

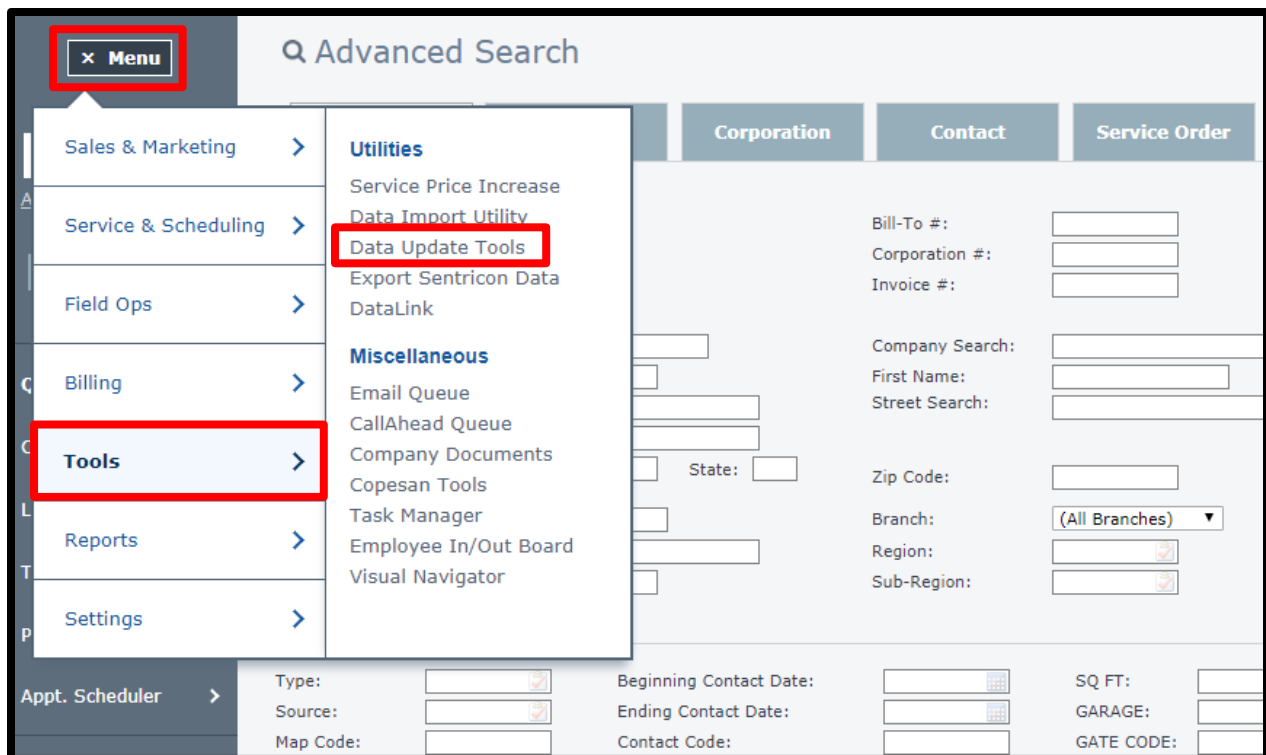
Tech Change Utility

Also known as Change Technicians, the Tech Change Utility allows you to mass update Service Orders, Program Steps, Service Setups, Renewals, Warranties, Technician Auto-Fill, Salespeople in Leads, and Called For in Calls in mass from one tech / route / salesperson to another.

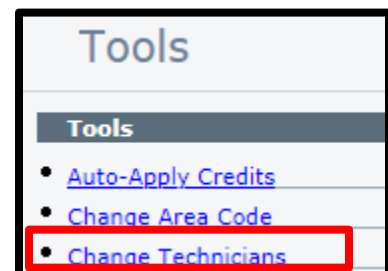
This utility is useful, for example, if you have to mass update a group of Service Orders for a specific date range from one tech to another because they are away on vacation.

To use the Tech Change Utility, complete the following steps:

1. On the desktop, go to *Menu > Tools > Data Update Tools*.



2. Click *Change Technicians*.
3. The following are frequently-used criteria for searching the data on which you are updating the Technician.



Selection Criteria

Old Technician:

New Technician:

Starting Work Date:

Ending Work Date:

Old Route:

New Route:

Branch:

Route List:

Map Code List:

City List:

Zip Code List:

Service List:

Look In Fields

Tech 1

Tech 2

Sales 1

Preferred Tech

Include

Service Orders

Program Steps

Service Setups

Renewals

Warranties

Technician Auto-Fill

Salespeople in Leads

Called For in Calls

Order Type

Service Orders

Production

Estimate

Call-Back

Program Status

Active

Inactive

Both

Setup Status

Active

Inactive

Both

Renewal Status

Active

Inactive

Both

Warranty Status

Active

Inactive

Both

Report Only

- **Old Tech:** should be populated with the current Tech; if updating something that does not have a Tech, select BLANK.
- **New Tech:** should be populated with who the Tech should be after you perform the update; New Tech or the New Route field must be populated

- **Old Route:** should be populated with what the current route, if applicable
- **New Route:** should be populated with what the route should be after you perform the update (if you are using and making changes to your routes); New Tech or the New Route field must be populated
- **Look In Fields:** used to select which specific Tech or Sales field you are updating; at least one field must be selected to proceed
- **Include:** used to select which specific Tech or Sales field you are updating; at least one field must be selected to proceed
- **Report Only:** checked by default to allow you to run a report to review; when ready to proceed with the update, uncheck the *Report Only* box and the Update window will appear

Let's take a look at an actual example before moving to the next step.

Ace is out of the office for the next 2 weeks on vacation, and I need to update all Service Orders in that date range to be changed from tech Ace to the floater David. I do not want any other orders or setups to be affected.

From the *Selection Criteria* screen, complete the following steps:

- Populate the Old Technician with *ACE*, the New Technician with *DAVID*, and the Starting and Ending Work Dates to reflect the time ACE will be away.
- Under the Include section, un-select all the options except for the Service Orders so that we are updating only Service Orders in the starting and ending date range entered.
- Select the *Look In* fields that you are changing from ACE to DAVID. In this example, we only want to update Tech 1.



Selection Criteria

Old Technician:

New Technician:

Starting Work Date:

Ending Work Date:

Old Route:

New Route:

Branch:

Route List:

Map Code List:

City List:

Zip Code List:

Service List:

Look In Fields

Tech 1

Include

Service Orders

Program Steps

Service Setups

Renewals

Warranties

Technician Auto-Fill

Salespeople in Leads

Called For in Calls

Order Type

Service Orders

Production

Estimate

Call-Back

Report Only

- With *Report Only* selected, scroll up and click *Display* to review the orders prior to running the actual update.

Date: 9/6/2018 3:54:12 PM Page: 1
 User: ADMN

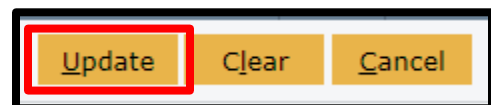
Change Technicians Report

Old Tech: [ACE] Start Work Date: [08/01/2018] Old Route: [All] Update:
 New Tech: [DAVID] End Work Date: [08/15/2018] New Route: [All] Service Orders
 Branch: [All] Route: [All] Map Code: [All]
 City: [All] Zip Code: [All] Service: [All]

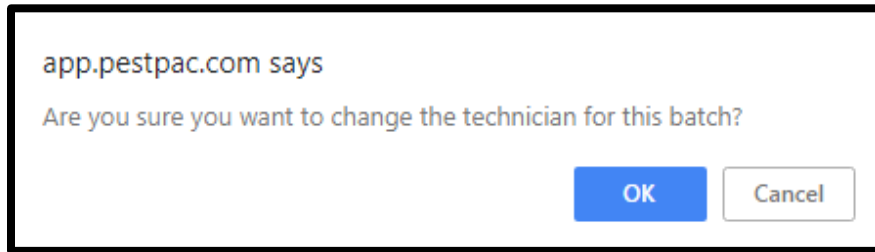
Service Orders

Order	Location	Name	Work Date	Work Time	Total
163468	20458	Paradiso, Katie	08/01/2018		100.00

- After reviewing the report, uncheck the *Report Only* box and click *Update* in the top-right of the screen.



- Click *OK* when asked “Are you sure you want to change the technician for this batch?”



7. When the update completes, you will see the screen refreshed with the records that were affected.



REMEMBER: For additional setup, training, and usage resources for FREE, including live webinars and a robust video library, please visit [PestPac University](#).