ServiceLink Flex

Training Guide

Sept 2023

TEXADA

Benefits

- Easy time entry for technicians – Start/Stop buttons allow you to jump from one work order or segment to another
- Communicate internally via blogs (on specific work order or separately)
- Mapping capability/directions to the jobsite
- Easily update SMU hours
- Voice-to-text for notes, blogs, and special instructions
- Single-screen view of schedule of jobs by date for the individual technician
- Single-screen summary of labor entries by the technician
- Add photos to work orders

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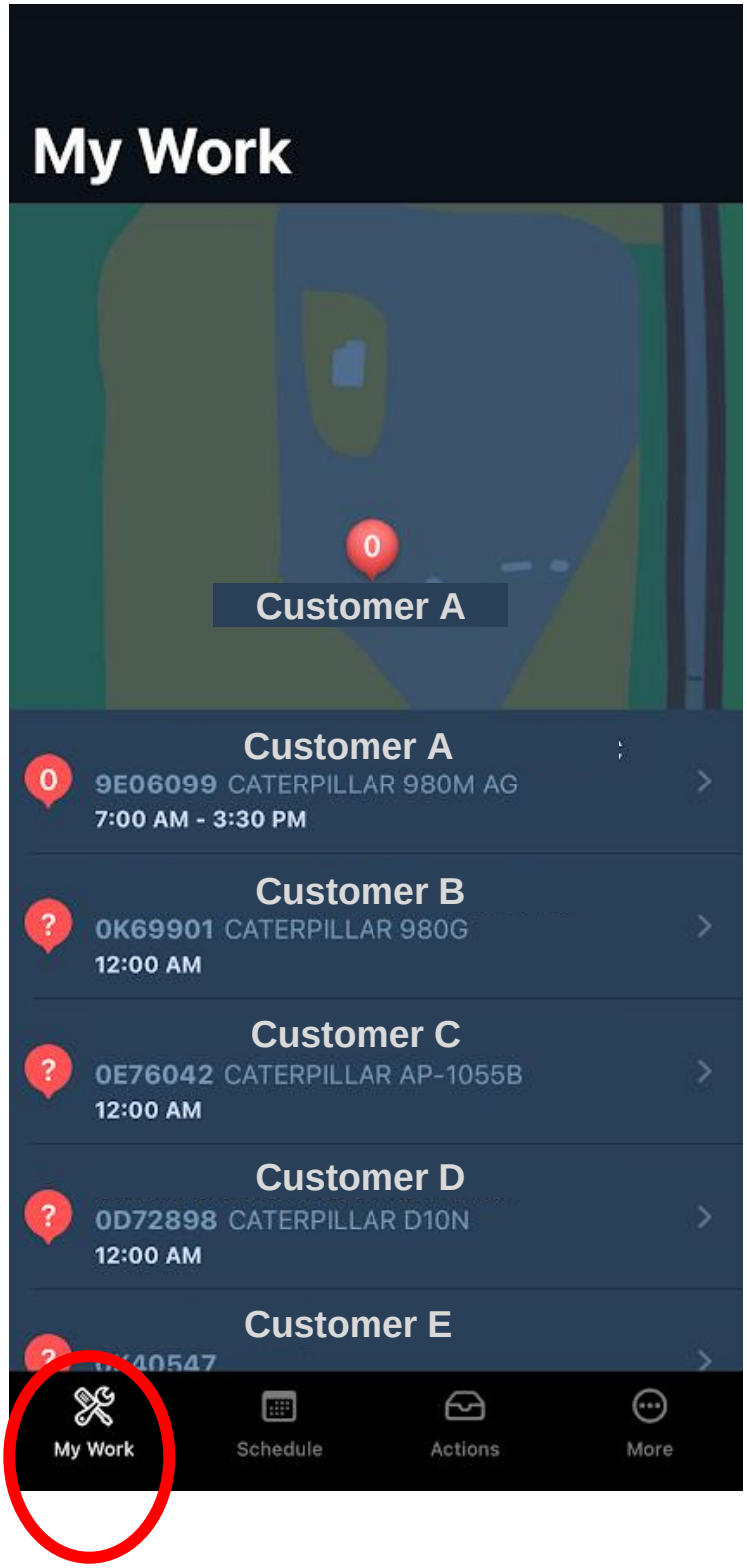
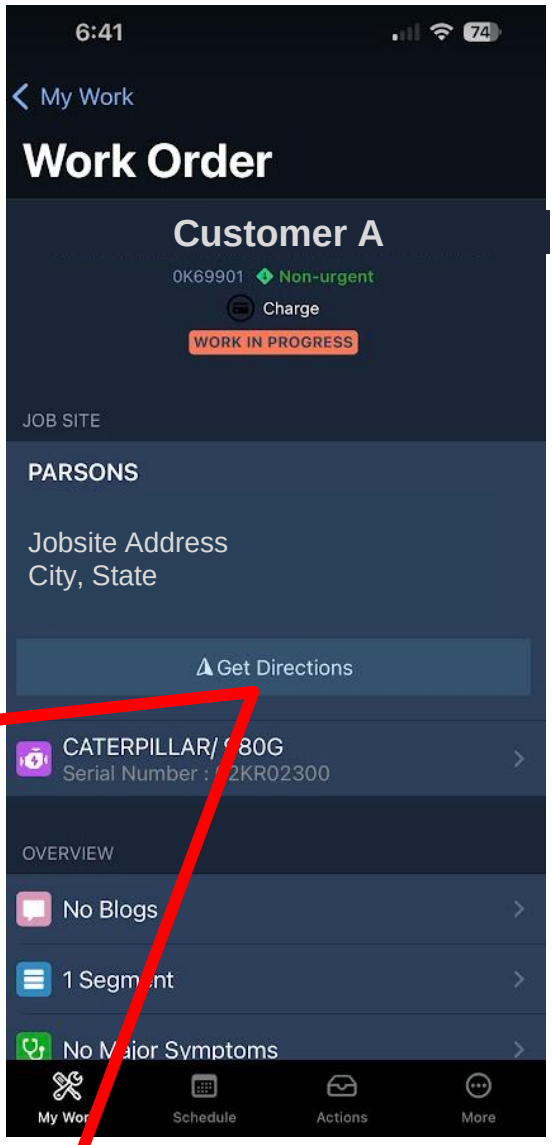
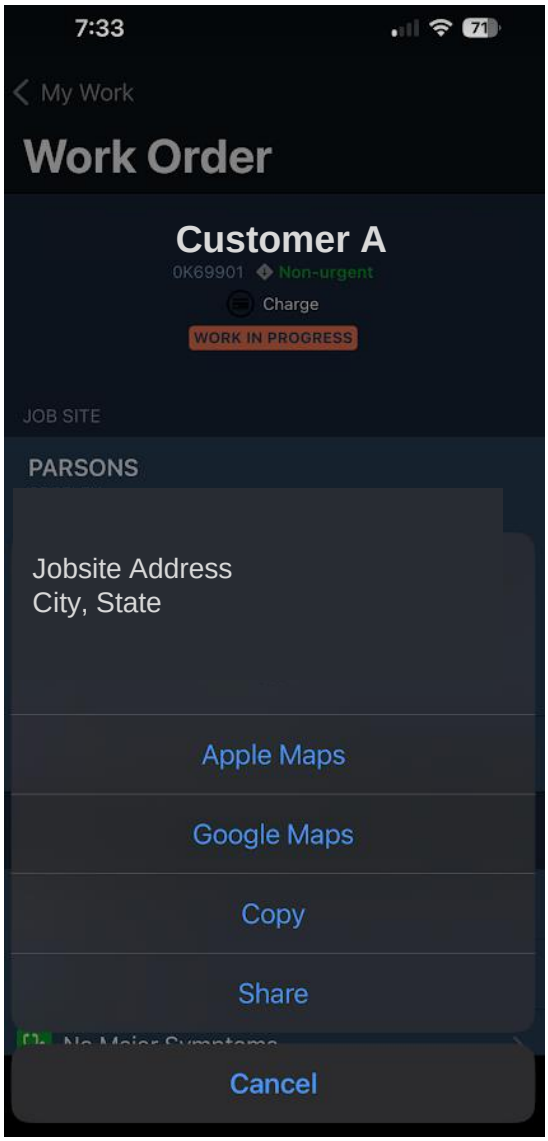
- The My Work landing page shows work assigned to the technician.
- The numbers in the bubbles reference the pins on the map. Those that have numbers have a jobsite address.
- The work orders on this page reflect scheduled work for the current day at that time and remaining for the rest of the day.



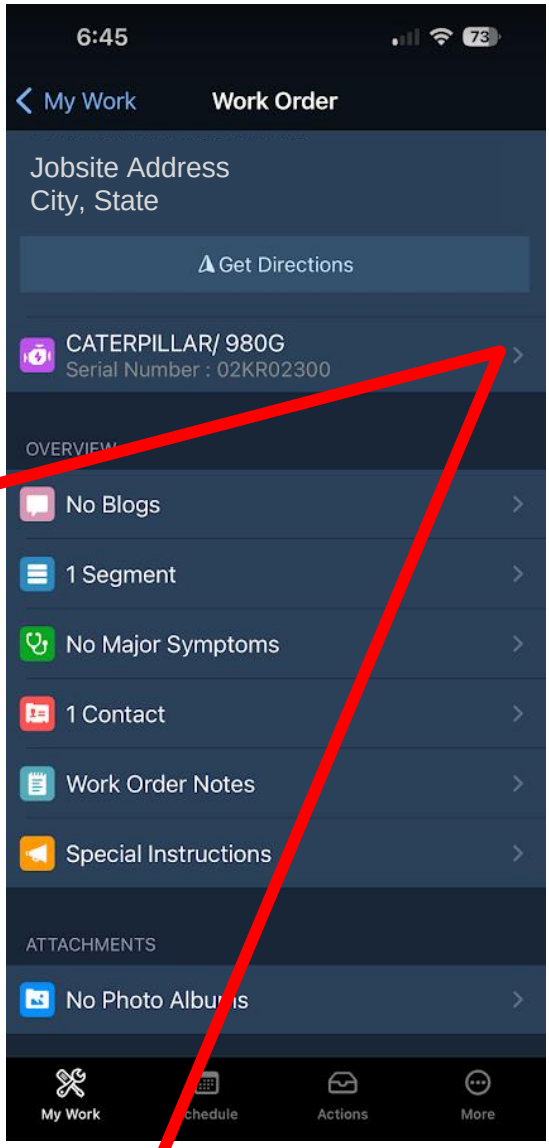
Directions to the jobsite address. This information comes from the work order overview tab in SalesLink.

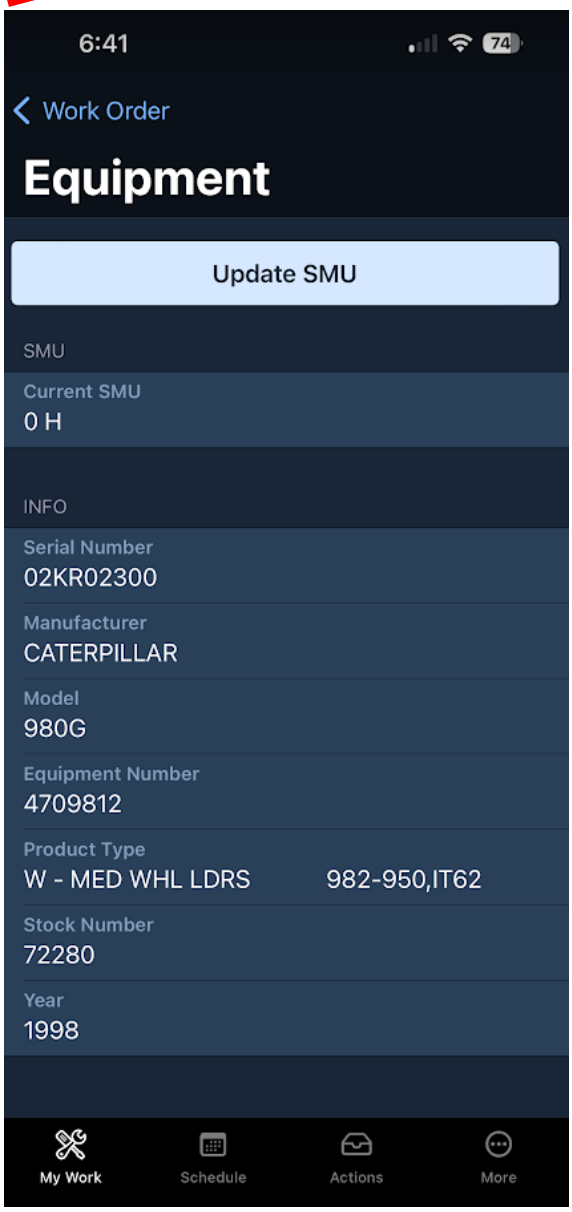




TEXADA

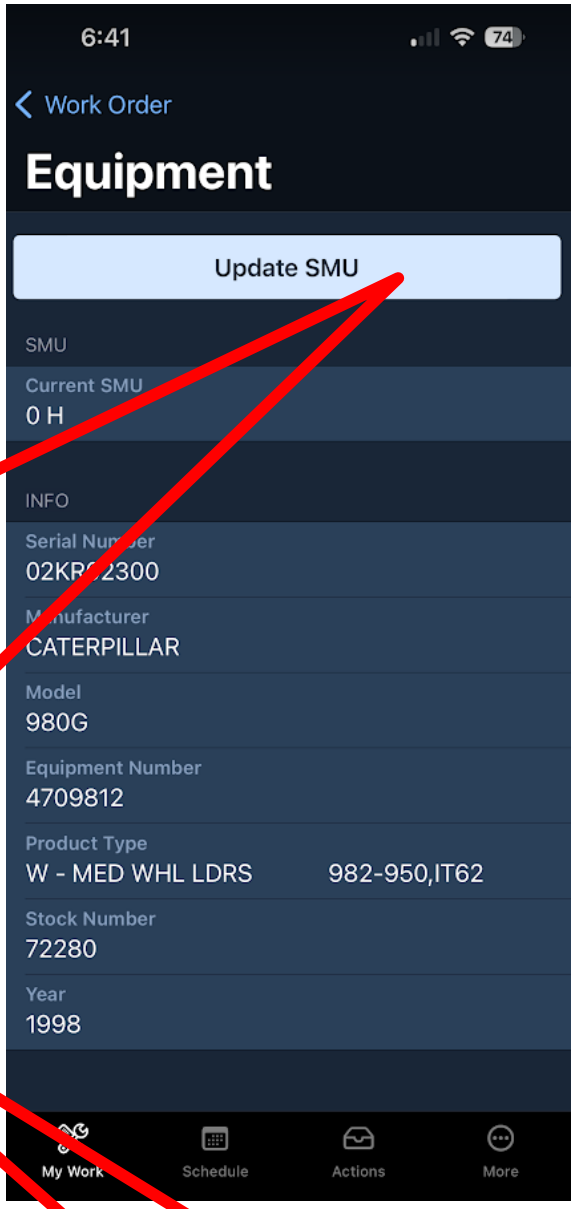
Update hour meter

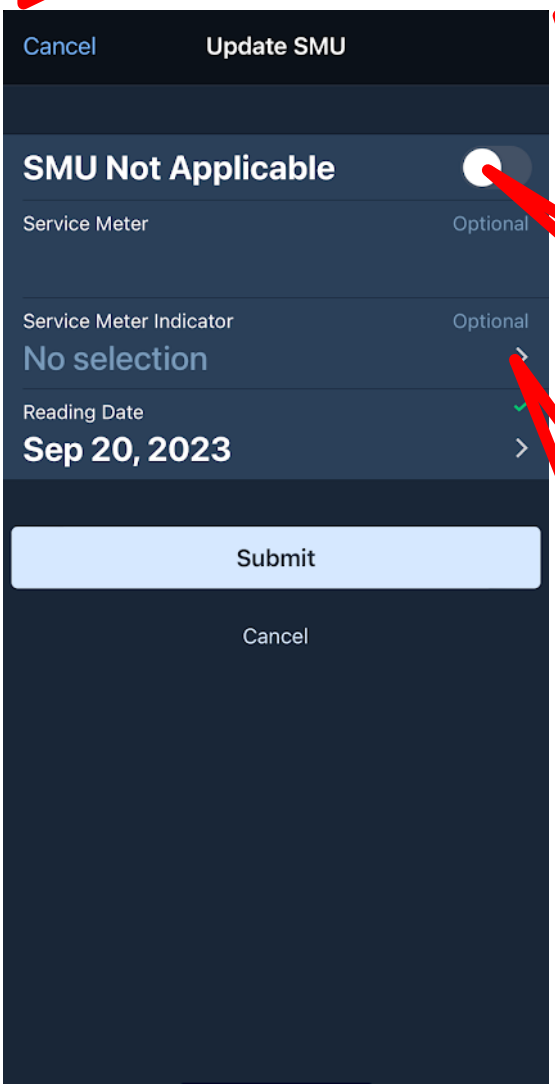




TEXADA

Update hour meter





Use this slider button for items without serial numbers

This selector is for units of measure: kilometers, miles, or hours

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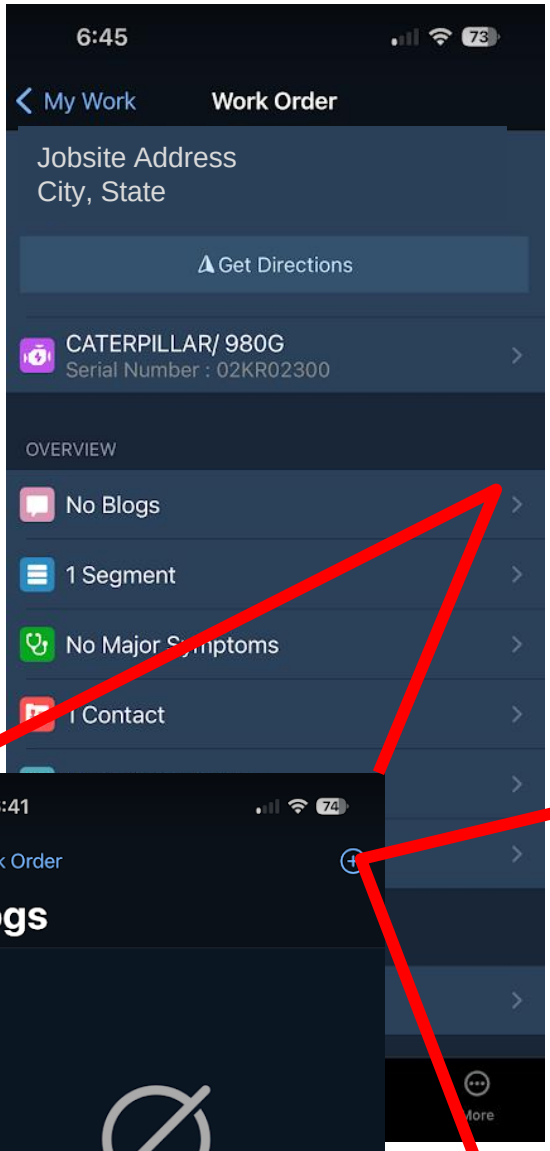
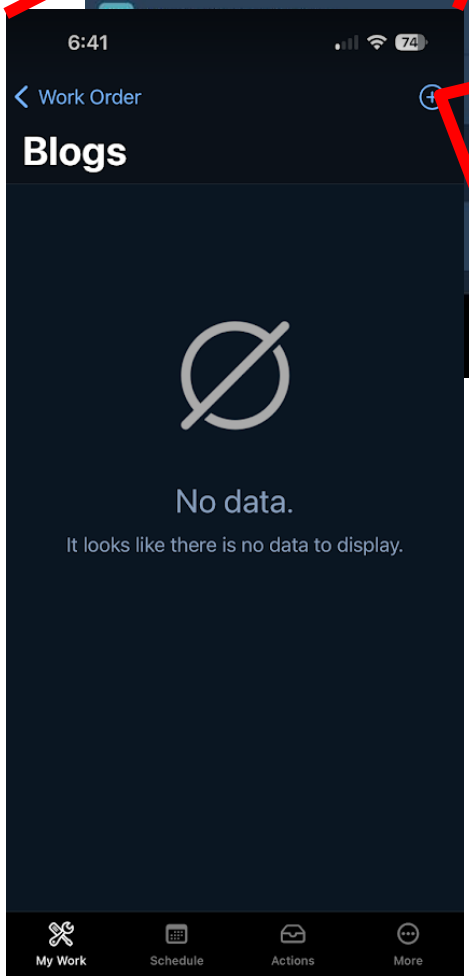
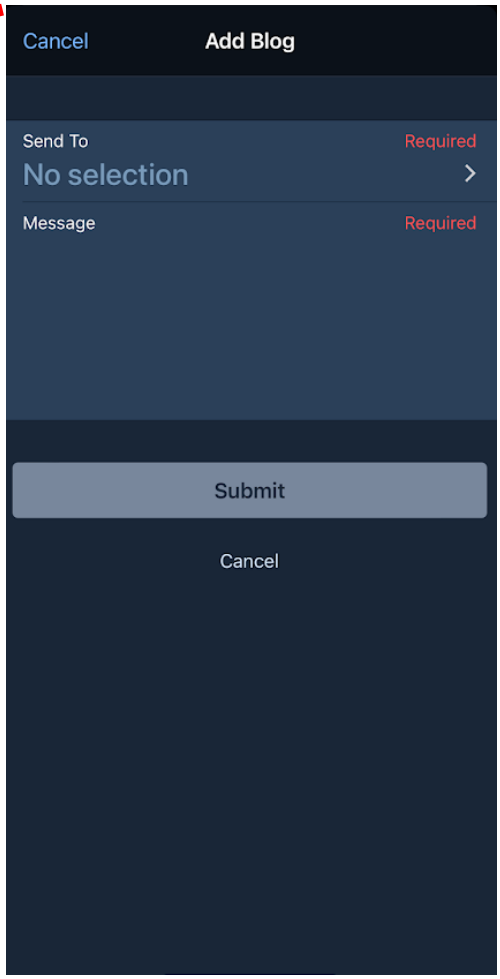
Blogs between users are created for various communications internally on a specific work order.







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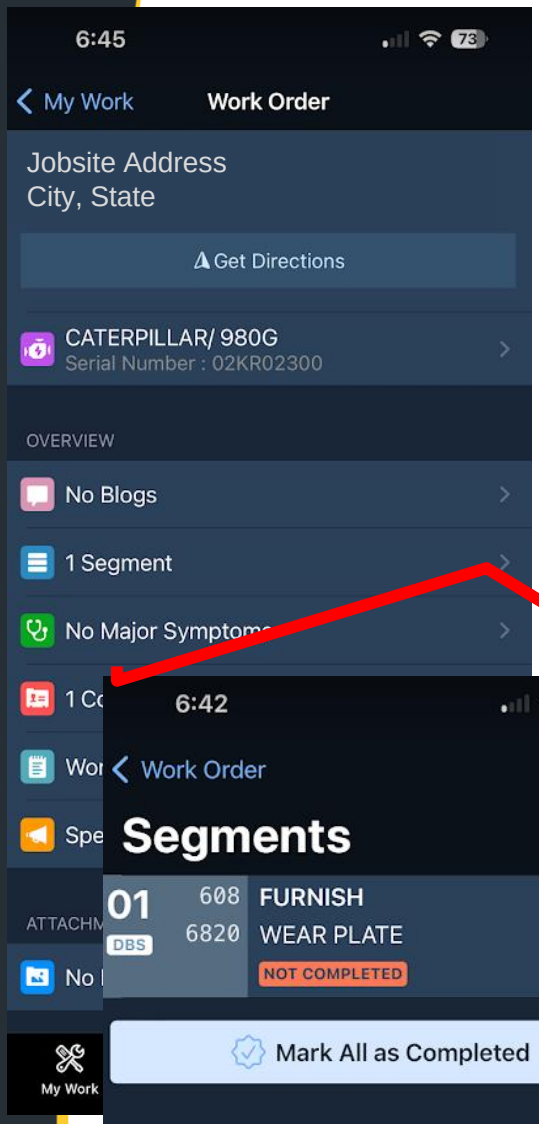
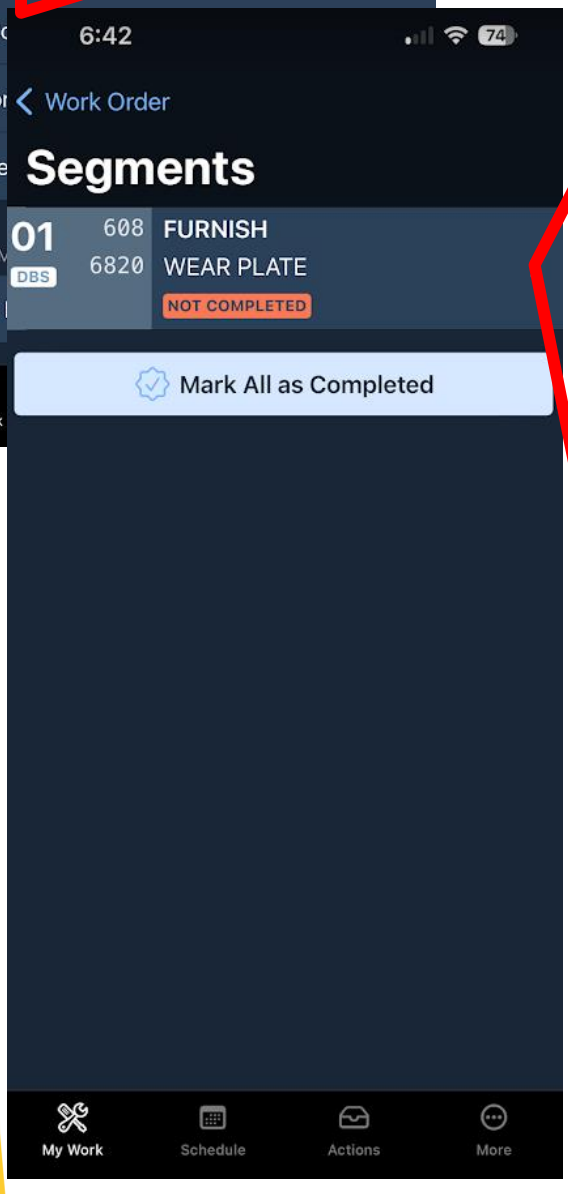
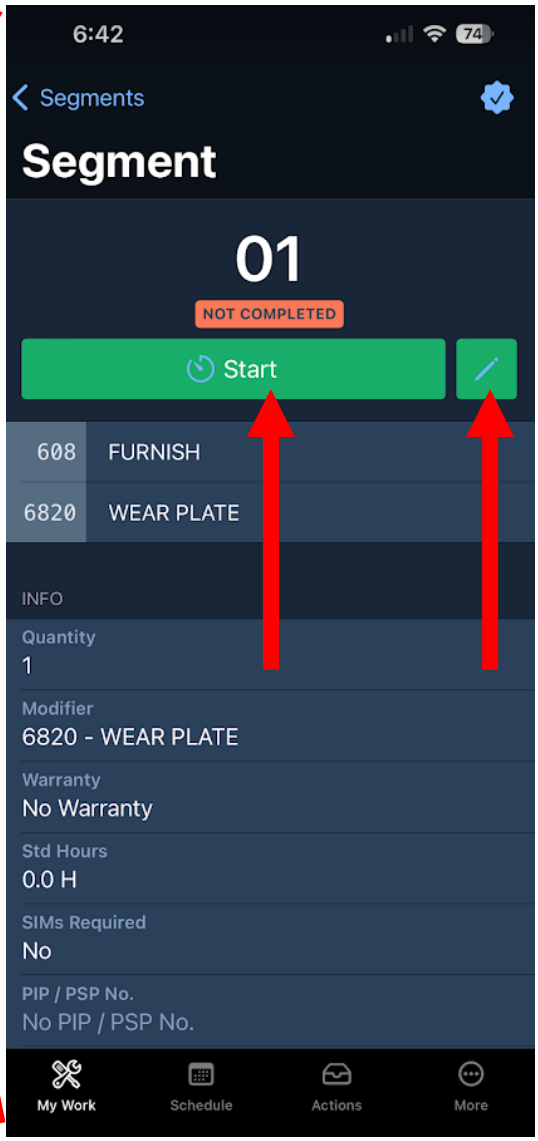
Adding time to a work order is as easy as clicking the start button on the appropriate segment.

Three ways to enter time:

1. Tap the Start button
2. Tap the Edit button
3. Elapsed hours





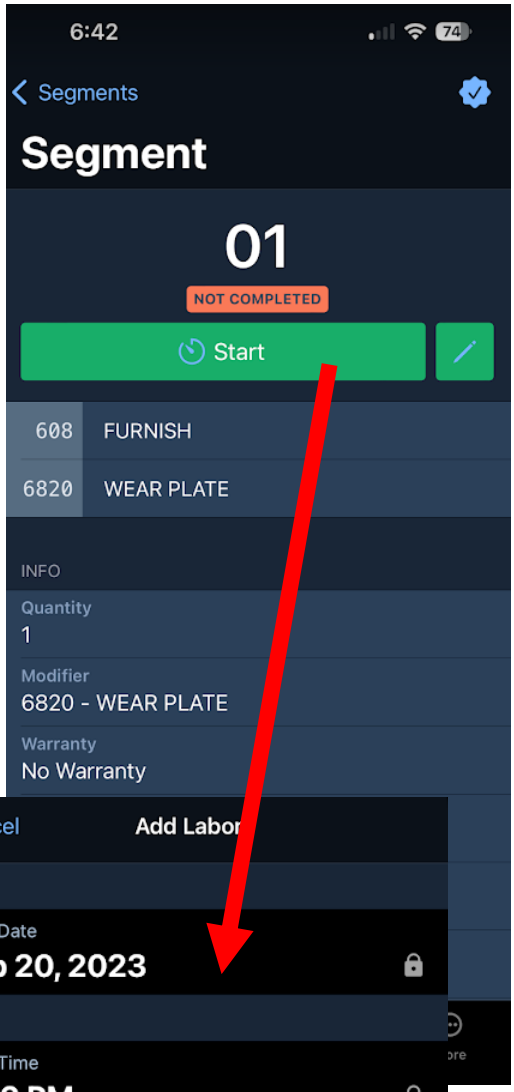


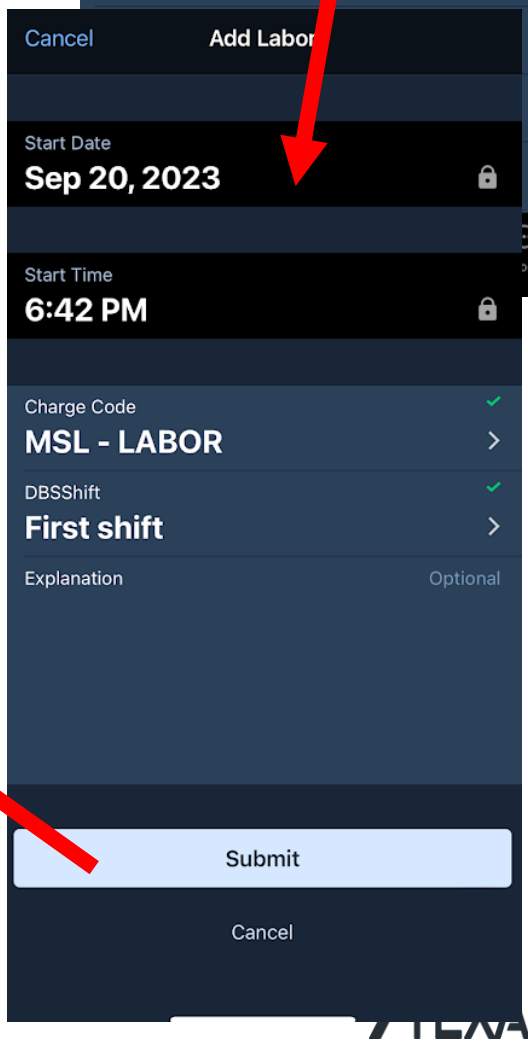
TEXADA

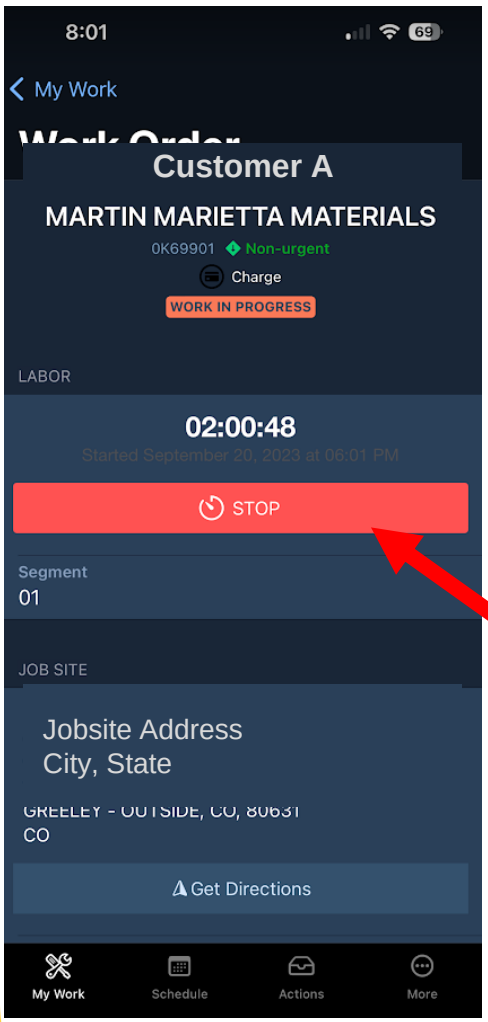
Option 1 START/STOP BUTTONS:

Tapping the Start button. That button will change to Stop. You can either tap that button to stop work, OR tap Start on a different segment of the same or a different work order.

Stop Button will show on w/o header (not segment)

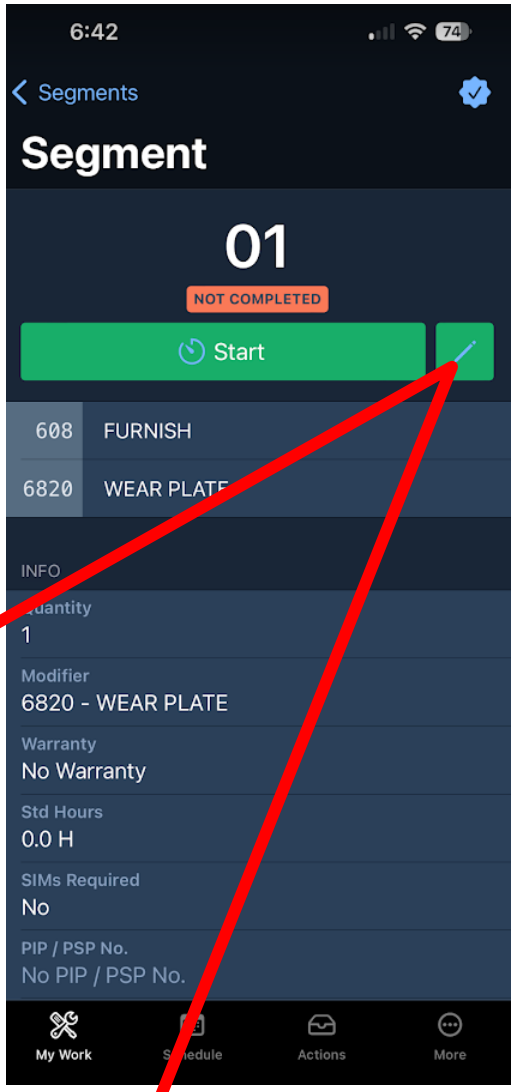


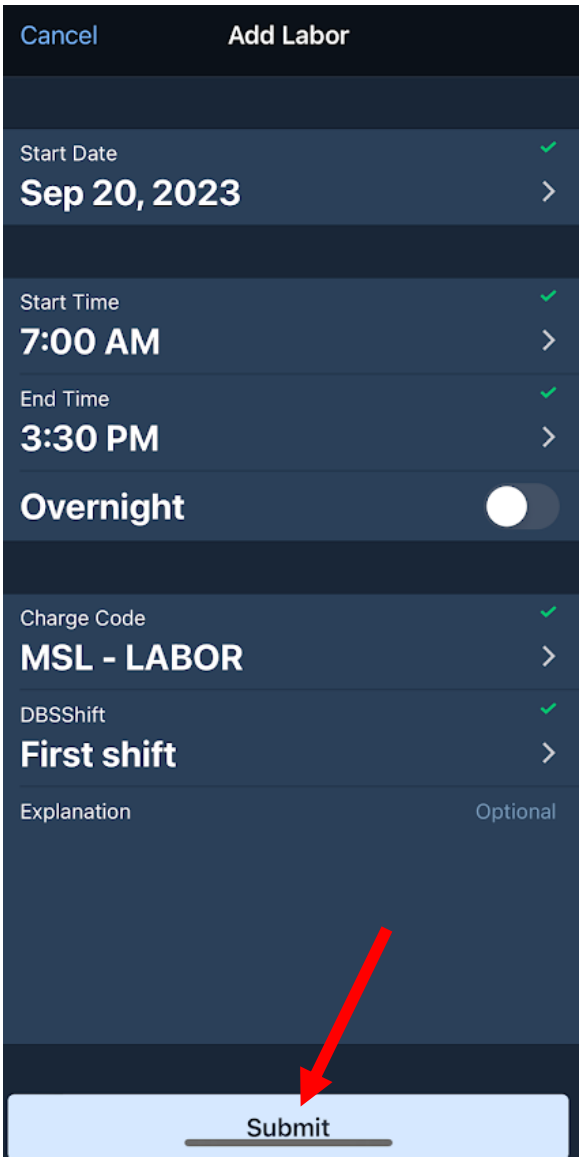




Option 2 MANUAL ENTRY - START/STOP TIME:

Tapping the Edit button. This allows for manual time start and stop; additional editing options exist on this page.





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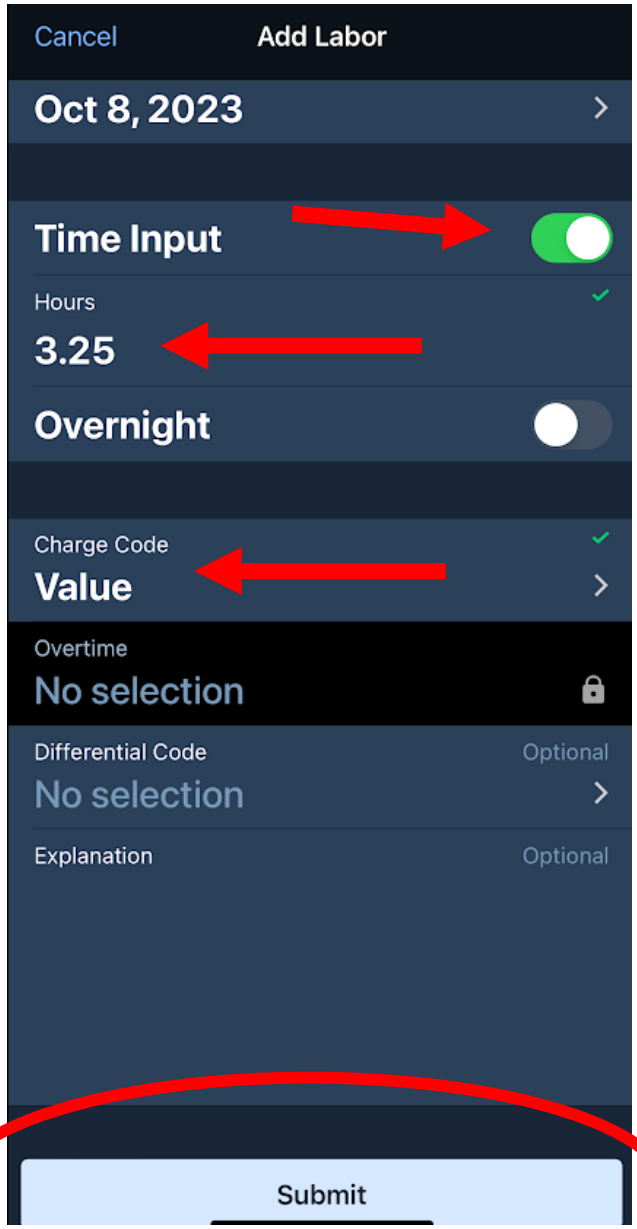
Option 3: MANUAL ENTRY - ELAPSED TIME:

Select the TIME INPUT button;

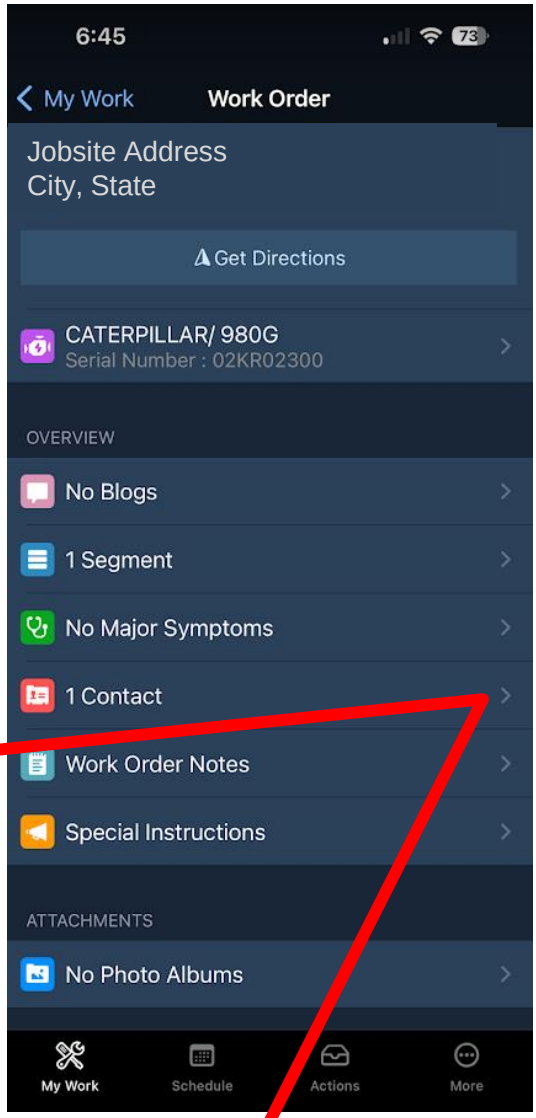
Enter hours worked;

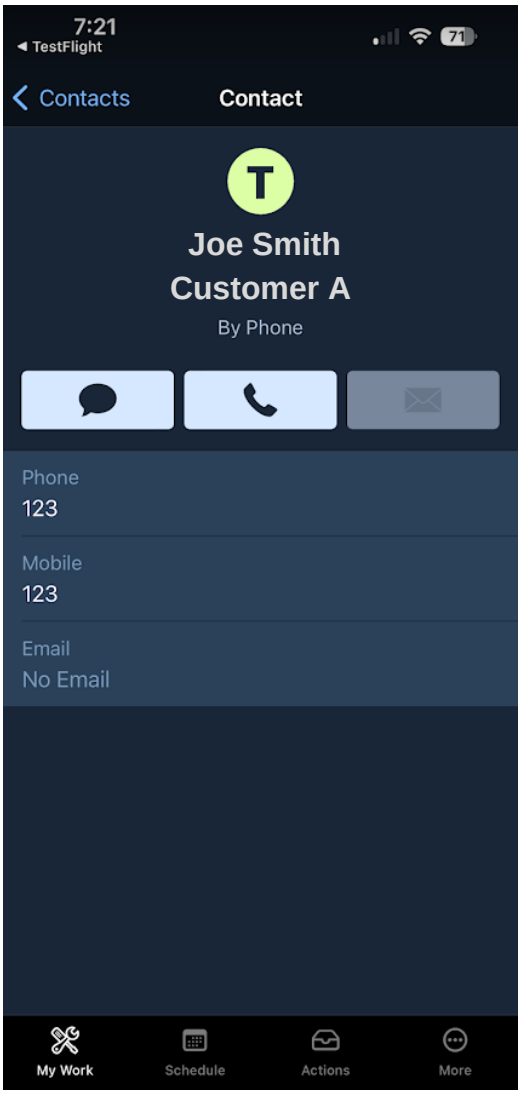
Select Charge Code;

Click SUBMIT



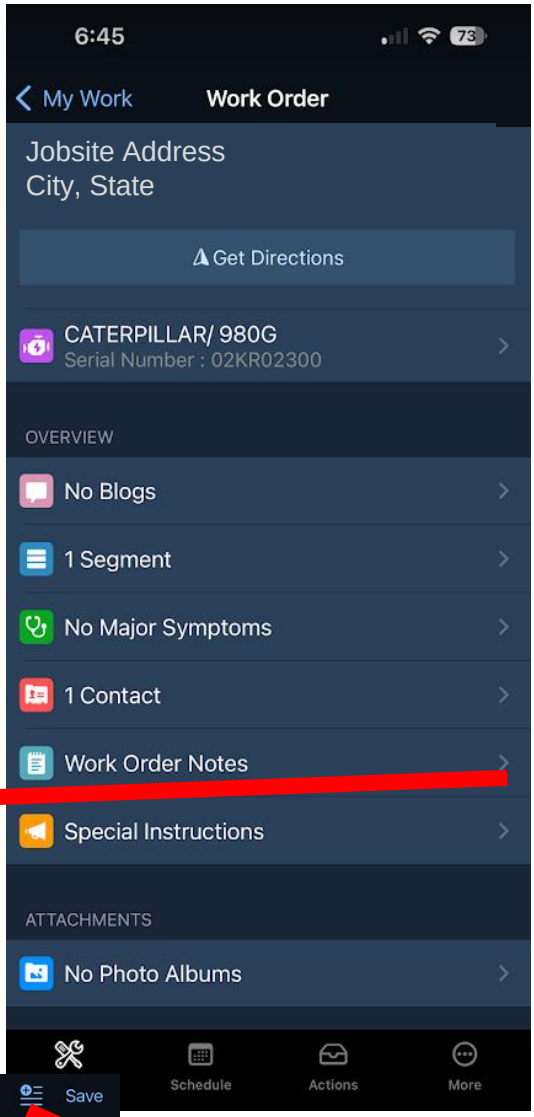
Find out who the contact(s) are for this specific work order.

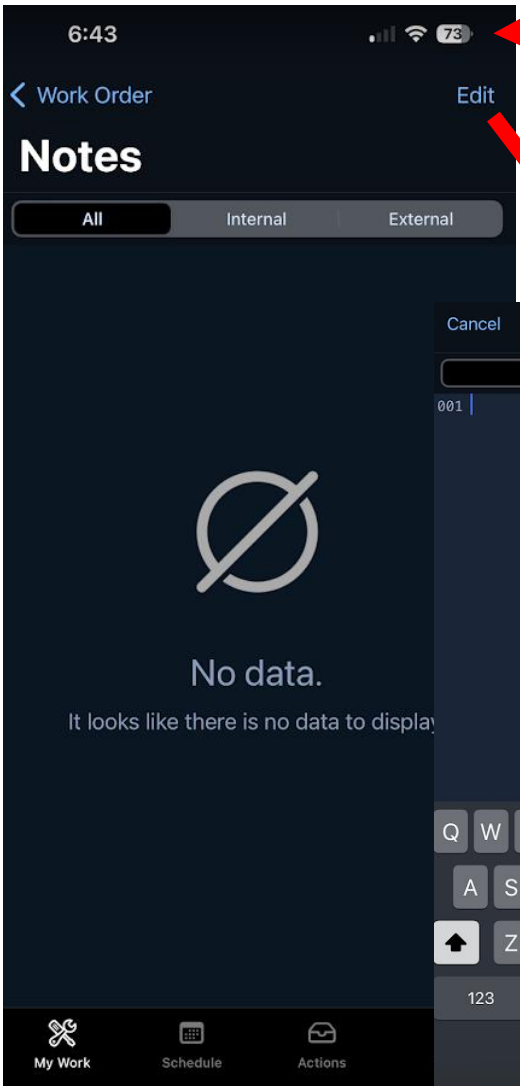


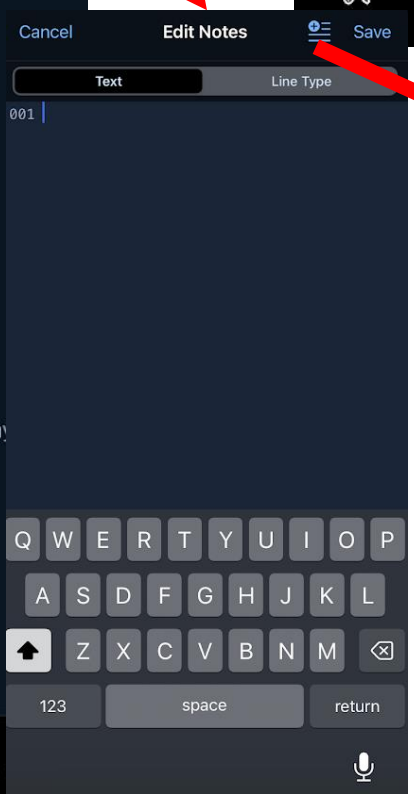


TEXADA

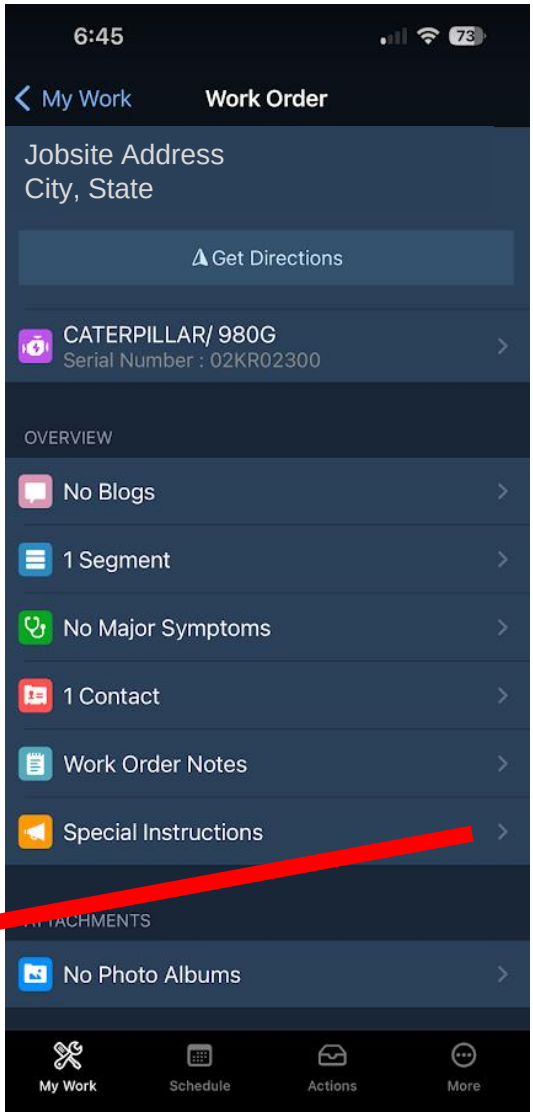
Access/create notes on the work order. Ability to insert a basic service report template if needed.

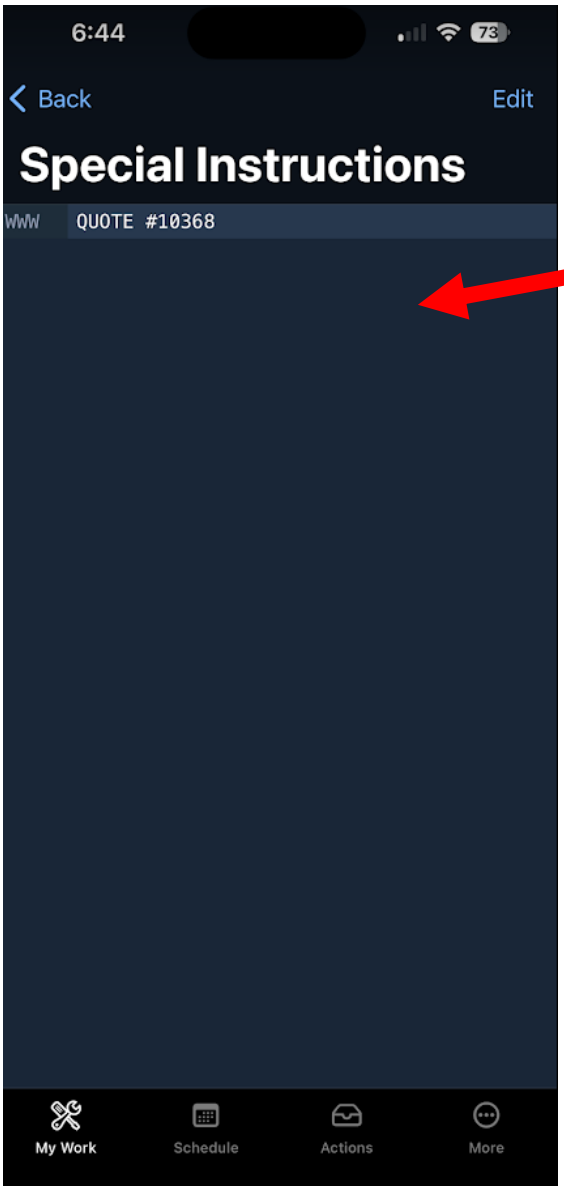






Access Special Instructions on the specific work order. Edit as needed using the Edit button.





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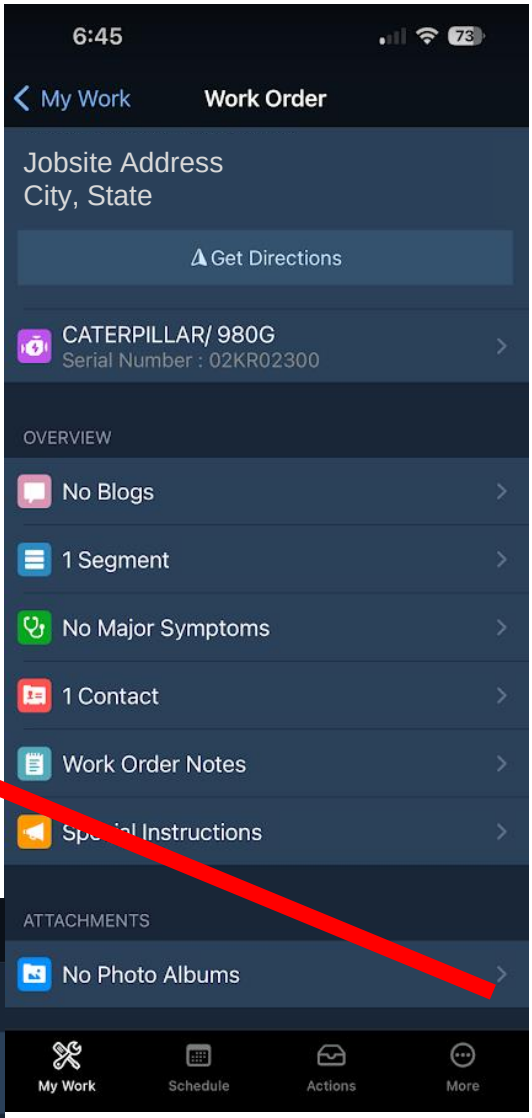
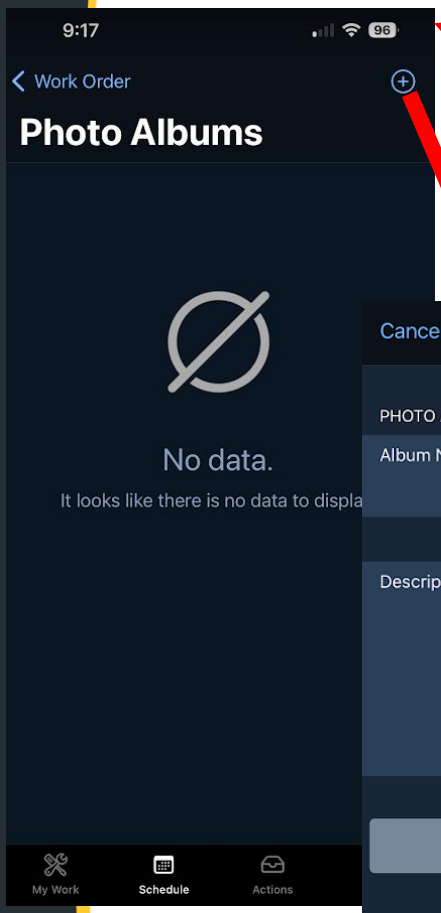
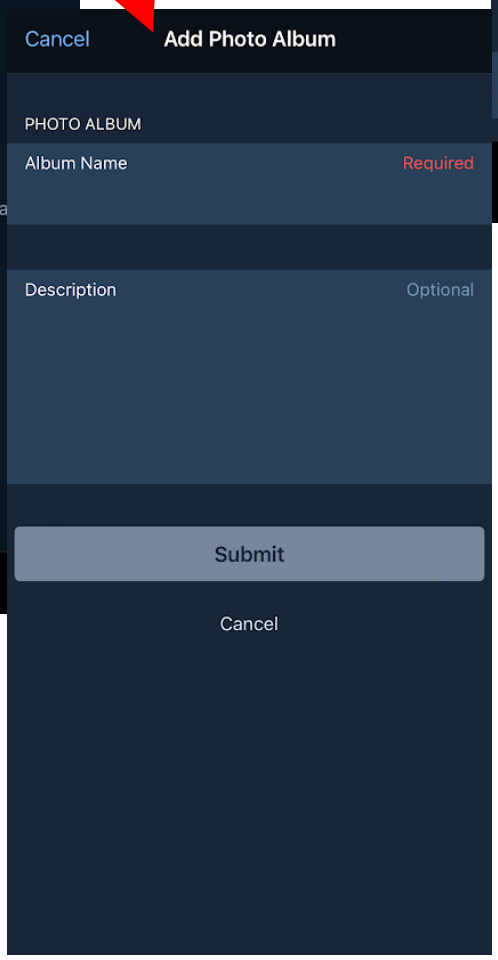
View or create photo albums for the specific work order.





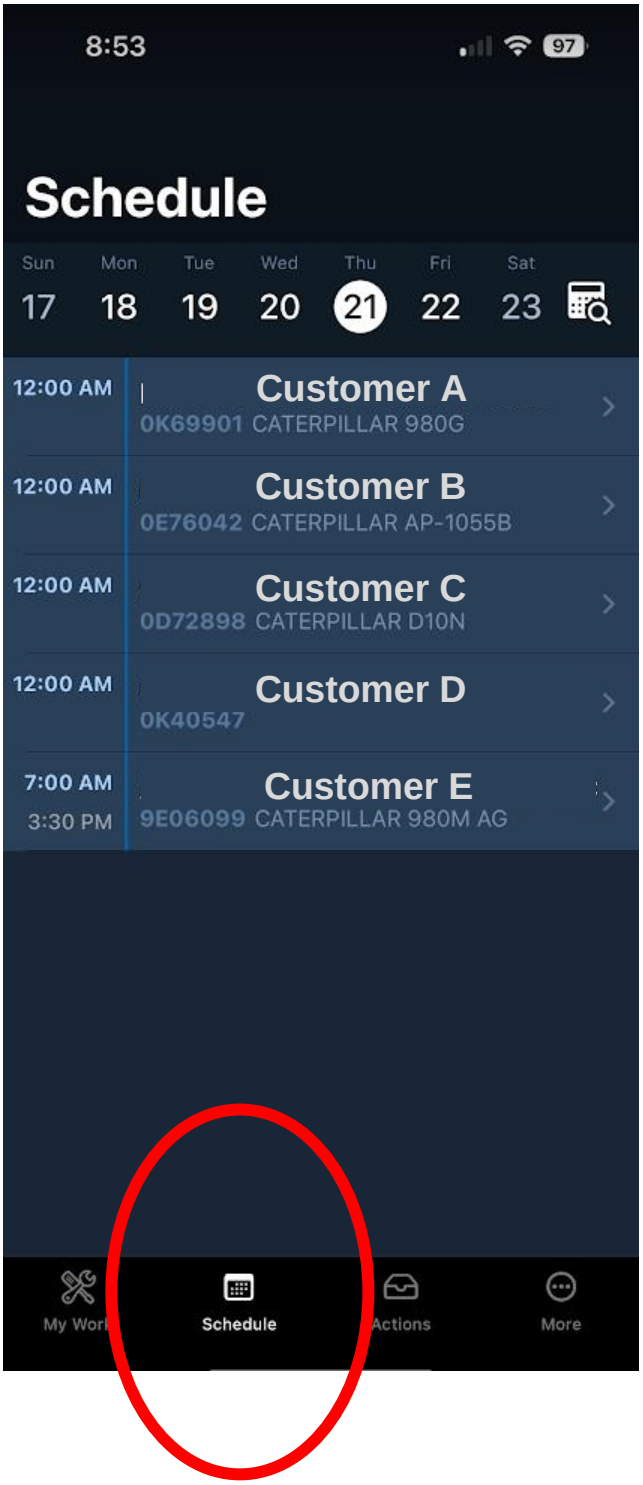


To create an album:

1) Tap + sign
2) Name Album (enter description if desired)
3) Tap Submit
4) Once Created go into Album and tap + sign
5) Select Camera OR Photo Library

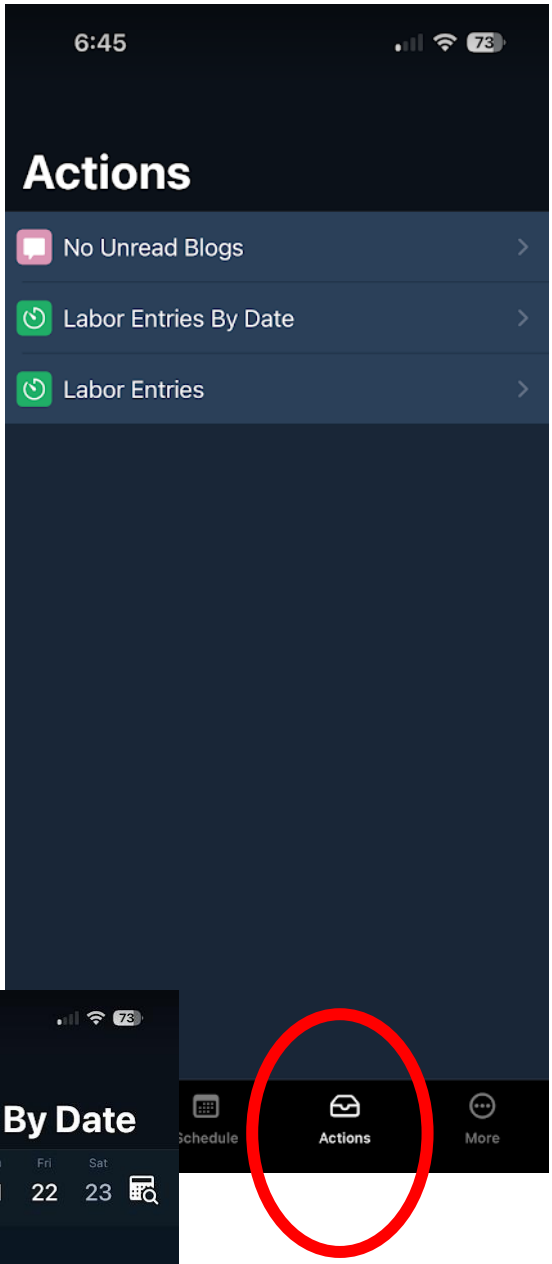
TEXADA

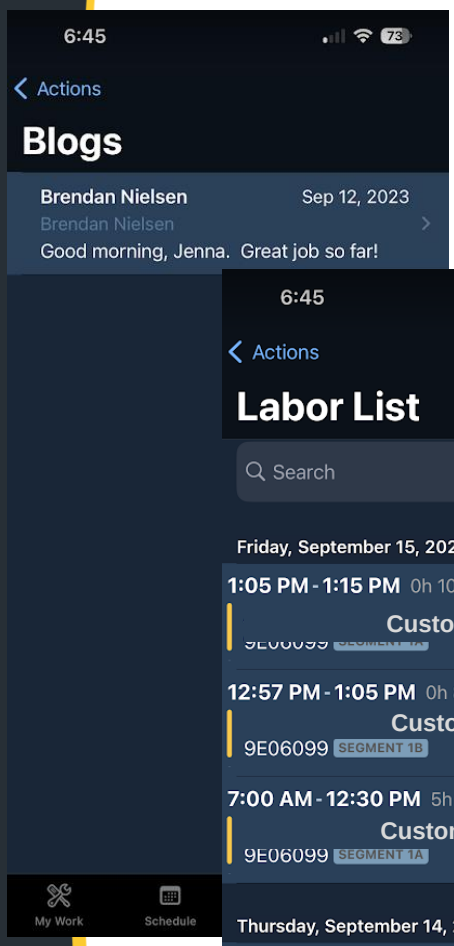
Access the technician's schedule using the icon on the bottom of the screen. Select the appropriate dates to see what is scheduled for that date.

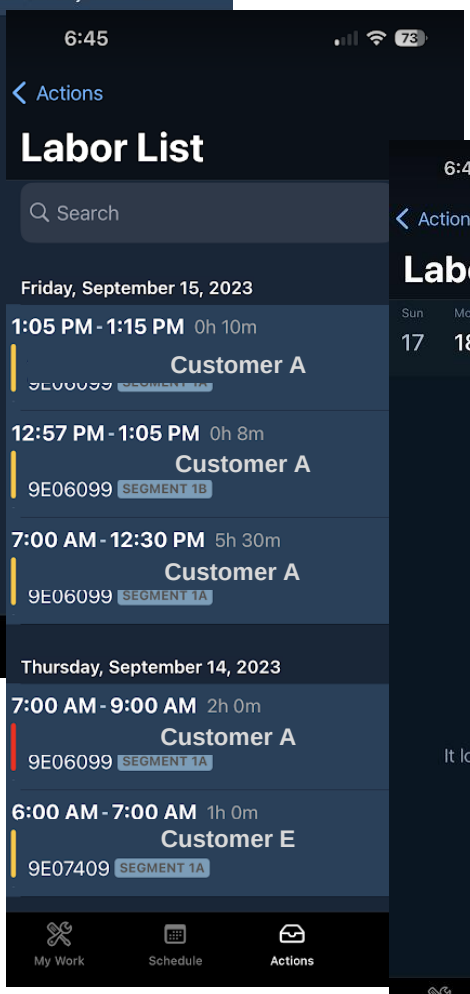


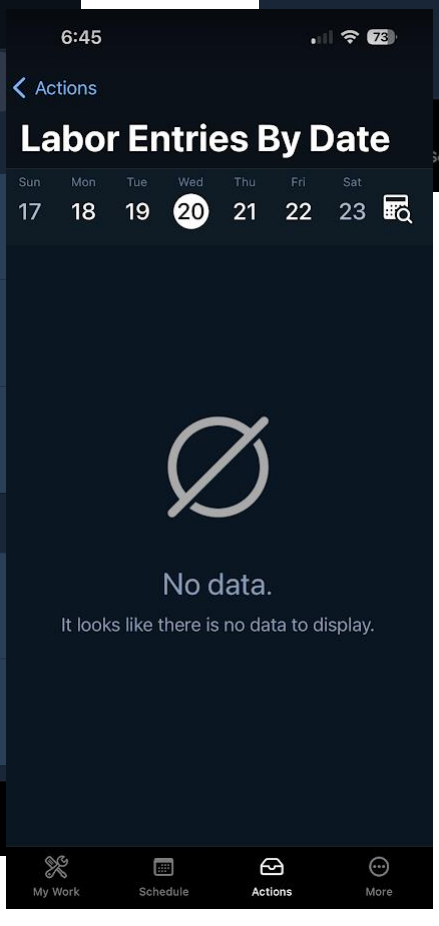
TEXADA

The **Actions button** are items that are directed to the technician summarize multiple jobs in those categories.









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OFFLINE MODE

NOTE: While **it is not possible to log in to ServiceLink Flex while offline**, users who are already logged in at the time they lose connection will be able to remain in offline mode for up to 12 hours. Once you return to an area with Internet connectivity, ServiceLink Flex will automatically return to online mode.

While in offline mode, the Schedule and Activities tabs will be **disabled.** You will not be able to interact with the map on the My Work screen

The following screens **will be accessible** while in OFFLINE MODE:

The following screens will be accessible while offline:

- My Work
  - Work Orders
  - Work Order Equipment Details
  - Work Order Parts Details
  - Work Order Contacts
  - Work Order Symptoms
  - Work Order Special Instructions
  - Work Order Misc Details
  - Work Order Blogs
- Work Order Segments
  - Segment Notes
  - Segment Labor Entries
  - Segment SIMS
- Work Order Segment Operations
  - Operation Notes
  - Operation Special Instructions
  - Operation Labor Entries

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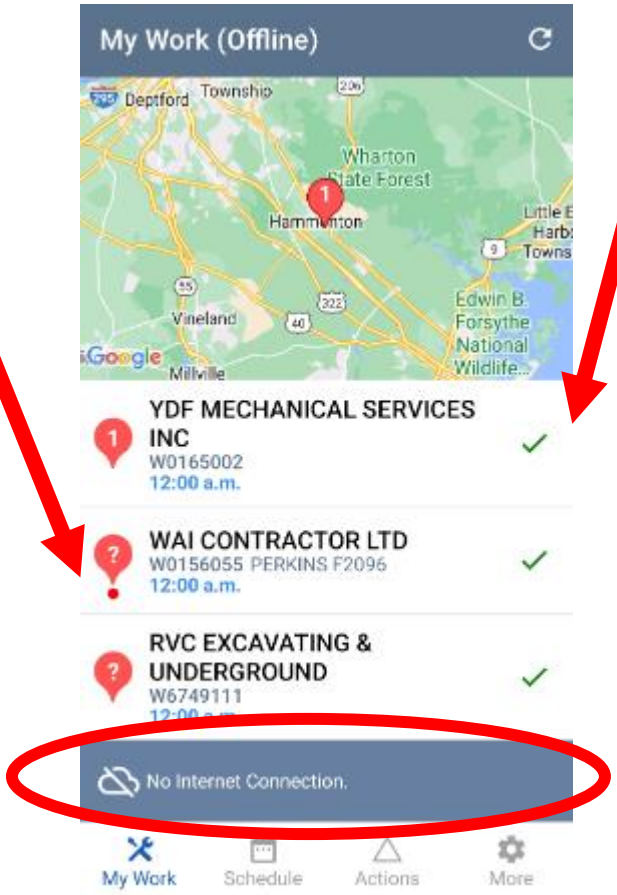
Work Orders that have at least one pending draft will be indicated by a small red bubble to the left of the Work Order name

Indicators show work orders that are available offline with a **green checkmark**. A red checkmark means the work order is only available while online



Work Order Drafts: Notes, SIMS, and Special Instructions

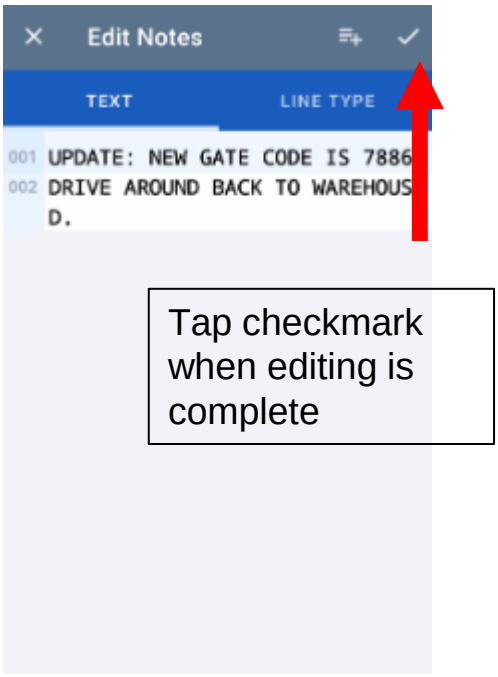
It is now possible to edit the following Work Order elements while in offline mode:

- Work Order Notes
- Work Order Special Instructions
- Segment Notes
- Segment Special Instructions
- Segment SIMS
- Operation Notes
- Operation Special Instructions

Changes made to these elements in offline mode will not be immediately visible. Instead, your changes will be saved as a draft that can be pushed to the server the next time you go online.

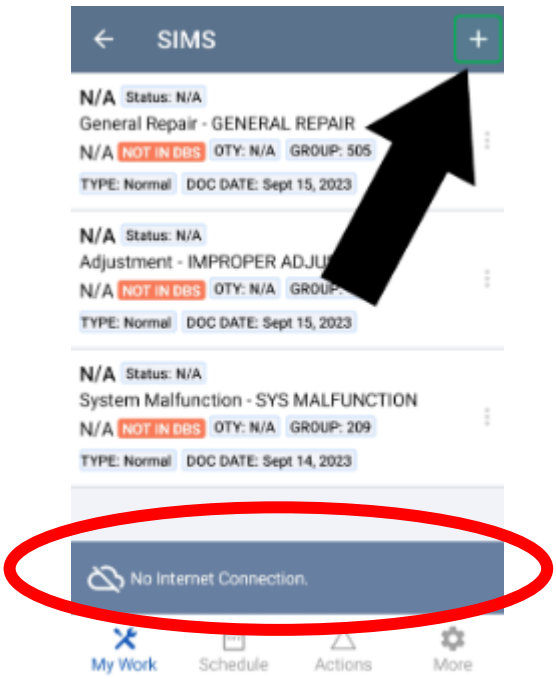
TEXADA

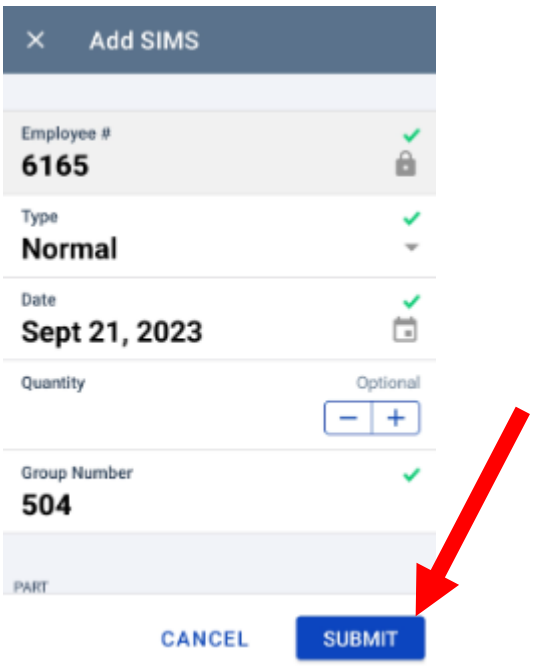
Notes and Special Instructions



Tap checkmark when editing is complete

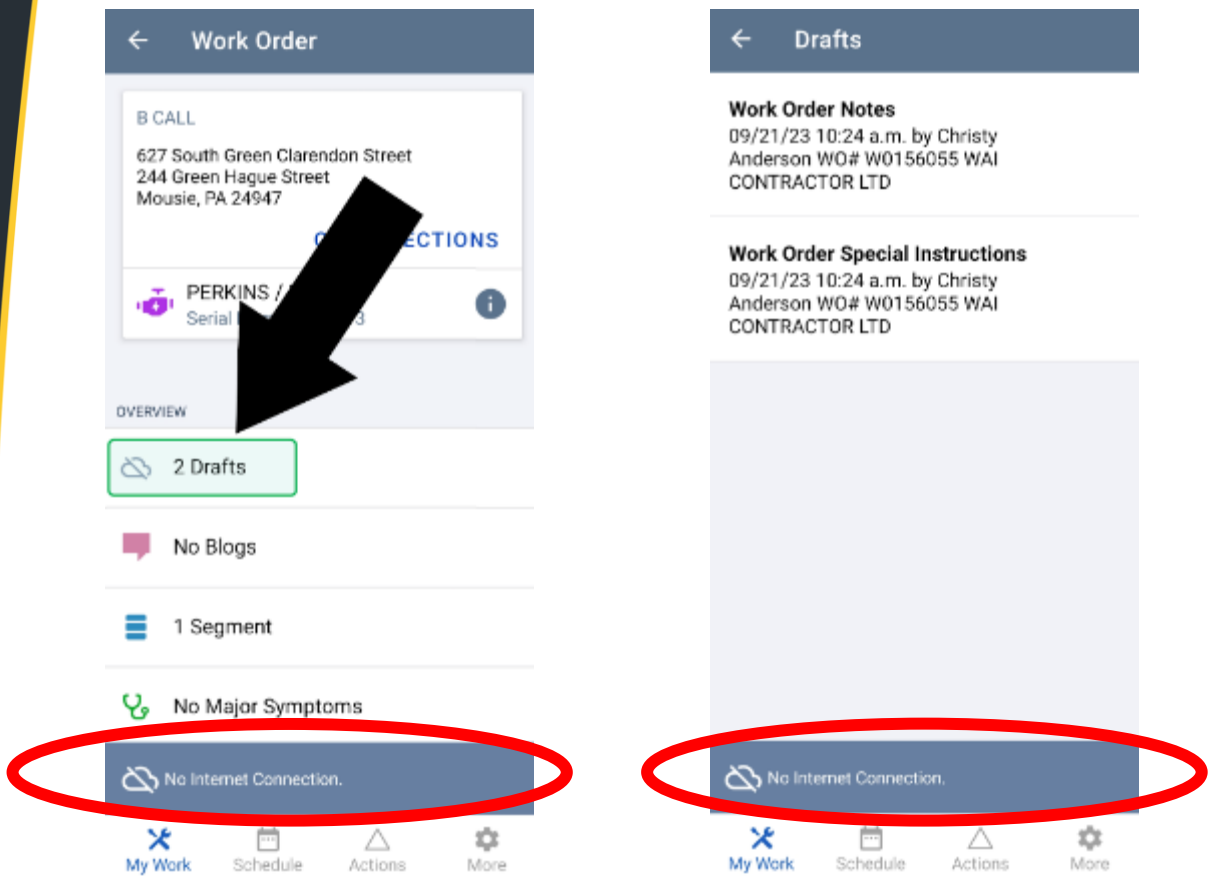
Segment SIMS





TEXADA

View and Manage Drafts



Drafts created in offline mode - including Notes, Special Instructions, and SIMS entries - can be viewed and managed from the details screen of the Work Order, Segment, or Operation for which the draft was created. Tap “Drafts” under the Overview section to view the current list of drafts, then tap on a draft to edit it.

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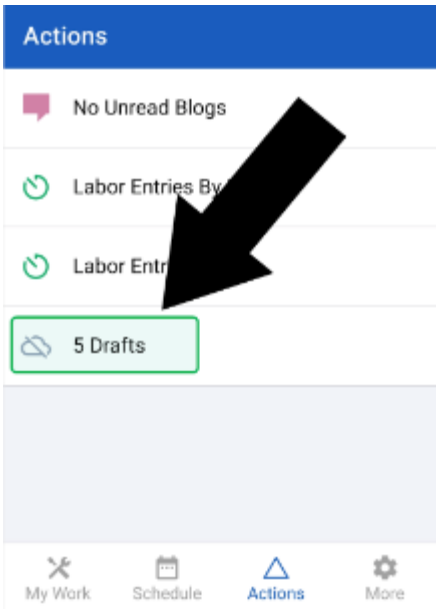
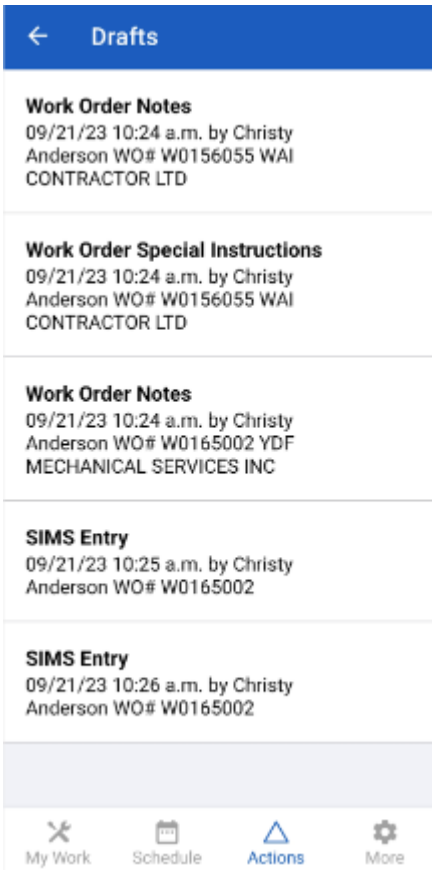
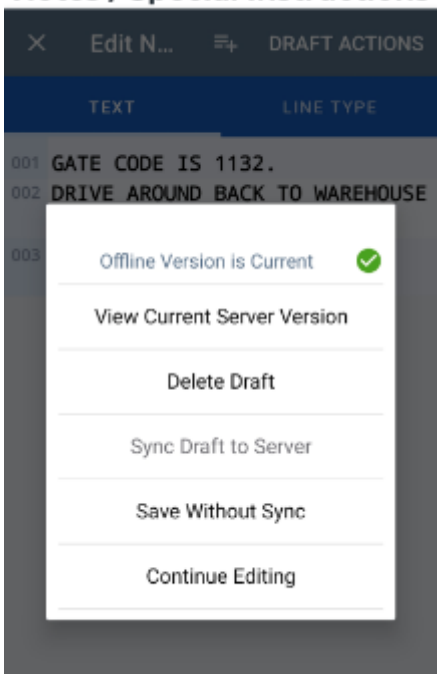
Once you are back online, you can also view a list of existing drafts across all Work Orders via the Actions tab. This feature is extremely useful for working through your list of drafts once you are back in an area with Internet access.



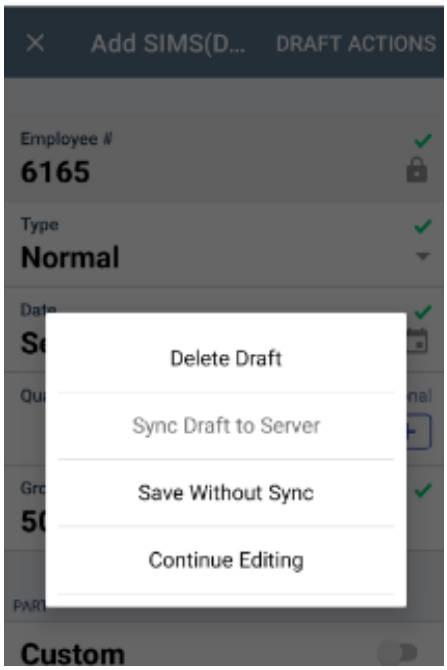


While editing an existing draft, tap the “Draft Actions” button in the top-right corner of the screen to access additional options for that draft:

Notes / Special Instructions



SIMS



Offline Version is Current: This line indicates whether changes have been made to the online version of a Note or Special Instruction since you went offline. If the offline version is showing as Non Current (indicated by a red X mark), you can use the “View Current Server Version” option to compare the offline and online versions. This is an important step because synching a draft Note or Special Instruction to the server will overwrite its current online version.

View Current Server Version: Compare your draft to the online (server) version of the Work Order Notes or Special Instructions.

Delete Draft: Delete your draft.

Sync Draft to Server: Submit your draft to the server. This option will only become available once you are back online. For Notes and Special Instructions, the current online version will be overwritten with your draft. For SIMS, your draft SIMS entry will be added to the list of SIMS for that Segment. Once your draft has been successfully pushed to the server, it will be deleted.

Save without Sync: Save your draft without pushing it online.

Continue Editing: Close the menu and continue editing your draft.

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