Work Order Update
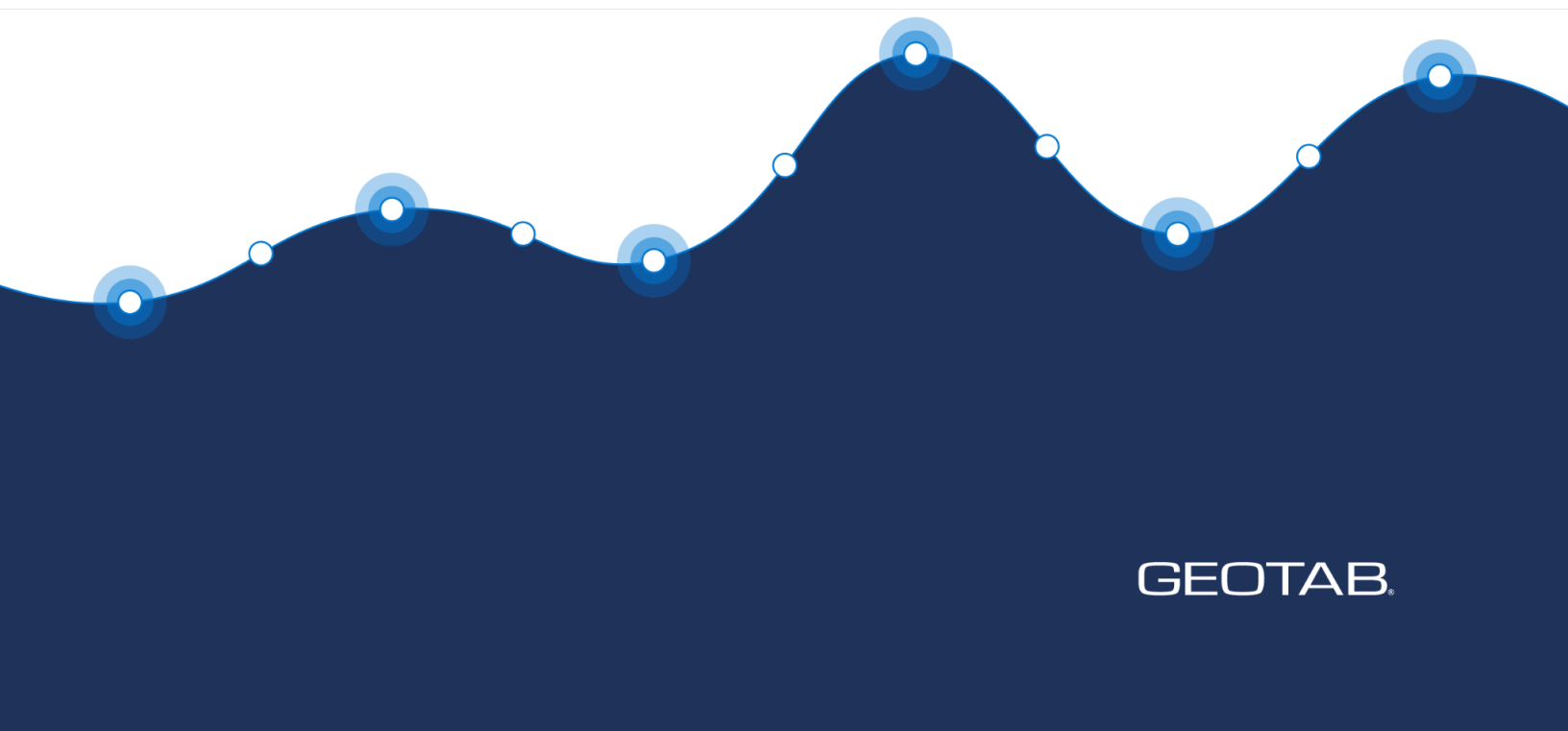
Installer Partner Community User Guide

May 2023

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.

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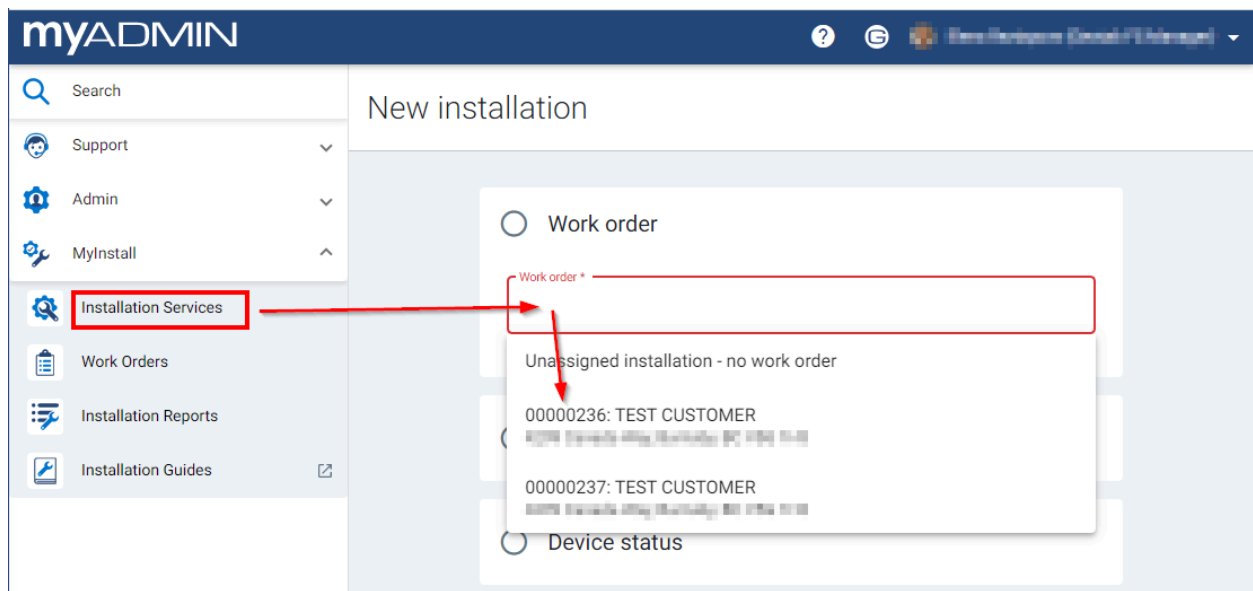
✱ **NOTE**: Option A includes more information about the work orders assigned to you.

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: |

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

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

✱ **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**:

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

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

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

Service Information

Status
Completed ▾

Installed By
Emelie

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**