

Partner Portal- Jobs Tab

In the Jobs tab, you can view all open jobs (subscribers) within your program.

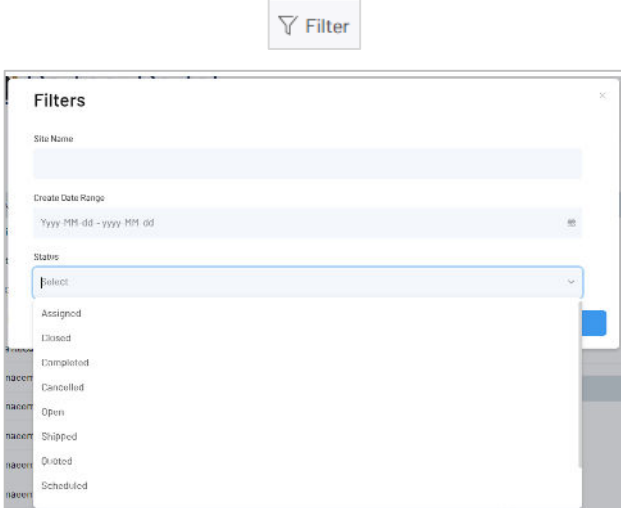
Jobs									Filter	Equipment		
Job#	Status	Type	Site Name	City	Sys Type	Cs#	Created Date	Compl	Result	Type	Cs#	Serial Number
500000107	Assigned	Installation	Verification B2BTest	Framingham	L7200C	905111111	12-21-2023, 02:57 PM					
500000106	Completed	Installation	Confirmation B2BTest	Framingham	LB90A1	901111111	12-21-2023, 02:48 PM	12-21-2023				
500000104	Completed	Installation	Alyse B2BTesting	Framingham	LB90AT	90111115X010824	12-21-2023, 01:38 PM	12-21-2023				
100000784	Completed	Installation	Larren RecurTest	Framingham	L7200C	9051111116	01-12-2024, 04:21 PM	01-12-2024				
100000759	Completed	Installation	Christina RecurTest	Framingham	LB90AT	9011111116	01-12-2024, 12:11 PM	01-12-2024				
100000719	Assigned	Installation	naecm5 naecmtest5	Middletown	LB90AT	-	01-10-2024, 03:16 PM					
100000718	Assigned	Installation	naecm4 naecmtest4	Tukwila	L7200C	-	01-10-2024, 12:12 PM					
100000716	Assigned	Installation	naecm3 naecmtest3	Rush & Division	LB90AT	-	01-10-2024, 02:01 PM					
100000715	Assigned	Installation	naecm2 naecmtest2	Windsor	LB90AT	-	01-10-2024, 02:53 PM					
100000714	Assigned	Installation	naecm1 naecmtest1	Kentlands	LB90AT	-	01-10-2024, 02:41 PM					

Actions		
Action Type	Comment	

Comments		
Change Date	Emp	Comment

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Section	Detail
1	<p>Jobs – view of all open jobs within the program</p>  <p>Filter – you can filter which job to access by selecting the filter and then putting the fields that will get to the desired job (s)</p> <p>Columns in the list</p> <p>Job # – the job number assigned from the CRM</p> <p>Status – status of the job</p> <ul style="list-style-type: none"> Assigned – assigned to be installed Completed – installation job was completed Cancelled – job was cancelled Open – job was created but not assigned or completed Shipped – job was shipped, this should not be a common status for program jobs Quoted – job was quoted Scheduled – job was scheduled for installation

Type – type of job
 Installation – job is for installation of equipment
 Swap/Upsell – job is to exchange type of equipment
 Site Name – name of the site
 City – city address for the subscriber
 Phone – phone number of the subscriber
 Sys Type– type of equipment
 Cs# – ID number of the equipment
 Created Date – date the job was created
 Completed Date – date the job was completed
 Actions – select icon to view the job details

Equipment – summarizes the equipment in the job.

Equipment		
Type	CS#	Serial Number
FDP917	–	1270000125
L7200C	905T111111	–

Actions – details any actions requested with the job. Actions are work that needs to be completed on the site.

Actions	
Action Type	Comment




Comments – displays comments added when the job was creates.

Comments		
Change Date	Emp	Comment

Job Details – displays the details of the job.

Go Back

Job Details

Job #	Site Name
500000106	Confirmation B2BTest 
Status	Site Address
Completed	11 Lawrence Street , 01702, MA
Type	Sys Type
Installation	L690AT
Assigned To	Create Date
HealthCare Services #TT200, Program	2023-12-21 
CS #	Complete Date
901T111111	2023-12-21 

Add comment

Close job

[Add reminder](#)

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Add comment – opportunity to add comments as needed

Close job – opportunity to manually close the job, not necessary as the test call into the Response Center will automatically close the job

Add reminder – add a reminder as needed