

Service Location Requirements on Job Entry

- For Face to Face (non-remote) jobs, the Location field displays and is required. Site Contact and Venue display as part of the service location information.
- For remote service jobs, the Location field does not show.

The image displays two screenshots of a service information form. The top screenshot shows the form for a 'Face to Face' service type. The 'Service Type' dropdown is set to 'Face to Face', and the 'Service Location info collected' status is indicated as 'Service Location info collected'. The 'Location' field contains the address 'St. Cecilia's Ward 215 Evelyn Way San Francisco, CA 94127'. The 'Site Contact' field contains 'Front Desk Attendant(123-123-1234)'. The 'Venue Information' section contains the text: 'ID badge must be carried at all times. Out of hours jobs must use house phone on exterior to gain entry and show ID badge on monitor before entry will be granted.' The bottom screenshot shows the form for a 'Video (Scheduled)' service type. The 'Service Type' dropdown is set to 'Video (Scheduled)', and the 'Service Location info collected' status is indicated as 'No Service Location info collected'.

Modifying the Service Type

Recurring Jobs: Service types of individual jobs can be modified by editing a job in the series. A popup prompts the user to select the option to update the service type for 'Only this job', 'This Job and All Following jobs' or 'All jobs'.

Team and/or Shift Assignments: Modify the service type of a single job using the 'Override Service Type' flag on the Assignments tab.

When the modification is from a Remote to a non-Remote service type, the service location information is required.

When the modification is from a non-Remote to a Remote service type, the location field is not displayed.

Disabling this feature

If you wish to collect a Service Location for all Service Types, navigate to the Admin menu, click on the Company menu and then the Configuration tab. Scroll to the bottom of the page, enable 'Use Proximity Search for Remote Services' and click the blue Save button on the left hand side.

A Location will be required for all Service types and the Proximity Search will be used on all jobs.

Configuration: Miscellaneous

Enable Inclusive Rating Search 

Show Interpreter Time Column 

Use Proximity Search for Remote Services 

Configuration: Reference Fields

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