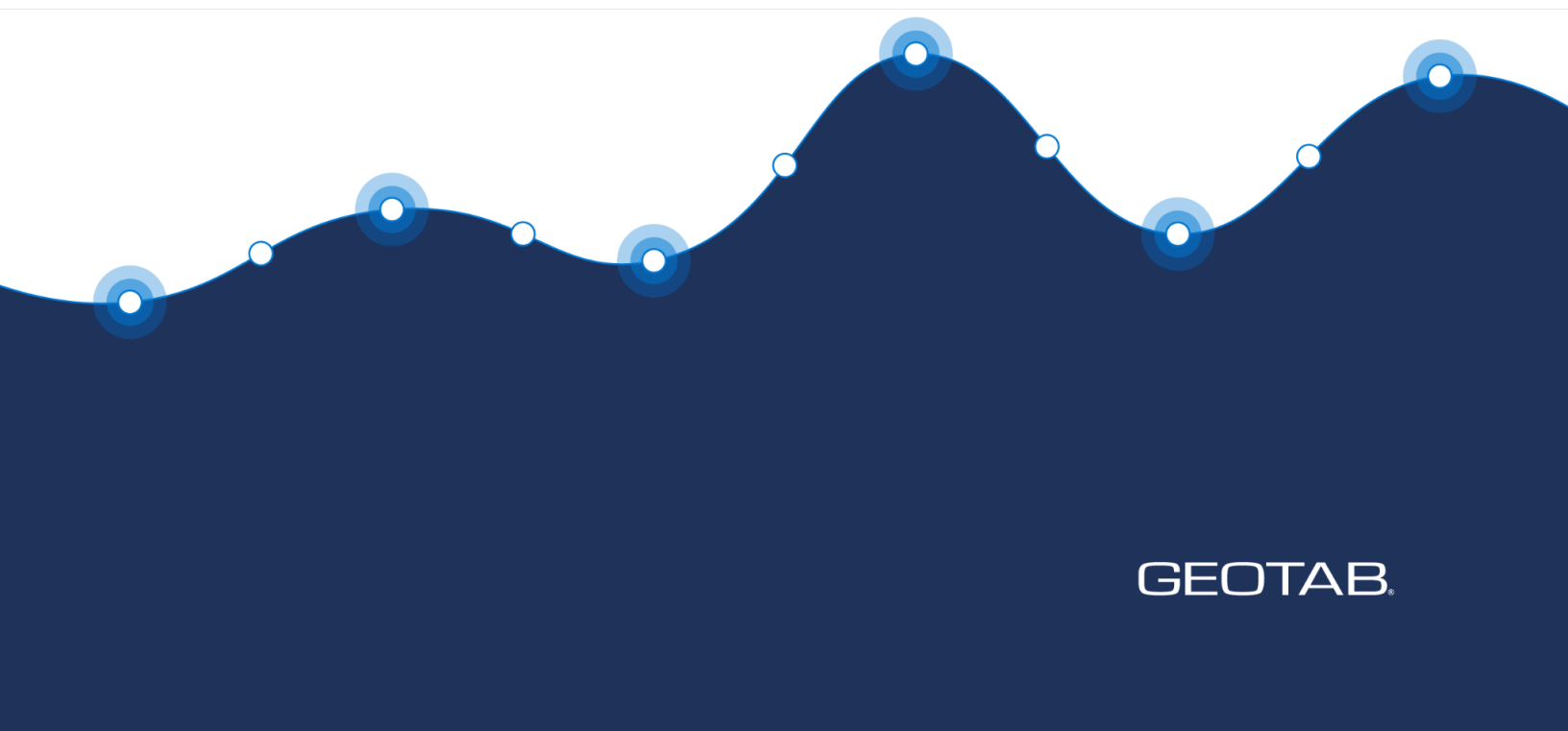


Work Order Update

Installer Partner Community User Guide

May 2023



GEOTAB®

Introduction

Geotab Authorized Installers use the Geotab Partner Community to manage Work Orders assigned to them by Geotab. This document outlines how to update a Work Order (WO) and how to populate Work Order Line Items (WOLI).

To access the Geotab Partner Community, go [here](#). Enter your username (email address) and password.

All Partner Community credentials for Authorized Installers are created by the Geotab Field Services team. If you need more information or have any questions about accessing the **Partner Community**, contact fieldservicecoordinators@geotab.com.

Automatically updating Work Order Line Items (MyInstall)

All installers with Geotab-assigned Work Orders must use MyInstall (full version) to perform installation checks. Using MyInstall and selecting the appropriate work order and services automatically transfer the installation information to the Partner Community, and populated it within the work order.

To access MyInstall (full version), go [here](#). Enter your username (email address) and password.

The initial administrator account is created by the Geotab Field Services team. The administrator can then create additional logins for their technicians.

Refer to the [MyInstall User Guide \[PUB\]](#) for more information on how to use MyInstall and create additional installer accounts.

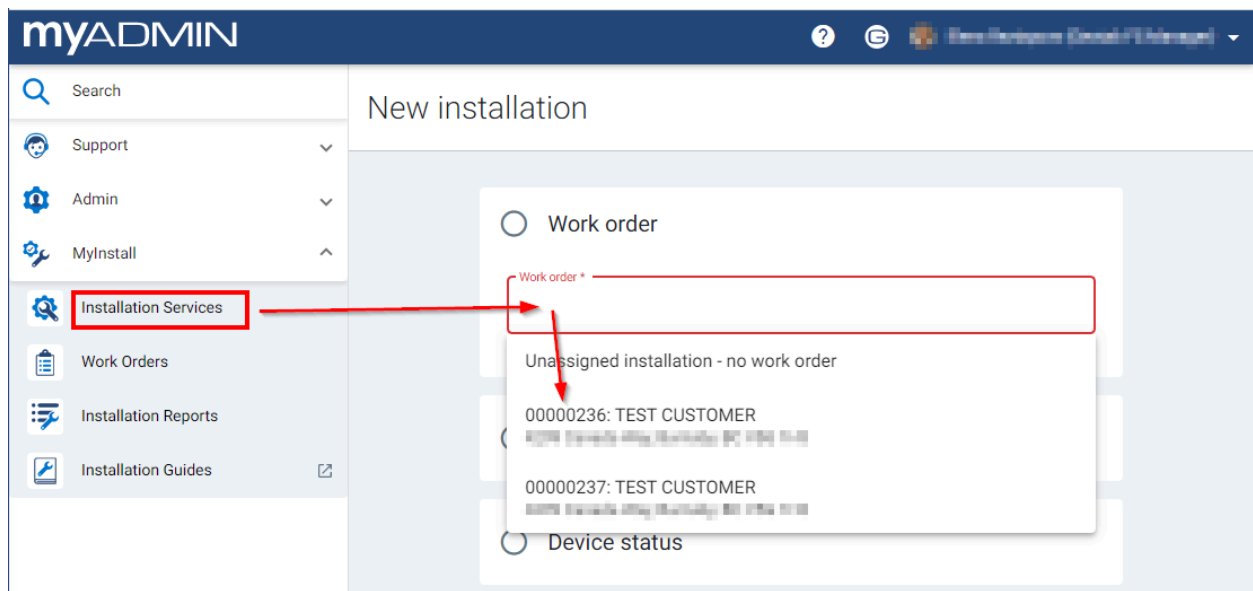
There are two ways to select the Work Order in MyInstall:

Option A: In the main menu, select **Work Orders** and then select the Work Order that is associated with your installation. Click **New Installation** to begin the installation check.

The screenshot shows the myADMIN interface. On the left sidebar, the 'Work Orders' menu item is highlighted with a red box. A red arrow points from this menu item to the 'Work Orders' section in the main content area. The 'Work Orders' section displays a list of work orders for 'TEST CUSTOMER'. The first work order is highlighted, showing details like Address, Contact, and Contact Phone Number. Below this, there is a table titled 'Install services' with columns 'Total' and 'Done'. The table shows 'Standard Installation' with a total of 2 and 1 done. At the bottom of the work order details, the 'New Installation' button is highlighted with a red box. Other buttons like 'Remove device', 'Swap devices', and 'Service device' are also visible.

Install services	Total	Done
Standard Installation	2	1

Option B: In the main menu, select the **Installation Services** tab and then select **New installation**. Next, use the Work Order text field to select the Work Order that is associated with your installation and then proceed with the installation check.



* **NOTE:** Option A includes more information about the work orders assigned to you.

Manually updating Work Order Line Items

In exceptional cases (such as when MyInstall cannot be used to perform an install check, or when MyInstall results cannot be submitted to the Partner Community due to server issues), Installer Admins can manually update Work Order Line Items. Here's how to do this:

- 1 Go to the **In Progress Work Orders** section and then select the work order you want to update. Click on the work order number:

Work Orders
In Progress Work Orders ▼

1 item • Sorted by Work Order Number • Filtered by My work orders - Status • Updated a few seconds ago

	Wor... ↑ ▼	Status ▼	Customer ... ▼	Custome... ▼	Street ▼	City ▼	St... ▼	To... ▼	To... ▼	
1	00008597	Accepted						177	0	

- 2 Under **Work Order Lines**, click **View All**:

Work Order Lines	Appointments	Invoices	Chatter
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Work Order Line Items (6+)			
Work Order Line Item Number	Status	Product Name	Vehicle Name
00000200	New	Standard Install	
00000199	New	Standard Install	
00000198	New	Standard Install	
00000197	New	Standard Install	
00000196	New	Standard Install	
00000195	New	Standard Install	
View All			

- 3 Edit a **Work Order Line Item** (WOLI) by clicking the number:

Work Orders > 00008597

Work Order Line Items

50+ Items • Sorted by Work Order Line Item Number • Updated a minute ago

	Work Ord... ▾	Status ▾	Product Name ▾	Vehicle ... ▾	Serial Nu... ▾	Install Da... ▾	Product Code ▾	Install Se... ▾	Charge ▾	Last Modified By ▾	
1	00000200	New	Standard Install				INS-GOSTRO	Install	CAD 80.00 (USD 57.14)	MyAdmin Integration User	▾
2	00000199	New	Standard Install				INS-GOSTRO	Install	CAD 80.00 (USD 57.14)	MyAdmin Integration User	▾
3	00000198	New	Standard Install				INS-GOSTRO	Install	CAD 80.00 (USD 57.14)	MyAdmin Integration User	▾
4	00000197	New	Standard Install				INS-GOSTRO	Install	CAD 80.00 (USD 57.14)	MyAdmin Integration User	▾
5	00000196	New	Standard Install				INS-GOSTRO	Install	CAD 80.00 (USD 57.14)	MyAdmin Integration User	▾
6	00000195	New	Standard Install				INS-GOSTRO	Install	CAD 80.00 (USD 57.14)	MyAdmin Integration User	▾
7	00000194	New	Standard Install				INS-GOSTRO	Install	CAD 80.00 (USD 57.14)	MyAdmin Integration User	▾
8	00000193	New	Standard Install				INS-GOSTRO	Install	CAD 80.00 (USD 57.14)	MyAdmin Integration User	▾
9	00000192	New	Standard Install				INS-GOSTRO	Install	CAD 80.00 (USD 57.14)	MyAdmin Integration User	▾
10	00000191	New	Standard Install				INS-GOSTRO	Install	CAD 80.00 (USD 57.14)	MyAdmin Integration User	▾

*** NOTE:** If multiple services were performed for a vehicle, you will need to update all associated WOLIs. For example, if you performed a removal and installation, you would update lines with Product Codes INS-REMOVAL and INS-GOSTRD.

- 4 Confirm that you selected the right WOLI by double-checking the information under **Details**:

Details	Related
<div> <div>Information</div> <div> <div>Work Order Line Item Number</div> <div>00000200</div> </div> <div> <div>Work Order</div> <div>00008597</div> </div> </div> <div> <div>Product Name</div> <div>Standard Install</div> </div> <div> <div>Product Code</div> <div>INS-GOSTRD</div> </div> <div> <div>Install/Service Type</div> <div>Install</div> </div>	
<div>Charge Information</div>	

- 5 In the **Status** drop-down menu, select **Completed** and then add the **Service Information** by clicking the pencil icon:

▼ Service Information

Status

Completed

--None--

New

✓ Completed

Canceled

Invoiced

Paid

▼ Service Information

Status		Last Communicated	
New			
Installed By		Installation Comments	
Install Date			

6 Add the **Device & Vehicle Information** by clicking the pencil icon:

▼ Device & Vehicle Information

Serial Number		Make	
Vehicle Name		Model	
VIN		Year	
Removed Device Serial Number			

7 Once all the information has been entered, click **Save**:

▼ Service Information

Status

Completed

Installed By

Emelle

Install Date

Date

4/3/2023

Time

12:00 PM

Last Communicated ⓘ

Date

Time

Installation Comments

▼ Device & Vehicle Information

Serial Number

G9F79020696H

Vehicle Name

21

VIN

F134676845996699

Removed Device Serial Number

Make

Ford

Model

F150

Year

2021

▼ Connected Equipment

Harness

Camera ID

Cancel

Save

Comments