

# REQUESTER DETAILS IN EMAIL – ASSIGN EMPLOYEE

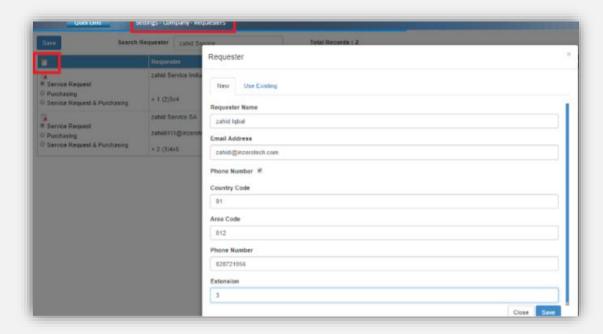
EAGLE TECHNOLOGY, INC.

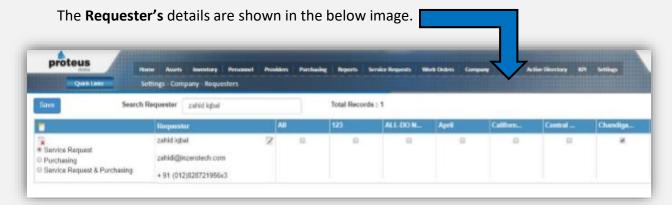


# **REQUESTER DETAILS IN EMAIL**

# ADD REQUESTER (SETTINGS >> COMPANY >> REQUESTERS)

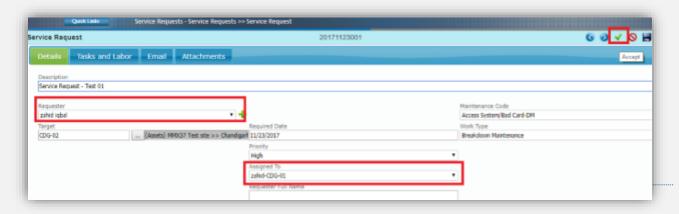
- Fill in the Requester Name field.
- Fill in the **Requester Email** field.
- Fill in the **Requester Phone Details** field.



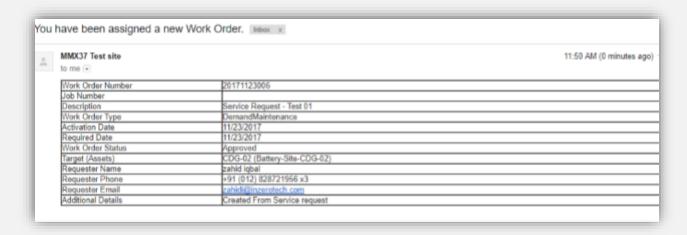


# SCENARIO 1 – ACCEPTING SERVICE REQUEST

- Select the *Requester* from the drop-down.
- Accept the service request.

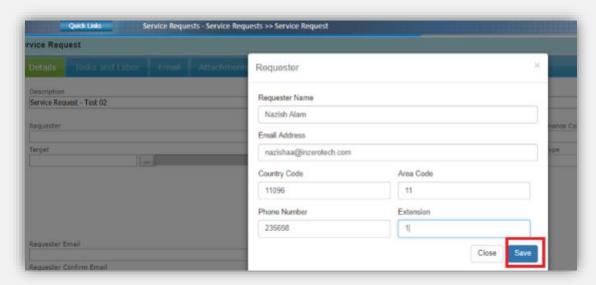


#### THE ASSIGNED EMPLOYEE WILL RECEIVE THE BELOW EMAIL:

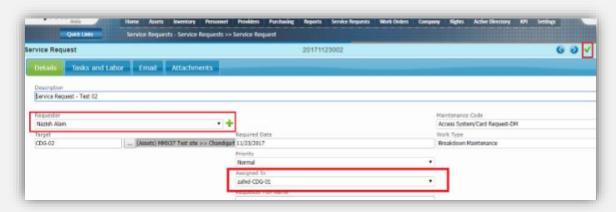


# SCENARIO 2 – ACCEPTING SERVICE REQUEST

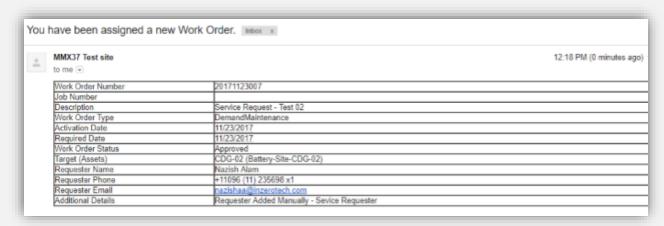
 Add the *Requester* by clicking the *Add* button, which is displays in front of the Requester drop-down.



Accept the service request.

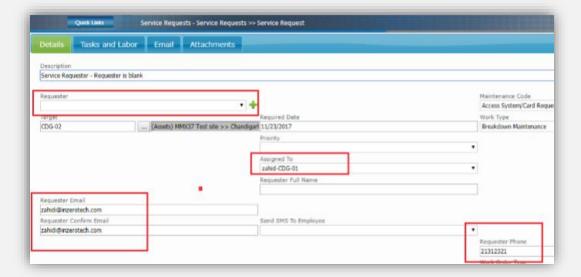


Requester details such as Name, Email, and Phone Number are displayed.

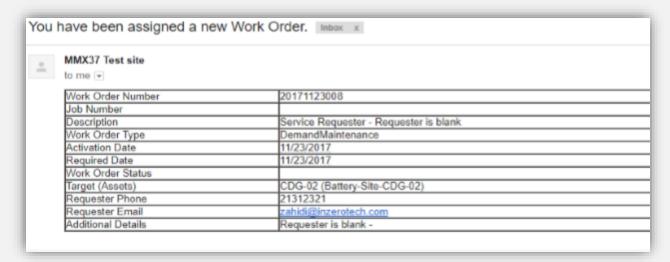


# SCENARIO 3 – ACCEPTING SERVICE REQUEST

- The **Requester** drop-down is now blank.
- Fill in the Requester Email and Requester Confirm Email field shown below.
- Fill in the Requester Phone field shown below.
- Accept the service request.

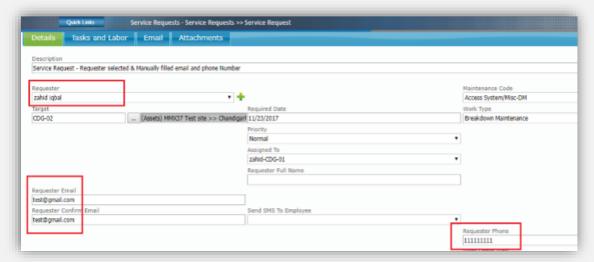


• The manually-filled *Requester Email* and *Requester Phone* fields are shown.

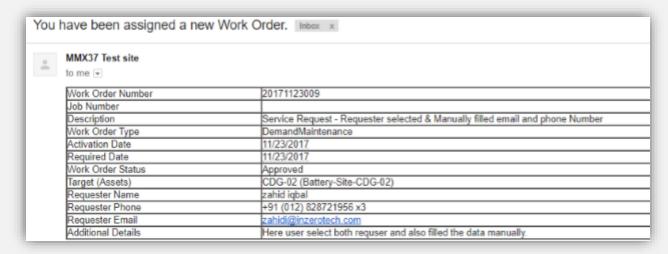


# SCENARIO 4 – ACCEPTING SERVICE REQUEST

- Select the Requester from the drop-down.
- Fill in the **Requester Email** and **Requester Confirm Email**, as shown below.
- Fill in the Requester Phone, as shown below.
- Accept the service request.

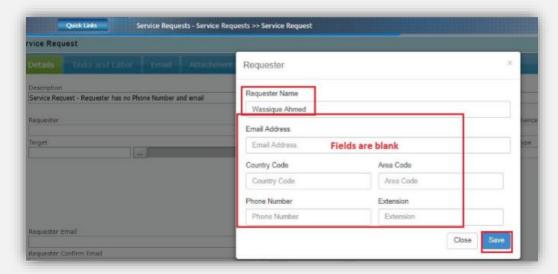


 Details such as *Name, Email*, and *Phone Number* are displayed, which are selected from the drop-down.

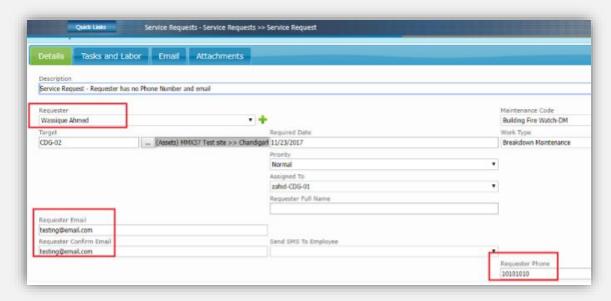


# SCENARIO 5 – ACCEPTING SERVICE REQUEST

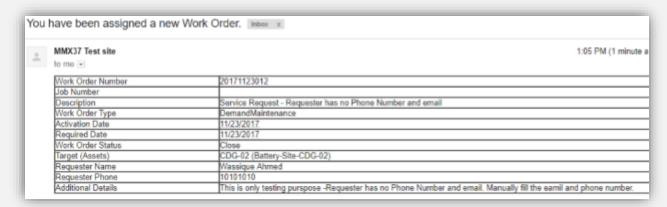
Add the Requester only. Fill in the Requester Name field, as shown below.



- Fill in the **Requester Email** and **Requester Confirm Email**, as shown below.
- Fill in the **Requester Phone**, as shown below.
- Accept the service request.

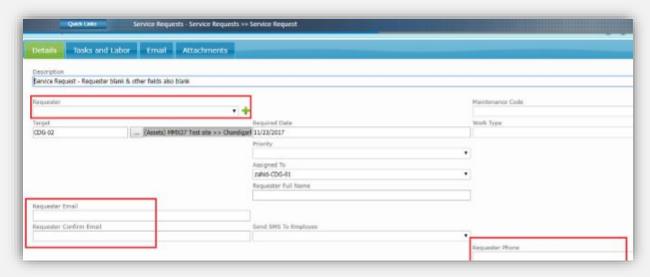


- The Requester Name is shown.
- The *Requester Phone Number* is shown.
- The Requester Email is not shown below.

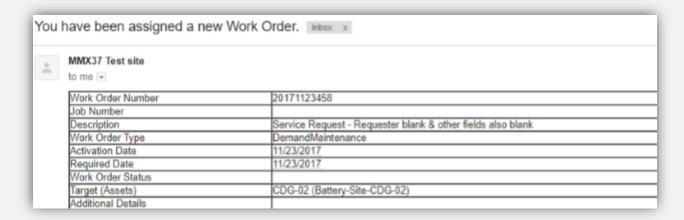


# SCENARIO 6 – ACCEPTING SERVICE REQUEST

- The Requester field is blank, as shown below.
- Requester Email, Requester Confirm Email, and Requester Phone fields are blank, as shown below.
- *Accept* the service request.

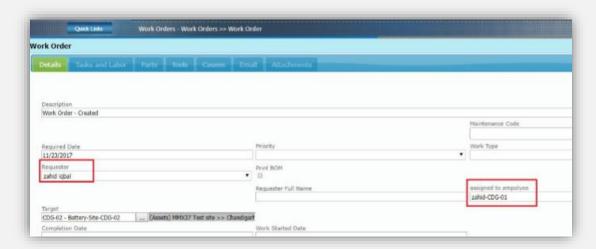


#### THE ASSIGNED EMPLOYEE WILL RECEIVE THE BELOW EMAIL:



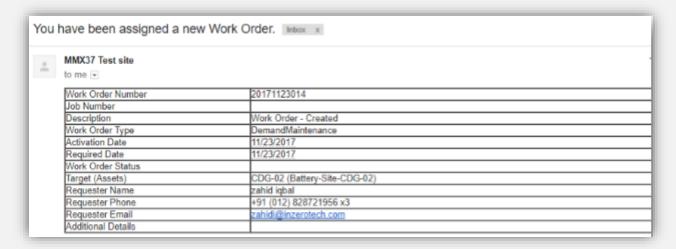
# SCENARIO 7 – WORK ORDER (CREATED)

• Create Work Order and select the Requester from the drop-down, as shown below.



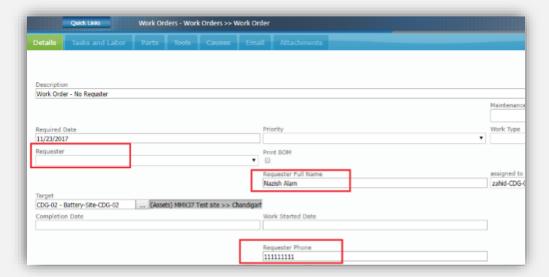
# THE ASSIGNED EMPLOYEE WILL RECEIVE THE BELOW EMAIL:

 Details such as *Name, Email*, and *Phone Number* are displayed, which are selected from the drop-down.



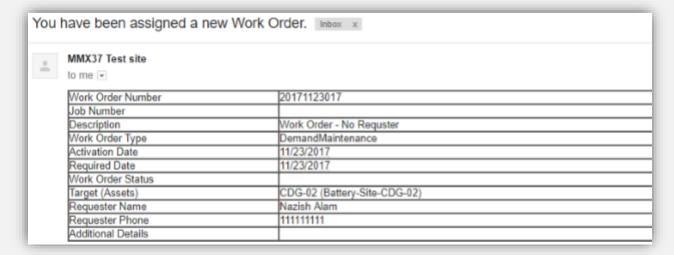
# SCENARIO 8 - WORK ORDER (CREATED)

- Create Work Order and Requester fields are blank, as shown below.
- Fill in the **Requester Full Name** and **Requester Phone** fields, as shown below.



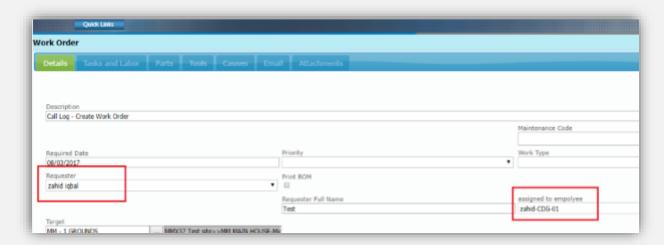
#### THE ASSIGNED EMPLOYEE WILL RECEIVE THE BELOW EMAIL:

Details such as Requester Name and Requester Phone fields are shown.



# SCENARIO 9 - CALL LOG - CREATE WORK ORDER

Create Work Order from Call Log and select Requester, as shown below.



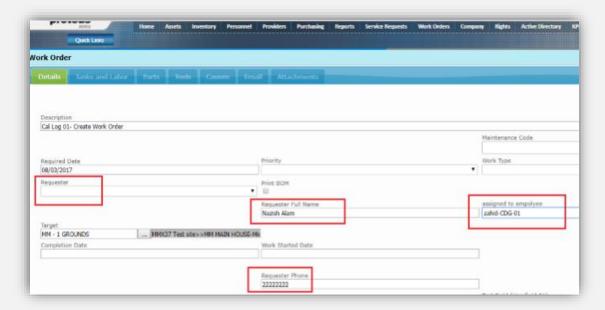
# THE ASSIGNED EMPLOYEE WILL RECEIVE THE BELOW EMAIL:

 Details such as *Name, Email,* and *Phone Number* are shown, which is selected from the drop-down.



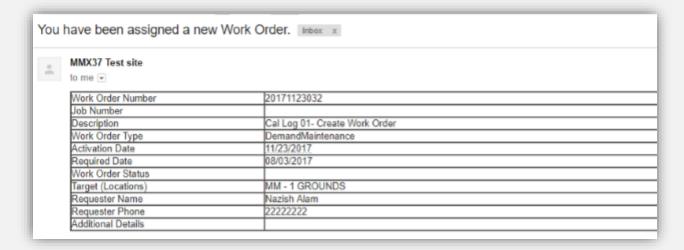
# SCENARIO 10 - CALL LOG - CREATE WORK ORDER

- Create Work Order and the Requester field is blank, as shown below.
- Fill in the **Requester Full Name** and **Requester Phone** fields, as shown below.



#### THE ASSIGNED EMPLOYEE WILL RECEIVE THE BELOW EMAIL:

 Details such as Requester Name and Requester Phone Number are displayed, as shown below.



# SCENARIO 11 – ASSET – CREATE WORK ORDER

• Same flow as shown in: Scenario 9 & 10

# <u>SCENARIO 12 – ASSET SYSTEM – CREATE WORK ORDER</u>

Same flow as shown in: Scenario 9 & 10

# SCENARIO 13 – LOCATION – CREATE WORK ORDER

Same flow as shown in: Scenario 9 & 10

# <u>SCENARIO 14 – STOCKROOM >> STOCKROOM PART – ISSUE REPAIR ORDER</u>

Same flow as shown in: Scenario 9 & 10