

ExpandIT Service

Guide to status codes

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Definitions

- **Work order**

The piece of paper you would find in the windshield of the truck with information on where to go, what to do

Setup: *ExpandIT Service > Configuration > Service Order Status Codes*

- **Task**

A subdivision of the work on the work order. Often linked to a service item. Using tasks, a work order can contain multiple service items or activities.

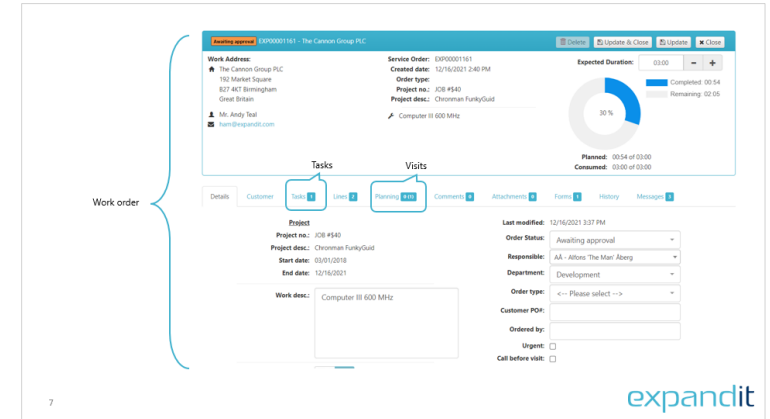
Setup: *ExpandIT Service > Configuration > Task Status Codes*

- **Visit**

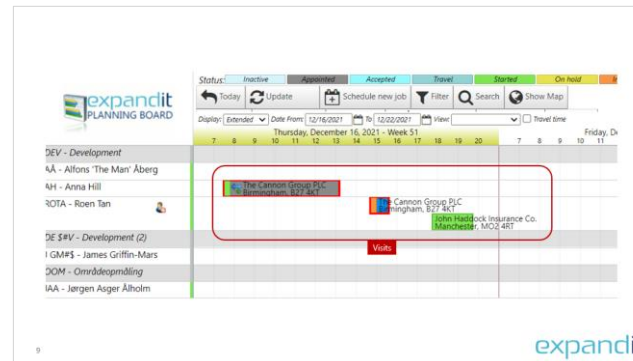
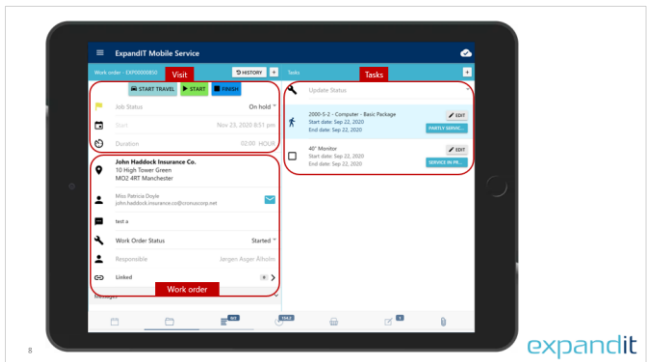
Like a calendar entry, for a specific field worker to work on a work order at a specific time.

Setup: *ExpandIT Service > Configuration > Status Codes*

- Each entity above has its own status

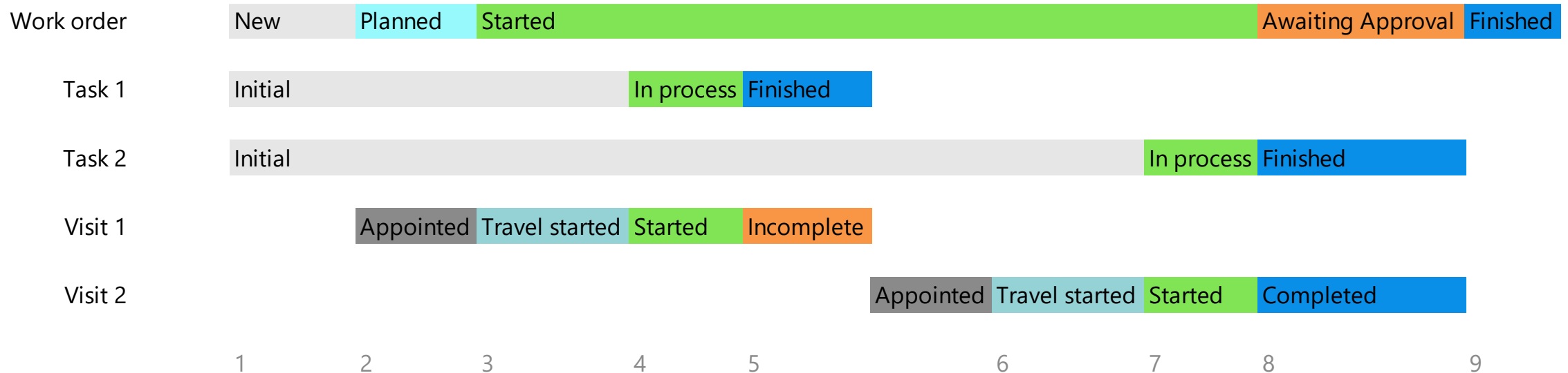
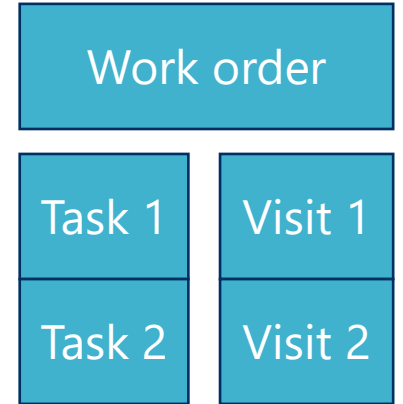


Work order



Example status flow

1. Work order created with two tasks
2. Scheduled in planning board
3. Field worker drives to the customer site
4. Field worker arrives and starts working on Task 1
5. Field worker finishes task one, and selects return another day
6. Field worker drives to the customer site the following day
7. Field worker arrives and starts working on Task 2
8. Field worker finishes Task 2 and finalizes the visit
9. The service manager approves the work order



Status setup

- Statuses are likely to change with the visit status
- A change in visit status may prompt for status changes on tasks and work order
- The behavior is controlled by the visit status
ExpandIT Service > Configuration > Status Codes
 Use the *Set task status* and *Set order status* to trigger the question in the field worker client
- The user can override the statuses (by selecting *Cancel* and/or manually changing)

Task Status

Do you want to update Task Status to Finished on this task?

- Airconditioning EZ3881

CANCEL OK

Work Order Status

Do you want to update Work Order Status to Awaiting Approval?

CANCEL OK

Status Codes [↗](#)

Map between internal

Status code	Description	Set task status	Set order status	Background color	Text color	Show on Client	SI
INACTIVE	Inactive	(no mapping)	WAITPLAN - Awaiting Planning				
APPOINTED	Appointed	INIT - Initial	PLANNED - Planned			✓	
ACCEPTED	Accepted	(no mapping)	PLANNED - Planned			✓	
TRAVELSTARTED	Travel	PROC - In Process	STARTED - Started			✓	
STARTED	Started	PROC - In Process	STARTED - Started			✓	
ONHOLD	On hold	(no mapping)	HOLD - On hold			✓	
INCOMPLETE	Incomplete	PARTSERV - Partially Serviced	STARTED - Started				
COMPLETED	Completed	FIN - Finished	WAITAPPR - Awaiting Approval				
REJECTED	Rejected	(no mapping)	WAITPLAN - Awaiting Planning				
OFFDUTY	Off duty	(no mapping)	WAITPLAN - Awaiting Planning				
URGENT	Urgent	(no mapping)	PLANNED - Planned			✓	

Links to task and order status

Status codes and NAV/BC

- Service Order = ExpandIT Work Order
- Service Item Line = ExpandIT Task
- Service Item Line Status = Repair Status
- Service Order status is updated by changes made to Service Item Lines
- This means, that in ExpandIT, the tasks are driving the NAV/BC Service Order status

Repair Status Setup

Code ↑	Description	Service Order Status	Priority	Initial	In Pro...	Fini...	Partly Serv...
→ <u>FIN</u>	Finished	Finished	Low	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
INIT	Initial	In Process	High	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PARTSERV	Partially Serviced	In Process	High	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PROC	In Process	In Process	High	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SPAREORD	Spare Part Ordered	On Hold	High	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WAITCUST	Waiting on Customer	On Hold	High	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Having questions?

Contact us today: sales@expandit.com

The ExpandIT Team

We are here to help you succeed!

