

# SERVICE AUTOMATION DASHBOARD

## QUICK REFERENCE GUIDE



CREATING WORK ORDERS /  
WORK ORDER STATUSES



REVIEWING WORK ORDERS /  
ADDING NOTES



ADDING FEEDBACK /  
SC MOBILE / INVOICES

### WHAT IS THE DASHBOARD?

Generate and track work orders, provide feedback on services, and view invoices for each location.

To login, go to [login.servicechannel.com](http://login.servicechannel.com). Enter your User ID and Password, and then click **Login**.

- If prompted, select a location in the drop-down in the top-right corner.

### CREATING WORK ORDERS

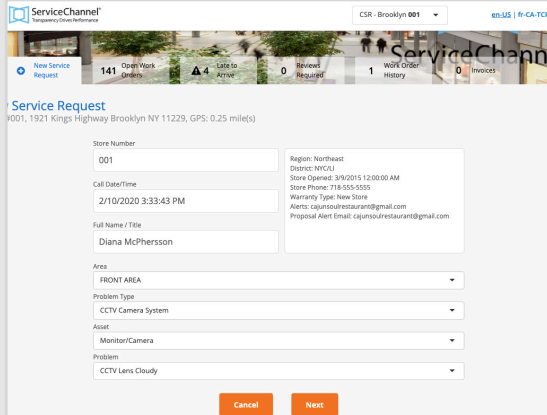
1. Click the **New Service Request** tab.
2. Enter keywords to find the appropriate **Area**, **Problem Type**, **Asset**, and **Problem**, and then click **Next**.

The system will check if a similar issue already exists.



- If your issue is a **Duplicate Work Order**, click **Cancel**.
- If your issue is a **Repeated Issue**, click the **checkbox** and then **Next**.
- If neither one applies to your issue, click **Next**.

3. Under Troubleshooting, describe the problem and then click **Next**.
4. Review the request for accuracy, noting the **Estimated Scheduled Date/Time** and (when applicable) the **Service Provider** assigned, so you will know who is coming and when.
5. Upload any pictures of the requested problem, when available.
6. Click **Submit Request**. A work order number is generated and dispatched.



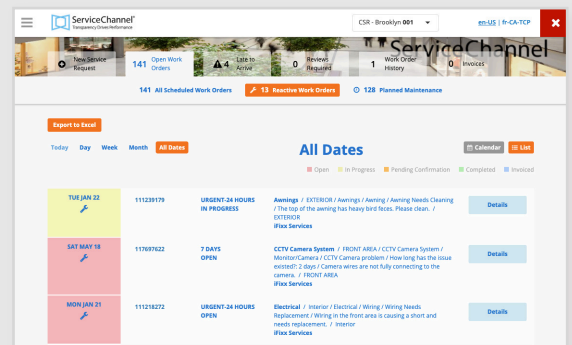
### WORK ORDER STATUSES

■ Open   
 ■ In Progress   
 ■ Pending Confirmation   
 ■ Completed   
 ■ Invoiced

- **Open:** The provider has not accepted the work order, or it has been declined.
- **In Progress:** The provider accepted and is on the issue.
- **Pending Confirmation:** You have to provide feedback on the provider's completed work.
- **Completed:** Your feedback is done, and the provider can invoice.
- **Invoiced:** You have to review the provider's invoice.

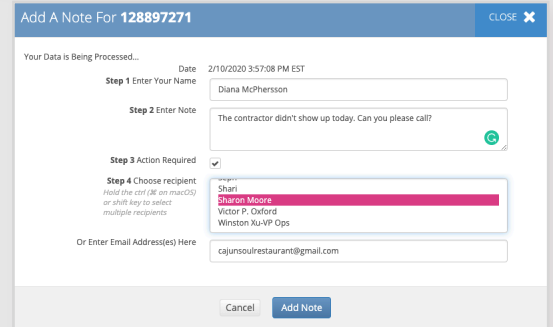
## REVIEWING OPEN WORK ORDERS / ADDING A NOTE TO A WORK ORDER

1. Click the **Open Work Orders** tab. The number on the tab equals the number of open work orders.
2. For each line item, you will see the **Scheduled Date** and **Work Order Status** (see #3), **work order Type** (repair or maintenance), the **Tracking Number**, the **Priority**, and the **description**.
3. The **Status Color** surrounds the Scheduled Date:  
Yellow = In Progress work orders  
Pink = Work Orders not accepted or declined.



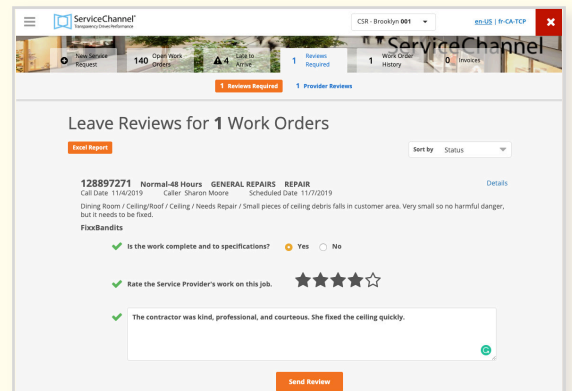
### TO ADD A NOTE FROM THIS PAGE

1. Click the **Details** button and then **Add New Work Order Note** on the bottom of the screen.
2. Enter your **Name** (if not already listed) and the note.
3. Check whether an **Action is Required**.
4. Select a **Recipient** for the note and **upload** any related photos, and then click **Add Note**.



## ADDING FEEDBACK TO A WORK ORDER

1. Click the **Reviews Required** tab. The number on the tab equals the number of work orders ready for feedback.
2. For each listed work order, mark **Yes** if the job was completed to specifications, or **No** if it was not.
  - **If you mark Yes**, you will see stars where you can rate the Provider's level of service. You can also enter comments about service (please keep your notes professional!).
  - **If you mark No**, enter why the job was not completed to specifications. This will put the work order back to the **In Progress** status and the provider will return on site.
3. Click **Send Review**.



## REVIEWING WORK ORDER HISTORY

1. Click the **Work Order History** tab.
2. Similar to Open Work Orders, view a list of **all work orders in all statuses**.

## APPROVING INVOICES

1. Click the **Invoices** tab.
2. On each Invoice, click **Action**.
3. In the **Action** drop-down menu select the appropriate action (**Approve**, **On Hold**, **Reject**).

## SC MOBILE APP

1. Download the SC Mobile App from the Apple App Store or Google Play store.
2. Your User ID and Password is the same that you use to log into the Dashboard on the web.
3. Tap **WOs** on the home screen to view the list of work orders for your location.
4. Tap **New WO** to create a work order.

