click [?] to lookup equipment information.

REMOTE TECH

Equipment: ?

-- OR --

Customer: ?

Equip. Desc:

Model: ?



- b. In the **Search** field enter search criteria.
Note: This search allows you to look for a value or a portion of a value by using a *contains* search. If the value you enter in the search field is found in any of the following fields, Remote Tech returns a list of matching equipment.
- c. If you want the search to query the **Location Marks** fields, on the **Location** tabs on the equipment records in e-automate check the **Location remarks** checkbox.
- d. Click [**Search**]. A list of equipment meeting your search criteria displays.

Actions	Equipment Number	Serial Number	Make	Model	Item	Item Description	Customer Number	Customer Name
Choose	EQ10000	85747658697	Canon	CN-PR5002	CN-PR5002	Canon Printer 5052	CS00	City Systems
Choose	EQ10018	85747658675	Toshiba	5001	TMFP-5001	Toshiba 5001	AREA51	Area 51 Expeditions
Choose	EQ10027	191919188	HP	PR5003	PR5003	HP 5003 Printer	CS01	Crawford, Steele & Company
Choose	EQ10001	85747658801	Sharp	SH-PR5000	SH-PR5000	SHARP PRINTER 5000	CE00	Cummings Engine
Choose	EQ10002	123654	Canon	CO335	CO335	335 Copier	WILDMKT1	Wild Marketing

- e. Locate the equipment for which you want to create a service call and click the **Choose** link in the **Actions** column of the equipment. The equipment number is added to the **Equipment** field.



REMOTE TECH

Equipment: EQ10000 ?

-- OR --

Customer: ?

Equip. Desc:

Model: ?

Serial Number:

☐ Create equipment on invoice

Call type: CopyQuality - Copy Quality ▾

Caller:

Description:

<< Cancel Continue

- **Customer:** To identify the equipment by the customer to which the equipment is assigned or identify an unknown equipment, do the following:
 - a. Identify the customer by either entering the customer name or number in the **Customer** field...

REMOTE TECH

Equipment: ?

-- OR --

Customer: ?

Equip. Desc:

Model: ?

Serial Number:

☐ Create equipment on invoice

Call type: CopyQuality - Copy Quality ▾

Caller:

Description:

<< Cancel Continue



...OR search for the customer using part of the customer name or number. This field is required. To search for the customer, do the following:

- i. Click [?] to look up customer information.


The customer search window displays.

- ii. In the **Search** field, enter the portion of the customer name or number you want to use to find the customer.


Note: This search allows you to look for a value or a portion of a value by using a *contains* search. If the value you enter in the search field is found in any of the following fields, Remote Tech returns a list of matching equipment. Fields searched are **Customer Number**, **Customer name**.

- iii. Click [**Search**]. A list of customers meeting your search criteria displays.



				
Actions	Customer Number	Customer Name	Customer Address	Primary Phone
Choose	CS00	City Systems	286 S 700 E Suite 100 Provo UT 84606	801-890-0933
Choose	CG00	Community Gospel Church	3377 S 300 W Salt Lake City UT 84115	801-322-9134
Choose	AREA51	Area 51 Expeditions	279 W State St Hurricane UT 84737	435-621-3200
Choose	CS01	Crawford, Steele & Company	365 E 600 S Provo UT 84606	801-243-1212
Choose	CE00	Cummings Engine	3650 N University Ave #200 Provo UT 84604	801-327-7941
Choose	WILDMKT	Wild Marketing	1745 S State St Provo UT 84604	801-324-9211
Choose	CH00	Cutler, Heath & Jones	2279 Mountain Vista Ln Provo UT 84606	801-189-0296
Choose	EB00	East Baptist Church	150 N 700 W Provo UT 84601	801-872-6848
Choose	Pony Xpress	Pony Express Industries	1285 N Freedom Blvd Provo UT 84604	801-397-7447
Choose	FP00	Frontier Products	1725 S State St Provo UT 84606	801-323-6296

- iv. Locate the customer for which you want to create a service call and click the **Choose** link in the **Actions** column of the customer. The customer number is added to the **Customer** field.



Equipment: ?

-- OR --

Customer: ?

Equip. Desc:

Model: ?

Serial Number:

☐ Create equipment on invoice

Call type:

- b. In the **Equip. Desc** field, enter a brief description of the equipment being serviced. This field is required.



REMOTE TECH

Equipment: ?

-- OR --

Customer: ?

Equip. Desc:

Model: ?

Serial Number:

☐ Create equipment on invoice

Call received:

- c. In the **Model** field, simply enter the model number...

REMOTE TECH

Equipment: ?

-- OR --

Customer: ?

Equip. Desc:

Model: ?

Serial Number:

☐ Create equipment on invoice

Call type:

...or search for the model number use part of the model number. This is not a required field, but maybe useful in narrowing your search results. To search for the model number, do the following:



- i. Click [?] to display the model search window.

REMOTE TECH

Equipment: ?

-- OR --

Customer: CS00 ?

Equip. Desc:

Model: ?

Serial Number:

☐ Create equipment on invoice

Call type: CopyQuality - Copy Quality

- ii. In the **Search** field, enter the portion of the model number you want to use to locate the model.

REMOTE TECH

Search

<< Cancel

- iii. Click [**Search**]. A list of models that meet your search criteria displays.
- iv. Locate the model for which you want to create a service call and click the **Choose** link in the **Actions** column of model.

REMOTE TECH

Actions	Model	Model Desc	Make
Choose	CN-PR5002	Canon Printer 5052	Canon
Choose	CO335	333 Copier	Canon
Choose	FX3B	Toshiba FX3B FAX	Generic Mak
Choose	HP584	HP FX584 FAX	HP
Choose	HPL-6	Laser Jet Printer	HP
Choose	5001	Toshiba 5001	Toshiba
Choose	PR5003	HP 5003 Printer	HP
Choose	SH-PR5000	SHARP PRINTER 5K	Sharp
Choose	SH-TX190	SHARP TX190 COPIER	Sharp
Choose	TX192	Toshiba TX190	Toshiba
Choose	X191	X191 Xerox Copier	Xerox



The model number is added to the **Model** field.

REMOTE TECH

Equipment: ?

-- OR --

Customer: ?

Equip. Desc:

Model: ?

Serial Number:

☐ Create equipment on invoice

Call type:

- v. In the **Serial Number** field enter the serial number of the equipment for which you want to create a service call.
- vi. If this equipment is unknown and you want to create the equipment in your database when the service call is invoiced, check the **Create equipment on invoice** checkbox.

REMOTE TECH

Equipment: ?

-- OR --

Customer: ?

Equip. Desc:

Model: ?

Serial Number:

☒ Create equipment on invoice



4. If your system administrator allows you to identify a call type, in the **Call type** field use the drop down menu to specify a call type. If you cannot enter a call type, Remote Tech displays, Call entered via web.

Note: When using Remote Tech, you can only enter a call type that is categorized as Corrective Maintenance, Preventative Maintenance, Phone Fix, and Courtesy Call. The call types of Install/Pickup and Other are not available in Remote Tech.

REMOTE TECH™

Equipment: ?

-- OR --

Customer: CS00 ?

Equip. Desc:

Model: CN-PR5002 ?

Serial Number:

☐ Create equipment on invoice

Call type: CopyQuality - Copy Quality ▼

Caller:

Description:

<< Cancel Continue

REMOTE TECH™

Equipment: ?

-- OR --

Customer: CS00 ?

Equip. Desc:

Model: CN-PR5002 ?

Serial Number:

☐ Create equipment on invoice

Call type: CopyQuality - Copy Quality ▼

Caller:

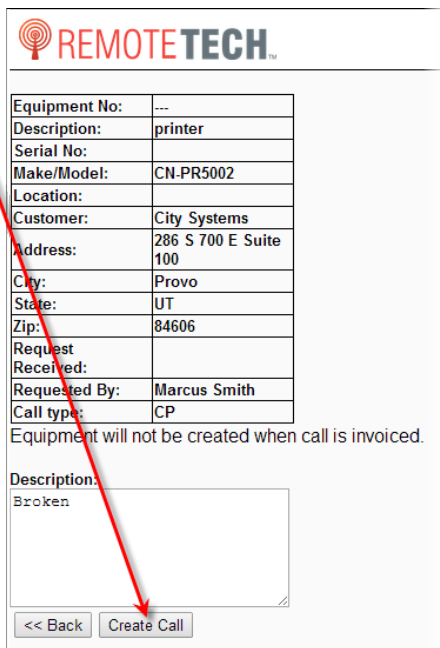
Description:

<< Cancel Continue

5. In the **Caller** field enter the name and phone number of the person to be identified on the call as the caller.

6. In the **Description** field, enter a description of the problem the customer is having with the equipment.

7. Click [**Continue**] to verify the call information prior to submitting or [<< **Cancel**] to return to the Tools List.



REMOTE TECH.

Equipment No:	---
Description:	printer
Serial No:	
Make/Model:	CN-PR5002
Location:	
Customer:	City Systems
Address:	286 S 700 E Suite 100
City:	Provo
State:	UT
Zip:	84606
Request Received:	
Requested By:	Marcus Smith
Call type:	CP

Equipment will not be created when call is invoiced.

Description:
Broken

<< Back Create Call

8. Click [**Create Call**] to submit your call to e-automate and place the call in your call list.

9. When the call is created, Remote Tech displays an acknowledgement window, click [**OK**] to acknowledge the call creation and return to the Tools List. If the call was not created you are also notified.

Invoice Info


If your e-automate system administrator allows automatic invoicing of service calls that are processed through Remote Tech, you use the Invoice Info button to view the results of invoices processed through Remote Tech that were automatically invoiced.

In order for your technicians to be able to access the Invoice Info button, your e-automate administrator must have the Auto Invoice Service Calls task in e-agent set-up with the appropriate Remote Tech rights and have the task running. If the task is not running, the Invoice Info function will not be available to your technicians.

How to Review Invoice Info

1. From the Remote Tech main page, click the **Tools** link to navigate to the tools page.






[Logout](#) | [Tools](#) | [Change password](#)

Call#	PR	BC	Customer	Status	Location	Remarks	Description	Make/Model	Est. Start	Address
SC1296			Paper Shack	Pending	Back office.		Blank areas on the pages	Sharp-SH-TX190	2/3/2014 15:47	1730 Beck St, Salt Lake City
SC1782			Bonneville Business Machines	Pending			Won't print	IBM-IBMKBID	3/11/2014 13:28	5251 Cove Canyon Dr., Park City
SC1809			City Systems	Pending	Purchasing Department		Thick black line showing up on the left side of all copies.	Canon-CN-PR5002	4/15/2014 10:00	286 S 700 E Suite 100, Provo
SC1499			Bank of National Fork	On Hold (I-SVR)	Accounting dept.		Incomplete Remarks - Won't work	Sharp-SharpMX-231OU	6/26/2013 10:00	33 E Main St, American Fork
SC1402			Cummings Engine	On Hold (WP)	Out in the shop. See Fred to gain access to the machine.		Paper jam, again.	Sharp-SH-PR5000	11/25/2013 14:32	3650 N University Ave #200, Provo

- Click [**Invoice Info**].

	
Item Lookup	
Call Lists	
Manage Inventory	
Fax Test	
Create Call	
Invoice Info	
Change Order	
Time Entry	
Administer RT	
<< Calls	

- Review the information displayed
 - Pending invoice requests:** This lists all the invoices that you have requested that have not yet been processed. The automated processor in e-automate processes every 60 seconds.
 - Failed invoice requests:** This lists all the failed automated invoice requests. Failed invoice requests display in this list for 48 hours and automatically drop off the list.
 - Successful invoice requests:** This lists the successful request. Successful invoice requests are displayed in this section for 48 hours and then are automatically removed.
- To return to the Tools, click the [<<Back](#) link.

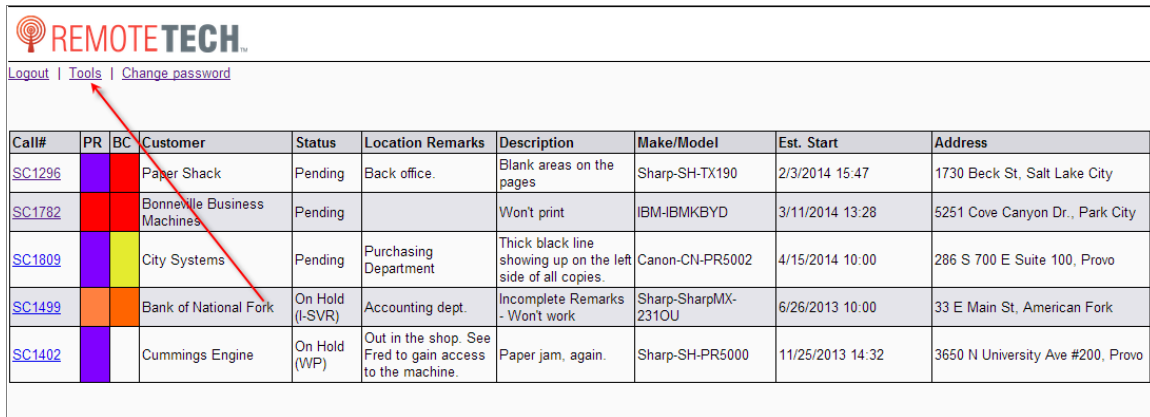
Change Order

If your e-automate system administrator allows you to enter information for equipment moving locations in Remote Tech you will have access to the Change Order functionality. With the change order functionality you can identify equipment that is moving between the dealership and



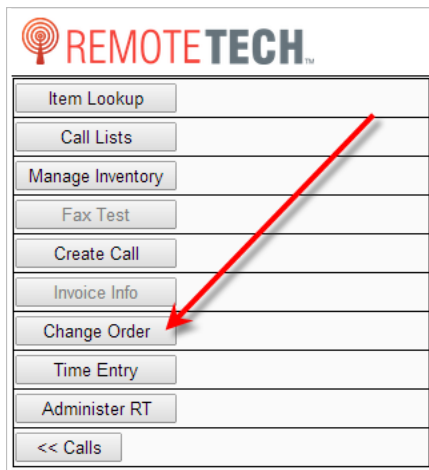
a customer location. For example, you can use Change Order to record information about equipment that is moving from the customer back to the dealer, by moving from the dealer to the customer, and equipment L due to loaner placement when equipment becomes inoperable.

1. From the Remote Tech main page, click the **Tools** link to navigate to the tools page.



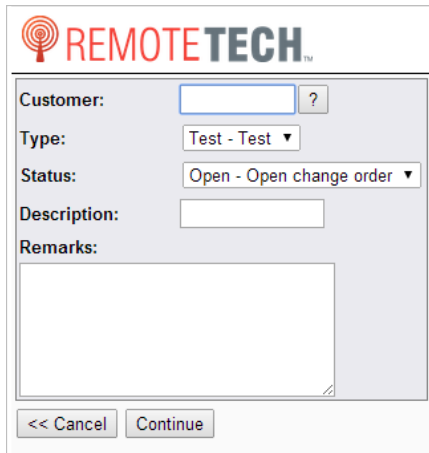
Call#	PR	BC	Customer	Status	Location Remarks	Description	Make/Model	Est. Start	Address
SC1296			Paper Shack	Pending	Back office.	Blank areas on the pages	Sharp-SH-TX190	2/3/2014 15:47	1730 Beck St, Salt Lake City
SC1782			Bonneville Business Machines	Pending		Won't print	IBM-IBMKBVD	3/11/2014 13:28	5251 Cove Canyon Dr., Park City
SC1809			City Systems	Pending	Purchasing Department	Thick black line showing up on the left side of all copies.	Canon-CN-PR5002	4/15/2014 10:00	286 S 700 E Suite 100, Provo
SC1499			Bank of National Fork	On Hold (I-SVR)	Accounting dept.	Incomplete Remarks - Won't work	Sharp-SharpMX-2310U	6/26/2013 10:00	33 E Main St, American Fork
SC1402			Cummings Engine	On Hold (WP)	Out in the shop. See Fred to gain access to the machine.	Paper jam, again.	Sharp-SH-PR5000	11/25/2013 14:32	3650 N University Ave #200, Provo

2. Click [**Change Order**].



REMOTE TECH™	
Item Lookup	
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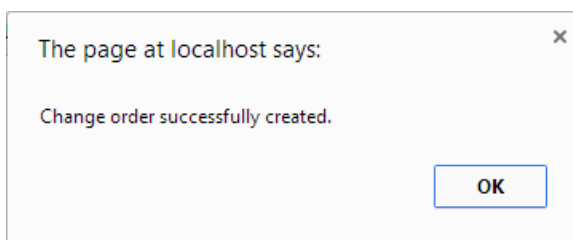
You will be redirected to the change order page.

Remote Tech form fields:

- Customer: [Text Field] ?
- Type: [Dropdown Menu] Test - Test
- Status: [Dropdown Menu] Open - Open change order
- Description: [Text Field]
- Remarks: [Text Area]
- Buttons: << Cancel, Continue

3. In the **Customer** field, enter the customer name or customer number to whom the equipment is associated. If you do not know the full customer name or number you may search for the customer using a portion of the customer name or number. To search for the customer, do the following:
 - a. Click the [?] next to the **Customer** field.
 - b. In the field, enter the criteria you want to use to search for the customer. A list of all customers meeting your search criteria displays.
 - c. From the list, locate the customer for whom you are looking and click the **Choose** link in the **Actions** column of the customer. You are redirected back to the change order field with the **Customer** field populated with the customer number.
4. In the **Type** field, use the dropdown menu to select the order type you want.
Note: Only the types that are enabled in e-automate for Remote Tech.
5. In the **Status** field, use the dropdown menu to select *Open* or any other user defined open status.
6. In the **Description** field, enter a brief description of this change order.
7. In the **Remarks** field, enter any remarks you feel are necessary.
8. Click [**Continue**]. A dialog displays informing you the change order was successful.



9. Click [**OK**].

Time Entry

You use the time entry tool to enter and complete time card entries recorded in Remote Tech. As you travel and work on service calls, Remote Tech tracks your travel and labor time. Once



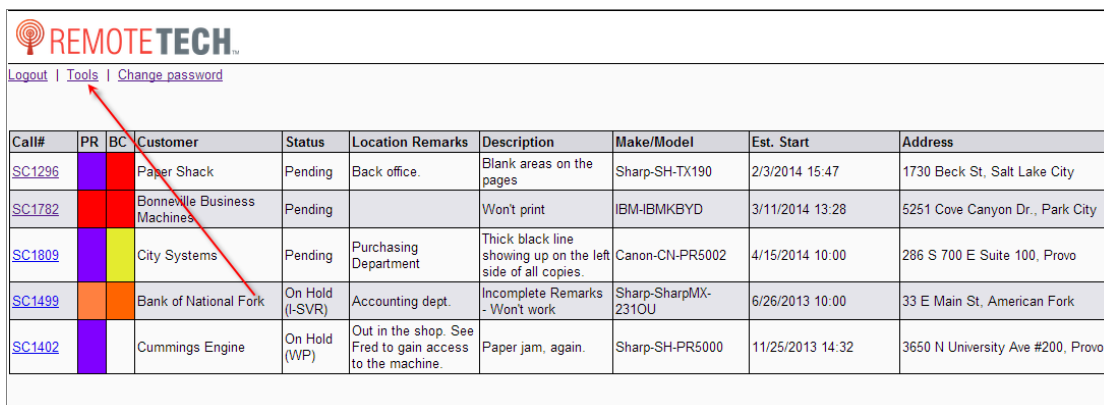
you have completed all service calls, technicians can use the Time Entry tool to login and identify any time gaps that may have occurred in your time card. For example, if you dispatched to a call at 8:00 AM and arrived at the call at 8:30 AM, Remote Tech would record that time as service travel time. Then, if from 8:30 AM until 9:30 AM you work on a service call, Remote Tech records that time as service labor time. If you finished the call at 9:30 AM and you did not dispatch yourself to the next call until 9:45 AM then you would have a 15 minute gap in your time card and you would use the **Time Entry** tool to record your gap time. Once you have recorded all time for the pay period, you then submit your time card and e-automate records and stores the time card information. You can also export the time card information to payroll as well as print detailed reports from time card information.

Once you have completed your service calls for the day, you can also come into the Time Card Entry tool and record appropriate reasons for your gaps in time for the day.

You must be given the proper rights to be able to use the Time Entry feature.

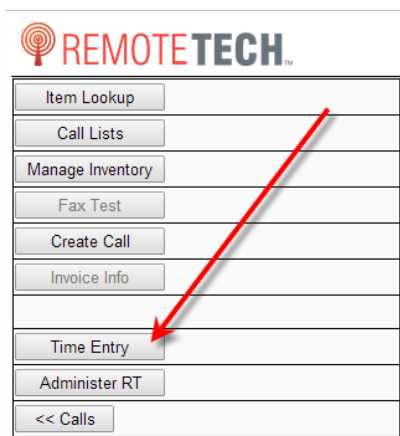
Creating a Time Card

1. From the call list page, click **[Tools]** to access the Tools list.



Call#	PR	BC	Customer	Status	Location	Remarks	Description	Make/Model	Est. Start	Address
SC1296			Paper Shack	Pending	Back office.		Blank areas on the pages	Sharp-SH-TX190	2/3/2014 15:47	1730 Beck St, Salt Lake City
SC1782			Bonneville Business Machines	Pending			Won't print	IBM-IBMKBYD	3/11/2014 13:28	5251 Cove Canyon Dr., Park City
SC1809			City Systems	Pending	Purchasing Department		Thick black line showing up on the left side of all copies.	Canon-CN-PR5002	4/15/2014 10:00	286 S 700 E Suite 100, Provo
SC1499			Bank of National Fork	On Hold (I-SVR)	Accounting dept.		Incomplete Remarks - Won't work	Sharp-SharpMX-2310U	6/26/2013 10:00	33 E Main St, American Fork
SC1402			Cummings Engine	On Hold (WP)	Out in the shop. See Fred to gain access to the machine.		Paper jam, again.	Sharp-SH-PR5000	11/25/2013 14:32	3650 N University Ave #200, Provo

2. Click **[Time Entry]**.



Item Lookup
Call Lists
Manage Inventory
Fax Test
Create Call
Invoice Info
Time Entry
Administer RT
<< Calls



The following window displays.

REMOTE TECH™

Create

Actions	Description	Status
Edit	06/30/2014 - 07/18/2014	Open

<< Tools

3. If you do not have a time card created for the current payroll period, create a time card by doing the following:
 - a. Click [**Create**].

REMOTE TECH™

Create

Actions	Description	Status
Edit	06/30/2014 - 07/18/2014	Open

<< Tools

- b. In the **Choose a pay period** field, use the drop down menu to select the pay period for which you want to create the time card.

REMOTE TECH™

Choose pay period:

(7/21/2014 - 8/1/2014) ▼

(7/21/2014 - 8/1/2014)

(8/4/2014 - 8/15/2014)

(8/18/2014 - 8/29/2014)

<< Cancel OK

- c. Click [**OK**] to create the time card. Once created, Remote Tech lists the time card in the list with other periods. You can click [**<<Cancel**] to cancel the creation of the time card.



Create

Actions	Description	Status
Edit	06/30/2014 - 07/18/2014	Open
Edit	07/21/2014 - 08/01/2014	Open

<< Tools

d. Click [**<<Tools**] to return to the Tools menu window.

Editing a Timecard

1. From the call list page, click [**Tools**] to access the Tools list.

[Logout](#) | [Tools](#) | [Change password](#)

Call#	PR	BC	Customer	Status	Location Remarks	Description	Make/Model	Est. Start	Address
SC1296			Paper Shack	Pending	Back office.	Blank areas on the pages	Sharp-SH-TX190	2/3/2014 15:47	1730 Beck St, Salt Lake City
SC1782			Bonneville Business Machines	Pending		Won't print	IBM-IBMKBYD	3/11/2014 13:28	5251 Cove Canyon Dr., Park City
SC1809			City Systems	Pending	Purchasing Department	Thick black line showing up on the left side of all copies.	Canon-CN-PR5002	4/15/2014 10:00	286 S 700 E Suite 100, Provo
SC1499			Bank of National Fork	On Hold (I-SVR)	Accounting dept.	Incomplete Remarks - Won't work	Sharp-SharpMX-2310U	6/26/2013 10:00	33 E Main St, American Fork
SC1402			Cummings Engine	On Hold (WP)	Out in the shop. See Fred to gain access to the machine.	Paper jam, again.	Sharp-SH-PR5000	11/25/2013 14:32	3650 N University Ave #200, Provo

2. Click [**Time Entry**].

Item Lookup

Call Lists

Manage Inventory

Fax Test

Create Call


Invoice Info

Time Entry

Administer RT

<< Calls

The following window displays.





Create

Actions	Description	Status
Edit	06/30/2014 - 07/18/2014	Open

<< Tools

- If you do not have a time card, complete the prior section, **Creating a Time Card** and then return to these instructions.
- In the time card list window, click the **Edit** link next to the time card you want to modify.




Create

Actions	Description	Status
Edit	06/30/2014 - 07/18/2014	Open
Edit	07/21/2014 - 08/01/2014	Open

<< Tools

The time card entry page displays.



From: Jul 21 2014
To: Aug 01 2014
Status: Open

Date	Description	Service Hours	Paid	Unpaid	Total	Notes
07/21/2014	Monday	08:00 - 17:00	0	0	0	1 missing entry.
07/22/2014	Tuesday	08:00 - 17:00	0	0	0	1 missing entry.
07/23/2014	Wednesday	08:00 - 17:00	0	0	0	1 missing entry.
07/24/2014	Thursday	08:00 - 17:00	0	0	0	1 missing entry.
07/25/2014	Friday	08:00 - 17:00	0	0	0	1 missing entry.
07/26/2014	Saturday		0	0	0	
07/27/2014	Sunday		0	0	0	
07/28/2014	Monday	08:00 - 17:00	0	0	0	1 missing entry.
07/29/2014	Tuesday	08:00 - 17:00	0	0	0	1 missing entry.
07/30/2014	Wednesday	08:00 - 17:00	0	0	0	1 missing entry.
07/31/2014	Thursday	08:00 - 17:00	0	0	0	1 missing entry.
08/01/2014	Friday	08:00 - 17:00	0	0	0	1 missing entry.


<< Pay Periods Submit

If you have a gap in time on your time card, the **Notes** column indicates there is a missing



entry for that day.

5. To account for the time gap, do the following.
 - a. Click on the date with the missing time.




From: Jul 21 2014
 To: Aug 01 2014
 Status: Open

Date	Description	Service Hours	Paid	Unpaid	Total	Notes
07/21/2014	Monday	08:00 - 17:00	0	0	0	1 missing entry.
07/22/2014	Tuesday	08:00 - 17:00	0	0	0	1 missing entry.
07/23/2014	Wednesday	08:00 - 17:00	0	0	0	1 missing entry.
07/24/2014	Thursday	08:00 - 17:00	0	0	0	1 missing entry.
07/25/2014	Friday	08:00 - 17:00	0	0	0	1 missing entry.
07/26/2014	Saturday		0	0	0	
07/27/2014	Sunday		0	0	0	
07/28/2014	Monday	08:00 - 17:00	0	0	0	1 missing entry.
07/29/2014	Tuesday	08:00 - 17:00	0	0	0	1 missing entry.
07/30/2014	Wednesday	08:00 - 17:00	0	0	0	1 missing entry.
07/31/2014	Thursday	08:00 - 17:00	0	0	0	1 missing entry.
08/01/2014	Friday	08:00 - 17:00	0	0	0	1 missing entry.

<< Pay Periods
 Submit

The time card detail page displays.



Pay Period: 07/21/2014 - 08/01/2014
 Date: Tuesday, July 22, 2014
 Service Hours: 08:00 - 17:00
 Paid Hours: 0.00
 Unpaid Hours: 0.00
 Total Hours: 0.00
 Notes: 1 missing entry.

< Previous Day
 Next Day >

Actions	TimeIn	TimeOut	Hours	Source	Activity	Description
Edit	08:00	17:00	9	Time Card	Gap	

Start: 09 :48 PM
 End: 09 :48 PM
 Activity:

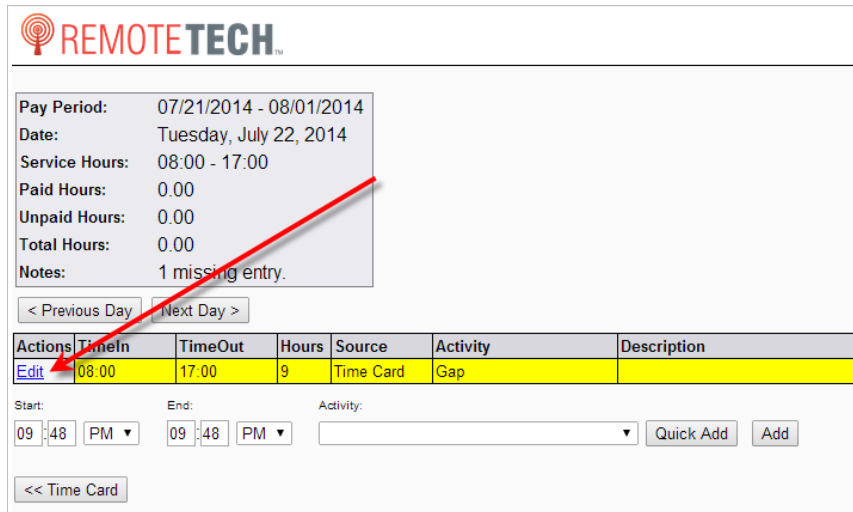
Quick Add
 Add

<< Time Card

Gaps in time on your time card are displayed in yellow. If you have Time entries that overlap, Remote Tech displays labor and travel conflicts in red.



- b. Next to the entry you want to modify, in the **Action** column, click the **Edit** link.



REMOTE TECH

Pay Period: 07/21/2014 - 08/01/2014
 Date: Tuesday, July 22, 2014
 Service Hours: 08:00 - 17:00
 Paid Hours: 0.00
 Unpaid Hours: 0.00
 Total Hours: 0.00
 Notes: 1 missing entry.

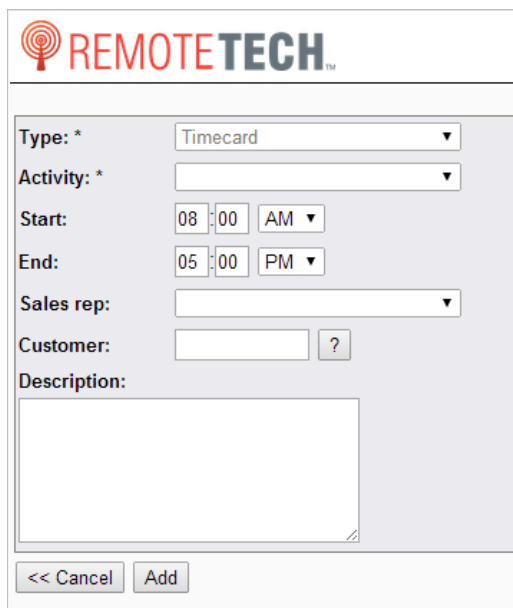
< Previous Day Next Day >

Actions	TimeIn	TimeOut	Hours	Source	Activity	Description
Edit	08:00	17:00	9	Time Card	Gap	

Start: 09:48 PM End: 09:48 PM Activity:

<< Time Card

The following page displays.



REMOTE TECH

Type: * Timecard

Activity: *

Start: 08:00 AM

End: 05:00 PM

Sales rep:

Customer: ?

Description:

<< Cancel Add

- c. In the **Activity** field, use the drop down menu to identify the activity for the time identified in this time card entry.
- d. In the **Start time** field, enter the beginning time of the specified activity.
- e. In the **End time** field, enter the ending time of the specified activity.
- f. If you want to associate this activity with a sales rep, in the **Sales rep** field use the drop down menu and identify an appropriate rep.



- g. If you want to identify on the time card that you spent time with a customer outside of normal travel and labor on a service call, you can identify a customer number in the **Customer** field. If you do not know the customer number, look up the customer number by completing the following:

- i. Adjacent to the Customer field, click [(...)] to open the search window.
- ii. In the **Search** field, enter search criteria to assist you in locating the customer number.

Note: This search allows you to look for a value or a portion of a value by using a *contains* search. If the value you enter in the field is found in the customer number field, customer name field, or the address field, Remote Tech returns a list of matching customers from which you can select. The search also allows you to search by customer assigned territory or customer address.


- iii. Click [**Search**] to display customers matching your search criteria.
- iv. Locate the customer you want and click the **Choose** link in the **Actions** column. The selected customer number is added to the Customer field.
 - a. In the **Description** field, enter an optional description.
 - b. Click [**Add**] to save the entry and return to the time card detail window.

Editing a Timecard Using Quick Add

The Quick Add functionality allows you to create time card entry from the current page without providing any specific entry details.

To use the Quick Add functionality, do the following.

1. From the call list page, click [**Tools**] to access the Tools list.



[Logout](#) | [Tools](#) | [Change password](#)

Call#	PR	BC	Customer	Status	Location	Remarks	Description	Make/Model	Est. Start	Address
SC1296			Paper Shack	Pending	Back office.		Blank areas on the pages	Sharp-SH-TX190	2/3/2014 15:47	1730 Beck St, Salt Lake City
SC1782			Bonneville Business Machines	Pending			Won't print	IBM-IBMKEYD	3/11/2014 13:28	5251 Cove Canyon Dr., Park City
SC1809			City Systems	Pending	Purchasing Department		Thick black line showing up on the left side of all copies.	Canon-CN-PR5002	4/15/2014 10:00	286 S 700 E Suite 100, Provo
SC1499			Bank of National Fork	On Hold (I-SVR)	Accounting dept.		Incomplete Remarks - Won't work	Sharp-SharpMX-2310U	6/26/2013 10:00	33 E Main St, American Fork
SC1402			Cummings Engine	On Hold (WP)	Out in the shop. See Fred to gain access to the machine.		Paper jam, again.	Sharp-SH-PR5000	11/25/2013 14:32	3650 N University Ave #200, Provo

2. Click [**Time Entry**].



REMOTE TECH

- Item Lookup
- Call Lists
- Manage Inventory
- Fax Test
- Create Call
- Invoice Info
- Time Entry**
- Administer RT
- << Calls

The following window displays.

REMOTE TECH

Create

Actions	Description	Status
Edit	06/30/2014 - 07/18/2014	Open

<< Tools

3. If you do not have a time card, complete the prior section, **Creating a Time Card** and then return to these instructions.
4. In the time card list window, click the **Edit** link next to the time card you want to modify.

REMOTE TECH


Create

Actions	Description	Status
Edit	06/30/2014 - 07/18/2014	Open
Edit	07/21/2014 - 08/01/2014	Open

<< Tools

The time card entry page displays.






From: Jul 21 2014
To: Aug 01 2014
Status: Open

Date	Description	Service Hours	Paid	Unpaid	Total	Notes
07/21/2014	Monday	08:00 - 17:00	0	0	0	1 missing entry.
07/22/2014	Tuesday	08:00 - 17:00	0	0	0	1 missing entry.
07/23/2014	Wednesday	08:00 - 17:00	0	0	0	1 missing entry.
07/24/2014	Thursday	08:00 - 17:00	0	0	0	1 missing entry.
07/25/2014	Friday	08:00 - 17:00	0	0	0	1 missing entry.
07/26/2014	Saturday		0	0	0	
07/27/2014	Sunday		0	0	0	
07/28/2014	Monday	08:00 - 17:00	0	0	0	1 missing entry.
07/29/2014	Tuesday	08:00 - 17:00	0	0	0	1 missing entry.
07/30/2014	Wednesday	08:00 - 17:00	0	0	0	1 missing entry.
07/31/2014	Thursday	08:00 - 17:00	0	0	0	1 missing entry.
08/01/2014	Friday	08:00 - 17:00	0	0	0	1 missing entry.

If you have a gap in time on your time card, the **Notes** column indicates there is a missing entry for that day.

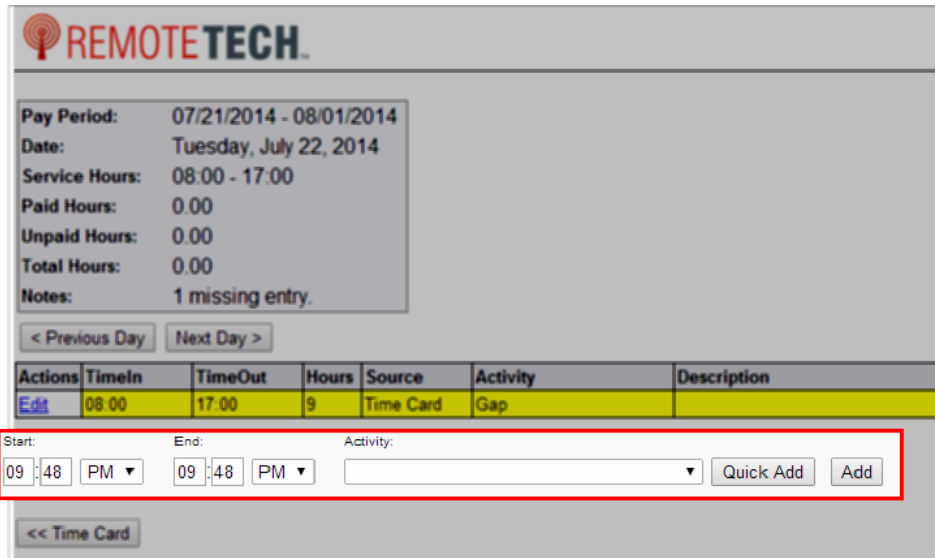
- Click on the date with the missing time.



From: Jul 21 2014
To: Aug 01 2014
Status: Open

Date	Description	Service Hours	Paid	Unpaid	Total	Notes
07/21/2014	Monday	08:00 - 17:00	0	0	0	1 missing entry.
07/22/2014	Tuesday	08:00 - 17:00	0	0	0	1 missing entry.
07/23/2014	Wednesday	08:00 - 17:00	0	0	0	1 missing entry.
07/24/2014	Thursday	08:00 - 17:00	0	0	0	1 missing entry.
07/25/2014	Friday	08:00 - 17:00	0	0	0	1 missing entry.
07/26/2014	Saturday		0	0	0	
07/27/2014	Sunday		0	0	0	
07/28/2014	Monday	08:00 - 17:00	0	0	0	1 missing entry.
07/29/2014	Tuesday	08:00 - 17:00	0	0	0	1 missing entry.
07/30/2014	Wednesday	08:00 - 17:00	0	0	0	1 missing entry.
07/31/2014	Thursday	08:00 - 17:00	0	0	0	1 missing entry.
08/01/2014	Friday	08:00 - 17:00	0	0	0	1 missing entry.

The time card detail page displays.

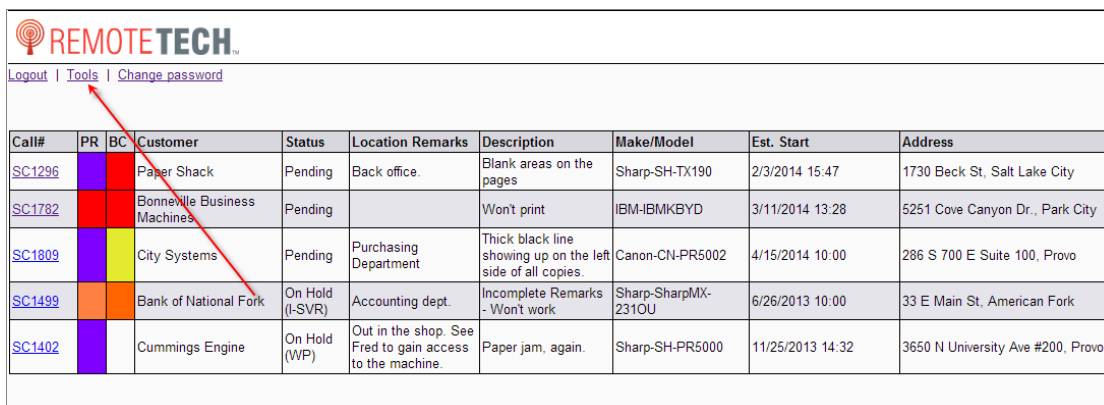
Gaps in time on your time card are displayed in yellow. If you have Time entries that overlap, Remote Tech displays labor and travel conflicts in red.

6. In the **Start** fields, enter the start time of the activity.
7. In the **End** fields, enter the end time of the activity.
8. In the **Activity** field, use the dropdown menu to select the appropriate activity code.
9. Click [**Quick Add**] to add the entry to the timecard.

Removing a Timecard Entry

To remove an existing entry, do the following:

1. From the call list page, click [**Tools**] to access the Tools list.



Call#	PR	BC	Customer	Status	Location Remarks	Description	Make/Model	Est. Start	Address
SC1296			Paper Shack	Pending	Back office.	Blank areas on the pages	Sharp-SH-TX190	2/3/2014 15:47	1730 Beck St, Salt Lake City
SC1782			Bonneville Business Machines	Pending		Won't print	IBM-IBMKBYD	3/11/2014 13:28	5251 Cove Canyon Dr., Park City
SC1809			City Systems	Pending	Purchasing Department	Thick black line showing up on the left side of all copies.	Canon-CN-PR5002	4/15/2014 10:00	286 S 700 E Suite 100, Provo
SC1499			Bank of National Fork	On Hold (I-SVR)	Accounting dept.	Incomplete Remarks - Won't work	Sharp-SharpMX-2310U	6/26/2013 10:00	33 E Main St, American Fork
SC1402			Cummings Engine	On Hold (WP)	Out in the shop. See Fred to gain access to the machine.	Paper jam, again.	Sharp-SH-PR5000	11/25/2013 14:32	3650 N University Ave #200, Provo

2. Click [**Time Entry**].



REMOTE TECH

- Item Lookup
- Call Lists
- Manage Inventory
- Fax Test
- Create Call
- Invoice Info
- Time Entry**
- Administer RT
- << Calls

The following window displays.

REMOTE TECH

Create

Actions	Description	Status
Edit	06/30/2014 - 07/18/2014	Open

<< Tools

3. If you do not have a time card, complete the prior section, **Creating a Time Card** and then return to these instructions.
4. In the time card list window, click the **Edit** link next to the time card you want to modify.

REMOTE TECH

Create

Actions	Description	Status
Edit	06/30/2014 - 07/18/2014	Open
Edit	07/21/2014 - 08/01/2014	Open

<< Tools

The time card entry page displays.

5. Click on the date with the missing time.



REMOTE TECH™

From: Jul 21 2014
To: Aug 01 2014
Status: Open

Date	Description	Service Hours	Paid	Unpaid	Total	Notes
07/21/2014	Monday	08:00 - 17:00	0	0	0	1 missing entry.
07/22/2014	Tuesday	08:00 - 17:00	0	0	0	1 missing entry.
07/23/2014	Wednesday	08:00 - 17:00	0	0	0	1 missing entry.
07/24/2014	Thursday	08:00 - 17:00	0	0	0	1 missing entry.
07/25/2014	Friday	08:00 - 17:00	0	0	0	1 missing entry.
07/26/2014	Saturday		0	0	0	
07/27/2014	Sunday		0	0	0	
07/28/2014	Monday	08:00 - 17:00	0	0	0	1 missing entry.
07/29/2014	Tuesday	08:00 - 17:00	0	0	0	1 missing entry.
07/30/2014	Wednesday	08:00 - 17:00	0	0	0	1 missing entry.
07/31/2014	Thursday	08:00 - 17:00	0	0	0	1 missing entry.
08/01/2014	Friday	08:00 - 17:00	0	0	0	1 missing entry.

<< Pay Periods Submit

The time card detail page displays.

- Next to the entry you want to remove, in the **Action** column, click the **Edit** link.

REMOTE TECH™

Pay Period: 07/21/2014 - 08/01/2014
Date: Tuesday, July 22, 2014
Service Hours: 08:00 - 17:00
Paid Hours: 0.00
Unpaid Hours: 1.00
Total Hours: 1.00
Notes: 1 missing entry.

< Previous Day Next Day >


Actions	TimeIn	TimeOut	Hours	Source	Activity	Description
Edit	08:00	09:00	1	Time Card	Travel	
Edit	09:00	17:00	8	Time Card	Gap	

Start: 10 :59 PM End: 10 :59 PM Activity: Quick Add Add

<< Time Card

The edit entry window displays.





Type: * Timecard

Activity: * TR - Travel

Start: 08 : 00 AM

End: 09 : 00 AM

Sales rep:

Customer: ?

Description:


☐ Delete this time entry

<< Cancel Update

- Check the **Delete this time entry** checkbox and click **[Update]**.
Note: You can only remove entries entered through time card.

Submitting Time Cards

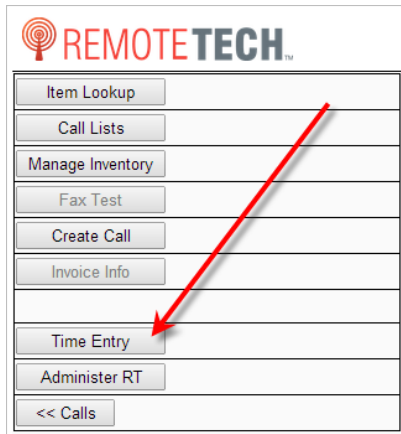
- From the call list page, click **[Tools]** to access the Tools list.



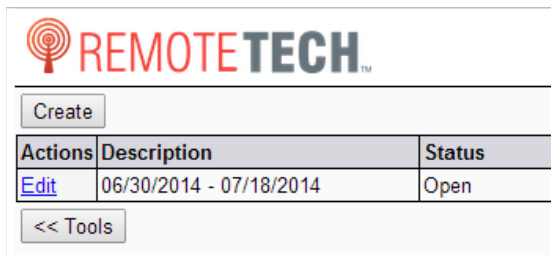
[Logout](#) | [Tools](#) | [Change password](#)

Call#	PR	BC	Customer	Status	Location Remarks	Description	Make/Model	Est. Start	Address
SC1296			Paper Shack	Pending	Back office.	Blank areas on the pages	Sharp-SH-TX190	2/3/2014 15:47	1730 Beck St, Salt Lake City
SC1782			Bonneville Business Machines	Pending		Won't print	IBM-IBMKBYD	3/11/2014 13:28	5251 Cove Canyon Dr., Park City
SC1809			City Systems	Pending	Purchasing Department	Thick black line showing up on the left side of all copies.	Canon-CN-PR5002	4/15/2014 10:00	286 S 700 E Suite 100, Provo
SC1499			Bank of National Fork	On Hold (I-SVR)	Accounting dept.	Incomplete Remarks - Won't work	Sharp-SharpMX-2310U	6/26/2013 10:00	33 E Main St, American Fork
SC1402			Cummings Engine	On Hold (WP)	Out in the shop. See Fred to gain access to the machine.	Paper jam, again.	Sharp-SH-PR5000	11/25/2013 14:32	3650 N University Ave #200, Provo

- Click **[Time Entry]** to open the **Time Card List** window.



The following window displays.

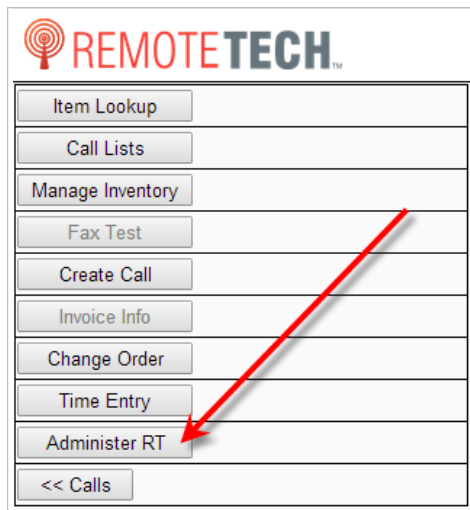


- Remote Tech displays the current date if the current date is in the time period. Use [**< Previous Day**] to go to a prior day and [**Next Day >**] to go to the next day to review and verify there are not gaps in your time card. If you have gaps in your time, see 'Verifying Daily Time' for instructions on how to fill your time gaps.
- Click [**Period Summary**] to view the time entries before they are submitted.
Note: Once time entries are submitted, you cannot change them.
- Click [**Submit**] to submit your time card entries.
Note: If the entries are not correct do not submit them because you cannot modify any entry once submitted.
- After submitting, you are returned to the **Edit Time Card** window in **View Only** mode.
- Click [**<< Back**] to close the **Time Card** window and return to the **Time Card List** window.
Note: The **Time Card List** window is configured to only display open time cards. To view closed time cards, uncheck **Show open items only** checkbox.
- Click [**Close**] to close the **Time Card List** window and return to the Remote Tech Tools List.

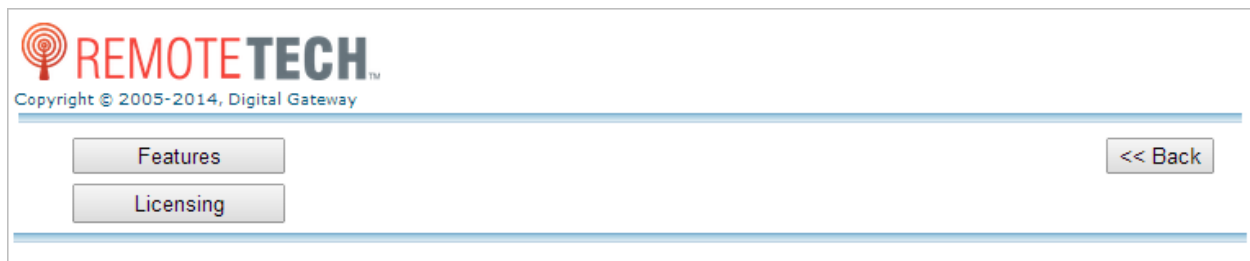
Administer RT

The Administer RT tool gives you access to the admin portion of Remote Tech; the Features area and the Licensing information.

When you click [**Administer RT**]...



You are taken to the following page.



For information on how to use the Features and Licensing functionality, see the Remote Tech Admin User Guide.

Reassigning a Service Call

If you have been given the rights, you can reassign service calls from one technician to another. You can assign your calls to other technicians, assign other technicians calls to you, and reassign service calls between other technicians.

Service calls can be reassigned from the call summary page that displays details of the service calls. If the service is assigned to the logged in technician, the summary page is the page from which you can dispatch, arrive, and depart the service call.

Not all service calls can be reassigned. Service calls that are dispatched, invoiced, on hold for any reason or, have materials cannot be reassigned. On service calls that cannot be reassigned, the Reassign button is inactive and an error message will display informing you of the reason the service call cannot be assigned.



REMOTE TECH

Assistants:
There are currently no assistants on this call...

Labor:
There are currently no labor records on this call...

Call Summary:

Technician:	Anne Surely	Reassign
Call#:	SC1831	Materials present
Status:	P	
Call received:	5/8/2014 12:53	
Due by:	5/8/2014 14:53	
Description:	TESTING TIME ZONE	
Caller:	Cadell Evans -- (801) 428-1046 --	
Call type:	E	
Sales Rep:	Billy Randolph -- (801) 349-0912 -- bonnevillebusiness@gmail.com	
Contract#		

If you have been given rights to reassign calls, the Calls for dropdown menu on the Technician Call List page displays the technicians to which you have rights to reassign service calls. The dropdown menu is divided into two sections; My Groups and Related Groups. The My Groups section displays all technicians that are assigned to any of the same groups to which the logged in technician is assigned. The Related Groups section displays all technicians that are assigned to any groups that have a relation to any of the groups to which the logged in technician is assigned.

You will only see these sections if you have been given the rights to reassign calls to these groups. The Groups are defined in the Remote Service Manager.



REMOTE TECH
Logout | Tools | Change password

Calls for Anne Surely
My Groups
Anne Surely
Lucy Pevensie
Related Groups
Ben Blue
Mike Wazowski
Unassigned
Cummins Computers
Pending

Techs that belong to groups to which the logged in technician is assigned.

Techs that belong to any groups that have a relation to any of the groups to which the logged in technician is assigned.

Call#	Location	Remarks	Description	Make/Model	Est. Start	Address
SC1037			test		5/23/2012 08:12	22 W 400 N, Orem
SC1046					12:00	1408 S State St, Orem
SC1047					09:00	1745 S State St, Provo
SC1048	City Systems	Pending			08:11	286 S 700 E Suite 100, Provo
SC1049	Crawford, Steele & Company	Pending	Bob will be out for the next 3 days. - broken		8/20/2012 10:25	365 E 600 S, Provo

To reassign service calls, do the following.

1. From the main Remote Tech page (pictured above), in the **Calls for** field, use the dropdown menu to select the technician who is currently assigned to the call you want to reassign.

REMOTE TECH
Logout | Tools | Change password

Calls for Ann Surely
My Groups
Anne Surely
Lucy Pevensie
Related Groups
Ben Blue
Mike Wazowski
Unassigned
Cummins Computers
Pending

Call#	Status	Location	Remarks	Description
SC1296	Pending	Back office.		Blas pag
SC1782	Pending			Wo
SC1809	Pending	Purchasing Department		This sho side
SC1499	On Hold (I-SVR)	Accounting dept.		Ince - W
SC1402	On Hold (WP)	Out in the shop. See Fred to gain access to the machine.		Pap

A list of calls assigned to the selected technician displays.

2. Click on the Call# of the service call you want to reassign.



REMOTE TECH[™]

[Logout](#) | [Tools](#) | [Change password](#)

Calls for

Call#	PR	BC	Customer	Status	Location	Remarks	Description	Make
SC1739			Mountain View Restaurant	Scheduled	Near restrooms		Won't dispense cash.	NCR-I
SC1813			Geyser Water	Pending	Procurement department.		Wont' work	Xerox
SC1812			Structural Engineering, Inc.	Scheduled			N	Toshib

3. The call summary page displays.
4. Click the **[Reassign]** button.

REMOTE TECH[™]

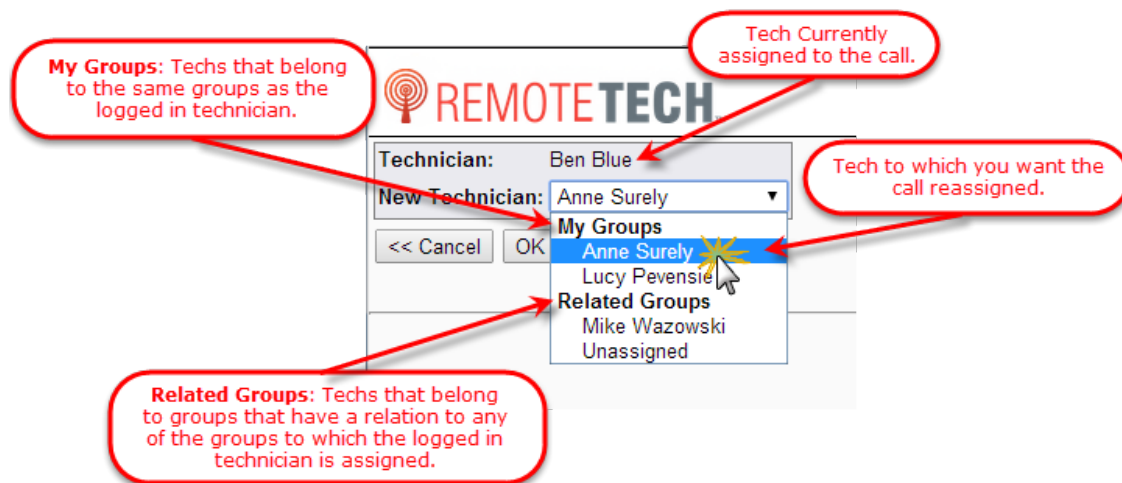
Labor:
There are currently no labor records on this call...

Call Summary:

Technician:	Ben Blue	Reassign
Call#:	SC1026	
Status:	P	
Call received:	12/29/2011 11:21	
Due by:	12/29/2011 15:21	
Description:	repeat error msg	
Caller:	Dextor Morgan -- 555-555-5555 -- dmorgan@example.com	
Call type:	Electrical	
Sales Rep:	Aurthur Fonzarelli -- 115 -- aurfurf@example.com	
Contract#		
Bill code:	TMC	
Terms:	Net30	
Priority:	Level4	
Make/Model:	SH-TX190	
Serial#:	22222223	

- In the **New Technician** field, use the dropdown menu to select the technician to whom you want to assign the call. The dropdown menu is divided in two sections: **My Groups** and **Related Groups**. The **My Groups** section displays all technicians that are assigned to any of the same groups to which the logged in technician is assigned. The **Related Groups** section displays all technicians that are assigned to any groups that have a relation to any of the groups to which the logged in technician is assigned.

Note: You will only see technicians for groups to which you have rights to reassign service calls.

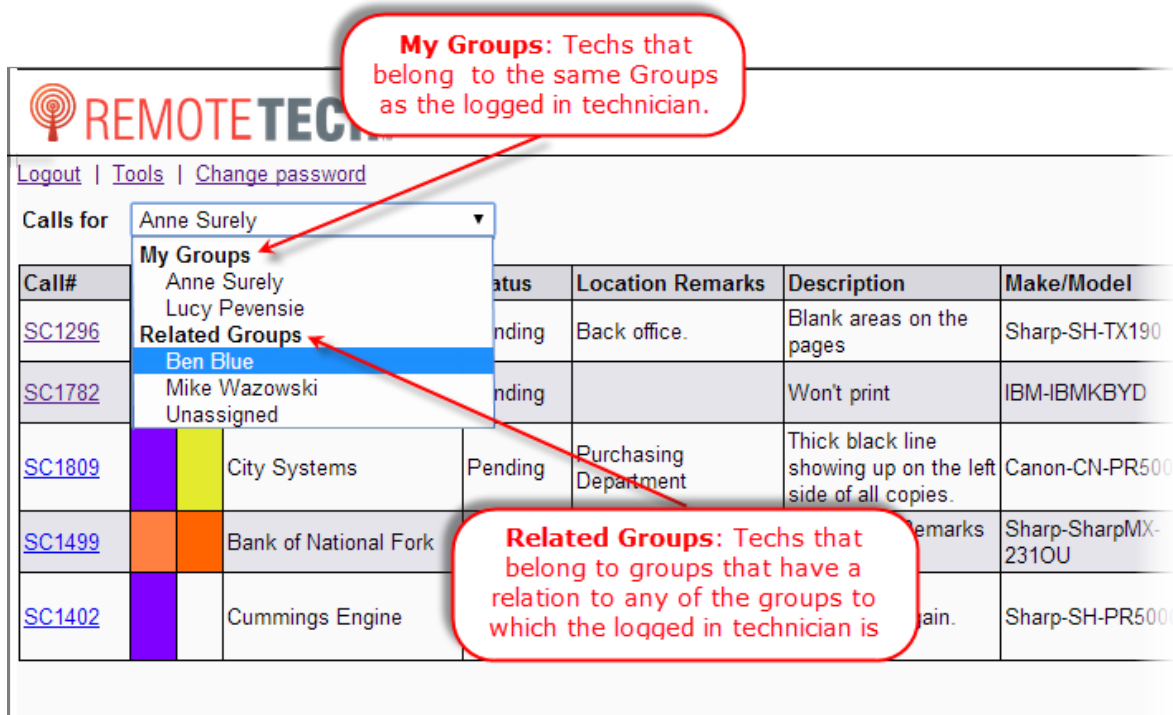


- Click [**OK**]. The technician you selected is now assigned to the service call.

Viewing Service Calls for Other Technicians

If you have been given the proper rights, a technician can view service calls that are assigned to other technicians. The **Calls for** field on the Call List page displays the technicians for whom the technician can view service calls. The technicians are divided into two groups: *My Groups* and *Related Groups*. The *My Groups* section displays all technicians that are assigned to any of the same groups to which the logged in technician is assigned. The *Related Groups* section displays all technicians that are assigned to any groups that have a relation to any of the groups to which the logged in technician is assigned.

You will only see these sections if you have been given the rights to reassign calls to these groups. The Groups and rights are defined in the Remote Service Manager by your administrator.



My Groups: Techs that belong to the same Groups as the logged in technician.

Related Groups: Techs that belong to groups that have a relation to any of the groups to which the logged in technician is

Call#	Status	Location	Remarks	Description	Make/Model
SC1296	Pending	Back office.		Blank areas on the pages	Sharp-SH-TX190
SC1782	Pending			Won't print	IBM-IBMKBYPD
SC1809	Pending	Purchasing Department		Thick black line showing up on the left side of all copies.	Canon-CN-PR500
SC1499		Bank of National Fork			Sharp-SharpMX-231OU
SC1402		Cummings Engine			Sharp-SH-PR500

When you select a technician from the **Calls for** dropdown menu, a list of service calls assigned to that technician displays.


Processing a Service Call

To record your travel, labor, materials, et cetera for a service call follow these instructions.


Dispatching

1. From the Call List, click the call number on which you want to work.



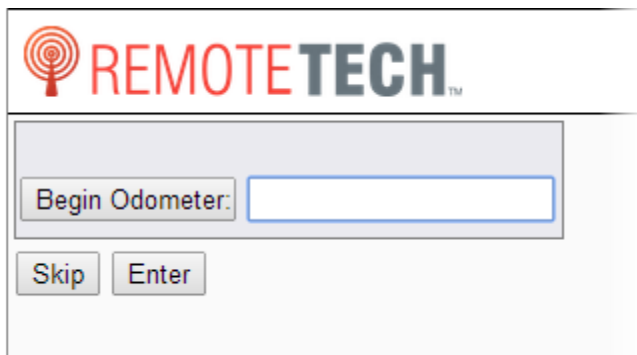
									
Logout Tools Change password									
Calls for Ann Surely									
Call#	PR	BC	Customer	Status	Location Remarks	Description	Make/Model	Est. Start	Address
SC1805			Swenson Financial Services	Pending		Customer believes the machine is leaking electric current. He found a pool of electrons and protons behind the machine.	Sharp-SH-PR5000	4/14/2014 10:00	5879 Cranston Cove, Salt Lake City
SC1845			City Systems	Pending		Broken		5/20/2014 10:00	286 S 700 E Suite 100, Provo
SC1855			City Systems	Pending	Purchasing Department	clanking noise	Canon-CN-PR5002	6/2/2014 09:30	286 S 700 E Suite 100, Provo
SC1847			City Systems	Pending		Making a loud clanking noise.		5/29/2014 10:00	286 S 700 E Suite 100, Provo
SC1499			Bank of National Fork	On Hold (I-SVR)	Accounting dept.	Incomplete Remarks - Won't work	Sharp-SharpMX-231OU	6/26/2013 10:00	33 E Main St, American Fork

Remote Tech navigates to the summary page of the service call selected.

	
<< Calls Close call	
Summary Items Meters P/R Misc Labor Notes	
<input type="button" value="Schedule"/>	Est. Start: <input type="text" value="4/14/2014 10:00"/>
Assistants: <input type="button" value="+"/> There are currently no assistants on this call...	
Labor: <input type="button" value="Quick Labor"/>	
<input type="button" value="Dispatch"/>	<input type="text" value="[click to dispatch call]"/>
<input type="button" value="Arrive"/>	<input type="text"/>
<input type="button" value="Depart"/>	<input type="text"/>
Call Summary:	
Technician:	Ann Surely <input type="button" value="Reassign"/>
Call#:	SC1805
Status:	P
Call received:	<input type="text" value="4/13/2014 15:32"/>
Due by:	4/14/2014 09:00
Customer believes the machine is leaking electric current. He found a	



2. Remote Tech displays the estimated start time. As necessary, you can modify the time to the current date and time by entering them into the **Est. Start** field. If unnecessary, continue on to the next step.
3. Click [**Dispatch**] to dispatch yourself on the service call. Doing so records the dispatch time as the current date and time. If your administrator requires odometer mileage, Remote Tech displays the Begin Odometer page.



The screenshot shows the REMOTE TECH logo at the top. Below it is a form titled "Begin Odometer:" with a text input field. At the bottom of the form are two buttons: "Skip" and "Enter".

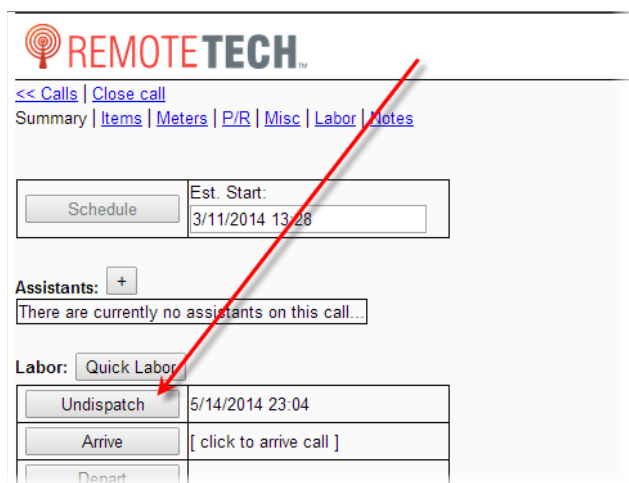
Note: This updates the e-automate database and flags the call as dispatched and saves the dispatch time to the e-automate database.

4. If you do not want to enter your odometer reading click [**Skip**].

If you want to enter your odometer reading, you may enter your odometer reading by either clicking [**Begin Odometer**] to enter your odometer reading at the time of dispatch or you may also enter your odometer reading in the provided field. Click [**Enter**].

You are returned to the Call Summary page.

5. If you accidentally dispatched or want to undispach, you can click [**Undispatch**] to cancel the dispatch of this call. Clicking [**Undispatch**] removes the labor record created in e-automate.

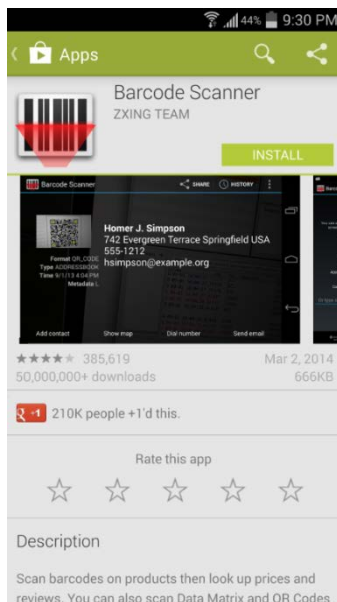


The screenshot shows the REMOTE TECH logo at the top. Below it are navigation links: "<< Calls | Close call", "Summary | Items | Meters | P/R | Misc | Labor | Notes". There is a "Schedule" button and an "Est. Start:" field with the value "3/11/2014 13:28". Below that is an "Assistants:" section with a "+" button and the text "There are currently no assistants on this call...". Under the "Labor:" section, there is a "Quick Labor" button. A table of labor records is shown with columns for action and time. The first row has an "Undispatch" button and the time "5/14/2014 23:04". The second row has an "Arrive" button and the text "[click to arrive call]". The third row has a "Depart" button. A red arrow points to the "Undispatch" button.



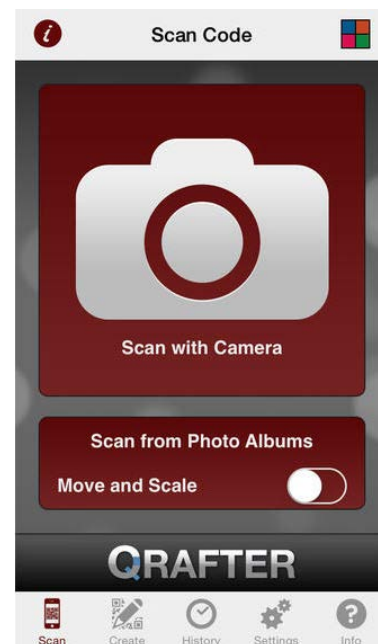
Arriving

Arriving a technician can be done by either clicking a button or scanning the equipment you are servicing depending on the device you are using. If you are processing a service call from a computer or a device that does not have a barcode scanning app installed, you arrive at the call by simply clicking the Arrive button on the call summary page. If you are using a smartphone or tablet that has a barcode scanning app installed, you can scan the piece of equipment you are servicing and Remote Tech will automatically enter the date and time of the scan as the arrival date and time.




If you are using an Android device, you need to install the Barcode Scanner app. The Barcode Scanner app works for both scanning QR codes for automatically entering arrival and departure times and scanning standard UPC barcodes to add materials to a call.

If you are using an iOS device, you need to install the QRAFTER app. The QRAFTER app works only for scanning QR codes for automatically entering arrival and departure times.





1. From the Call List, click the call number on which you want to work. Remote Tech navigates to the summary page of the service call selected.




[Logout](#) | [Tools](#) | [Change password](#)

Click on the call # to view service call detail.

Call#	PR	BC	Customer	Status	Location	Remarks	Description	Make/Model	Est. Start	Address
SC1296			Paper Shack	Pending	Back office.		Blank areas on the pages	Sharp-SH-TX190	2/3/2014 15:47	1730 Beck St, Salt Lake City
SC1782			Bonneville Business Machines	Pending			Won't print	IBM-IBMKBID	3/11/2014 13:28	5251 Cove Canyon Dr., Park City
SC1809			City Systems	Pending	Purchasing Department		Thick black line showing up on the left side of all copies.	Canon-CN-PR5002	4/15/2014 10:00	286 S 700 E Suite 100, Provo
SC1499			Bank of National Fork	On Hold (I-SVR)	Accounting dept.		Incomplete Remarks - Won't work	Sharp-SharpMX-2310U	6/26/2013 10:00	33 E Main St, American Fork
SC1402			Cummings Engine	On Hold (WP)	Out in the shop. See Fred to gain access to the machine.		Paper jam, again.	Sharp-SH-PR5000	11/25/2013 14:32	3650 N University Ave #200, Provo

2. Remote Tech displays the estimated start time. As necessary you can modify the time to the current date and time by entering them into the **Est. Start** field. If unnecessary, continue on to the next step.
3. Record your arrival time by doing one of the following.
 - If you are using computer or device that does not have a barcode scanning app installed, do the following.
 - a. Click [**Arrive**].



[<< Calls](#) | [Close call](#)

[Summary](#) | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | [Labor](#) | [Notes](#) | [Exchange Equipment](#)

Est. Start:

Labor:

3/13/2014 22:23

[click to arrive call]

Remarks:

Notes:

Call Summary:

Technician:

Anne Surely

Call#:

SC1018

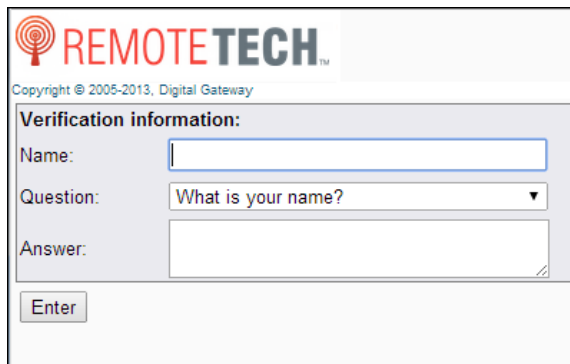
The **End Odometer** page displays.



The screenshot shows the Remote Tech logo at the top. Below it is a form with a label "End Odometer:" followed by a text input field. At the bottom of the form are two buttons: "Skip" and "Enter".

- b. In the **End Odometer** field enter your ending odometer reading. This stops your travel time and calculates your miles. Click **[Enter]** to save your ending odometer reading or **[Skip]** to return to the call summary.

If your admin requires you to enter verification information, the **Verification information** page displays.



The screenshot shows the Remote Tech logo at the top. Below it is the text "Copyright © 2005-2013, Digital Gateway". The main section is titled "Verification information:" and contains three fields: "Name:" with a text input field, "Question:" with a dropdown menu showing "What is your name?", and "Answer:" with a text input field. At the bottom is an "Enter" button.

- c. In the **Name** field, enter the name of the arriving technician.
 - d. In the **Question** field, use the dropdown menu to select a verification question.
 - e. In the **Answer** field, enter the answer to the question you selected.
 - f. Click **[Enter]**. You are returned to the summary page and Remote Tech automatically enters the current date and time as the arrival time on the service call.
- Note:** Remote Tech records this date and time in your e-automate database and displays this time in the Dispatch Console.
- If you are using your smartphone or tablet and you have the correct barcode scanning app installed, do the following.
 - a. Click the **[Arrive]** button.



demo.tech-anyware.com:81/RTS/psum

REMOTE TECH

[<< Calls](#) | [Close call](#)

Summary | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | [Labor](#) | [Notes](#)

Est. Start: 2/24/2014 11:46

Assistants:
There are currently no assistants on this call...

Labor:

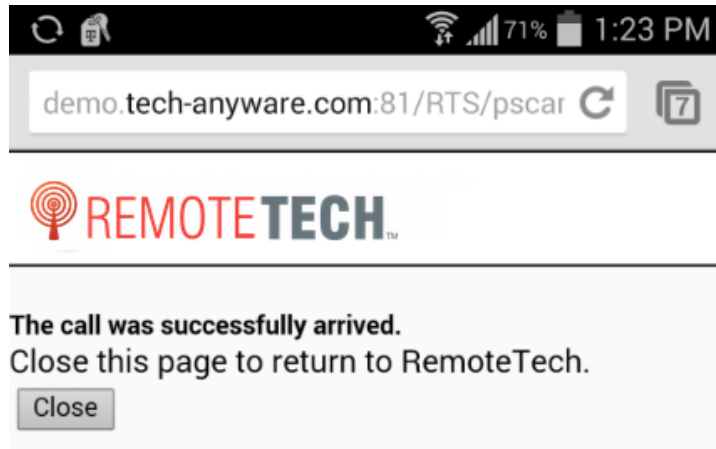
<input type="button" value="Dispatch"/>	3/10/2014 23:48
<input type="button" value="Arrive"/>	3/12/2014 14:31
<input type="button" value="Depart"/>	[click to depart call]

Call Summary:

Technician:	Ann Surely
Call#:	SC1778
Status:	D
Call received:	2/24/2014 09:46
Due by:	2/24/2014 11:46
Description:	Streaks on the pages

Your scanning app will open.

- b. Scan the barcode on the piece of equipment being serviced. Remote Tech verifies the equipment is the correct piece of equipment. A page displays informing you whether or not the call was successfully arrived.



- c. Click [**Close**]. If the call was successfully arrived, Remote Tech automatically enters the current date and time in the **Arrive** field.

Note: Remote Tech records the date and time in your e-automate database and displays this time in the Dispatch Console.

demo.tech-anyware.com:81/RTS/psum

REMOTE TECH

[<< Calls](#) | [Close call](#)

Summary | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | [Labor](#) | [Notes](#)

Est. Start: 2/24/2014 11:46

Assistants:
There are currently no assistants on this call...

Labor:

Dispatch	3/10/2014 23:48
Arrive	3/12/2014 14:31
Depart	(click to depart call)

Call Summary:

Technician:	Ann Surely
Call#:	SC1778
Status:	D
Call received:	2/24/2014 09:46
Due by:	2/24/2014 11:46
Description:	Streaks on the pages

4. The Call Summary region displays the following information:
UNDER WARRANTY: A message displays in red adjacent to the **Call Summary** heading informing you whether or not the service call was created within the equipment's warranty period. Whether or not the call is within the warranty period is based on the equipment warranty date or the warranty expiration meter.



Call#: Service call number assigned to the displayed service call.

Status: Status of the call

Call received: Date and time the call was entered.

Due by: Date and time by which the customer must have this call completed.

Description: Description of the problem the customer is experiencing with the machine.

Caller: Customer employee who placed the service call.

Call type: Call type assigned to the service call.

Note: You may change the call type from the summary page if necessary by clicking on the call type link

Sales rep: Sales rep assigned to the customer at the time the service call is created. This field provides the sales rep's name, phone, and email.

Contract#: If the equipment is on contract, this field displays the contract number of the contract to which the equipment is assigned.

Bill code: Bill code assigned to the equipment.

Terms: Billing terms assigned to this customer.

Priority: Priority with which this call type should be handled

Make/Model: Make and model of the equipment on the call.

Serial#: Serial number assigned to the equipment.

Equipment#: Equipment number assigned to the machine on the call.

Install date: Date the machine was installed at the customer location.

Warranty date: Equipment warranty date.

IP address: IP address assigned to the equipment on the call. Only available in 8.0.

Mac address: MAC address assigned to the equipment on the call. Only available in 8.0.

Eq. primary note: Displays the equipment's primary note.

Location remarks: Displays any equipment location remarks.

Contact: Customer contact.

Customer#: Number assigned to this customer in e-automate.

Customer: Name of the customer on this call.

Address: Customer address.

City: Customer City address.

State: Customer State address.

Zip: Customer zip code.

Phone: Customer phone number.

Email: Customer's main contact email.

Work order#: Number of the work order containing the service call.

PO#: PO number assigned to this service call.

History: Provides a link to this calls service history.

Map: Provides a link to access Google Maps.

From the **Call summary** region, do any of the following for which you have rights:

- To edit the description, click in the **Description** field and enter the description.
- To edit the call type, do the following.



- a. Click the **Call** type link.

Call Summary:

Technician:	Ann Surely
Call#:	SC1809
Status:	D
Call received:	4/14/2014 22:12
Due by:	4/15/2014 10:00
Description:	Thick black line showing up on the left side of all copies.
Caller:	Jack Bauer
Call type:	CP
Sales rep:	Brian Russel -- (801) 453-1235 -- bonnevillebusiness@gmail.com
Contract#	CS001-01
Bill code:	G
Terms:	2/10
Priority:	L3
Make/Model:	CN-PR5002
Serial#:	85747658697
Equipment#:	EQ10000
Install date:	2/1/1999
Warranty date:	8/1/1999
IP address:	
MAC address:	
Eq. primary note:	Equipment Remarks

The following page displays.

REMOTE TECH[™]

Call Type: CP - Copy Quality ▼

<< Cancel OK

- b. Use the dropdown menu in the **Call Type** field to select the desired call type.

REMOTE TECH[™]

Call Type: JM - Jam ▼

<< Cancel


- CP - Copy Quality
- CSET - Computer Settings
- E - Emergency
- EP - Electrical Problem
- INOP - Inoperable
- JM - Jam**
- NP - No Power
- UNKN - Unknown Tech to diagnose
- WF - Won't Feed



- c. Click [OK]. You are returned to the Call summary with the new call type displayed.
- To edit equipment on the service call, do the following:
 - a. Click the equipment number link, located in the **Equipment #** field.

Description:	press of excitations and proteins behind the machine.		
Caller:	Higgs Field		
Call type:	CourtesyCall		
Sales rep:	Billy Randolph -- (801) 349-0912 -- billy@toppcopy.com		
Contract#			
Bill code:	TMC		
Terms:	COD		
Priority:	L6		
Make/Model:	SH-PR5000		
Serial#:	ps9551		
Equipment#:	EQ10017		
Install date:	5/30/1999		
Warranty date:			
IP address:			
MAC address:			
Eq. primary note:	A special notice from Sharp on this unit.		
Location remarks:			
Contact:	Kelly		
Customer#:	SF00		
Customer:	Swenson Financial Services		
Address:	5879 Cranston Cove		
City:	Salt Lake City		
State:	UT		
Zip:	84128		
Phone:	801-896-3271		
Email:			
Work order#:	606		

The following page displays.



☐ Search all locations
☒ Show only host equipment

Equipment Number	Serial Number	Make	Model	Location Remarks	Customer Number	Customer Name	Customer Address	Office Open	Office Close	Contact	Contact Phone	Technician	Remarks
EQ10017	ps9551	Sharp	SH-PR5000		SF00	Swenson Financial Services	5879 Cranston Cove	08:00	17:00	Kelly	801-896-3271	Ester Wright	A special notice from Sharp on this unit.

Replace with:

- b. Search for the equipment you want on this call by doing the following:




- i. In the **Search** field enter a portion of the equipment number.
Note: If you want to replace with an unknown piece of equipment, simply click **[Update]**.
- ii. If necessary, you may check either the **Search all locations** and/or **Show only host equipment** to narrow your search.
- iii. Click **[Search]**. Remote Tech displays a list of equipment that meet your search criteria.

☐ Search all locations


☒ Show only host equipment

- iv. In the **Actions** column of the equipment you want on the service call, click **Choose**. The equipment you select displays under the **Replace with** region on the page that displays.



Actions	Equipment Number	Serial Number	Make	Model	Item	Item Description	Customer Number	Customer Name	Customer Address	Location Remarks	Office Open	Office Close	Contact	Contact Phone	Technician
Choose	EQ10000	85747658697	Canon	CN-PR5002	CN-PR5002	Canon Printer 5052	CS00	City Systems	286 S 700 E Suite 100 Provo UT 84606	Purchasing Department	08:00	17:00	Anne	801-621-3004	Ester Wright

- v. Click **[Update]** to replace the equipment that was previously on the call with the newly selected equipment.



☐ Search all locations

☒ Show only host equipment

Current equipment:
 Unknown equipment

Replace with:

Equipment Number	Serial Number	Make	Model	Item	Item Description	Customer Number	Customer Name	Customer Address	Location Remarks	Office Open	Office Close	Contact	Contact Phone	Technician	Remarks
EQ10000	85747658697	Canon	CN-PR5002	CN-PR5002	Canon Printer 5052	CS00	City Systems	286 S 700 E Suite 100	Purchasing Department	08:00	17:00	Anne	801-621-3004	Ester Wright	Equipment



- To edit the IP Address, click in the **IP Address** field and enter the appropriate address.

Description:	Leaking electric current. He found a pool of electrons and protons behind the machine.
Caller:	Higgs Field
Call type:	CourtesyCall
Sales rep:	Billy Randolf -- (801) 349-0912 -- billy@toppcopy.com
Contract#	
Bill code:	TMC
Terms:	COD
Priority:	L6
Make/Model:	SH-PR5000
Serial#:	ps9551
Equipment#:	EQ10017
Install date:	5/30/1999
Warranty date:	
IP address:	<input type="text"/>
MAC address:	<input type="text"/>
Eq. primary note:	A special notice from Sharp on this unit.
Location remarks:	<input type="text"/>
Contact:	Kelly
Customer#:	SF00
Customer:	Swenson Financial Services
Address:	5879 Cranston Cove
City:	Salt Lake City
State:	UT
Zip:	84128
Phone:	801-896-3271
Email:	
Work order#:	606
PO#:	
History:	History
Map:	Map

[Add verification information](#)

- To edit the Mac address, click in the **Mac Address** field and enter the appropriate address.

Serial#:	
Equipment#:	Unknown equipment
Install date:	
Warranty date:	
IP address:	<input type="text"/>
MAC address:	<input type="text"/>
Eq. primary note:	
Location remarks:	<input type="text"/>
Contact:	
Customer#:	CS00
Customer:	City Systems
Address:	286 S 700 E Suite 100
City:	Provo
State:	UT
Zip:	84606
Phone:	801-890-0933
Email:	info@CitySystems.com
Work order#:	645
PO#:	CS000001
History:	History
Map:	Map

PM Information:	
Last PM date:	
Next PM date:	
Last PM display:	
Next PM display:	

[Add verification information](#)



- To modify the **Location remarks** field (if allowed), click in the field and make appropriate changes.

Serial#:	
Equipment#:	Unknown equipment
Install date:	
Warranty date:	
IP address:	<input type="text"/>
MAC address:	<input type="text"/>
Eg. primary note:	
Location remarks:	<input type="text"/>
Contact:	
Customer#:	CS00
Customer:	City Systems
Address:	286 S 700 E Suite 100
City:	Provo
State:	UT
Zip:	84606
Phone:	801-890-0933
Email:	Info@CitySystems.com
Work order#:	645
PO#:	CS000001
History:	History
Map:	Map

PM Information:	
Last PM date:	
Next PM date:	
Last PM display:	
Next PM display:	

[Add verification information](#)

- To send an email to the email address associated with the service call, do the following:
 - Click the email address listed on the service call summary.



Priority:	L3
Make/Model:	
Serial#:	
Equipment#:	Unknown equipment
Install date:	
Warranty date:	
IP address:	<input type="text"/>
MAC address:	<input type="text"/>
Eq. primary note:	
Location remarks:	<input type="text"/>
Contact:	
Customer#:	CS00
Customer:	City Systems
Address:	286 S 700 E Suite 100
City:	Provo
State:	UT
Zip:	84606
Phone:	801-890-0933
Email:	Info@CitySystems.com
Work order#:	645
PO#:	CS000001
History:	History
Map:	Map

PM Information:

Last PM date:	
Next PM date:	
Last PM display:	
Next PM display:	

[Add verification information](#)

- b. Your device opens your email composer.
- c. Compose the email and send.
- To review call service history, do the following:
 - a. To access call history, click the **History** link at the bottom of the page.




Bill code:	
Terms:	2/10
Priority:	L3
Make/Model:	
Serial#:	
Equipment#:	Unknown equipment
Install date:	
Warranty date:	
IP address:	<input type="text"/>
MAC address:	<input type="text"/>
Eq. primary note:	
Location remarks:	<input type="text"/>
Contact:	
Customer#:	CS00
Customer:	City Systems
Address:	286 S 700 E Suite 100
City:	Provo
State:	UT
Zip:	84606
Phone:	801-890-0933
Email:	Info@CitySystems.com
Work order#:	645
PO#:	CS000001
History:	History
Map:	Map

PM Information:	
Last PM date:	
Next PM date:	
Last PM display:	
Next PM display:	

[Add verification information](#)

Remote Tech queries information about service calls for the equipment associated with this service call. You can view the call number, customer, date, meter type, call type, status, description, remarks, problems, repairs, and items used on the call from the summary window.

- b. To view more detail about a service call in the list, click the call number link.

											
Call#	Customer	Date	Meter Type	Meter	Call Type	Status	Description	Remarks	Problems	Repairs	Items
SC1261	City Systems	4/3/2013 07:06			Receive-Send	X	Won't send. Customer asked if they needed a phone line for it to work.				
SC1182	City Systems	2/6/2013 09:55			CourtesyCall	X	Needs setup				

<< Back



- c. Review the call information and click [**OK**] to return to the service call history list.
 - d. When finished reviewing call history, click [**<< Back**] to return to the call Summary page.
- To use Remote Tech mapping, do the following:

- a. To access a map to the service click the **Map** link.


Bill code:	
Terms:	2/10
Priority:	L3
Make/Model:	
Serial#:	
Equipment#:	Unknown equipment
Install date:	
Warranty date:	
IP address:	
MAC address:	
Eq. primary note:	
Location remarks:	
Contact:	
Customer#:	CS00
Customer:	City Systems
Address:	286 S 700 E Suite 100
City:	Provo
State:	UT
Zip:	84606
Phone:	801-890-0933
Email:	Info@CitySystems.com
Work order#:	645
PO#:	CS000001
History:	History
Map:	Map

PM Information:
Last PM date:
Next PM date:
Last PM display:
Next PM display:

[Add verification information](#)

call,

- b. Remote Tech displays the address information it passes to the mapping site. Modify as necessary.
- c. Click [**OK**] to pass the address parameters to the mapping site and leave Remote Tech. The mapping site provides driving instructions to the address received from Remote Tech. You can return to Remote Tech by clicking **BACK** on your browser.



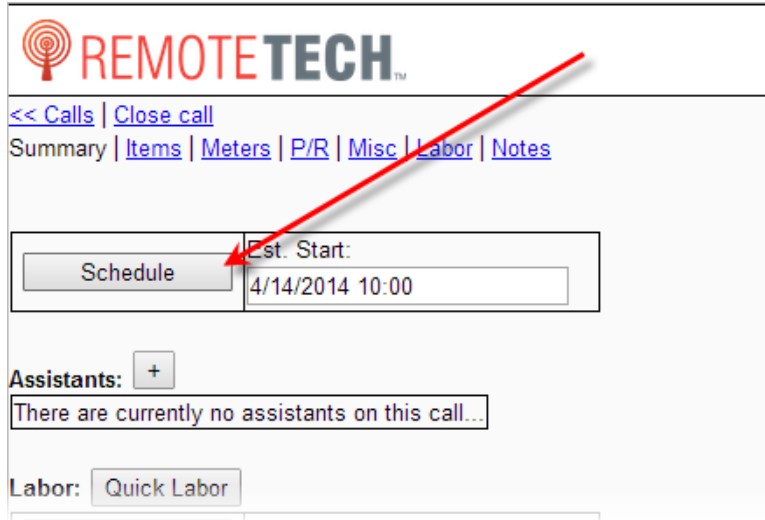
Street:	286 S 700 E Suite 100
City:	Provo
State:	UT
Zip:	84606
Country:	US ▼

<< Cancel OK

**Note, if you press OK you will leave RemoteTech. Use your browser's BACK command to return to this page.*

Scheduling a Call

From the Call Summary page, you have the ability to schedule a service call.



REMOTE TECH™

[<< Calls](#) | [Close call](#)

Summary | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | [Labor](#) | [Notes](#)

Est. Start: 4/14/2014 10:00

Assistants:

There are currently no assistants on this call...

Labor:

Recording Materials Used

To record materials being used on a service call, the item number of the item you are adding must be provided. If you know the item number you may simply enter the item number. If you do not know the item number you may search to find the item using a portion of the item number. When you perform an item search you can narrow the resulting list by choosing to search only your inventory, search only related items, and/or search only allowed items. Any items you add to a service call must have a service code identified on the item record in e-automate. If you have the appropriate rights, you can add a non-inventory item or an item that is not currently in stock. If you add an item that is not currently in stock, you will need to mark that item as either *Used* to over allocated or *Needed* to pre-order. The *Needed* status does not display in the dropdown menu if you do not have the rights to pre-order items.

To record materials used on the service call, do the following:

1. Click the **Items** link to add inventory items. Items already added to the service call are listed.



[<< Calls](#) | [Close call](#)

[Summary](#) | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | [Labor](#) | [Notes](#) | [Exchange Equipment](#)

Est. Start:
8/9/2012 12:00

Labor:

<input type="button" value="Dispatch"/>	3/14/2014 18:54
<input type="button" value="Arrive"/>	3/14/2014 18:55
<input type="button" value="Depart"/>	[click to depart call]
Remarks:	<input type="text"/>
Notes:	<input type="text"/>

Call Summary:

Technician:	Anne Surely
Call#:	SC1046
Status:	D

2. To identify items to add to the service call, do one of the following:
 - If you know the item number, enter the item number in the **Add item** field.

[<< Calls](#) | [Close call](#)

[Summary](#) | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | [Labor](#) | [Notes](#)

Item#	Qty	Serial#	Description	Status	Warehouse/Bin	Amount
55-55342	1		Panel assembly	USED	AnnWH - Anne Bin	0.00

- If you do not know the item number, do the following:
 - a. Click [?] to navigate to the item search.



REMOTE TECH™

<< Calls | Close call

Summary | Items | Meters | P/R | Misc | Labels | Notes

Add item ?

Item#	Qty	Serial#	Description	Status	Warehouse/Bin	Amount
55-55342	1		Panel assembly	USED	AnnWH - Anne Bin	0.00

- b. In the search field, enter a portion of the item number, a portion of the manufacturer's number, or a portion of the historical manufacturer's number. You can also enter a portion of the item description in the search to determine the e-automate item number.

REMOTE TECH™

Search

☒ Search only my inventory

☐ Search only related items

☐ Search only allowed items

<< Cancel

- c. You can check any of the following checkboxes:

Search only my inventory: When checked, Remote Tech queries only items that are in your current inventory.


Search only related items: When checked, Remote Tech queries only items that are associated with the equipment item in e-automate.

Search only allowed items: When checked, Remote tech queries only items that are allowed.


Note: To display a list of all items in your inventory leave the field blank, uncheck **Search only related items**, and check **Search only my inventory**.

- d. Click [**Search**] to search for the item number. Click [**<< Cancel**] to cancel the search. A list of items that meet your search criteria displays.



				
Actions	Item	Available	Description	Category
Choose	006R01551	50	Black Toner for WorkCentre 5325/5845	Parts
Choose	007K17071	45	Xerox 6010 Drive Assembly Motor	Parts
Choose	0700019	30	Xerox Part	Supplies
Choose	106R01510	94	Black Toner Cartridge Xerox Phaser 6700	Supplies
Choose	120E31603	1	Xerox 6700 ADC Sensor	Parts
Choose	1657B004BA-YT	133	Yellow Toner Cartridge for Canon imageRUNNER C1022	Supplies
Choose	1658B004BA-MT	89	Magenta Toner Cartridge for Canon imageRUNNER C1022	Supplies
Choose	1659B004BA-CT	93	Cyan Toner Cartridge for Canon imageRUNNER C1022	Supplies
Choose	1660B004AA	229	Drum - Canon Image Runner C1022	Supplies
Choose	1660B004BA-BT	-1	Black Toner Cartridge for Canon imageRUNNER C1022	Supplies

- e. Locate the item you want to add to the service call and in the **Actions** column, click **Choose**.

				
Actions	Item	Available	Description	Category
Choose	006R01551	50	Black Toner for WorkCentre 5325/5845	Parts
Choose	007K17071	45	Xerox 6010 Drive Assembly Motor	Parts
Choose	0700019	30	Xerox Part	Supplies
Choose	106R01510	94	Black Toner Cartridge Xerox Phaser 6700	Supplies
Choose	120E31603	1	Xerox 6700 ADC Sensor	Parts
Choose	1657B004BA-YT	133	Yellow Toner Cartridge for Canon imageRUNNER C1022	Supplies

This returns you to the add item page and populates the item you choose in the **Add item** field.



REMOTE TECH™

<< Calls | [Close call](#)

[Summary](#) | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | [Labor](#) | [Notes](#)

Add item ? 1

Item#	Qty	Serial#	Description	Status	Warehouse/Bin	Amount
55-55342	1		Panel assembly	USED	AnnWH - Anne Bin	0.00

3. In the quantity field, enter the quantity you want.

REMOTE TECH™

<< Calls | [Close call](#)

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Add item ? 1

Item#	Qty	Serial#	Description	Status	Warehouse/Bin	Amount
55-55342	1		Panel assembly	USED	AnnWH - Anne Bin	0.00

4. Click [**Add item**]. If you are using a barcode scanner, you can scan the barcode associated with the item by clicking the **scanning** button. It will add the item to the call with a quantity of one.

REMOTE TECH™

<< Calls | [Close call](#)


[Summary](#) | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | [Labor](#) | [Notes](#)

Add item ? 1

Item#	Qty	Serial#	Description	Status	Warehouse/Bin	Amount
55-55342	1		Panel assembly	USED	AnnWH - Anne Bin	0.00

Remote Tech displays the next add item page.





Item: 55-55342

Description:

Category: Parts

Quantity:

Serial#:

Status:

Delivery method:

Date needed:

Bin:

Price: 600.00

Discount: 0%


Notes:

☐ Bill

☐ Delete this item record from call

5. In the **Description** field, you may modify the description, if necessary.
6. In the **Quantity** field, you may modify the number of this item you want.
7. In the **Serial#** field, use the dropdown menu (if enabled) to select the appropriate serial number.
8. In the **Status** field, select the appropriate status for this item.
- Note:** If you add an item that is not currently in stock, you will need to mark that item as either *Used* to over allocate or *Needed* to pre-order. You can only over allocate items if the ability is given in e-automate.
9. In the **Delivery method** field, use the dropdown menu (if enabled) to select the appropriate delivery method.
10. In the **Date needed** field, enter the date by which you must have the item.
11. In the **Bin** field, use the dropdown menu to select the appropriate bin. In order to select another technician's bin you must have access, in e-automate, to that technician's warehouse.
12. In the **Notes** field, enter notes you feel necessary for this item.

13. Click [OK] to add the item to the service call.
14. Repeat the above steps to add additional items to the service call.
13. To remove or modify the quantity of an item, do the following:
 - a. In the **Item #** column, click the item number you want modified.



[<< Calls](#) | [Close call](#)
[Summary](#) | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | [Labor](#) | [Notes](#)

Item#	Qty	Serial#	Description	Status	Warehouse/Bin	Amount
55-55342	1		Panel assembly	USED	AnnWH - Anne Bin	0.00



- b. To add or remove quantity without completely removing the item, in the **Quantity** field, enter the appropriate quantity.

REMOTE TECH[™]

Item: 55-55342

Description: Panel assembly

Category: Parts

Quantity: 1

Serial#:

Status: USED

Delivery method: Pick-up - Pick-up

Date needed:

Bin: AnnWH - Anne Bin (1 available)

- c. If the item is serialized, in the **Serial #** field, enter the serial number or use the search to identify the serial number.

- d. To change the status of the item, in the **Status** field, use the drop down menu to identify a different status than displayed.

Note: When completing a rescheduled call you must mark all items **Used** or remove them from the call before you can complete the call.

- e. To completely remove the item from the service call, check the **Delete this item record from the call** checkbox.

Note: If the item is on the call as a result or a transfer or a purchase order, Remote Tech displays how the item is associated with the call. Remote Tech displays PO for purchase linked items and TO for transfer order linked items.

- f. Click **[OK]** to save your changes or **[<< Cancel]** to return to the items page.

REMOTE TECH[™]

Item: 55-55342

Description: Panel assembly

Category: Parts

Quantity: 1

Serial#:

Status: USED

Delivery method: Pick-up - Pick-up

Date needed:

Bin: AnnWH - Anne Bin (1 available)

Price: 600.00

Discount: 0%

Notes:

☐ Bill

☐ Delete this item record from call

<< Cancel OK

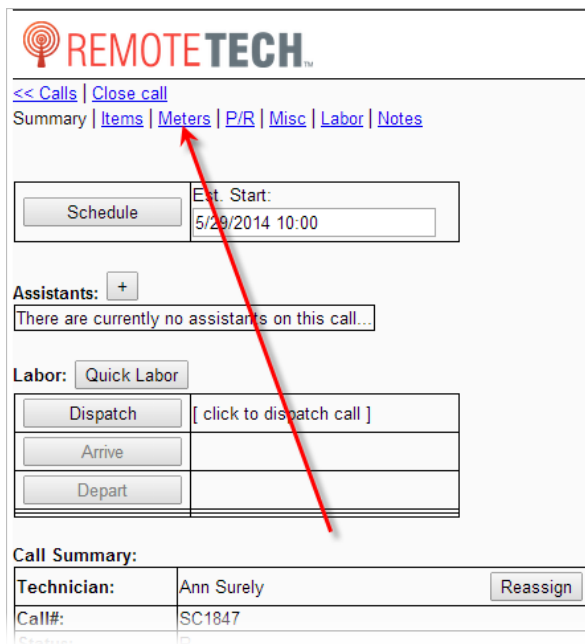


Recording Meters

If the equipment on which you are working is metered, you can record meters. If your admin has required meter readings, you will be required to provide a service meter before you can complete the service call based on your e-automate settings. If your admin does not require meter readings, the system will use the last valid meter reading.

1. To record meters for the service call, click the **Meters** link to access the meter entry page.

Note: Remote Tech displays the meters associated with the equipment. If the equipment has multiple meters, Remote Tech displays multiple meters.



REMOTE TECH™

[<< Calls](#) | [Close call](#)

[Summary](#) | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | [Labor](#) | [Notes](#)

Est. Start: 5/29/2014 10:00

Assistants:
There are currently no assistants on this call...

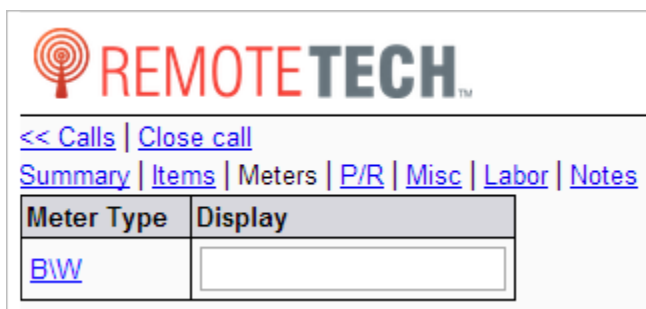
Labor:

[click to dispatch call]

Call Summary:

Technician:	Ann Surely	<input type="button" value="Reassign"/>
Call#:	SC1847	

The following page displays.



REMOTE TECH™

[<< Calls](#) | [Close call](#)

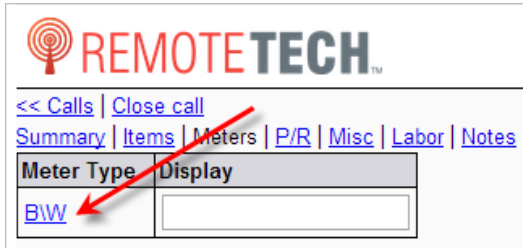
[Summary](#) | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | [Labor](#) | [Notes](#)

Meter Type	Display
BW	<input type="text"/>

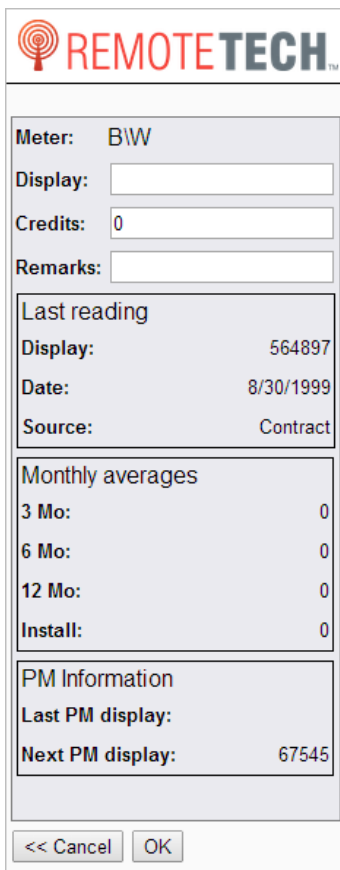
2. In the appropriate field, enter the meters from the equipment being serviced.
3. If you want to record not only a meter, but also the details associated with the meter such as credit or remarks, do the following:



- a. Click on the meter link you want to enter.



The following page displays.



- b. In the **Display** field enter the meter.
- c. If allowed to enter meter credits, enter them in the **Credits** field.
- d. To enter remarks enter them in the **Remarks** field.

Note: Meters entered in Remote Tech comply with the existing meters already recorded in e-automate. In some cases the meters in e-automate may prevent a meter from being entered through Remote Tech. If your administrator has allowed it, you can enter



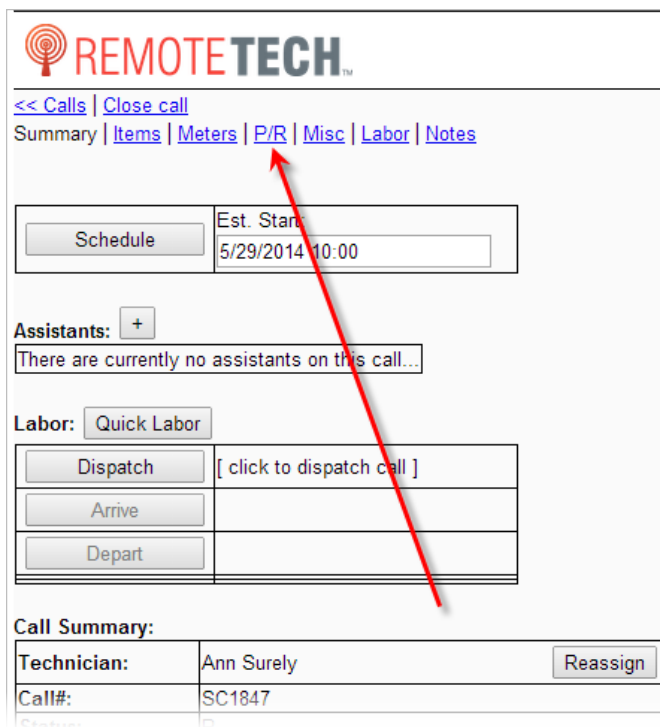
the word "force" in the remarks for a meter and force the meter into e-automate for service call invoicing. If configured, Remote Tech can display the last known meter and meter source in the meter detail page.

- e. Click [OK] to save your meter and return to the meters page. Click [<< Cancel] to return to the meter page without saving the information.
- f. If you have multiple meters, repeat the above steps until you have entered all appropriate meters.

Recording Problem and Repair Codes

You use problem and repair codes to identify what the real problems were on the equipment and what you did to solve them. Calls are classified with a call type but the call type may not really be what was wrong with the equipment. When trained technician properly classify problems and repairs, e-automate builds a database of accurate equipment problems and solutions.

1. Click the **P/R** link to access the problems and repair code entry page.



The screenshot shows the REMOTE TECH interface. At the top, there is a navigation bar with links: << Calls | Close call. Below this, there is a sub-navigation bar with links: Summary | Items | Meters | P/R | Misc | Labor | Notes. A red arrow points to the P/R link. Below the navigation bar, there is a section for scheduling with a 'Schedule' button and an 'Est. Start' field showing '5/29/2014 10:00'. Below this, there is a section for assistants with a '+' button and a message: 'There are currently no assistants on this call...'. Below this, there is a section for labor with a 'Quick Labor' button and a table with buttons: Dispatch, Arrive, and Depart. The 'Dispatch' button has a tooltip that says '[click to dispatch call]'. At the bottom, there is a 'Call Summary' section with fields for 'Technician:' (Ann Surely) and 'Call#:' (SC1847). There is a 'Reassign' button next to the technician field.

The following page displays.



2. To record problem codes for the service call, do the following:
 - a. Use the drop down menu to select an appropriate problem code.
 - b. Click **[Add Problem]** to add the problem code to the service call.
 - c. You can add additional problem codes as necessary.
 - d. To remove a problem code, in the **Actions** column next to the problem code you want to remove, click the **Remove** link.

Actions	Problem
Remove	BA

3. To record repair codes for the service call, do the following.
 - a. Use the drop down menu to select an appropriate repair code.
 - b. Click **[Add Repair]** to add the repair code to the service call.
 - c. You can add additional repair codes as necessary.
 - d. To remove a repair code, in the **Actions** column next to the repair code you want to remove, click the **Remove** link.



REMOTE TECH[™]

[<< Calls](#) | [Close call](#)

[Summary](#) | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | [Labor](#) | [Notes](#)

BA - Blank areas on the pages ▼

Actions	Problem
Remove	BA

ASVCPACK - Applied Service Pack ▼

Actions	Repair
Remove	ASVCPACK

Recording Miscellaneous Information

To record miscellaneous information on the service call, do the following:

1. Click the **Misc** link to display the entry page.

REMOTE TECH[™]

[<< Calls](#) | [Close call](#)

[Summary](#) | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | [Labor](#) | [Notes](#)

Est. Start: 5/29/2014 10:00

Assistants:
There are currently no assistants on this call.

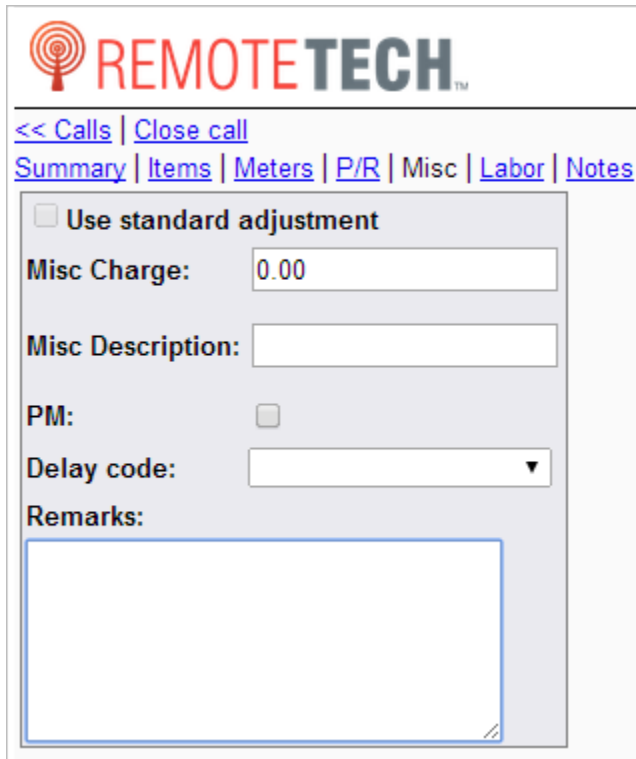
Labor:

<input type="button" value="Dispatch"/>	[click to dispatch call]
<input type="button" value="Arrive"/>	
<input type="button" value="Depart"/>	

Call Summary:

Technician:	Ann Surely	<input type="button" value="Reassign"/>
Call#:	SC1847	

The following page displays.

2. If you want to use the standard adjustment identified in e-automate, check the **Use standard adjustment** checkbox.
3. In the **Misc Charge** field, enter the amount of the miscellaneous charge.
Note: If the customer already has a misc. charge associated with their customer record, Remote Tech already populates the charge in the field.
4. In the **Misc Description** field, enter the description you want displayed on the invoice for the miscellaneous charge.
Note: If the customer already has a misc. charge associated with their customer record, Remote Tech already populates the description in the field.
5. If you performed preventive maintenance on the service call and you want to update the preventive maintenance profile for the equipment, check the **PM** checkbox.
6. If you were delayed, you can use the drop down menu in the **Delay code** field to identify a delay code explaining the reason for delay.
Note: Some companies require delay codes.
7. In the **Remarks** field enter appropriate remarks for the service call. Your system administrator can configure these remarks to print on the service invoice. Enter remarks according to your system configuration.

Recording Labor on Service Calls

If your system administrator allows editing of labor information, you will see a **Labor** link on the Remote Tech Call Summary page. For calls assigned to you, depending on the rights given by your admin, you may be able to edit either all labor records or only your own labor records. To edit labor on service calls, do the following:



Adding Labor Records

To add a labor record, do the following.

1. Click the **Labor** link, to display the edit labor page.

REMOTE TECH[™]

[<< Calls](#) | [Close call](#)

[Summary](#) | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | **[Labor](#)** | [Notes](#)

Est. Start: 5/29/2014 10:00

Assistants:
There are currently no assistants on this call...

Labor:

<input type="button" value="Dispatch"/>	[click to dispatch call]
<input type="button" value="Arrive"/>	
<input type="button" value="Depart"/>	

Call Summary:

Technician:	Ann Surely	<input type="button" value="Reassign"/>
Call#:	SC1847	

The following page displays.

REMOTE TECH[™]

[<< Calls](#) | [Close call](#)

[Summary](#) | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | **[Labor](#)** | [Notes](#)

<input type="button" value="Dispatch"/>	<input type="text"/>
<input type="button" value="Arrive"/>	<input type="text"/>
<input type="button" value="Depart"/>	<input type="text"/>
<input type="button" value="Add"/>	

There are currently no labor records shown...

2. In the **Dispatch** field enter a dispatch date and time.
Note: You can click [**Dispatch**] to enter the current date and time in the field.




3. In the **Arrive** field enter an arrival time.
Note: You can click **[Arrive]** to enter the current date and time in the field.
4. In the **Depart** field enter a departure time.
Note: You can click **[Depart]** to enter the current date and time in the field.
5. Click **[Add]** to add a new line item with the date and times in the **Dispatched**, **Arrival**, and **Departure** columns populated.
6. To add an activity code associated with this labor entry, repeat step 3.

Adding Quick Labor

The Quick Labor option allows you to work on another service call and add labor records without undischarging from the call to which you are currently dispatched.

To add Quick Labor, do the following.

1. From the call list, locate the call for which you want to add Quick Labor.


[Logout](#) | [Tools](#) | [Change password](#)

Calls for Luke Walker

Call#	PR	BC	Customer	Eq#	Make/Model	Status	Location Remarks	Description	Est. Start	Address
SC1855			Mountain View Restaurant	EQ10152	NCR-NCRSS26	Scheduled	Near restrooms	Won't dispense cash.	2/7/2014 09:58	7700 Stein Way, Park City
SC1813			Geyser Water	XX99102	Xerox-X191	Pending	Procurement department.	Won't work	4/17/2014 16:20	1408 S State St, Orem
SC1812			Structural Engineering, Inc.	EQ10028	Toshiba-TX192	Scheduled	Museum office.	N	4/18/2014 09:54	201 S Main St #900, Salt Lake City

The Call Summary for the selected call displays.

2. Click the **[Quick Labor]** button.



REMOTE TECH[™]

[<< Calls](#) | [Close call](#)

[Summary](#) | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | [Labor](#) | [Notes](#)

Est. Start: 7/2/2014 09:30

Assistants:
There are currently no assistants on this call...

Labor:

7/8/2014 13:11

[click to arrive call]

Call Summary:

Technician:	Ann Surely
Call#:	SC1855
Status:	D
Call received:	5/30/2014 16:30
Due by:	7/2/2014 09:30
Description:	clanking noise

The following page displays.

REMOTE TECH[™]

Start Time: 10:40 PM

Activity: HD_EMAIL - Help desk, s€ ▾

Remarks

The **Start Time** displays the time you clicked the [**Quick Labor**] button.

3. In the **Activity** field, use the dropdown menu to select the activity code you want to assign to this Quick Labor record. The activity code defines the type of activity performed on the service call.
4. In the **Remarks** field, enter any notes you want to add to this labor record.

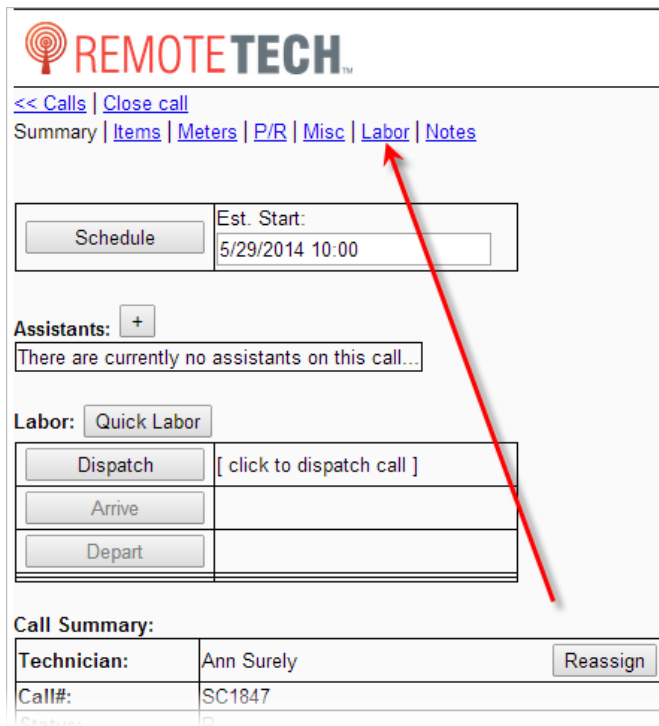


Editing Labor Records and Adding Activity Codes and Interruptions

Adding activity codes and interruptions is done through the Edit Labor option of Remote Tech. In order to be able to add interruptions, the call must be marked *Arrived*; Remote Tech does not allow you to add interruptions if you are traveling.

To edit an existing labor entry, do the following.

1. Click the **Labor** link, to display the edit labor page.



REMOTE TECH

[<< Calls](#) | [Close call](#)

[Summary](#) | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | [Labor](#) | [Notes](#)

Est. Start: 5/29/2014 10:00

Assistants:
There are currently no assistants on this call...

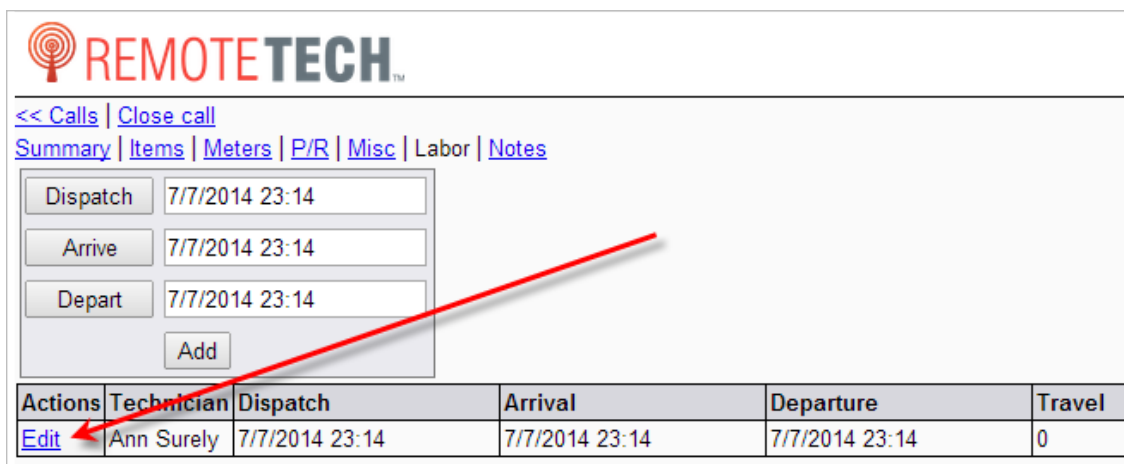
Labor:

<input type="button" value="Dispatch"/>	[click to dispatch call]
<input type="button" value="Arrive"/>	
<input type="button" value="Depart"/>	

Call Summary:

Technician:	Ann Surely	<input type="button" value="Reassign"/>
Call#:	SC1847	

2. Locate your labor record listed below and in the **Actions** column click the **Edit** link next to the labor record you want to edit.



REMOTE TECH

[<< Calls](#) | [Close call](#)

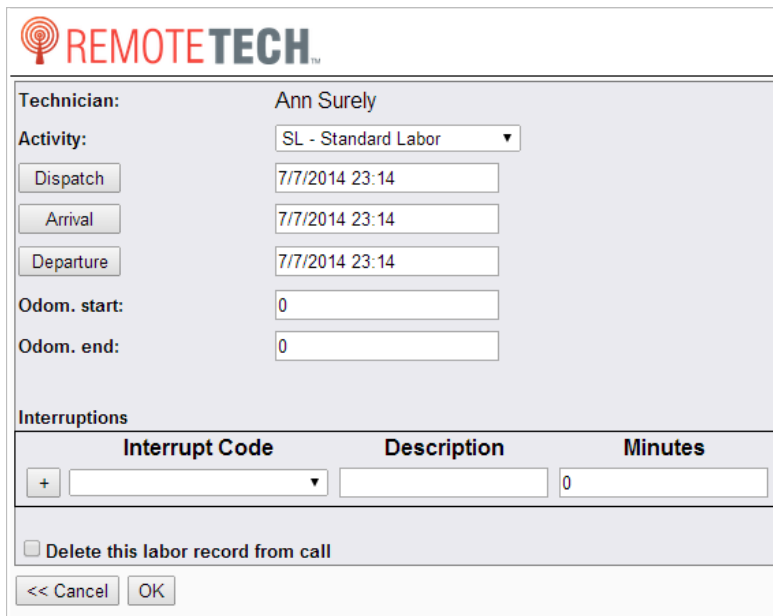
[Summary](#) | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | [Labor](#) | [Notes](#)

<input type="button" value="Dispatch"/>	7/7/2014 23:14
<input type="button" value="Arrive"/>	7/7/2014 23:14
<input type="button" value="Depart"/>	7/7/2014 23:14
<input type="button" value="Add"/>	

Actions	Technician	Dispatch	Arrival	Departure	Travel
Edit	Ann Surely	7/7/2014 23:14	7/7/2014 23:14	7/7/2014 23:14	0



The following page displays.



REMOTE TECH

Technician: Ann Surely

Activity: SL - Standard Labor

Dispatch: 7/7/2014 23:14

Arrival: 7/7/2014 23:14

Departure: 7/7/2014 23:14

Odom. start: 0

Odom. end: 0

Interruptions

Interrupt Code	Description	Minutes
+		0

☐ Delete this labor record from call

<< Cancel OK

3. In the **Activity** field use the drop down menu to select an appropriate activity code for this labor record.
Note: Activities available are configured by your system administrator.
4. In the **Dispatch** field modify the date and time to reflect the correct dispatch time.
Note: You can click [**Dispatch**] to enter the current date and time in the field.
5. In the **Arrival** field modify the date and time to reflect the correct arrival time.
Note: You can click [**Arrive**] to enter the current date and time in the field.
6. In the **Departure** field modify the date and time to reflect the departure time.
Note: You can click [**Departure**] to enter the current date and time in the field.
7. In the **Odom. start** field modify your beginning vehicle odometer as necessary.
8. In the **Odom. end** field modify your ending vehicle odometer as necessary.
9. If you want to add an interruption, use the dropdown menu in the **Interrupt Code** field, to select the appropriation interrupt code.
Note: You must be arrived in order to add Interrupt codes. You cannot add interruptions during travel.
10. In the **Description** field, enter a brief description of the interruption.
11. In the **Minutes** field, enter how many minutes the interruption should last.
12. Click [**+**] to the left of the interruption to add the interruption.
13. To delete an interruption click [**X**] to the left of the interruption.
14. If you want to remove this labor record, check the **Delete this labor record from call** checkbox.
15. Click [**OK**] to save your changes or click [**<<Cancel**] to return to the labor entry page.
16. If you want to remove this labor record, check the Delete this labor record from the call checkbox.
17. Click [**OK**] to save your changes or click [**<< Cancel**] to return to the labor entry page.



Deleting Labor Records

1. Click the **Labor** link, to display the edit labor page.

REMOTE TECH
[<< Calls](#) | [Close call](#)
[Summary](#) | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | **[Labor](#)** | [Notes](#)

Est. Start: 5/29/2014 10:00

Assistants:
 There are currently no assistants on this call...

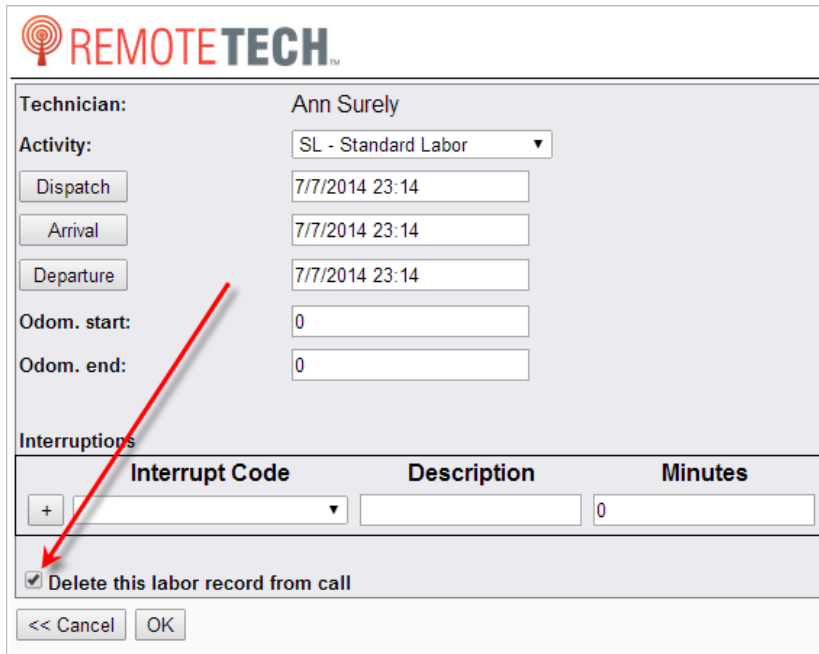
Labor:

<input type="button" value="Dispatch"/>	[click to dispatch call]
<input type="button" value="Arrive"/>	
<input type="button" value="Depart"/>	

Call Summary:

Technician:	Ann Surely	<input type="button" value="Reassign"/>
Call#:	SC1847	

2. Locate the labor record you want to remove.
3. In the **Actions** column click the **Edit** link next to the labor record you want to remove. Remote Tech displays the edit labor entry page.
4. Check the **Delete this labor record from call** checkbox.



REMOTE TECH

Technician: Ann Surely

Activity: SL - Standard Labor

Dispatch: 7/7/2014 23:14

Arrival: 7/7/2014 23:14

Departure: 7/7/2014 23:14

Odom. start: 0

Odom. end: 0

Interruptions

Interrupt Code	Description	Minutes
+		0

☒ Delete this labor record from call

<< Cancel OK

5. Click [OK]. Remote Tech takes you back to the labor entry page.

Adding, Viewing, and Editing Service Call Notes

Depending on the rights your administrator has granted, you may have the ability to view, add, and/or edit notes related to service calls, the work order, the equipment associated with the call, model associated with the call, the make associated with the call, the customer, the contact (if a linked contact), the contract if any, and the technician assigned to the call. The information provided by each note includes not only the note itself, but also who created the note, the date the note was created, who updated the note, and the date the last update was done. If you have been given the rights, the notes are accessed through the **Notes** link at the top of the call summary page. The instructions below assume you have been given all rights. If you do not see certain notes, note information, or functionality explained below, you may not have those rights. The instructions identified below are applicable to each note area enabled by your administrator for you.

1. From the call list, click on the call number of the service for which you want to view notes. The call summary displays.
2. Click on **Notes** at the top of the call summary page. All notes to which you have rights display identified by the type of note: Call notes, Technician notes, et cetera.



REMOTE TECH

[<< Calls](#) | [Close call](#)

Summary | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | [Labor](#) | [Notes](#)

Schedule	Est. Start: 5/29/2014 10:00
----------	--------------------------------

Assistants: [+](#)

There are currently no assistants on this call...

Labor: [Quick Labor](#)

Dispatch	[click to dispatch call]
Arrive	
Depart	

- If enabled, the **Primary note** field displays the primary notes for the service call. If you have been given edit rights, you may edit the service call primary note.

REMOTE TECH

[<< Calls](#) | [Close call](#)

Summary | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | [Labor](#) | [Notes](#)

Call notes:

Primary note:

8 notes [Show top 1](#) | [Show all](#) [+](#)

- If there are more than five notes, Remote Tech displays the **Show top 5** link. To view the top five notes associated with this service call, click **Show top 5**. To view all the eligible notes, click **Show all**.
Note: Your system administrator determines the number of notes for the top number of notes link.
- If enabled, you can add a note, by doing the following:
 - Click the [\[+\]](#) next to **Show all**. The Add Call Note page opens.



Note: You can also add notes from the call notes list page. Click on **Show all** to display a list of all service call notes and click **[Add note]** located at the top of the page. The add note page opens.

The following page displays.

- b. In the **Note type** field, use the dropdown menu to select the appropriate note type.
- c. In the **Note** field, enter the note.
- d. Click **[OK]**.
6. If enabled, you can edit a note, by doing the following:
 - a. From the notes page, click either **Show top #** or **Show all** to display the list notes.
 - b. In the **Actions** column of the note you want to edit, click **Edit**. The note displays.
 - c. In the **Note** field, use the dropdown menu to select the appropriate note type.
 - d. In the **Note** field, make any necessary changes.

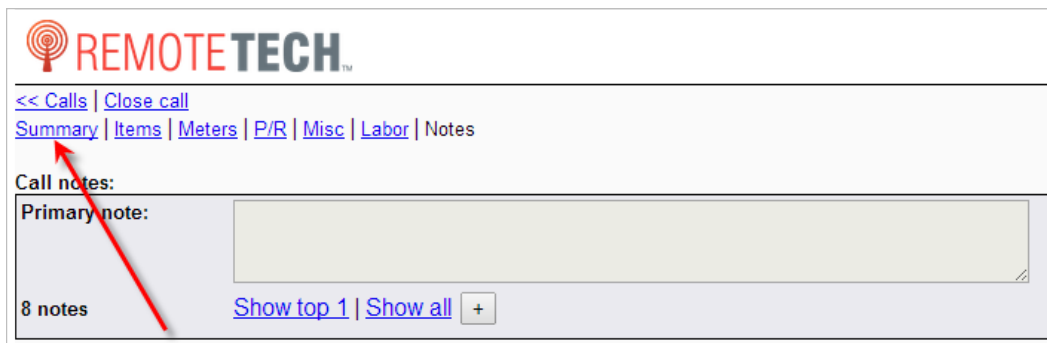


- e. Click **[OK]**.
7. Your administrator determines the notes you can edit. While you may not be able to edit the note, you can view the notes by doing the following:
 - a. From the notes page, click either **Show top #** or **Show all** to display the list notes.
 - b. In the **Actions** column of the note you want to view, click **View**. The note displays.

Departing

When you complete or reschedule a service call you must record the date and time of your departure. Departing a technician can be done by either clicking a button or scanning the equipment you are servicing depending on the device you are using. If you are processing a service call from a computer or a device that does not have a barcode scanning app installed, you depart the call by simply clicking the Depart button on the call summary page. If you are using a smartphone or tablet that has a barcode scanning app installed, you can scan the piece of equipment you are servicing and Remote Tech will automatically enter the date and time of the scan as the departure date and time.

1. If you in an area of Remote Tech other than the summary page (Items, Meters, P/R, and so on), click the **Summary** link at the top of the page to return to the summary page.



The screenshot shows the Remote Tech interface. At the top, there is a navigation bar with the Remote Tech logo and several links: << Calls, Close call, Summary, Items, Meters, P/R, Misc, Labor, and Notes. The Summary link is highlighted with a red arrow. Below the navigation bar, there is a section for Call notes. It includes a Primary note field, a list of 8 notes, and buttons for Show top 1, Show all, and a plus sign.

2. If you have not recorded the departure time, do one of the following.
 - If you are using your smartphone or tablet and you have the correct barcode scanning app installed, do the following.
 - a. Click the **[Depart]** button.



demo.tech-anyware.com:81/RTS/psum

REMOTE TECH

[<< Calls](#) | [Close call](#)

Summary | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | [Labor](#) | [Notes](#)

Schedule Est. Start: 2/24/2014 11:46

Assistants: +
There are currently no assistants on this call...

Labor: Quick Labor

Dispatch	3/10/2014 23:48
Arrive	3/12/2014 14:31
Depart	[click to depart call]

Call Summary:

Technician:	Ann Surely
Call#:	SC1778
Status:	D
Call received:	2/24/2014 09:46
Due by:	2/24/2014 11:46
Description:	Streaks on the pages

- b. Your scanning app will open.
- c. Scan the barcode on the piece of equipment being serviced. Remote Tech verifies the equipment is the correct piece of equipment. A page displays informing you whether or not the call was successfully arrived.

demo.tech-anyware.com:81/RTS/pscar

REMOTE TECH

The call was successfully departed.
Close this page to return to RemoteTech.

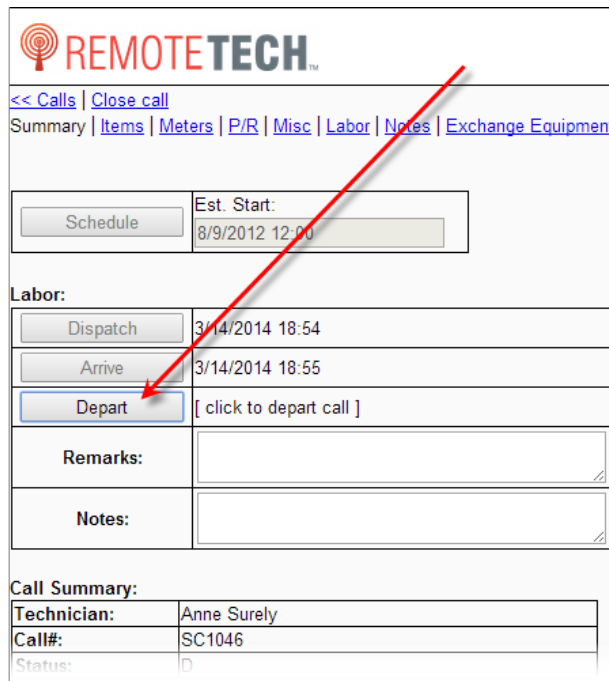
Close



- d. Click [**Close**]. If the call was successfully arrived, Remote Tech automatically enters the current date and time in the **Arrive** field.

Note: Remote Tech records the date and time in your e-automate database and displays this time in the Dispatch Console.

- If you are using a computer or device that does not have a barcode scanning app installed, do the following.
 - a. Click [**Depart**].



REMOTE TECH

[<< Calls](#) | [Close call](#)

[Summary](#) | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | [Labor](#) | [Notes](#) | [Exchange Equipment](#)

Schedule	Est. Start: 8/9/2012 12:00
----------	-------------------------------

Labor:

Dispatch	3/14/2014 18:54
Arrive	3/14/2014 18:55
Depart	[click to depart call]

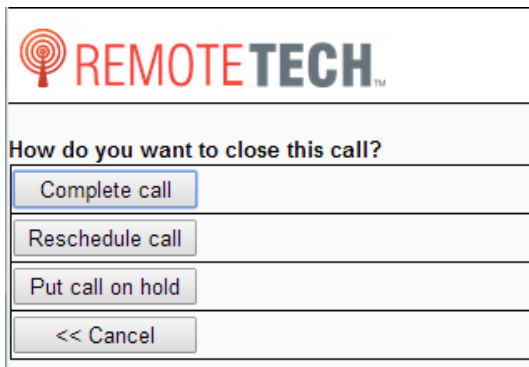
Remarks:

Notes:

Call Summary:

Technician:	Anne Surely
Call#:	SC1046
Status:	D

3. You are redirected to the close call page.



REMOTE TECH

How do you want to close this call?

Complete call
Reschedule call
Put call on hold
<< Cancel

Remote Tech displays two buttons, the [**Complete call**] and the [**Reschedule call**] buttons. If neither of these buttons is active, hover over the buttons and Remote Tech displays an explanation.

A third button, [**Place call on hold**], is available if there are customer-created on-hold codes which the technician can set from Remote Tech, or you have added an item that is needed.



If you need to enter additional information, click [**<< Cancel**] to return to the Call Summary page and enter appropriate information. For directions for this point forward, see the **Closing a Service Call** topic below starting at step number 2.

Closing a Service Call

1. From the call summary page, click the **Close call** link at the top of the page.

REMOTE TECH

[<< Calls](#) | [Close call](#)

Summary | [Items](#) | [Meters](#) | [P/R](#) | [Misc](#) | [Labor](#) | [Notes](#) | [Exchange Equipment](#)

Est. Start: 8/9/2012 12:00

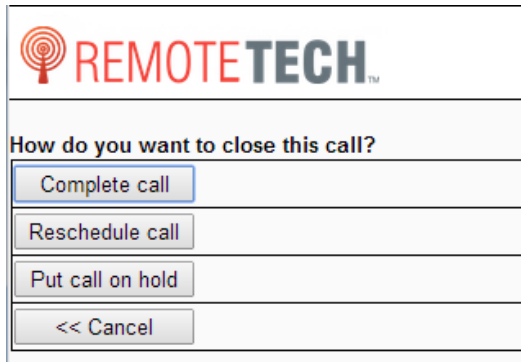
Labor:

<input type="button" value="Dispatch"/>	8/14/2014 18:54
<input type="button" value="Arrive"/>	8/14/2014 18:55
<input type="button" value="Depart"/>	[click to depart call]
Remarks:	<input type="text"/>
Notes:	<input type="text"/>

Call Summary:

Technician:	Anne Surely
Call#:	SC1046
Status:	D

The Close call page displays

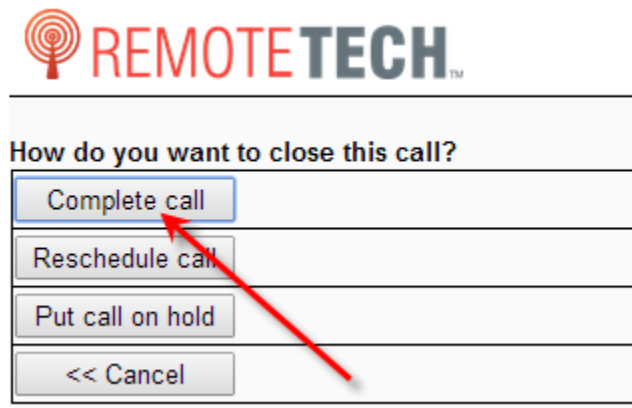


REMOTE TECH[™]

How do you want to close this call?

Complete call
Reschedule call
Put call on hold
<< Cancel

2. Do one of the following:
 - To complete the call, do the following:
 - a. Click [**Complete call**].



REMOTE TECH[™]

How do you want to close this call?

Complete call
Reschedule call
Put call on hold
<< Cancel

The Complete Call page displays.



Complete call

Labor:

Dispatch:	7/7/2014 23:14
Arrival:	7/7/2014 23:14
Departure:	7/7/2014 23:14
Start Odom.	<input type="text"/>
End Odometer:	0

Call Summary:

Call#:	SC1805
Description:	Customer believes the machine is leaking electric current. He found a pool of electrons and protons behind the machine.
Caller:	Higgs Field
Make/Model:	SH-PR5000
Serial#:	ps9551
Equipment#:	EQ10017
Customer#:	SF00
Customer:	Swenson Financial Services
Address:	5879 Cranston Cove
City:	Salt Lake City
State:	UT
Zip:	84128
Phone:	801-896-3271
Email:	
Work order#:	606
PO#:	

- If necessary, modify the **Start Odom.** and **End Odometer** fields.
- Review the other values associated with the service call.
- If necessary, modify the **Remarks** on the service call.
- If enabled, enter verification information by doing the following:
 - In the **Name** field, enter your name.
 - In the **Question** field, use the dropdown menu to select a verification question you want to answer.
 - In the **Answer** field, provide an answer to the question you selected in the **Question** field.
- From this page you can also e-mail a summary of this work order. After the email information is provided, the email is sent upon closing the call. Do the following:
 - If you want to view how the email will appear to the recipient, click the **Preview** link.
 - Check the **Email work order summary** checkbox.
 - In the **Email** field, enter the e-mail address to which you want a summary of this work order sent.
- If you need to make any changes, click [**<< Cancel**] to return to Call Summary page. Make necessary changes and return.
- Click [**Submit**] to mark the call **OK to Invoice** in e-automate.



- i. If your administrator has not enabled invoice return you are redirected to the call list. If invoice return is enabled, Remote Tech displays invoice request page. Do the following:
 - i. If you do not want the invoice returned to a fax or an email, select **None**.
 - ii. If you want the service invoice emailed to an email address, select **Email** and enter the email address.
 - iii. If you want the service invoice faxed to a fax number, select **Fax** and enter the fax number to which you want the invoice faxed.
 - iv. Click **[OK]** to complete the request and return to the calls list. Remote Tech submits the request and e-agent (program that processes the request) attempts to send invoices every minute based on your requested method. To view success and failed requests, click the **Tools** link and click **[Invoice Info]** to see the results.
- j. If you receive any of the following warnings, you must make appropriate corrections before the call can be completed.
 - o Total labor time exceeds specified hours.
 - o Response time exceeds specified hours.
 - o Total mileage exceeds specified miles.
 - o Labor conflicts.
- To reschedule the call, do the following:
 - a. Click **[Reschedule call]**.




How do you want to close this call?

Complete call
Reschedule call
Put call on hold
<< Cancel

You will be redirected to the Reschedule call page.





Reschedule call

Labor:

Dispatch:	7/7/2014 23:14
Arrival:	7/7/2014 23:14
Departure:	7/7/2014 23:14
Start Odom.	<input type="text" value="0"/>
End Odometer:	<input type="text" value="0"/>

Call Summary:

Call#:	SC1805
Description:	Customer believes the machine is leaking electric current. He found a pool of electrons and protons behind the machine.
Caller:	Higgs Field
Make/Model:	SH-PR5000
Serial#:	ps9551
Equipment#:	EQ10017
Customer#:	SF00
Customer:	Swenson Financial Services
Address:	5879 Cranston Cove
City:	Salt Lake City
State:	UT
Zip:	84128
Phone:	801-896-3271
Email:	
Work order#:	606

- b. Verify the information displayed on the page is correct.
- c. If you need to modify the odometer readings, make the appropriate changes in the **Start Odom.** And **End Odometer** fields.
- d. In the **Remarks** field you can enter any remarks about the reason the call is incomplete.
Note: These remarks are added to the **Problem description** field on the rescheduled call.
- e. If enabled, enter verification information by doing the following:
 - i. In the **Name** field, enter your name.
 - ii. In the **Question** field, use the dropdown menu to select a verification question you want to answer.
Note: The questions are for you to ask the employee you are interacting with at the customer site.
 - iii. In the **Answer** field, provide an answer to the question you selected in the **Question** field.
- f. If you would like to e-mail a summary of this work order, do the following:
 - i. Check the **Email work order summary** checkbox.
 - ii. In the **Email** field, enter the e-mail address to which you want a summary of this work order sent.
- g. Click [**Reschedule**]. Remote Tech displays the next page.



- h. In the **Incomplete code** field, use the drop down menu and select an appropriate incomplete code.
 - i. If you need parts for the rescheduled call, in the **Delivery Method** field use the drop down menu and identify a delivery method.
Note: Technicians that do not pickup parts at the main warehouse and have their parts shipped, should select **Ship to Technician** or **Ship to Customer**.
 - j. If you want to specify a date for the needed part, enter the date you want the parts in the **Date Needed** field.
 - k. To add any remarks, enter them in the **Remarks** field.
 - l. To remove any items listed in the **Items needed** region, select the item and click **[Remove Item]**.
 - m. To add an item needed for the rescheduled call, in the **Add item** field, enter the item number. If enabled, you can add non-inventory items or items that are not currently in stock when rescheduling a call. If you do not know the item number and need to look it up, do the following:
 - i. Click **[?]** to search for the item number.
 - ii. In the search field, enter search criteria.
Note: You can enter a portion of an item number, a portion of the item description, or the manufacturer's number recorded in your e-automate system. You can also use a historical manufacturer's number (if you are tracking these historical manufacturer's numbers in your e-automate database).
 - iii. Locate the item you need and click the **Choose** link in the **Actions** column of the item.
 - iv. Remote Tech displays a list of items matching your criteria. If there are more than ten, you can click **More >>** to see additional items. If there are no items matching your criteria, Remote Tech reports and you can click **[<< Cancel]** to return to the item field.
 - v. Based on the items displayed, determine which item you want for the rescheduled call and in the **Actions** column, click **Choose** to add the item number to the **Add item** field.
 - n. In the **Quantity** field, enter the needed quantity.
 - o. Click **[Add item]** to the **Items needed** region.
 - p. Click **[OK]** to mark the original call with a status of **OK to Invoice** and create a new, rescheduled call in e-automate. The original call is removed from your Call List and the rescheduled call is listed in the Call List. If you added parts that are needed and you do not have the items in your warehouse, Remote Tech creates the call in your Call List and places the call on hold with a **Waiting for Parts (WP)** flag. You cannot release the call until the parts are provided to your warehouse and the call is marked, **Parts available (PA)**. If the call is flagged Parts Available you can make arrangements to pick up the parts or wait for them to be shipped to you or the customer. If your system administrator allows you to release calls on hold, **Parts Available (PA)** you can release the call from hold and dispatch yourself to complete the rescheduled call. Click **[<< Cancel]** to cancel the rescheduled call.
- To put the call on hold, do the following:



- a. Click [**Put call on hold**].

REMOTE TECH

How do you want to close this call?

Complete call
Reschedule call
Put call on hold
<< Cancel

Remote Tech displays the following page.

REMOTE TECH

Reason: BadSync - Bad Data f ▼

<< Cancel	OK
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- b. In the **Reason** field, use the dropdown menu to select the reason you are placing this service call on hold.
- c. Click [**OK**]. The call is marked on hold and is removed from your call list. You can view the call by searching for the call using the **Call Lists** tool found in the **Tools** menu.

Releasing a Service Call from On Hold Status

If you have been given permissions by your admin, you can release the on hold status of a service call. Depending on which permissions your admin grants, you may be allowed to release some on hold statuses and not others.

To release a service call from being on hold, do the following.

1. Locate the call you want to release from being on hold by using the Call Lists Tool. See **Call Lists Tool** topic above for directions on how to search for service calls.

Note: Calls that are on hold do not show in your call list.



- On the **Status** row, click **[Release]**.

Labor:

Dispatch	Arrival	Departure	Start odo.	End odo.	Remarks	Notes
7/9/2014 20:41	7/9/2014 20:42		2400	0		

Call Summary:

Technician:	Anne Surely	<input type="button" value="Reassign"/>
	Materials present	
Call#:	SC1047	
Status:	H	<input type="button" value="Release"/>
Call received:	8/15/2012 21:10	
Due by:	8/16/2012 09:00	
Description:	Paper Jam	
Caller:	Bob Sacamena	
Call type:	Jam	
Sales Rep:	Stanley Yelnats -- 210 -- stanleyy@example.com	
Contract#		
Bill code:	TMC	
Terms:	Net5	
Priority:	Level4	

- Remote Tech releases the call, sets the status to **Pending** and returns you the Call List. You can then dispatch yourself normally.