

PSA DEEP DIVE

UNLOCKING AUTOMATION IN SERVICE ORDER MANAGEMENT

Tony Mehner



AGENDA

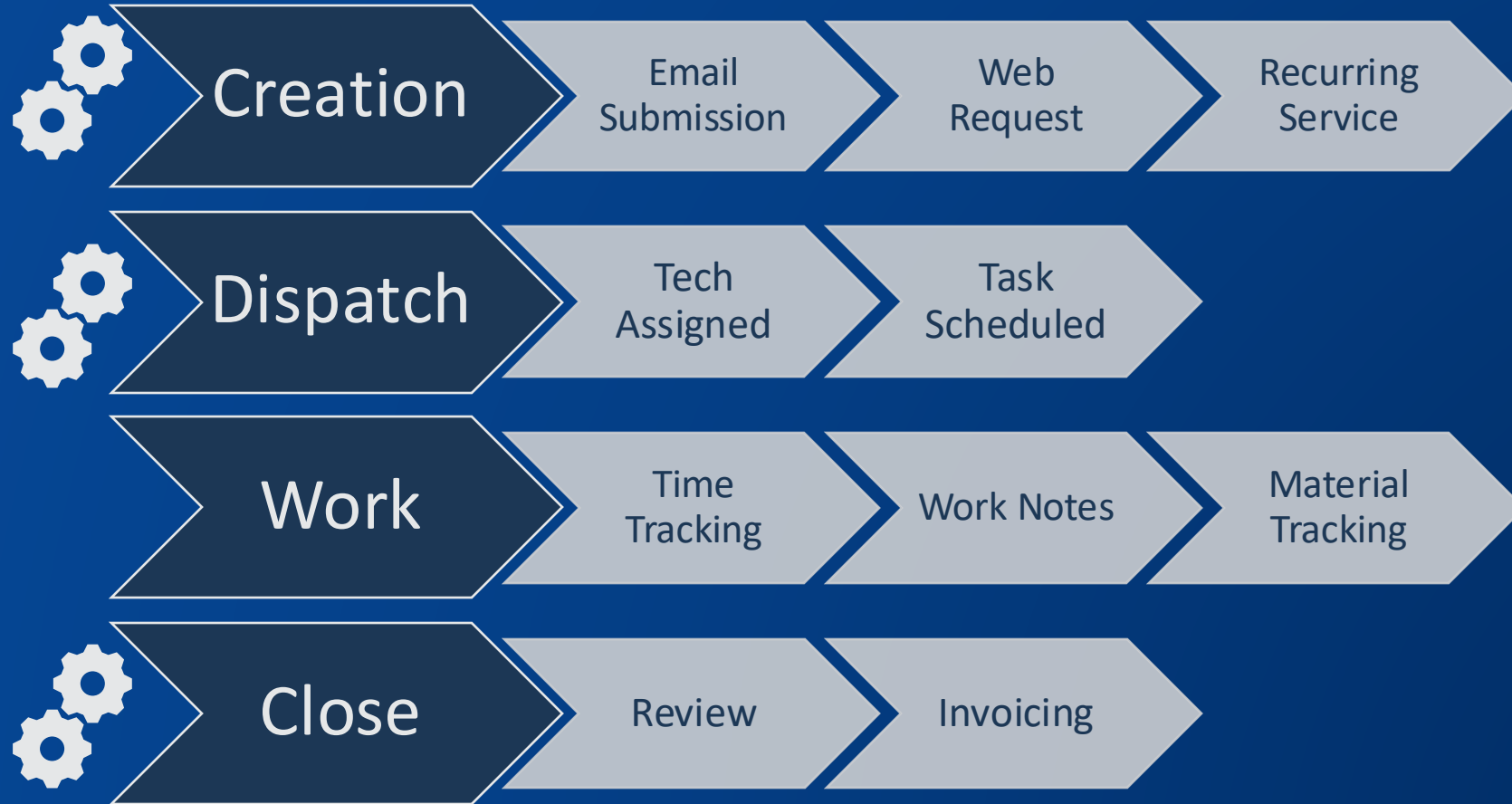
PSA DEEP DIVE: UNLOCKING AUTOMATION IN SERVICE ORDER MANAGEMENT

- An Overview of the Service Order Process
- **Automation:** Automatically Create Service Orders
- **Automation:** Automatically Assign Technicians
- **Automation:** Automatically Invoice Service Orders
- Question & Answer



THE SERVICE ORDER PROCESS

PSA DEEP DIVE: UNLOCKING AUTOMATION IN SERVICE ORDER MANAGEMENT



AUTOMATING SERVICE ORDER CREATION

PSA DEEP DIVE: UNLOCKING AUTOMATION IN SERVICE ORDER MANAGEMENT



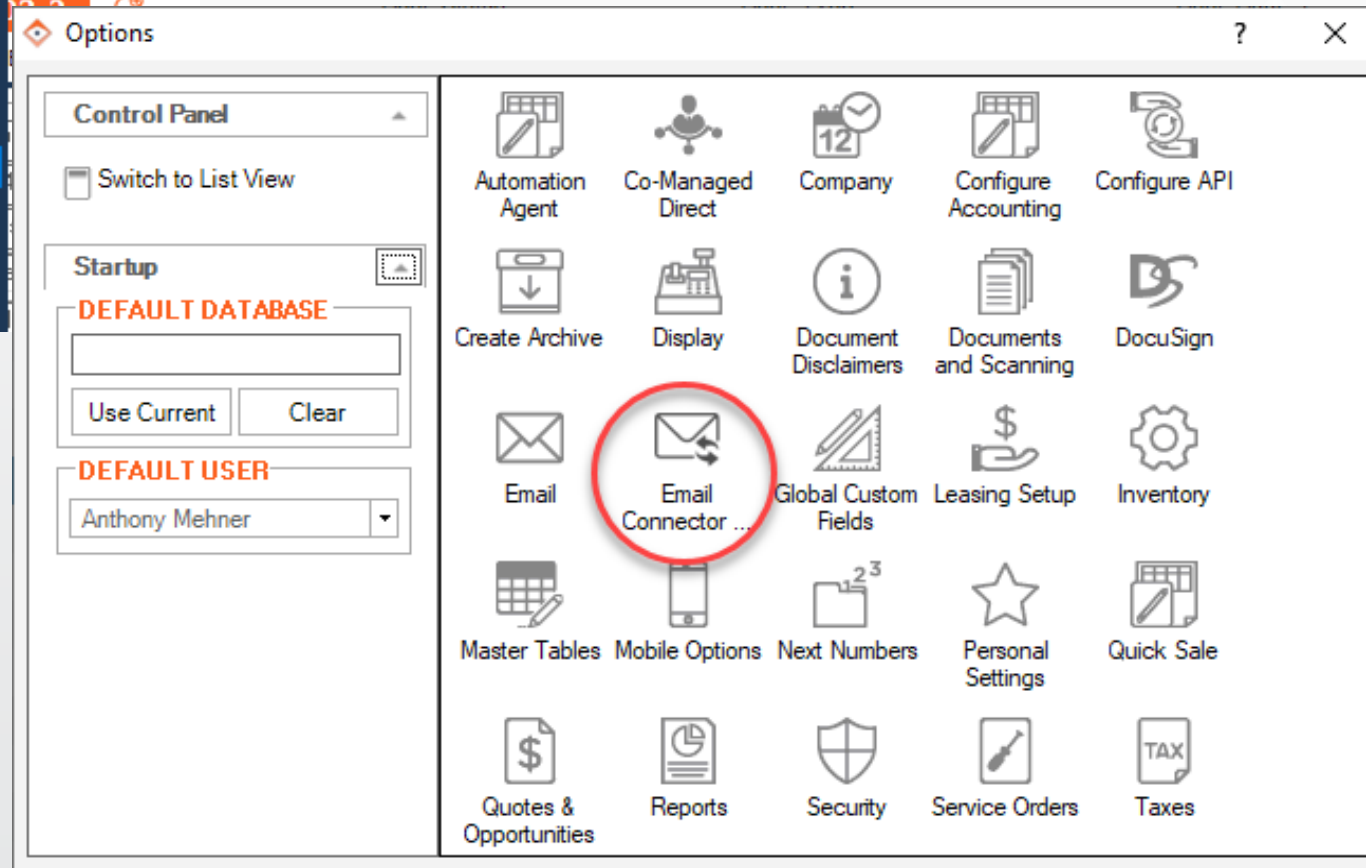
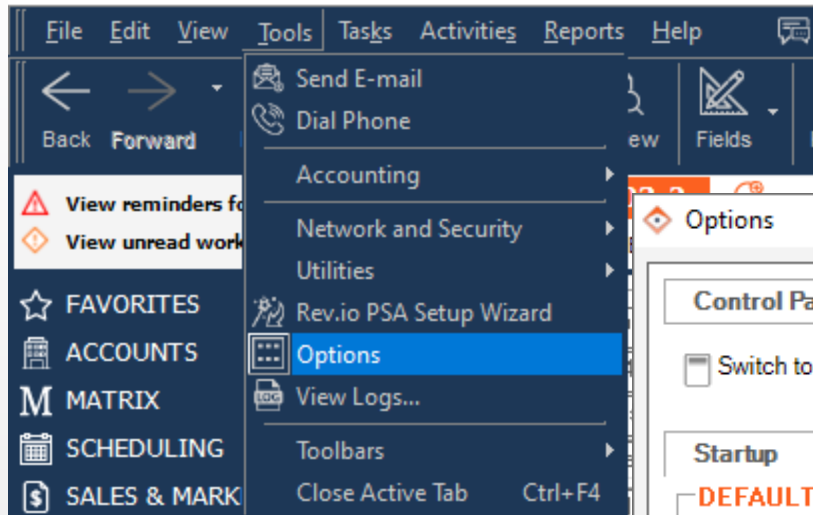
- Email Connector
- Customer Portal
- Recurring Service Orders



EMAIL CONNECTOR

AUTOMATING SERVICE ORDER CREATION

Rev.io PSA [TMEHNER\TIGERPAW;VaultCube Technologies]



EMAIL CONNECTOR

AUTOMATING SERVICE ORDER CREATION

Tigerpaw Email Connector Settings

Templates Servers Inboxes Auto SO Data Collection Global Attachments Global Omissions Service Settings

Name	Address	SSL Sup	SSL P	Default	Num. of In	Proto	
VaultCube S...	imap.gmail.com	<input checked="" type="checkbox"/>	993	143	1	2	<div>Edit</div> <div>Duplicate</div> <div>Remove</div>

About Help OK Cancel

Server Editor

Name: VaultCube Support Request

Server Address: imap.gmail.com
i.e. outlook.office365.com or imap.gmail.com

Service Type: Other

Protocol: IMAP

Non-Secure port: 143

SSL port: 993

OK Cancel

Tigerpaw Email Connector Settings

Templates Servers Inboxes Auto SO Data Collection Global Attachments Global Omissions Service Settings

Email Request

Add

Edit

Duplicate

Remove

About Help OK Cancel

Inbox Editor

Inbox Properties Attachments Omissions

Email address: request.vaultcube@gmail.com

Template: Email Request

Server: VaultCube Support Request

Protocol: IMAP

☐ Use email address as user name

User name: request.vaultcube@gmail.com

Password: *****

☒ Use SSL port if available

Port: 993

Override archive path: C:\Users\tmehner\Documents\02 Tigerpaw

Default dispatch board: (None)

Test Connection OK Cancel

Template Editor

Template type: Service Order Template

Name: Email Request

Values for service orders created from incoming emails

Taken by rep: VaultCube Technologies

Tech assigned: (unassigned)

☒ Assign tech selected above only

☐ Assign in this order: contract tech/account default/tech selected above

☐ Assign in this order: account default/contract tech/tech selected above

☐ Assign in this order: contract tech/tech selected above

☐ Assign in this order: account default/tech selected above

Status: Schedule Tech

Type: Email Request

Priority: Medium

☒ Use priority from active default contract

High priority: High

☐ Use priority from active default contract

Values for service orders updated from incoming emails

Status: Updated by Client

OK Cancel



EMAIL CONNECTOR

AUTOMATING SERVICE ORDER CREATION

Dispatch Board

Dispatch Board for the day of 08/15/2024

Anthony Mehner
Sched/Avail: 6/8
Scheduled: 75%
Hrs Logged: 0

Kaylee Shepard
Sched/Avail: 8/8
Scheduled: 100%
Hrs Logged: 0

Kegan Ehlers
Sched/Avail: 7/8
Scheduled: 88%
Hrs Logged: 0

Thursday, August 15

8:00

9:00 Application Error - Blue Screen S
One Stop Dental - Corporate
Omaha, NE
SO Number: 10010

10:00

11:00

12 pm

1:00 Alarm Installation S
Ball Aerospace
Omaha, NE
SO Number: 10044

2:00

3:00

4:00

Training Phase S
One Stop Dental - Corporate
Omaha, NE
SO Number: 10027
8:00 AM - 4:00 PM (est. time 7:00)
SO Priority: Medium
(No board assigned)

Cabling Phase S
One Stop Dental - Corporate
Omaha, NE
SO Number: 10024
8:00 AM - 12:00 PM (est. time 3:00)

Deployment Phase S
One Stop Dental - Corporate
Omaha, NE
SO Number: 10025

Work items

Filter Name: Dispatch

	Account	SO No.	Brief Description	Priority	Severity	Status	Dispatch Board	Received Date	Rec. Time	Tech Assigned
Email Request			Network Down					5/6/2016	12:12 PM	
Email Request			Server Crash					5/6/2016	12:16 PM	
Service Order	One Stop Denta...	10010	Application Em...	Medium		Schedule Tech		7/27/2016	8:42 AM	Anthony Me...
Service Order	One Stop Denta...	10023	Design Phase	Medium		Schedule Tech		11/5/2018	10:47 AM	Anthony Me...
Service Order	One Stop Denta...	10024	Cabling Phase	Medium		Schedule Tech		11/5/2018	10:55 AM	Kegan Ehlers
Service Order	One Stop Denta...	10028	Cabling Phase	Medium		Schedule Tech		11/5/2018	10:55 AM	Anthony Me...
Service Order	One Stop Denta...	10025	Deployment Ph...	Medium		Schedule Tech		11/5/2018	10:56 AM	Kegan Ehlers
Service Order	One Stop Denta...	10029	Deployment Ph...	Medium		Schedule Tech		11/5/2018	10:56 AM	Anthony Me...
Service Order	One Stop Denta...	10026	Configuration P...	Medium		Schedule Tech		11/5/2018	10:57 AM	Anthony Me...
Service Order	One Stop Denta...	10027	Training Phase	Medium		Schedule Tech		11/5/2018	10:57 AM	Kaylee Shep...
Service Order	One Stop Denta...	10030	Configuration P...	Medium		Schedule Tech		11/5/2018	10:57 AM	Anthony Me...
Service Order	One Stop Denta...	10032	Testing Phase	Medium		Schedule Tech		11/5/2018	11:02 AM	Anthony Me...
Service Order	Fallon's Cosmed...	10041	[Asset ID] Pape...	Medium		Schedule Tech		7/23/2024	8:48 AM	Al Powell

Page 1 of 1

1 thru 15 of 15

Match Found = Service Order Creation

No Match = Service Request Creation



EMAIL CONNECTOR


AUTOMATING SERVICE ORDER CREATION

- Rev.io PSA will now automatically read incoming emails to the designated inbox and create a service order if a direct match is found.
- If no match is found, it will generate a request, from which you can create a service order.
- This feature provides your clients with 24/7 access to easily create tickets.



CUSTOMER PORTAL

AUTOMATING SERVICE ORDER CREATION

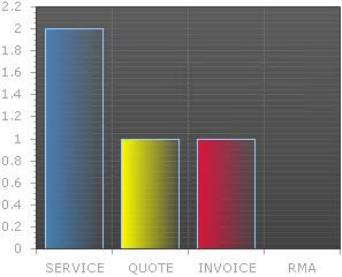


Building A Safer Tomorrow

[Save Layout](#) [Restore Default Layout](#) [?](#)

Account Summary



ACTIVE ITEMS



Item Type	Count
SERVICE	2.0
QUOTE	1.0
INVOICE	1.0
RMA	0.0

Account

Hannah Chapman



Binary Helix

Account Number: 10050

Account Rep: Blaine Villafuerte

Rep Phone: (405) 592-4544 Ext. 4629

Rep Email: Blaine@vaultcube.us

IP Address: ::1

Open Balance: **\$215.00**



Quotes

Quote	Status	Description	Date
10018	Accept Reject Open	Upgraded Security Camera Cable	8/16/2024


Invoices

Invoice	Balance	Paid	Date
10306	\$215.00	\$0.00	8/16/2024

Service Orders

SO	Status	Description	Opened
 10051	Schedule Tech	Network Connectivity Issues	
 10052	Open	Security Camera Connectivity Issues	8/16/2024

Contracts




VaultCube Technologies | 103 Vernon Square | Omaha, NE | 68003 | USA
(402) 555-1335 | ContactUs@VaultCubeTech.com | www.vaultcube.com



CUSTOMER PORTAL

AUTOMATING SERVICE ORDER CREATION



Building A Safer Tomorrow

Service History

Request Service

Service

Account

Binary Helix

Name

Hannah Chapman

☐ New Contact

Email

hannah.chapman@binaryhelix.net

Phone

(401) 059-7432

Ext. Main

Optional Request Details

PO Number

110067

Status

Schedule Tech

Priority

Medium

Reference

System

Contract

Item to Service

VDC-242V03-2 - Bosch Dome CCTV

Brief Description

Door Access Card Reader Down

Detailed description of your issue

We are experiencing an issue with the door access reader at the main entrance, which has been down since 9:00 AM today. The reader does not recognize any access cards, preventing employees from entering the building. We have already checked the power supply and connections and verified that no scheduled maintenance is ongoing. This issue is causing significant inconvenience and security concerns as employees are unable to access the premises. Please investigate and resolve this issue as soon as possible. If additional information is needed, feel free to contact me directly. Thank you for your prompt attention to this matter.

SUBMIT



CUSTOMER PORTAL

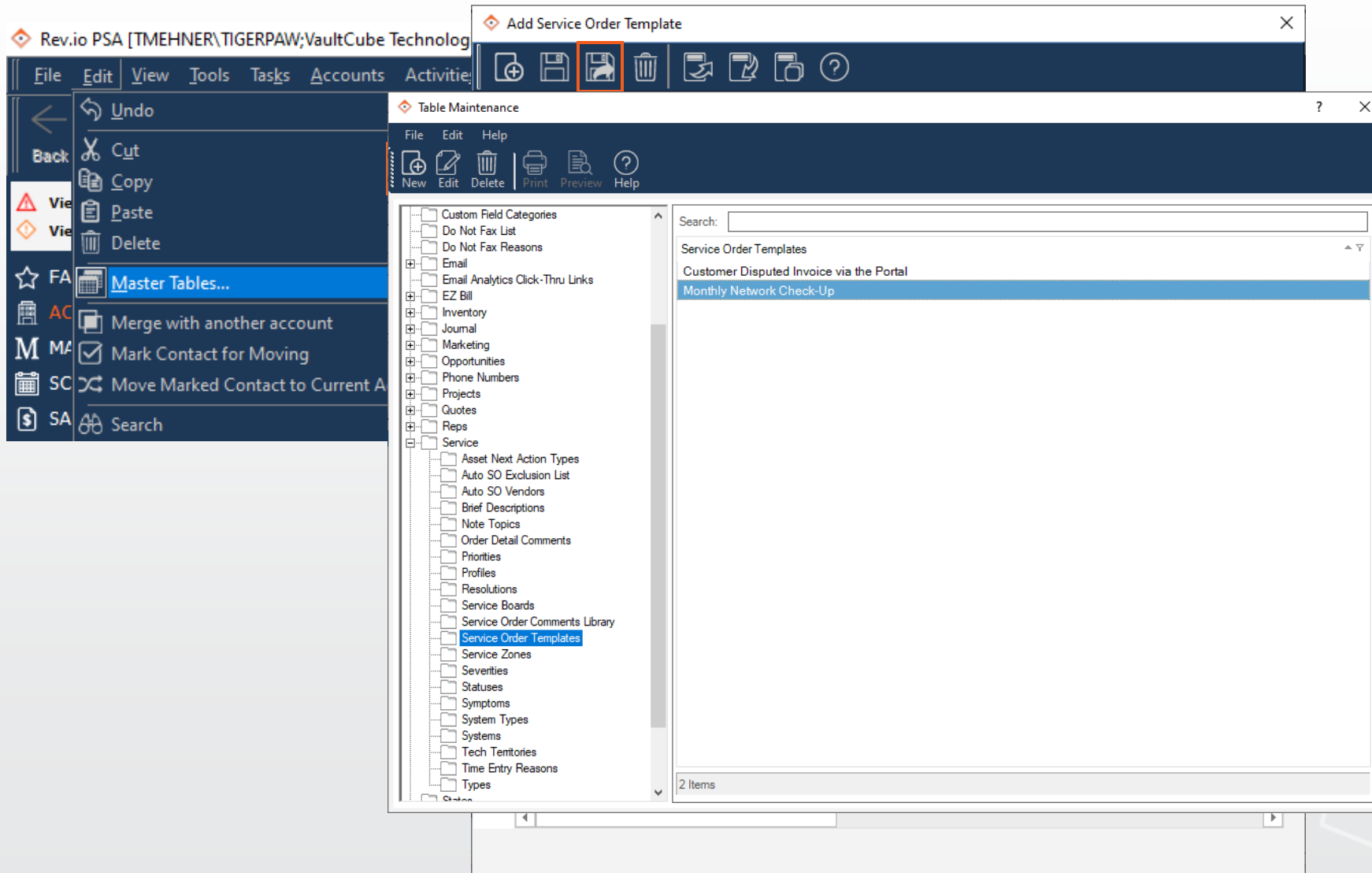
AUTOMATING SERVICE ORDER CREATION

- Once submitted, this Service Order will be processed by Rev.io PSA and appear in the Service Order Matrix and Dispatch Board.
- A workflow can be created to notify personnel of your choice when a ticket comes in this way.
- Your client can track the ticket status and add notes via the Customer Portal, providing 24/7 access to issue reporting and enhancing transparency.



RECURRING SERVICE ORDERS

AUTOMATING SERVICE ORDER CREATION



RECURRING SERVICE ORDERS

AUTOMATING SERVICE ORDER CREATION

Rev.io PSA [TMEHNER\TIGERPAW;VaultCube Technologies]

File Edit View Tools Tasks Accounts Activities Reports Help Support Live Chat Academy User Forum

Back Forward History New Save Print Preview Journal Related Tasks Docs Quotes Contracts **SOs** Assets Passwords Invoices Projects Fields Folders Accounting Knowledge Groups Email Dial Merge Help

View reminders for past due tasks **Binary Helix** View unread workflow notifications Binary Helix (10050)

FAVORITES
ACCOUNTS
MATRIX
SCHEDULING
Calendar
Group Calendar
Dispatch Board
Dispatch Board (Classic)
Tasks
Workflow Notifications

GENERAL INFORMATION

Name: Binary Helix Account ID: Type: Customer
Address 1: 7170 Cinder Goose Wharf Status: Active
Address 2: Created: 2/10/2016
City, State: LogLick RI
Zip, Country: 02810-1783 USA
Primary Rep: Blaine Villafuerte
☐ Vendor
☐ Subcontractor

PHONE NUMBERS

Phone	Ext.
(401) 633-6320	Main

SUMMARY

- Journal entries
- Open quotes
- Related accounts
- Open opportunities
- Open Invoices
- Open projects
- Custom fields
- Active contracts
- Open service orders
- Open RMAs
- Past due tasks

HOT NOTE

Contacts Web & Email Marketing Special Instructions Service Defaults Directions to Location

Contact Name	First Name	MI	Last Name	Title	Department	Address 1	Address 2	City	State	Zip Code
Hannah Chapman	Hannah		Chapman			7170 Cinder Goose		LogLick	RI	02810-1783



RECURRING SERVICE ORDERS

AUTOMATING SERVICE ORDER CREATION

Service Orders for Binary Helix

File Help

New SO Print Preview Filter: All orders Help

SO Number	Brief Description	System Serviced	Priority	Status	Type	Requested	Received	Opened	Closed	Time Used
10052	Security Camera Connectivity		Medium	Open	Service Call	08/16/2024	08/16/2024			4:00
10051	Network Connectivity Issues		Medium	Schedule	Service Call	08/16/2024				

Recurring Order Schedules

Schedule Description	Frequency	Start Date	Last Due Date	End Date	Tickets Created	Active
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Create Recurring Service Orders for Binary Helix

Recurring name: Monthly Network Preventive Maintenance

Use SO template: Monthly Network Check-Up

Taken by rep to use: Anthony Mehner

Create order: 5 day(s) before due Received time to use: 09:00 AM

RECURRING PATTERN

☐ Daily ☐ Weekly ☒ Monthly ☐ Yearly

Recur every 1 month(s)

☐ Day(s) ☐ On the Second Monday

START/STOP

Start: 08/16/2024

☒ No end date ☐ End after: occurrences ☐ End by:

OK Cancel



RECURRING SERVICE ORDERS

AUTOMATING SERVICE ORDER CREATION

- Rev.io PSA will now automatically generate a Monthly Network Preventive Maintenance Service Order five days before the second Monday of each month.
- This Service Order will be visible in the Service Order Matrix and the Dispatch Board.



AUTOMATING DISPATCH

PSA DEEP DIVE: UNLOCKING AUTOMATION IN SERVICE ORDER MANAGEMENT



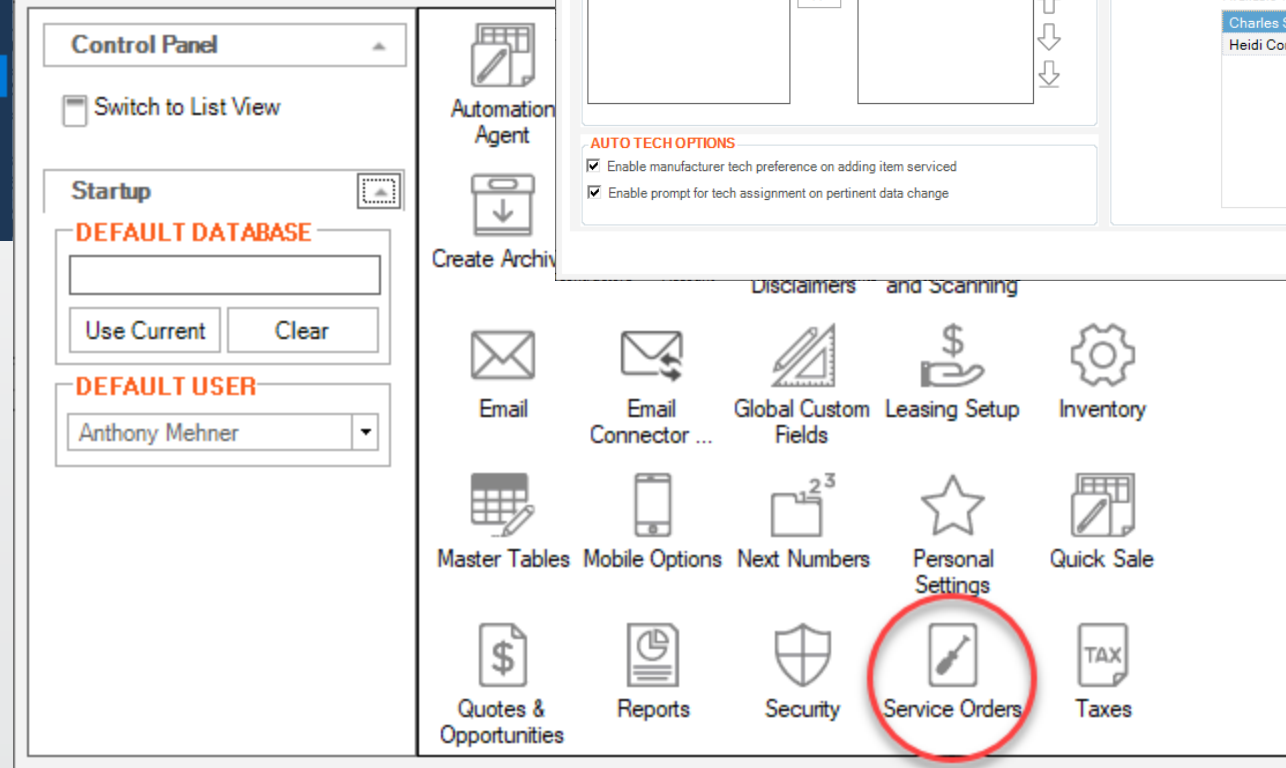
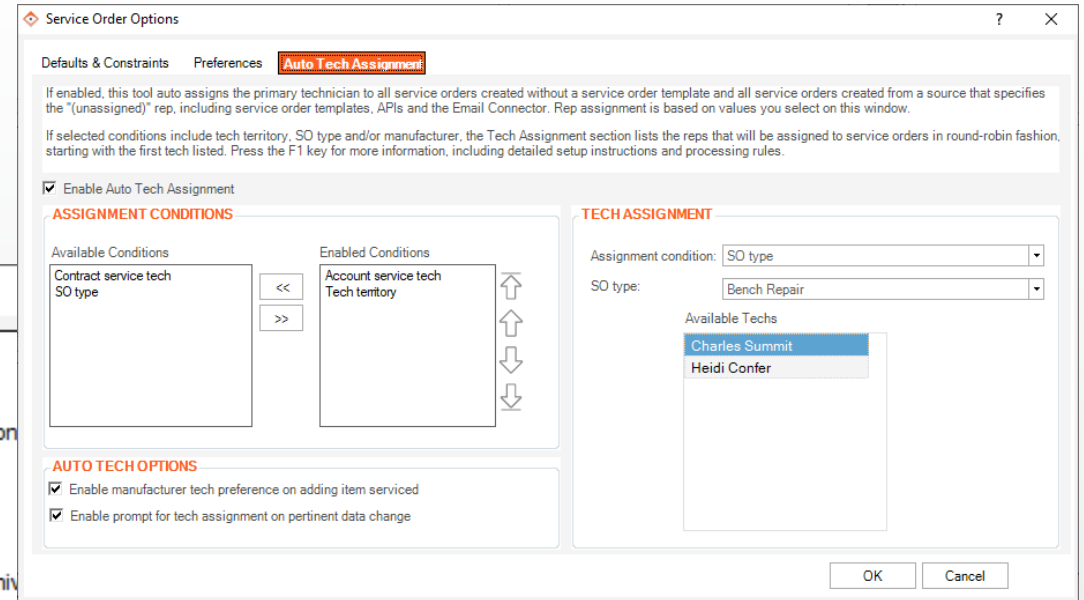
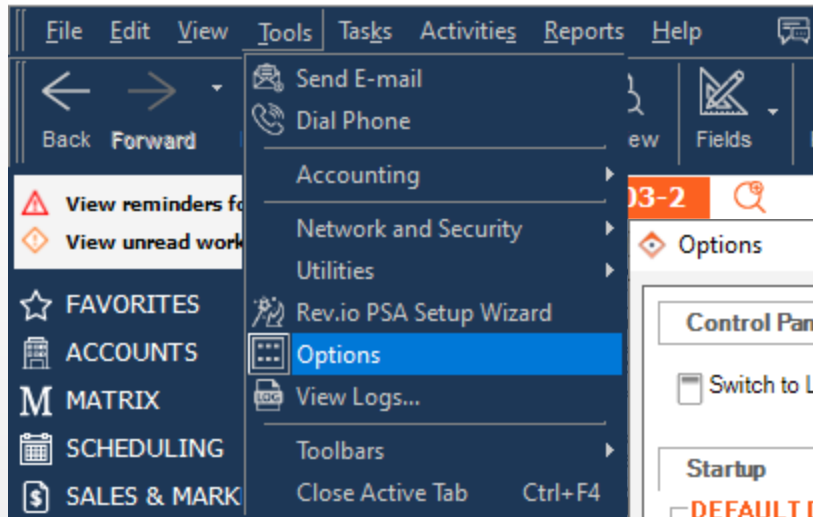
- Auto Tech Assignment



AUTO TECH ASSIGNMENT

AUTOMATING DISPATCH

Rev.io PSA [TMEHNER\TIGERPAW;VaultCube Technologies]



AUTO TECH ASSIGNMENT

AUTOMATING DISPATCH

- Rev.io PSA will now review tickets, whether created manually or automatically, and assign technicians according to your established rules.
- This streamlines the process for dispatchers to review schedules and manage scheduled tickets.
- For unscheduled work, the system will automatically queue tickets to the appropriate technicians.



AUTOMATING TICKET CLOSURE

PSA DEEP DIVE: UNLOCKING AUTOMATION IN SERVICE ORDER MANAGEMENT



- Auto SO Invoicing



AUTO INVOICING SERVICE ORDERS

AUTOMATING TICKET CLOSURE

Rev.io PSA [TMEHNER\TIGERPAW;VaultCube Technologies]

File Edit View Tools Tasks Activities Reports Help

Back Forward Send E-mail Dial Phone Accounting Network and Security Utilities Rev.io PSA Setup Wizard Options View Logs...

FAVORITES ACCOUNTS MATRIX

Options

Control Panel

Switch to List View

Startup

DEFAULT DATABASE

Use Current Clear

DEFAULT USER

Anthony Mehner

Automation Agent Co-Managed Direct Company Configure Accounting Configure API Create Archive Display Document Disclaimers Documents and Scanning DocuSign Email Email Connector ... Global Custom Fields Leasing Setup Inventory Master Tables Mobile Options Next Numbers Personal Settings Quick Sale Quotes & Opportunities Reports Security Service Orders Taxes

Edit Recurring Schedule for Auto Invoicing

Schedule name: Daily SO Invoicing

Description: Daily SO Invoicing

☒ Enable schedule

RECURRING SCHEDULE

☐ Minutely ☐ Every day(s) ☒ Daily ☒ Every weekday ☐ Weekly ☐ Monthly ☐ Yearly

START/STOP

Start: 08/14/2024 at 12:00 AM ☒ No end date ☐ End after: occurrences ☐ End by:

OK Cancel

Automation Agent

Feature: Auto Invoicing

☒ Enable Auto Invoicing

AUTO INVOICING OPTIONS

Actions to take on invoiced orders:

☒ Close invoiced orders that meet the criteria for closing

☒ Complete tasks for closed orders

Invoicing rep: VaultCube Technologies

☒ Email invoice 1 days after creation

Email template: TSI APEX - Invoice Attached - Payment Due (not auto paid) - External Notice

Invoice report: C:\Program Files (x86)\Tigerpaw Software\Tigerpaw\Reports\Invoice.rpt

OK Cancel

Schedule Name	Description	Enabled
Daily SO Invoi...	Daily SO Invoicing	<input checked="" type="checkbox"/>

OK Cancel



AUTO INVOICING SERVICE ORDERS

AUTOMATING TICKET CLOSURE

Rev.io PSA [TMEHNER\TIGERPAW\VaultCube Technologies]

File Edit View Tools Tasks SOs Activities Reports Help Support Live Chat Academy User Forum

Back Forward History New Save Print Preview Journal Related Notes Items Svcd Parts Tasks Docs Quotes Contracts SOs Assets Passwords Invoices Projects Fields Folders Accounting Knowledge Groups Email Dial Merge Help

View reminders for past due tasks **SO 10018** View unread workflow notifications Sarif Industries (10068) > Ruth Parr > Service Order 10018

FAVORITES ACCOUNTS MATRIX SCHEDULING SALES & MARKETING SERVICE

Service Orders
Service Order Detail
Contracts
Contract Detail
Recurring Agreements
Enter Time
Symptoms
RMAs
Exchanges
Poll MSP Assets
SO Templates
Data Collection Import
EZ Order
Manage DCA Asset Imports

PROJECTS INVOICING TIME & EXPENSES INVENTORY REPORTS & ANALYTICS INTEGRATIONS STATUS AND SETUP

GENERAL INFORMATION

Brief Desc: Incident Security - Threat Status: Assigned

Contact: Ruth Parr Type: Service Call Ref No:

Phone: (402) 815-9237 Main Priority: Emergency (1 hrs 24x7) Cust. PO:

Email: ruth.parr@gmail.com Severity: High Board: (all)

Acc. Phone: (402) 324-4051 Main Zone: Display on customer portal

SUMMARY

- Tasks
- Parts & labor
- Printed
- Items serviced
- Time logs
- Signature
- SO notes
- Documents
- Custom fields
- Recurring orders
- Related SOs
- Expenses
- Not Invoiced

WORK REQUESTED

Sweep and secure area due to threat

INTERNAL COMMENTS

WORK PERFORMED

Detail Billing Shipping Codification Subcontractors Account Related Documents Totals Analysis

DATES AND TIMES

Received: 09/17/2018 at 9:17 AM by Al Powell

Requested: at by

Opened: at

Closed: at

Verified: by Repeat Count: 0

TECHNICIANS

Primary: Anthony Mehner

Associated Technicians

Rep Anthony Mehner Tasks Logged Hours Billable Hours Expenses Mileage

Al Powell

CONTRACT

Contract No.: Basis: Expires on:

Description: Remaining:

Estimated Time: 0 hr 00 m No time logged

System:

When service order is complete, just check 'Ready to auto invoice'



AUTO INVOICING SERVICE ORDERS

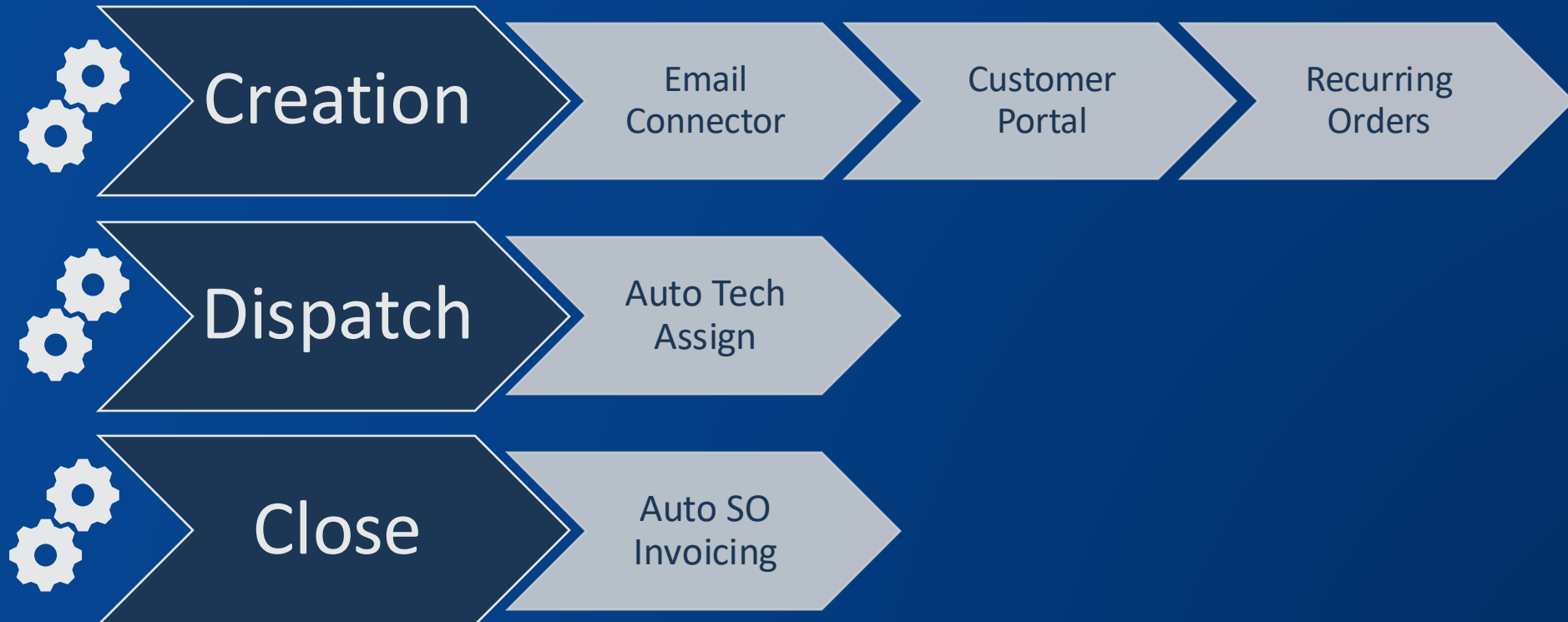
AUTOMATING TICKET CLOSURE

- Rev.io PSA will now automatically review your Service Orders daily and invoice any that have the “Ready to Auto Invoice” option checked.
- This eliminates the need for your invoicing staff to manually create invoices for each service order.
- Additionally, the system will automatically email the invoice to your customer!



AUTOMATING THE SERVICE ORDER PROCESS

PSA DEEP DIVE: UNLOCKING AUTOMATION IN SERVICE ORDER MANAGEMENT



QUESTIONS?

PSA DEEP DIVE: UNLOCKING AUTOMATION IN SERVICE ORDER MANAGEMENT

