

## Work Flow Guidelines

1. **Golden Rule:** Keep customers [and your coworkers] updated. This includes:
  - a. **Anything** relayed to the customer should be written in the WO notes. If you called and left a voicemail saying the device is RFP, that should be put in the notes and the Next Update time should be appropriately selected (ex. 48 hours). If there are no notes beyond the initial RFP status, the realistic assumption is that no one has reached out to the customer since then.
  - b. **Update Today:** This is **not** update your coworkers or “push” each work order to the next day. This is a list of *customers* expecting an update. Even if the device isn’t repaired, there should be *something* to tell the customer. This box **must** be at 0 by EOD every **single** day.
  - c. **SMS:** Confirm “SMS” is checked in the Contacts tab before sending SMS public update.
  - d. **Initials are NOT an update.**
  
2. **Queue Management:** The repair queue is intended **only** for devices that *actually* need attention. This includes:
  - a. **Awaiting Repair:** If you do **not** have: 1) the replacement part, 2) the device, and 3) customer approval, the work order is **not** Awaiting Repair.
    - i. If you’re missing #1, the device goes to NTO with a link and/or description of part.
    - ii. If you’re missing #2, the customer should be notified, customer contact notated in the work order, next update set to 48 hours, and work order status set to Awaiting Device.
    - iii. If you’re missing #3, the customer should be notified, customer contact notated in the work order, next update set to 48 hours, and status set to Awaiting Callback. When applicable, after two weeks of no customer contact, the customer should be notified that their part will be returned in the next week unless some contact with the store is made.
  - b. **Repair Queue:** A manager or senior tech should really be “staging” the work orders for the day at BOD, and this should realistically take < 15m. If accurate Next Update times are used, then techs should easily be able to sort the queue by the next update column and complete repairs (and quote incoming repair turnaround) in the proper order.
    - i. If you have Multi-Day and Single-Day separated. Use “work order actions” to send WO’s from multi-day to single-day if they need to be completed in the near future, so they aren’t missed.
  
3. **Check-ins:** Part should be physically grabbed and scanned to the work order. If the lobby is so backed up that grabbing the part is too time consuming, that likely means someone else should also be up front checking devices in. Items page can be used to confirm a part is **not** in-store.
  
4. **The Repair isn’t Everything:** Successful repairs don’t always mean happy customers. We need to keep them informed. Everyone should follow the steps outlined in these very easy to understand trainings:
  - a. [Proper Work Order Updates & Notes](#)
  - b. [Work Order Updates](#)
  - c. [Proper Work Order Updates & Notes](#)