

Service Technician

Service

- In the app, select **Service**.
- Click the service list icon (top left corner) to view your appointments for the day.
- Next to that is the person with a "+" icon, used to search for a customer if needed.
- The car icon starts your route navigation for the day, beginning with your first appointment.
- The date icon lets you change the date to view future or past appointments.
- For the current day, select the visit list and choose the job you're heading to. Jobs are listed in numerical order, starting with the 1st job.
- Once inside a job, you'll see:
 - A photo of the location
 - The customer's name
 - Directions to the location
 - The ability to call the number on file
 - The account status and current plans
- **Concerns:** lists the reason for the visit.
- **Parts:** lists any parts added by the office needed for this specific job. This doesn't always need to be filled out; it's used for billing purposes.
- Toggle from the **Info** section to **System** to see the systems listed on the account (e.g., boiler, furnace, hot water heater, etc.).
- **Notes:** log what you did and what still needs to be done. The office will see these notes and use them when speaking with the customer.
- **Pictures:** submit photos of your work or anything relevant to the job. Once uploaded, the office can see them immediately.
- When you're ready to begin, select **Start Job** at the bottom:
 - A confirmation warning will appear; select **Yes** to proceed.
 - The screen will show the job as in progress, with a timer in the top right corner.
- When finished, select **End Job**. The job will turn green and be marked complete.
- Return to your visit list and select the next job.
- At the end of the day, clock out the same way you clocked in that morning.

Revision #1

Created 2026-09-09 14:31:49 UTC by Kozy Operations

Updated 2026-09-09 14:32:19 UTC by Kozy Operations