Sage Service Operations- Alert Manager Guide

About Alerts:
Using the Custom Field Manager, Admin users can setup custom Alert Messages for a Service Site, Work Order, or Customer Equipment. The label and text for each message can be customized and formatted to notify your users. Alerts are displayed prominently for field and office employees on the Work Order and Service Site pages to ensure all are informed of safety issues or special customer procedures before arriving onsite. Here are a few examples to get you started:

Site Specific Safety Notes

<table>
<thead>
<tr>
<th>Safety Issue</th>
</tr>
</thead>
<tbody>
<tr>
<td>This location has asbestos in the concrete floor. Do not drill holes in the floor.</td>
</tr>
</tbody>
</table>

Site Specific Procedures

<table>
<thead>
<tr>
<th>Customer Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>There is a strict Standard Operating Procedure for this client. Please CLICK HERE for to retrieve the customers SOP.</td>
</tr>
</tbody>
</table>
Follow the steps outlined below to set up custom Alert Messages:

1. Make sure the appropriate custom field(s) is enabled for your organization.
   Go to Admin>Settings>Service Locations> Enable Site Custom Fields
   Go to Admin>Settings>Service Locations> Enable Equipment Custom Fields
   Go to Admin>Settings>Work Orders> Enable Work Order Custom Fields

2. Set Up Custom Field Alert - Tools>Custom Field Manager
   a. Click +Custom Field
   b. Select Input Type - Alert Message
c. Set up Alert Message and identify Resource - Service Site Equipment, Service Site, or Work Order - this will determine WHERE the Alert Message appears

Create Custom Field

<table>
<thead>
<tr>
<th>Name</th>
<th>Safety Notice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource</td>
<td></td>
</tr>
<tr>
<td>Service Site Equipment</td>
<td></td>
</tr>
<tr>
<td>Service Site Equipment</td>
<td></td>
</tr>
<tr>
<td>Service Site</td>
<td></td>
</tr>
<tr>
<td>Work Order</td>
<td></td>
</tr>
</tbody>
</table>

Instructions:
Viewable instructions for the user on how to fill out this custom field.

Input Type:

- d. Click Status: Enable and click Save Custom Field

3. Set up actual Alert Message on the selected Resource - Service Site (Service Site History>Site Detail>Edit)
a. In the Site History>Edit screen, scroll down to Custom Information

![Custom Information](image)

- Customer Account Manager:
  - Select One
- Not To Exceed Price:
  - Select One

![Safety Issue Alert Color](image)

- Alert Color:
  - Red

- Default Alert Body:
  - This location has asbestos in the concrete floor. Do not drill holes in the floor.

b. Pick an Alert Color and fill in the Default Alert Body then click Modify Location

![Safety Issue Alert Color](image)

- Alert Color:
  - Red
  - Green
  - Blue
  - Yellow
  - Red

![Default Alert Body](image)

- Default Alert Body:
  - This location has asbestos in the concrete floor. Do not drill holes in the floor.

c. Service Site Alerts will appear on Service Site History and on Work Orders for that Site.
3. You can repeat these steps to set up Alerts in **Equipment** and **Work Orders** in addition to Service Sites on the work order details page and the equipment details page.

4. Alerts can also be viewed on the notification tool.

**Additional Considerations**
- Service Site Equipment Alerts will appear on Service Site Equipment History
- Work Order Alerts will appear on the Work Order and in the Work Order email Notification. The following is an example of a work order alert displayed on the work order email notification.

The following notification for Work Order #15237 has been sent to you:

Comments:
email
Description:
please check HVAC
Site Info:
Denver Sports Club
2465 S. University Blvd
Denver, CO 80209
https://www.denversportsclub.com
Note: Possible Location

You will need additional equipment for this work order.

Problem Code:
Melt
Equipment:
Absolute Area 1 | | 123-456-1 | Roof

Status:
Open
Zone Supervisor:
Test 1

The Tech Tool URL is https://stage.mobiletechno.com/work_order_detail?wp_ord=15237