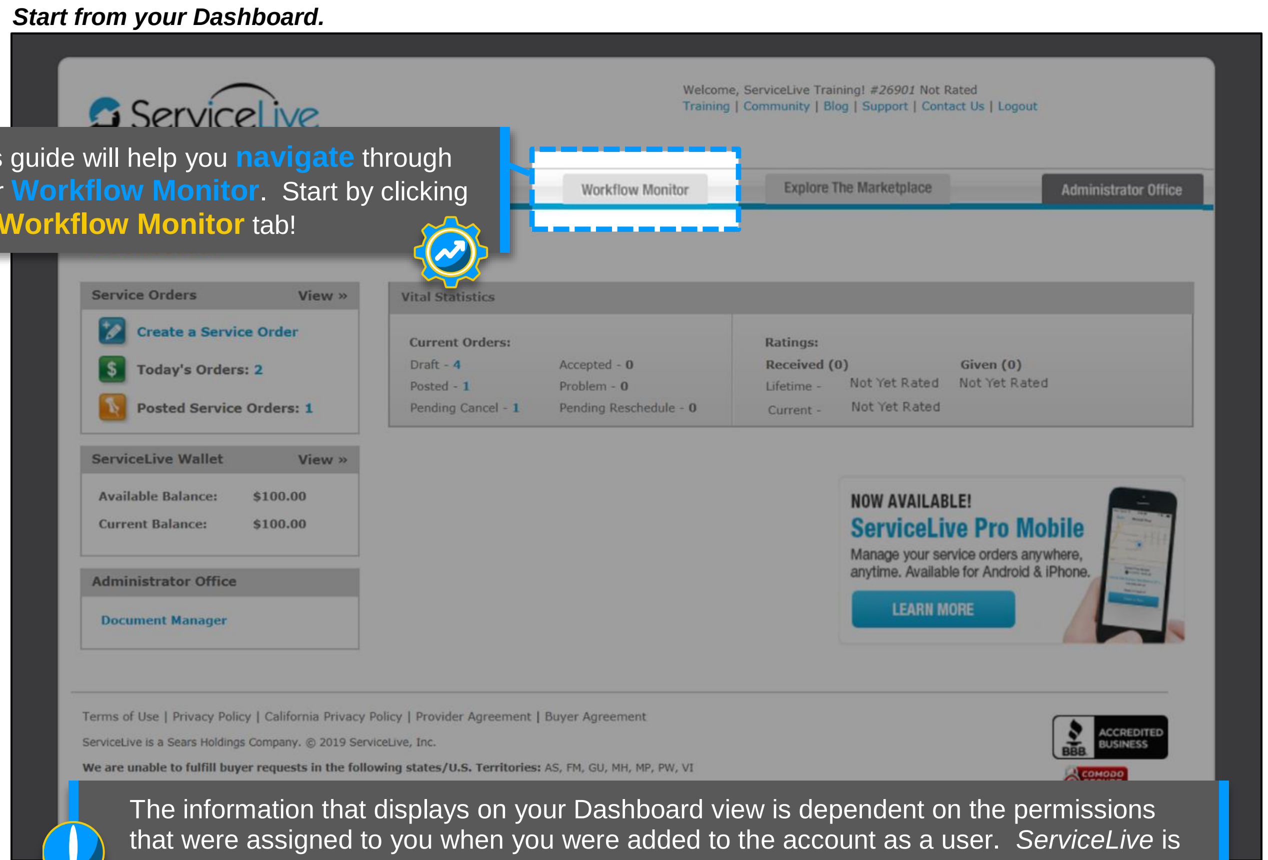
We developed a workflow solution that will help you and your team manage Service Orders throughout their lifecycle. We call this the Workflow Monitor, which includes queues and search tools that can streamline your Service Order workflow and processes. ServiceLive workflow queues are a list of Service Orders stored to be retrievable in a defined order. The defined order that we store them in for you, is by order status. For example, if you want to work on the next available order in Posted status, you can find that order in the Posted queue.

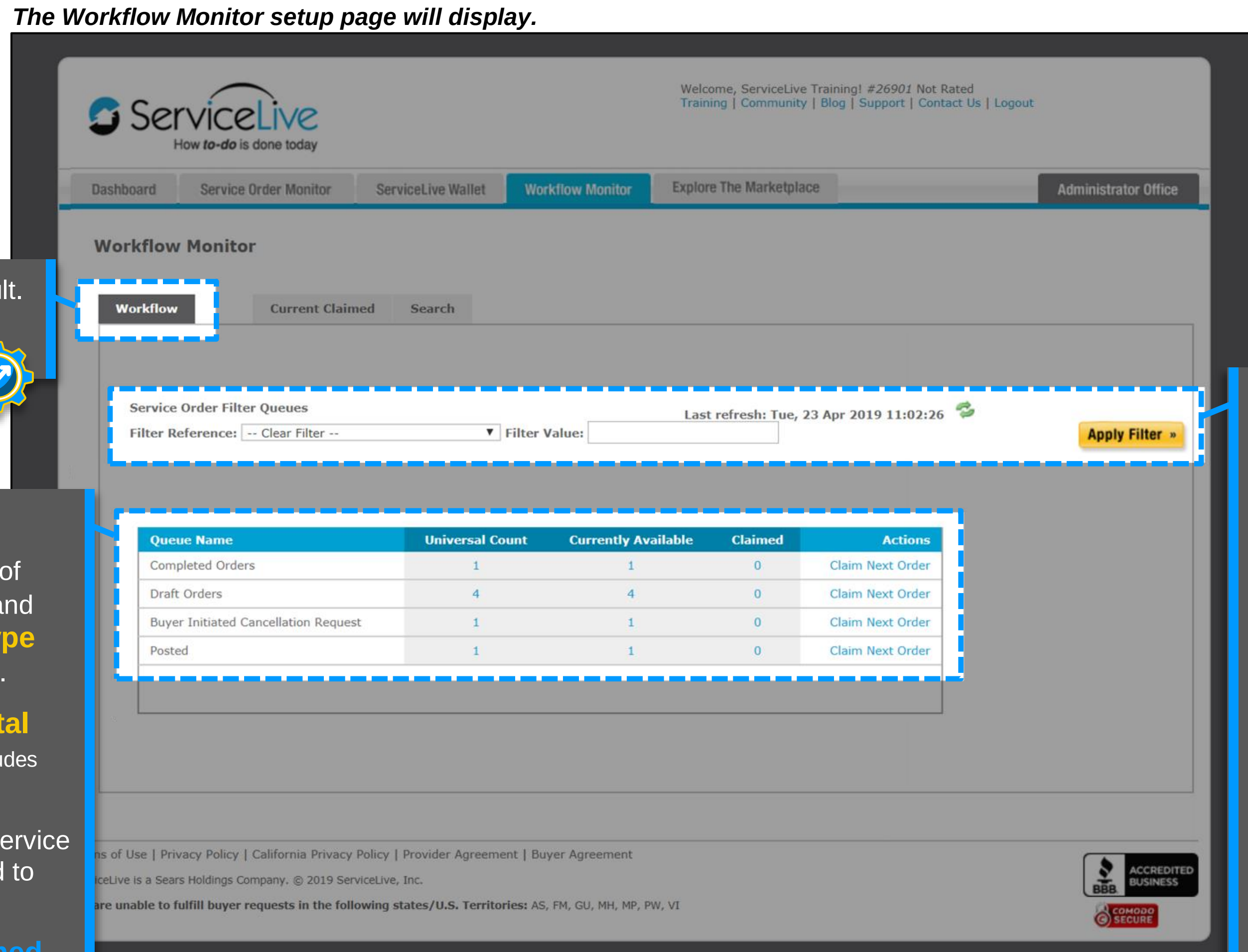
Start from your Dashboard.



This guide will help you **navigate** through your **Workflow Monitor**. Start by clicking the **Workflow Monitor** tab!

The information that displays on your Dashboard view is dependent on the permissions that were assigned to you when you were added to the account as a user. *ServiceLive* is optimized for *Google Chrome* and *Mozilla Firefox* browsers. Do not use *Internet Explorer*. If you do not see these options, contact your *ServiceLive* account Administrator for help!

The Workflow Monitor setup page will display.



The **Workflow** tab will display by default. The Workflow queues you've set up will display on this tab.

Your **queues** will display in this table.

The **queue name** lets you know what type of **Service Orders** (by order status) are in line, and some queues will also let you know **what type of action is needed** (e.g. cancellation request).

The **universal count** lets you know the **total count** of all Service Orders in line (which includes claimed and un-claimed).

The **total count** of **currently available** Service Orders lets you know how many orders need to be worked.

You'll have a breakdown of how many **claimed** Service Orders are being worked on in each queue. Other users cannot claim already claimed orders, however, these orders can still be searched for and accessed from the Search tab.

> These **number values** are **accessible links** (as long as the value is **blue**), that will display their respective Service Orders under the **Search tab** in a list format. Clicking a value that is not blue will still take you to the Search tab, but the results will be blank.

The **actions column** lets you **claim the next available Service Order** in line.

You can use this section to **search** for information embedded in a Service Order by selecting **filter references** and entering **filter values**. These are all related to your **Custom References** (if you've configured them).

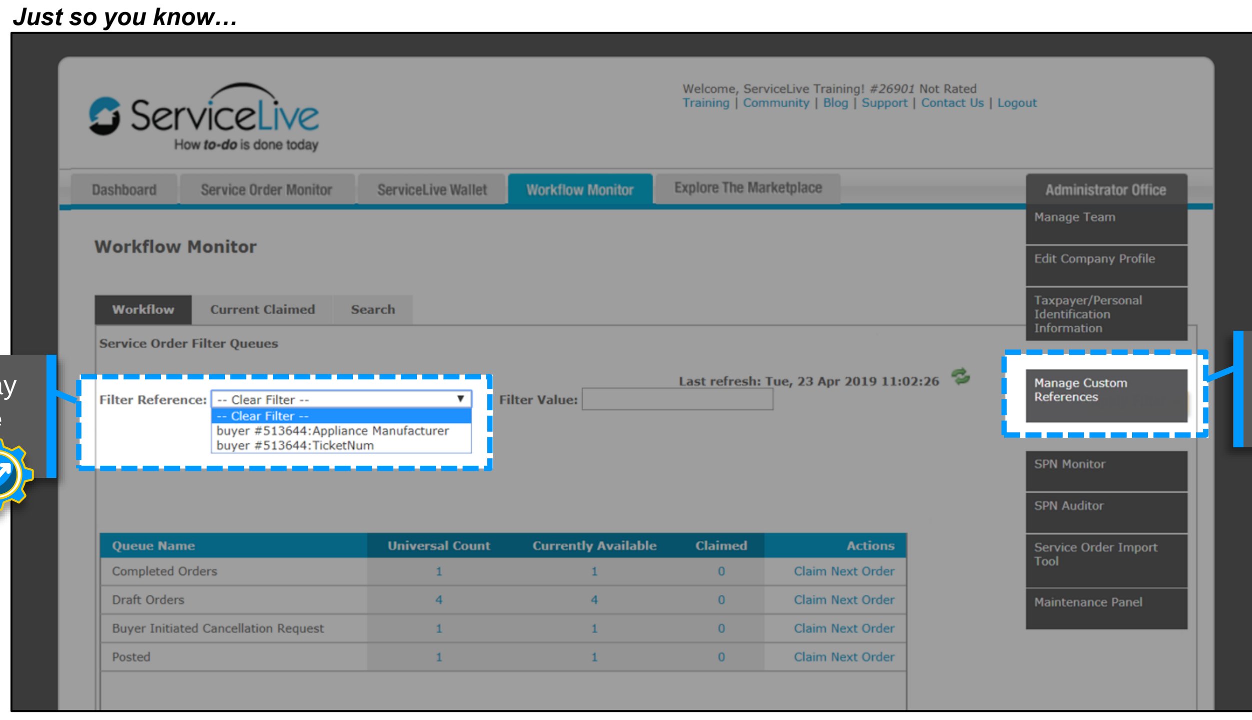
> The **filter reference** is the **Custom Reference field** in a Service Order, and the **filter value** is **information that's entered** in that Custom Reference field.

Choose a **filter** from the **Filter Reference** dropdown menu.

Enter a **filter value** (e.g. N, Y, etc.).

Apply your filter to display all orders related to the **filter value** you entered.

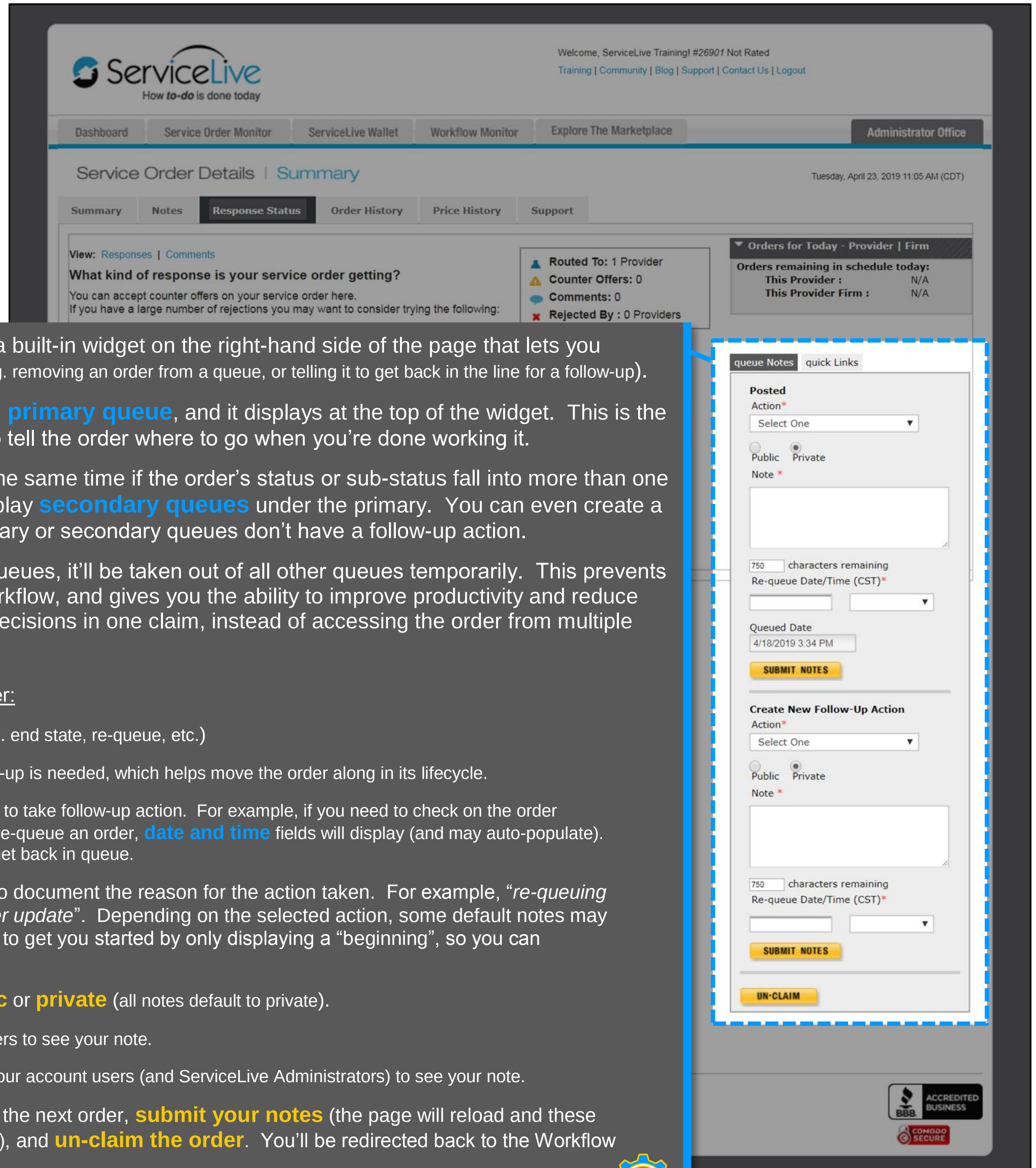
Just so you know…



This list of **filter references** will display all of the **Custom References** you've created.

You can **create and manage** your **Custom References** here!

Inside a Claimed Service Order



Service Orders claimed from a queue have a built-in widget on the right-hand side of the page that lets you manage the order's priority in that queue (e.g. removing an order from a queue, or telling it to get back in the line for a follow-up).

The queue you claimed the order from is the **primary queue**, and it displays at the top of the widget. This is the only queue in the widget that requires you to tell the order where to go when you're done working it.

Some orders may be in multiple queues at the same time if the order's status or sub-status fall into more than one queue's entry criteria. Those orders will display **secondary queues** under the primary. You can even create a new follow-up action, which helps if the primary or secondary queues don't have a follow-up action.

When you claim an order that's in multiple queues, it'll be taken out of all other queues temporarily. This prevents other account users from disrupting your workflow, and gives you the ability to improve productivity and reduce rework by letting you make multiple queue decisions in one claim, instead of accessing the order from multiple queues!

When you're done working a claimed order:

Choose an **action** from the dropdown (i.e. end state, re-queue, etc.)

Use the **end state** option when no follow-up is needed, which helps move the order along in its lifecycle.

Use the **re-queue** option when you need to take follow-up action. For example, if you need to check on the order tomorrow morning. When you choose to re-queue an order, **date and time** fields will display (and may auto-populate). Use these fields to tell the order when to get back in queue.

After you chose an action, **enter notes** to document the reason for the action taken. For example, "*re-queuing for tomorrow morning to check for Provider update*". Depending on the selected action, some default notes may automatically display, which are designed to get you started by only displaying a "beginning", so you can document the rest in your own words.

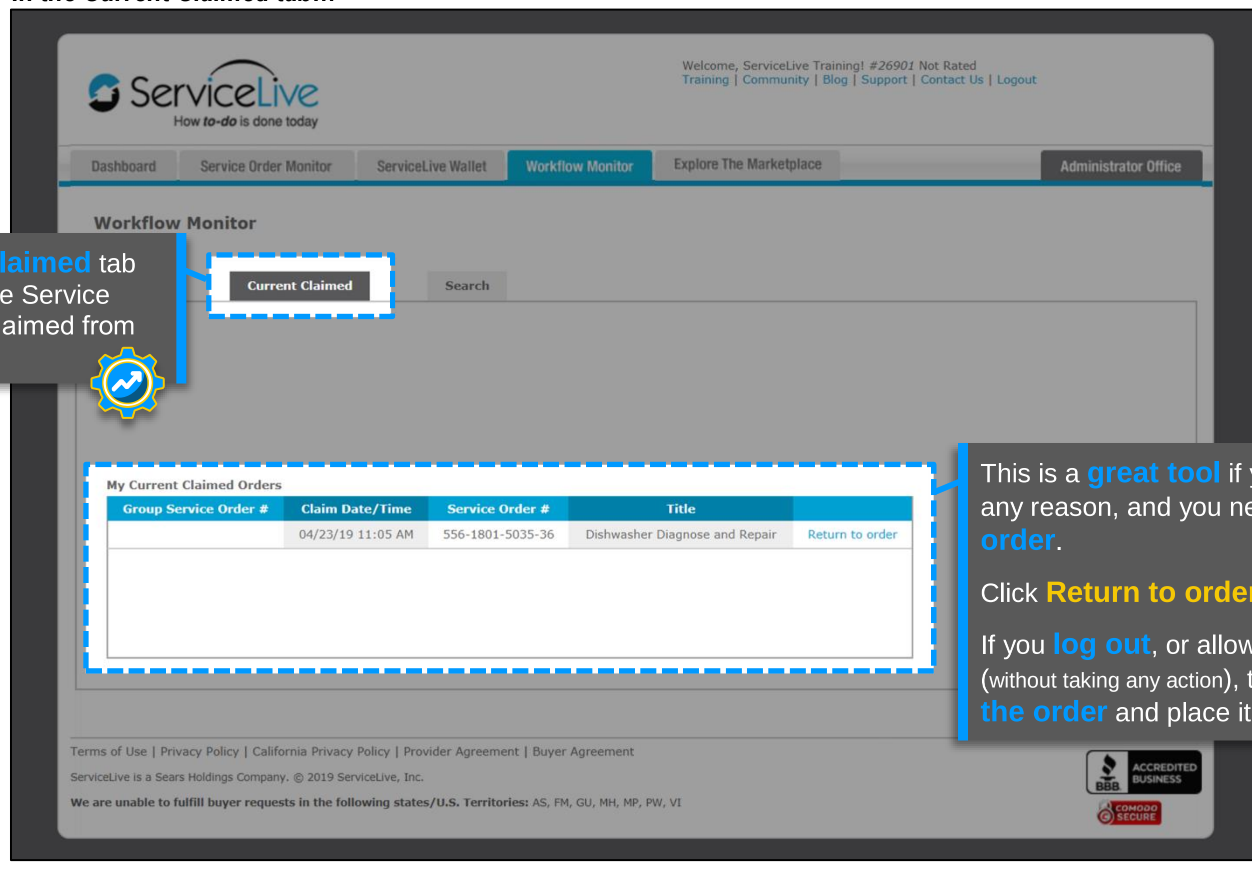
Determine if your note needs to be **public** or **private** (all notes default to private).

Use the **public** option if you want Providers to see your note.

Use the **private** option if you only want your account users (and ServiceLive Administrators) to see your note.

When **you're all done** and ready to claim the next order, **submit your notes** (the page will reload and these notes will display on the order's Notes tab), and **un-claim the order**. You'll be redirected back to the Workflow Monitor.

In the Current Claimed tab…



The **Current Claimed** tab displays all of the Service Orders you've claimed from the queues.

This is a **great tool** if you have to **exit a claimed order** for any reason, and you need to **find your way back into the order**.

Click **Return to order** to access the Service Order.

If you **log out**, or allow an order to **sit idle** for 15-minutes (without taking any action), the system will automatically **un-claim the order** and place it back into the appropriate queue(s).

In the Search tab…

Use the **Search** tab to locate specific (or multiple) Service Orders, no matter which queue(s) they're located in.

Define your searches with **search terms** or **criteria** (that can be combined) to find the Service Order(s) you're looking for in one easy search.

Use **search terms** if you have a general idea of what you're looking for (like a customer's state, or a Service Order's status).

Clicking the **+** icon **next to a search term** will expand a list of available options – choose as many search terms as you need.

When you select a search term, it'll display in the **Selected Search Terms** window, this lets you keep track of what you're searching for.

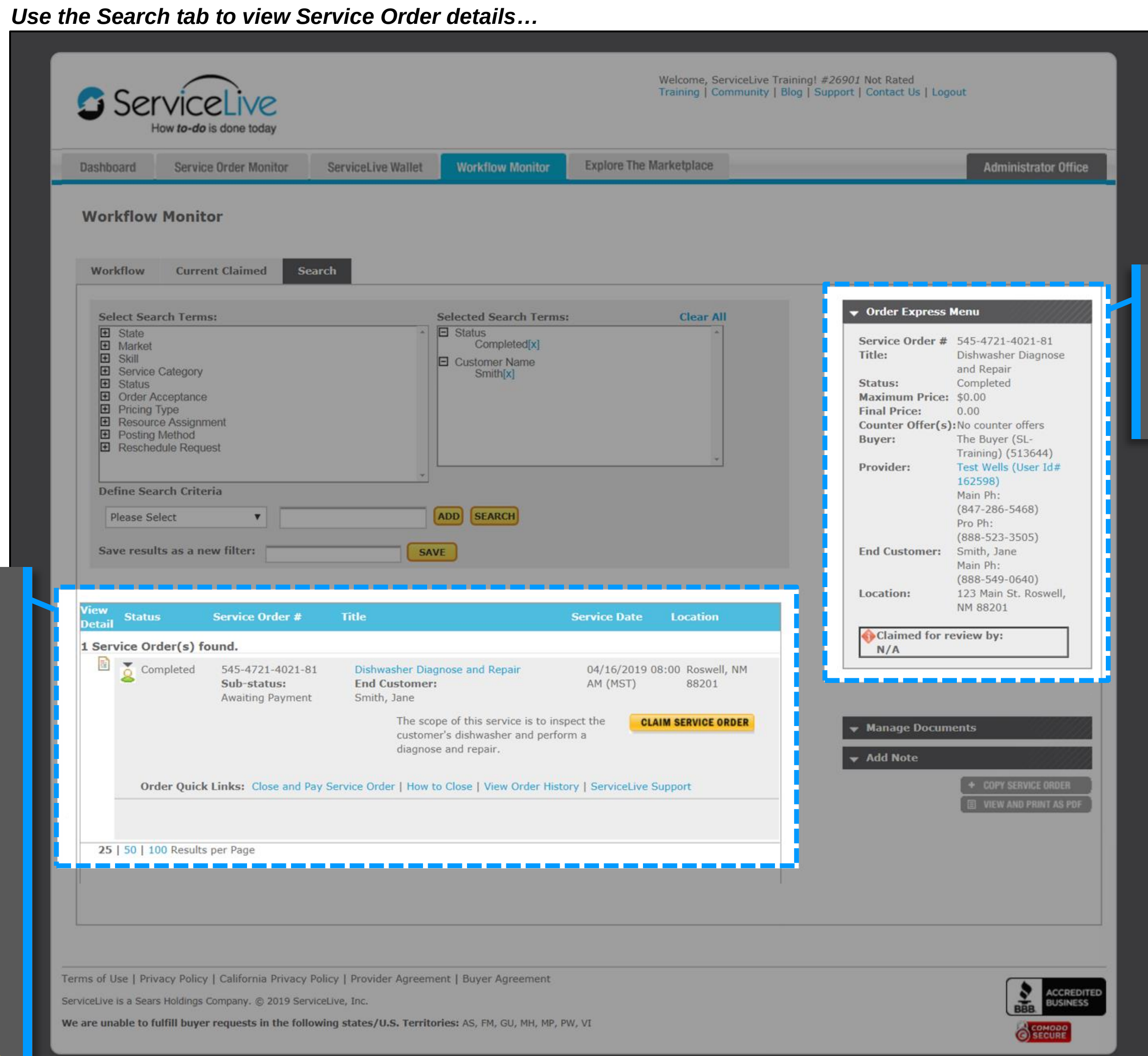
Use the options in the **Define Search Criteria** dropdown menu when you need to search for all Service Orders that **match specific details** (like a customer's name, phone number, etc.), then **enter that specific information** into the **criteria field**. Click **ADD** to include the criteria in the **Selected Search Terms** window. You can **repeat this step** to include as many search terms as you need, giving you the **advantage of finding the orders** you're looking for **quicker and easier**.

Click **SEARCH** when you're ready!

There are **two ways** to **change** or **remove** selected **terms or criteria** from your search – click the ☒ icon **next to the option** you'd like to remove, or click **Clear All** to **remove everything** and start fresh.

Your **search results** will display here.

Use the Search tab to view Service Order details…



When you **expand** an order in the **search results**, more details will display here in the **Order Express Menu** for a **quick overview** without having to access the order.

To view **high-level Service Order details**, click the **order's title** to expand the search results window.

Click **CLAIM SERVICE ORDER** to access the full order.

Some orders in your search results may **already be claimed** by one of your team members. Orders that are claimed by others will display an icon next to the order's status.

Orders that are already claimed **will not display** the CLAIM SERVICE ORDER button. However, the order **can still be accessed** (without claiming), by clicking one of the **Order Quick Links** at the bottom of the order details window.

Questions?
Contact our Support Team at **888-549-0640**, option **5**
Mon - Fri, 8am to 7pm Central Standard Time
Sat, 8am to 5pm Central Standard Time

You can also email us at **Support@servicelive.com**
Mon - Fri, 8am to 5:30pm Central Standard Time