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CALL BACKS

When there is a completed job, and the customer calls back to say the problem is still not fixed, we have a “Call Back” situation. There are a few reasons this could happen:

1. The tech mis-diagnosed the problem.
2. The part was defective and needs to be replaced.
3. There was an additional problem associated with the initial repair that did not get fixed.

For all of these reasons, a Call Back work order is created to return to the customer’s home and assess the situation.

CREATING A CALL BACK WORK ORDER

There are two ways to create a Call Back work order:

1. Creating a Call Back work order from the original work order
2. Clicking on the Call Back box and searching for the original work order.

CREATING A CALL BACK WORK ORDER FROM THE ORIGINAL WORK ORDER

1. Open the original work order. Typically, this will happen when the customer calls back to complain.
2. Click on Options, then Create Call Back work order.

Work Order Options Print/Email Save Discard

Name: Rivers, Jordan

Address: 76630 - Primary - 1342 Old

Third Party Billing:

Work Authorization:

Work PO Number:

Phone: (254) 555-1234 - Cell

Email Address: deborah.mckenney@dwyer

Job Status: WSA Ready

Dispatch Code: COD-COD

Skill Level: Standard

Accounting Class Code:

Adjustments
Attachments
Communication Notes
Copy
Cores & Returns
Create Call Back Work Order
Customer
Inventory Transfer
Job History - Bill To
Job History - Customer
Notes
Notifications
Payments
Purchase Orders
Split Pay

3261409

2 - Lorena

Customer Call

03/27/2020

09:52 am - 10:52 am

AM

B, Rebecca

B, Rebecca

3. The Call Back work order is a new order with the customer information already entered and the original tech tied to the work order.
 - a. The original tech is tied to the Call Back work order so that the Call Back is credited to that tech on the Big Board and Owners dashboard. A different tech may go back to fix the problem, so we want to keep track of the person who may have made the original mistake.

Work Order Options Print/Email Save Discard

Name: Rivers, Jordan

Address: 76630 - Primary - 1342 Old Bethar

Third Party Billing:

Work Authorization:

Work PO Number:

Phone: (254) 555-1234 - Cell

Email Address: deborah.mckenney@dwyergroup.com

Job Status: Ready To Schedule

Dispatch Code: COD-COD

Skill Level: Standard

Accounting Class Code:

Job Length: 60

Lead Source: Existing Customer

Sec Source:

Specialty Scale:

Claim Info:

Claim Submitted:

Warranty:

Call Back:

Source Ticket Number: 3261409

Original Tech: B, Rebecca

Ticket #: 4779074

Zone: 2 - Lorena

Job Source: Customer Call

Job Date: 03/27/2020

Job Time: 03:06 pm - 04:06 pm

Time Slot: AM

Schedule Confirmed:

Tech Completed: MM/dd/yyyy

Forced Tech: B, Rebecca

Techs: Select Technician

Split Pay Type: All to Primary Tech

Add Tax Authority:

Name	Active	Exempt
Waco	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Waco	<input type="checkbox"/>	<input type="checkbox"/>

Price Book:

- b. Notes are not copied from the original work order. The notes, parts, tasks from the original work order can be seen by the tech on the iPad in Job History ([see Call Backs on the iPad](#)).
- 4. Change the Dispatch Code to CB – Call Back. Because the Dispatch Codes are customizable per office, you may have a different Dispatch Code, such a Recall. Dispatch Codes can be edited under Setup Franchise > Options > Dispatch Codes.

Work Order
Options ▾ Print/Email ▾ Save Discard

<p>Name: <input type="text" value="Rivers, Jordan"/></p> <p>Address: <input type="text" value="76630 - Primary - 1342 Old Bethan"/> ▾</p> <p>Third Party Billing: <input type="checkbox"/></p> <p>Work Authorization: <input type="text"/></p> <p>Work PO Number: <input type="text"/></p> <p>Phone: (254) 555-1234 - Cell</p> <p>Email Address: deborah.mckenney@dwyergroup.com</p> <p>Job Status: <input type="text" value="Ready To Schedule"/> ▾</p> <p>Dispatch Code: CB-Call Back ▾</p> <p>Skill Level: <input type="text" value="Full Line"/> ▾</p> <p>Accounting Class Code: <input type="text"/></p>	<p>Ticket #: <input type="text" value="4779074"/></p> <p>Zone: <input type="text" value="2 - Lorena"/> ▾</p> <p>Job Source: <input type="text" value="Customer Call"/> ▾</p> <p>Job Date: <input type="text" value="03/27/2020"/> <input type="button" value="📅"/> <input type="button" value="📅"/></p> <p>Job Time: 03:06 pm - 04:06 pm</p> <p>Time Slot: <input type="text" value="AM"/> ▾</p> <p>Schedule Confirmed: <input type="checkbox"/></p> <p>Tech Completed: <input type="text" value="MM/dd/yyyy"/> <input type="button" value="📅"/> <input type="button" value="✍️"/> <input type="button" value="📄"/> <input type="button" value="🗑️"/></p> <p>Forced Tech: <input type="text" value="B, Rebecca"/> ▾</p> <p>Techs: <input type="text" value="Select Technician"/></p> <p><input type="button" value="Make Primary"/></p>
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- 5. Add a Job Description note.

Work Order Notes
Save Note Clear Form

Note Type: ▾

Washing machine repaired on 3-26-20, but the problem has returned. WPL washing machine|not spinning.

Internal Work Order Comments

03/27/20 10:06 AM - Baker, Rebecca

Work Order was copied from WO 3261409 by Baker, Rebecca on Mar 27 2020 10:06AM

- 6. Save Note and Work Order.

CREATING A CALL BACK WORK ORDER BY CLICKING ON THE CALL BACK CHECKBOX

If you have an existing work order, it can be designated as a Call Back by clicking on the Call Back checkbox.

1. At the bottom of the work order, click on the Call Back checkbox. Clicking on the checkbox will open the Source Ticket# and Original Tech fields.

Lead Source: Existing Customer ▼
Sec Source: ▼
Specialty Scale: ▼
Claim Info:
Claim Submitted:
Warranty:
Call Back:
Source Ticket Number: Source Ticket Number
Original Tech:

2. In the Source Ticket Number field, search for the original work order number to connect it to the Call Back work order. Click on the customer name and ticket number to select it.

Call Back:
Source Ticket Number: 453
Original Tech: - Mouse, Mickey - 4534195

3. Selecting the ticket# will populate the tech associated with that work order.

Call Back:
Source Ticket Number: 4534195
Original Tech: B, Rebecca

4. Change the Dispatch Code to CB – Call Back. Because the Dispatch Codes are customizable per office, you may have a different Dispatch Code, such a Recall. Dispatch Codes can be edited under Setup Franchise > Options > Dispatch Codes.

Job Status: Ready To Schedule ▼
Dispatch Code: CB-Call Back ▼
Skill Level: Full Line ▼

Confirmed:
Tech Completed: MM/dd/yyyy
Forced Tech: B, Rebecca ▼

5. Add a Job Description note.

Work Order Notes

[Save Note](#) [Clear Form](#)

Note Type:

Washing machine repaired on 3-26-20, but the problem has returned. WPL washing machine not spinning.

Internal Work Order Comments
03/27/20 10:06 AM - Baker, Rebecca
Work Order was copied from WO 3261409 by Baker, Rebecca on Mar 27 2020 10:06AM

6. Save Note and Work Order.

CALL BACKS ON THE IPAD

1. On the iPad, the tech will identify the job as a Call Back based on the Dispatch Code and Job Description.

10:24 AM Fri Mar 27 90%

Back Warranty WO #4779074 Tech Info Edit Next

Price Book: Basic

Ticket 4779074

Customer Details

Name: Rivers, Jordan
Address: 1342 Old Bethany Rd.
City: Bruceville
ZIP Code: 76630
Cell Phone: (254) 555-1234

Job Description

Visit Number: 1
Dispatch Code: CB
Source: Customer Call
Primary Tech: B, Rebecca
Technician Alert:
Job Description: Mar 27, 2020, 10:22 AM
Washing machine repaired on 3-26-20,
but the problem has returned. WPL
washing machine not spinning.

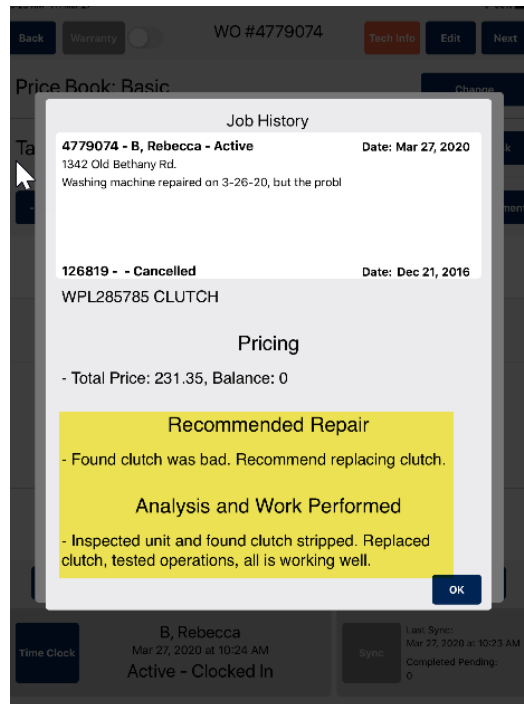
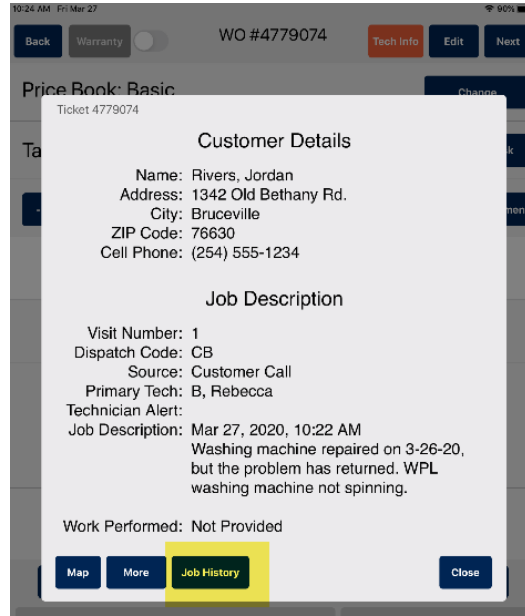
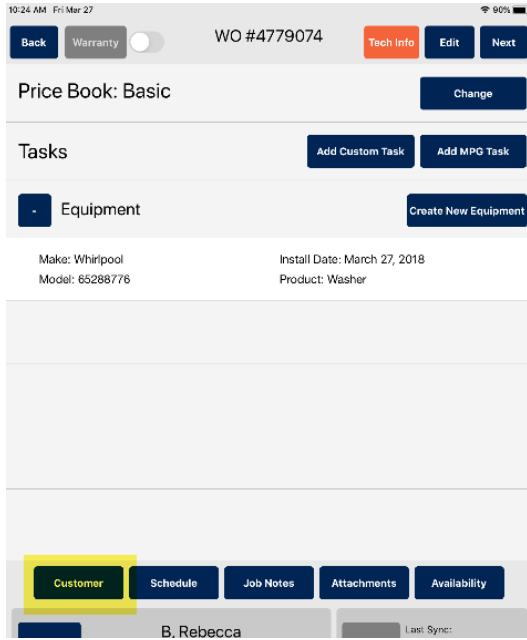
Work Performed: Not Provided

Map More Job History Close

B, Rebecca
Mar 27, 2020 at 10:24 AM
Active - Clock In

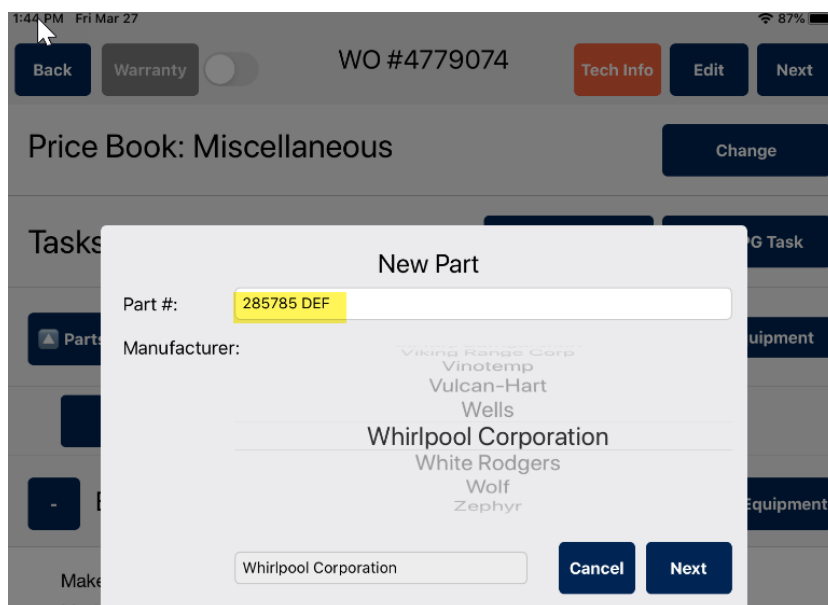
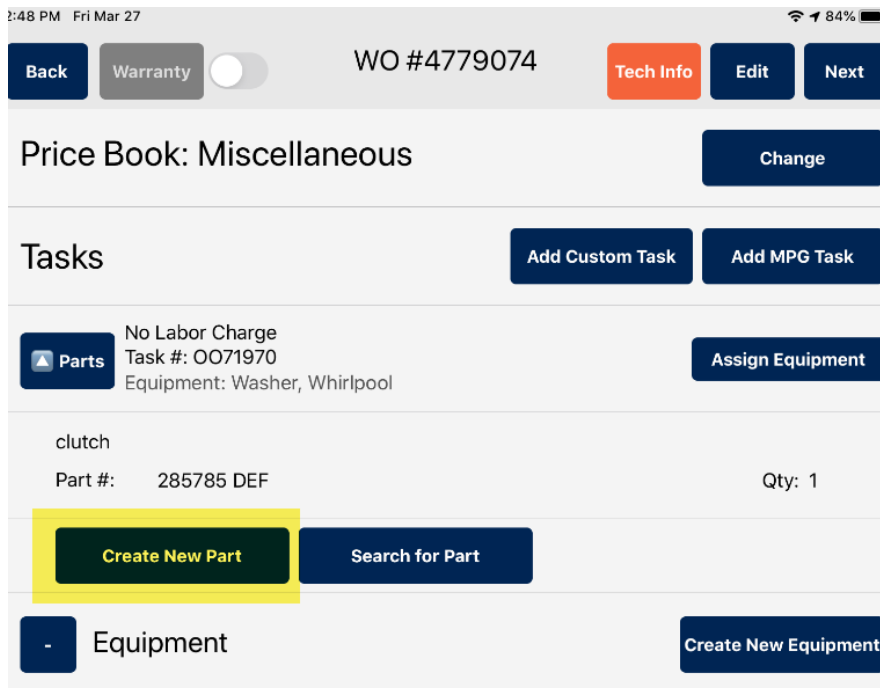
Last Sync:
Mar 27, 2020 at 10:23 AM
Completed Pending:
0

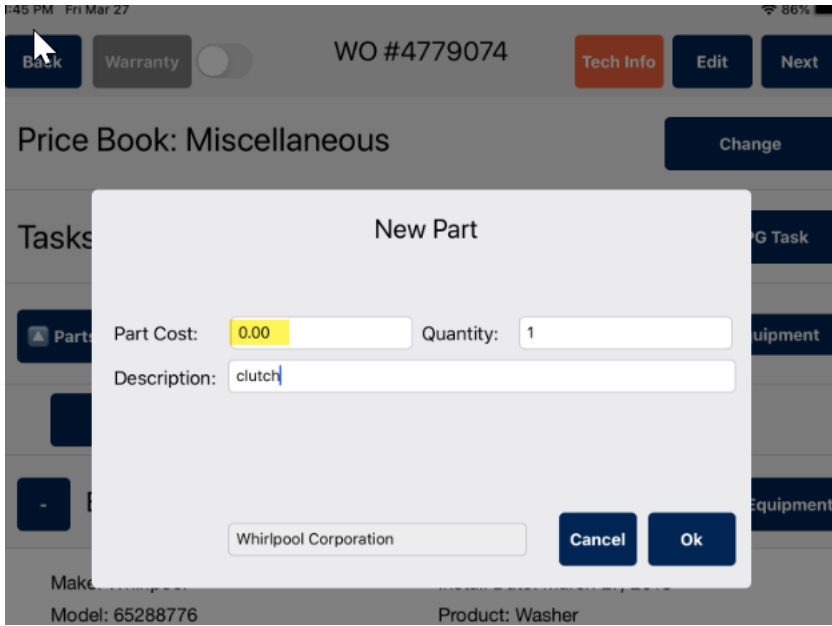
- Once the problem has been re-diagnosed, the tech will determine if it was truly a Call Back due to misdiagnosis or faulty part OR if the machine actually has an additional problem.
- The tech can see job notes from the previous visit by pressing the Customer button inside the work order, then the Job History button from the Customer Detail screen.



4. If the problem was incorrectly diagnosed, select a \$0.00 labor task on the work order. If you do not have a "No Labor" task, search for "Task" in the SW help section or on Higher Logic for instructions on adding an MPG task.
 - a. If an additional part is required, it can be added to the No Labor task in order to charge the customer for the new part only.

5. If the part is defective, select a \$0.00 labor task on the work order, then create a new part with the original part# and DEF appended to the end of the part#. Enter \$0.00 as the cost. If using SmartParts, this part cannot be ordered, because it is not the true part number. The part will need to be ordered from the office. The DEF at the end is the cue for the office staff that it is a defective replacement part.





6. If the equipment has a completely different problem, unrelated to the original repair, create the quote as normal, selecting the appropriate tasks and parts.

CALL BACK WORK ORDERS COMING BACK FROM THE IPAD

1. When the Call Back work order comes back to SW from the iPad, the office can determine if it was truly a Call Back. If it was not a Call Back, the Call Back checkbox can be unchecked and the original tech will not be credited with a Call Back.
2. If there was a defective part on the Call Back work order, as long as the tech has followed the instructions above, the part will be listed as the normal part# with DEF appended to the end. The PO and work order will both have this fictitious part#. **Change both parts to the correct part# so that it will be tracked correctly in Inventory.** Having the fictitious part# serves 2 purposes: 1. allowing the tech to charge \$0.00 on the iPad without giving him the ability to edit all part prices, 2. Alerting the office that it is a defective part.

Parts - No Labor Charge									
	MFG	MFG #	Part Name	Cost	QTY	Price	Extended	Stock Part	Used
	WPL	285785 DEF	clutch	\$0.00	1	\$0.00	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Search 1 - 1 displayed , 1 in total

Purchase Order Parts List												
	# In Stock	MFG	MFG #	Part Name	Qty	Total	Stock Part	Is Core	Status	Rcvd Qty	Vend Inv #	Active
	0	WPL	285785 DEF	clutch	1	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>	Open	0		<input checked="" type="checkbox"/>

Search 1 - 1 displayed , 1 in total