

Add or Edit Technician

Overview:

The "Technician Setup" module allows users to seamlessly create and manage technicians. From basic information to availability, services, tags, and maintenance schedules, this module provides a comprehensive setup for technician profiles.

1. Access "Technician Setup":

- Navigate to the "Technician Setup" module to create or manage doctor profiles.

2. Add New Technician:

- Click on "Add New Technician" to initiate the setup process.

The screenshot shows the SaleRise interface for adding a new technician. The left sidebar has a 'Technician' menu item highlighted. The main content area has a table with existing technicians and a red box around the '+ Add Technician' button. To the right, the 'Add Technician' form is displayed with fields for Name, Description, Email, Phone, and Company, along with an 'Active' toggle and 'CANCEL' and 'SAVE INFO' buttons.

3. Basic Information:

- Fill in essential details for the technician.
 - **Name:** Full name of the technician.
 - **Description:** A brief description of the technician.
 - **Email, Phone:** Contact details for appointments.
 - **Company:** Select the company to which the technician is associated.

4. Upload Images:

- Navigate to the "Images" tab to upload technician images.

- **Multiple Images:** Allow users to upload multiple images for the technician.

The screenshot shows the 'Technician - Warner' setup page in the ScaleRise application. The left sidebar contains navigation options: Sites, Services, Appointment, General, Company, Technician (selected), Service, Tags, Extras, Reservations, and Calendar. The main content area has a tabbed interface with 'INFO', 'IMAGES', 'AVAILABILITY', 'SERVICES', and 'MAINTENANCE'. The 'IMAGES' tab is active, displaying the text 'Attach images to this Technician' and an 'Upload Image' button with a paperclip icon. Above the tabbed interface is a list of technicians: Dom jack, Jon mark, David, Watson, and Warner (highlighted in blue).

5. Access "Availability" Tab:

- Navigate to the "Availability" tab within the technician setup.

6. Slot Time Configuration:

- Choose between "Custom Slot Time" or "By Services."
- **Custom Slot Time:**
 - Specify the duration of each appointment slot (e.g., 60 minutes for a 1-hour slot).
 - Example: If a custom slot time is set to 60 minutes, each slot represents a one-hour appointment.

The screenshot shows the 'Technician - Warner' setup page with the 'AVAILABILITY' tab selected. The 'Availability Type' is set to 'Daily'. Below this, there is a configuration section for 'Slot Session' and 'Duration (in minutes)'. The 'Slot Session' is set to 'Custom' and the 'Duration' is set to '40'. A red box highlights this configuration area, and a red arrow points to it with the label 'Custom Slot Session'. Below the configuration section, there are fields for 'Days' (containing the text 'No days, please add') and 'Timeslots'. At the bottom right, there is a '+ ADD DAY' button and a 'CANCEL' button.

- **By Services:**

- Create slots based on the time associated with each service.
- Example: If a service takes 30 minutes, slots will be generated accordingly.

The screenshot shows the 'Appointment / Technician' page in the ScaleRise system. The left sidebar contains navigation options: Sites, Services, Appointment, General, Company, Technician, Service, Tags, Extras, Reservations, and Calendar. The main content area is titled 'Technician - Warner'. It features a table of technicians with columns for name and a delete icon. The 'Warner' technician is selected. Below the table, there are tabs for 'INFO', 'IMAGES', 'AVAILABILITY', 'SERVICES', and 'MAINTENANCE'. The 'AVAILABILITY' tab is active. It shows 'Availability Type' as 'Daily' and 'Slot Session' as 'By Company'. The 'Days' field displays 'No days, please add' and the 'Timeslots' field is empty. A red box highlights the 'Slot Session By Company' field, and a red arrow points to it with the label 'Slot Session By Company'.

7. Add Days of Availability:

- Click on "Add Days" to specify the days the technician is available.
 - **Select Days:** Choose the days the technician will be available for appointments.

This screenshot is similar to the previous one, but with a red box highlighting the '+ ADD DAY' button in the 'Days' field. A red arrow points to this button with the label 'Add Days'. The 'Timeslots' field remains empty, and the 'Slot Session' is still 'By Company'.

- Example: Select these days if a technician is available on Mondays and Wednesdays.

8. Time Slot Configuration:

- For each selected day, add multiple time slots:

The screenshot shows the 'Appointment / Technician' page for 'Technician - Warner'. The left sidebar contains navigation options: Sites, Services, Appointment, General, Company, Technician, Service, Tags, Extras, Reservations, and Calendar. The 'Technician' section is expanded, showing a list of technicians: Dom jack, Jon mark, David, Watson, and Warner. The 'Warner' technician is selected. The main content area shows the 'Technician - Warner' profile with tabs for INFO, IMAGES, AVAILABILITY, SERVICES, and MAINTENANCE. The 'AVAILABILITY' tab is active. It displays 'Availability Type: Daily' and 'Slot Session: By Company'. Under 'Days', Sunday and Monday are marked as 'Open'. Under 'Timeslots (Sunday)', the 'Start' time is 08:00 AM, 'End' time is 04:00 PM, and 'Seats' is 1. A red box highlights the '+ ADD TIMESLOT' button, with a red arrow pointing to it and the text 'Add Multiple Timeslots'.

- **Start Time and End Time:** Define the beginning and end of the working hours.

The screenshot shows the 'Appointment / Technician' page for 'Technician - Warner'. The left sidebar contains navigation options: Sites, Services, Appointment, General, Company, Technician, Service, Tags, Extras, Reservations, and Calendar. The 'Technician' section is expanded, showing a list of technicians: Dom jack, Jon mark, David, Watson, and Warner. The 'Warner' technician is selected. The main content area shows the 'Technician - Warner' profile with tabs for INFO, IMAGES, AVAILABILITY, SERVICES, and MAINTENANCE. The 'AVAILABILITY' tab is active. It displays 'Availability Type: Daily' and 'Slot Session: By Company'. Under 'Days', Sunday and Monday are marked as 'Open'. Under 'Timeslots (Sunday)', the 'Start' time is 08:00 AM, 'End' time is 04:00 PM, and 'Seats' is 1. A red box highlights the 'Start' and 'End' time fields, with a red arrow pointing to them and the text 'Start & End Time'.

- Example: If working hours are from 9:00 AM to 5:00 PM, set the start and end times accordingly.
- **Seats:** Specify the number of bookings allowed in each time slot.

The screenshot shows the 'Appointment / Technician' page for 'Technician - Warner'. The left sidebar contains navigation options: Sites, Services, Appointment, General, Company, Technician, Service, Tags, Extras, Reservations, and Calendar. The 'Technician' section is expanded, showing a list of technicians: Dom jack, Jon mark, David, Watson, and Warner. The 'Warner' technician is selected. The main content area shows the 'Technician - Warner' profile with tabs for INFO, IMAGES, AVAILABILITY, SERVICES, and MAINTENANCE. The 'AVAILABILITY' tab is active. It displays 'Availability Type: Daily' and 'Slot Session: By Company'. Under 'Days', Sunday and Monday are marked as 'Open'. Under 'Timeslots (Sunday)', the 'Start' time is 08:00 AM, 'End' time is 04:00 PM, and 'Seats' is 1. A red box highlights the 'Seats' field, with a red arrow pointing to it.

- Example: If there are five seats, five customers can book appointments in that time slot.

9. Save Time Slots:

- Click "Save" to confirm the configured time slots.
 - Example: After saving, the system generates slots based on the specified times for each selected day.

10. Services Assignment:

- In the "Services" tab, assign services to the technician.
 - **Assign Multiple Services:** Link various services to the technician.

The screenshot shows the 'Services' tab in the SoleRise application. On the left, a sidebar lists navigation options: Sites, Services, Appointment, General, Company, Technician, Service, Tags, Extras, Reservations, and Calendar. The 'Technician' section is expanded, showing a list of technicians: Dom Jack, Jon mark, David, Watson, and Warner. The 'Warner' technician is selected. The main area displays the 'Technician - Warner' details. At the top, there are tabs for INFO, IMAGES, AVAILABILITY, SERVICES, and MAINTENANCE. The 'SERVICES' tab is active, showing a section titled 'Attach services to this Technician'. Below this, there are four services with toggle switches: 'Electrical Panel Upgrades' (checked), 'Lighting Repair' (checked), 'Ceiling Fan In' (unchecked), and 'Wiring and Rewiring' (unchecked). At the bottom right, there are 'CANCEL' and 'SAVE SE' buttons.

- **Tags:** Add tags to categorize services (e.g., free, not included).

11. Maintenance Schedules:

- Access the "Maintenance" tab to manage technician unavailability.

- **Add New Maintenance:** Specify start and end dates, times, and reasons.

The screenshot shows the 'Add New Maintenance' form in the ScaleRise system. The left sidebar contains navigation links for Sites, Services, Appointment, General, Company, Technician, Service, Tags, Extras, Reservations, and Calendar. The main content area is titled 'Technician - Dom jack' and features a table with columns for Start, End, Reason, and Actions. A red box highlights the '+ ADD NEW' button, and a red arrow points to it with the text 'Add Maintenance'.

Start	End	Reason	Actions
2023-09-07 20:00	2023-09-07 13:00	aaa	EDIT DELETE
2023-09-19 08:00	2023-09-20 07:00	kjh	EDIT DELETE
2023-09-28 08:00	2023-10-02 16:00	nn	EDIT DELETE

Records per page: CANCEL SAVE CH

- **Table View:** Display a table view of past and upcoming maintenance schedules.
- **Edit or Delete Maintenance:** Allow users to modify or remove maintenance entries.

The screenshot shows the 'Edit Maintenance' form in the ScaleRise system. The left sidebar contains navigation links for Sites, Services, Appointment, General, Company, Technician, Service, Tags, Extras, Reservations, and Calendar. The main content area is titled 'Technician - Dom jack' and features a table with columns for Start, End, Reason, and Actions. A red box highlights the 'EDIT' button, and a red arrow points to it with the text 'Edit Maintenance'.

Start	End	Reason	Actions
2023-09-07 20:00	2023-09-07 13:00	aaa	EDIT DELETE
2023-09-19 08:00	2023-09-20 07:00	kjh	EDIT DELETE
2023-09-28 08:00	2023-10-02 16:00	nn	EDIT DELETE

Records per page: CANCEL SAVE CH

12. Save and Review:

- Click "Save" to confirm the technician setup.
- Review the technician profile and make any necessary edits.

13. View and Manage Technician:

- Access the list of technicians with options to edit or deactivate.

14. Edit Technician Details:

- Click on the edit button to modify the technician information.

Revision #3

Created 2024-01-16 08:48:26 UTC by Adnan

Updated 2024-01-19 15:49:40 UTC by Adnan