



DIRECTV Rio

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HSP Technician Wireless

Instructor Guide

Updated: 6/22/2009

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## Notes

## Detail

### Section 1

5 minutes

- Ensure all items listed are covered before commencing the course.
- Explain that Rio is the name for DIRECTV's implementation of Siebel. Hereafter, it will be referred to as Rio.

### Introduction

- Discuss administrative details (Breaks, cell phones, attendance forms)
- Discuss course materials (Classroom guide, quick reference cards, simulations)
- Discuss course format (Tell-Show-Do, interactive simulations (Computer Based Training – CBT) and role plays)
- Discuss course agenda
- Have participants introduce themselves and discuss their expectations of the course

#### IMPORTANT MATERIAL INFORMATION

- The Instructor and Participant Guides coincide with the DIRECTV CBTs. The CBTs provide interactive simulations of the Rio Wireless Application.
- The CBTs were created from the Rio Wireless Test Environment. Therefore, product information contained in the CBTs may not coincide with current product information.
- All customer information references are fictitious.
- Rio software updates released after April 2008 may not be included in the material.

## Notes

## Detail

### Section 2

### Course Outline

5 minutes

#### Course Length

1 day

- 8 hrs of curriculum

#### Audience

- Home Service Provider (HSP) Technicians

#### Course Objectives

- Discuss each of the overall objectives with participants.
- Review Glossary of Computer Terms job aid.
- Review Glossary of Rio Siebel Terms job aid.
- To instruct participants on basic wireless navigation
- To guide participants through business processes and how they will use Rio to activate and close Activities and Activities and manage VIP OOP Activities
- To provide participants with hands-on experience with the Application through a simulated environment

#### Course Agenda

#### Agenda

- Introduction
- Rio Basics — Wireless
- Install and Upgrade Orders — Wireless
- Former Installs — Wireless
- Service Orders — Wireless
- VIP OOP Install and Upgrade — Wireless
- VIP OOP Service — Wireless
- Closing

*Continued on next page*

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**Notes****Detail**

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**Course Outline** *(continued)*

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**Job Aids / Quick Reference Cards****IMPORTANT MATERIAL INFORMATION**

Listed below are the Job Aids and Quick Reference Cards (QRCs) reviewed throughout the training.

**Quick Reference Cards (QRCs)**

- DIRECTV Intermec CN3 Wireless Device QRC
- DIRECTV Rio Basics – Wireless QRC
- DIRECTV Update OLIs and Activity Closure Steps / Scenarios - Wireless QRC

**Job Aids**

- Adding Non-Serialized OLI for Service Activities job aid
- Adding Protection Plan OLI — Wireless job aid
- Adding Rio as a Trusted Site job aid
- DOA Replacement – Wireless job aid
- DTV Service Request Activity Order / Timeframes job aid
- eTrust Identity Manager Login job aid
- Former Install job aid
- Glossary of Computer Terms job aid
- Glossary of Rio Siebel Terms job aid
- How to Submit Order Line Items by Sub Type job aid
- IRD Actions by Sub Type job aid
- Service IRD Replace New Replacement Receiver job aid
- Single Wire Multi-Switch job aid
- Troubleshooting Failed Line Item Errors in Siebel job aid

## Notes

## Detail

### Section 3

5 minutes

- Discuss system benefits. This may be done with a demonstration to highlight some of the key benefits.

### Rio Benefits — Wireless

#### Improved Field Technician productivity

- Eliminate the need to call a Dispatcher or HSP Call Center to activate and close Activities on most Activity types.
- Technicians can status, activate and close Activities using their wireless-based equipment units
- Look into customer's equipment history
- Real time visibility to Activity changes. Cancelled or rescheduled Activities are removed from the Activity List view and Order Line Item changes are updated on the OLI List view
- Individual view of equipment on hand (electronic)
- Ability to delete non-serialized Order Line Items without user interaction
- A single device doubles as a phone and Activity Status handler

#### Automated and streamlined processes

- Optimized, automated scheduling for technician routes based on service region, schedule and skills (exceptions are handled manually by dispatchers)
- Automated equipment inventory management and tracking via bar code scanning
- End-to-end view by warehouse technicians into Inventory Transactions for DIRECTV components only
- Detailed, timely view into technician attendance and average daily Activities completed

## Notes

## Detail

# Section 13

# Rio Basics — Wireless

120 minutes

## Process Objectives

- Discuss process objectives.
- Learn how to log in and out of eTrust Identity Manager
- Learn how to log in to the Application
- Learn how to use the Main Menu
- Learn how to use the Menu Bar
- Learn how to use links to navigate through the Application
- Learn how to work with lists and forms, Records and fields
- Learn how to log out of the Application
- Learn how to review and acknowledge the current day's Activities
- Learn how to view truck inventory
- Learn how to search for products in inventory
- Learn how to review and update an Activity
- Learn how to map the customer's address
- Learn how to update Order Line Items (OLIs) and capture parts used
- Learn how to activate the Assets
- Learn how to close an Activity

## Key Points

- Discuss key business rules.
- This section covers basic navigation (first 8 tasks) and the daily tasks technicians will perform (last 6 tasks), including reviewing their Activities, viewing inventory and a breakdown of the general steps required to complete an Activity. The other wireless sections cover the specific types of Activity scenarios and how to complete each type of Activity.
- Technicians will access Rio over the internet using the wireless unit
- This section covers basic navigation on the wireless unit as well as general tasks technicians will perform daily on the wireless unit
- Technicians will have a read-only view of their truck inventory

## Notes

## Detail

# Rio Basics — Wireless *(continued)*

## Key Points

- Discuss key business rules.
- For each Activity assigned to a technician, the technician must update the status of the Activity in Rio at different stages. Upon physically completing the work for the Activity, the technician must update the customer's Order Line Items in Rio with the actions taken, capture the assets and products used and close the Activity.
- If an Activity is marked Activation Approved (indicated by a 'Y' on the Activity Detail view) or automation is allowed, the technician will be able to activate services from the wireless unit upon submitting the Order Line Items.
- If the Activity is not marked Activation Approved (indicated by an 'N' on the Activity Detail view) or if automation is not allowed, technicians are required to provide a new install / former install customer reconnecting their service with a Welcome Kit brochure to order programming prior to beginning the installation.
- If the customer called to add their services to their account during the installation, technicians can click the Activation Approval Hyperlink in the Activity Detail view.
- If the customer did not order their programming, the technician must call the designated number to activate the customer's services then close the Activity using their wireless unit.
- If a technician does not have a wireless device or is out of coverage range on the wireless unit, the technician will call the dispatcher or HSP Call Center to update the Order Line Items and close the Activity in Rio.



## Notes

## Detail

### Task 13.1a

### Using eTrust Identity Manager — Wireless

#### Guided Exercise

- Discuss business scenario with students before performing Guided Exercise.
- Review [eTrust Identity Manager Login job aid](#).
- Review [DIRECTV Intermec CN3 Wireless Device QRC](#).
- Review [CBT 13.1a](#).
- Review [Adding Rio as a Trusted Site job aid](#).

The eTrust Identity Manager allows you to log in to the wireless environment securely by providing a platform for centrally managing access to the DIRECTV Applications, thus reducing complexities of logging in and performing daily tasks.

eTrust Identity Manager allows you to easily manage your Password without calling the DIRECTV Support center therefore saving you time and allowing you to always have access to the Wireless environment without any delay.

Before using eTrust Identity Manager to access the wireless environment you will be required to set up your forgotten Password questions. These questions will be used in the future if you should forget your Password. You will also reset your Password at this time.

To set up your forgotten Password questions and reset your Password you will access the eTrust Identity Manager.

Let's learn how to use eTrust Identity Manager — Wireless in Rio by setting up your Password questions and changing your Password.

#### Exercise steps

You can access eTrust Identity Manager in one of two ways.

First, when logging into the Wireless Siebel Application Login screen, you can click one of the links below the **Login** button.

Secondly, you can go directly to the eTrust Identity Manager site by using the URL: <https://iam.rio.directv.com/idm/fss>.

*Continued on next page*

Notes

Detail

## Using eTrust Identity Manager — Wireless *(continued)*

### Exercise steps

1. Click on the **Click here to manage your Password** Hyperlink.

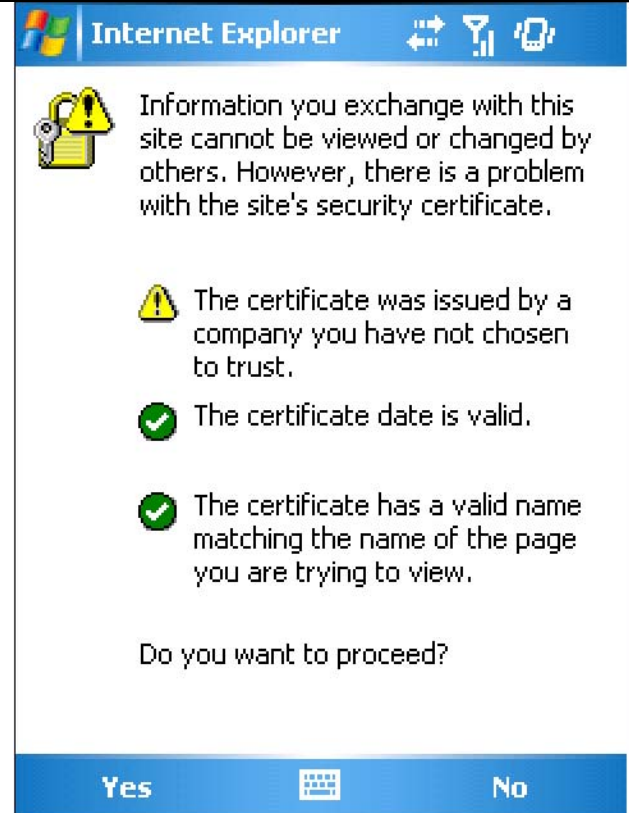


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Notes

Detail

## Using eTrust Identity Manager — Wireless *(continued)*

Exercise steps	
You may get a security screen such as this before accessing the Login screen	
	
2.	Simply click on <b>Yes</b> to continue to the Login screen.
3.	Click the down arrow to scroll down the screen to view both the <b>Username</b> and <b>Password</b> fields.
4.	Type your Username in the <b>Username</b> field.
5.	Click in the <b>Password</b> field.
6.	Type your Password in the <b>Password</b> field.
7.	Click the <b>Login</b> button.

*Continued on next page*

Notes

Detail

## Using eTrust Identity Manager — Wireless *(continued)*

### Exercise steps

8. Click on the **Modify My Password Questions** Hyperlink.

There are five questions and answers that must be completed in order to set up your eTrust Identity Manager Profile. Click on the drop-down arrow in **Question 1** and select a question. Enter the answer to the question in the **Answer 1** field.

Repeat this process for the remaining **Question 2-5** fields and **Answer 2-5** fields.

The screenshot shows a mobile browser window with the URL <https://iam.rio.r3.directv.com/id>. The page title is "Modify My Password Questions". The form contains the following fields:

- User ID
- First Name
- Last Name
- Question 1 (with a drop-down arrow)
- Answer 1
- Question 2 (with a drop-down arrow)
- Answer 2
- Question 3 (with a drop-down arrow)
- Answer 3
- Question 4 (with a drop-down arrow)
- Answer 4
- Question 5 (with a drop-down arrow)
- Answer 5

At the bottom of the form are "Submit" and "Cancel" buttons. The mobile interface includes a "Back" button and a "Menu" icon at the very bottom.

*Continued on next page*

Notes

Detail

## Using eTrust Identity Manager — Wireless *(continued)*

Exercise steps
9. Once all five questions have been selected and the answers completed for each question, review your questions and answers and click on the <b>Submit</b> button.
The <b>Confirmation Page</b> will display a message stating the status of your submitted request. In this instance, the request was already completed.
10. Click <b>OK</b> to continue.
11. Click on <b>My Account</b> to access the list of options to modify your account.
Once your five Password questions and answers have been set up, you can change your Password. <i>Note:</i> You will need to remember the five questions and answers you created in case you forget your Password. Without answering all five questions correctly, you will not be able to log into eTrust Identity Manager.
12. Click on the <b>Change My Password</b> Hyperlink to change your Password.
Password Policy: <ul style="list-style-type: none"><li>• Passwords must be a minimum of 8 characters</li><li>• Passwords must be changed every 90 days</li><li>• Password history will be maintained for 6 past versions</li><li>• Passwords must include a case change and both alpha and numeric characters (special characters should be available for use. <i>Example:</i> RIO3hsp*)</li><li>• Passwords should not be common words nor the same as the user name</li></ul>
13. Click the down arrow to scroll down the screen to view the rest of the page.

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**Notes**

**Detail**

## Using eTrust Identity Manager — Wireless *(continued)*

### Exercise steps

14. Type your new Password in the **Password** field.
15. Retype your new Password in the Confirm **Password** field.
16. Click the **Submit** button.  
The **Confirmation Page** will display a message stating the status of your submitted request. In this instance, the request is still pending. You view all of your submitted tasks by clicking on the **View My Submitted Tasks** Hyperlink under My Account from the main menu.
17. Click **OK** to continue.
18. Click **Logout** to exit eTrust Identity Manager.
19. Click on the **Close this window** button to securely close the browser. This exits the browser completely.

## Notes

## Detail

### Task 13.1b

### Logging Into Rio — Wireless

#### Guided Exercise

- Discuss business scenario with students before performing Guided Exercise.
- [Review CBT 13.1b.](#)

There are two types of wireless devices — handheld and laptop. The training will be set up as a laptop. If you are using a handheld device, you would require a stylus to scroll to the appropriate fields.

To log into Rio, you will launch an Internet Explorer browser and enter the URL (Web site address) for Rio. You can save the URL under **Favorites** for easy access in the future.

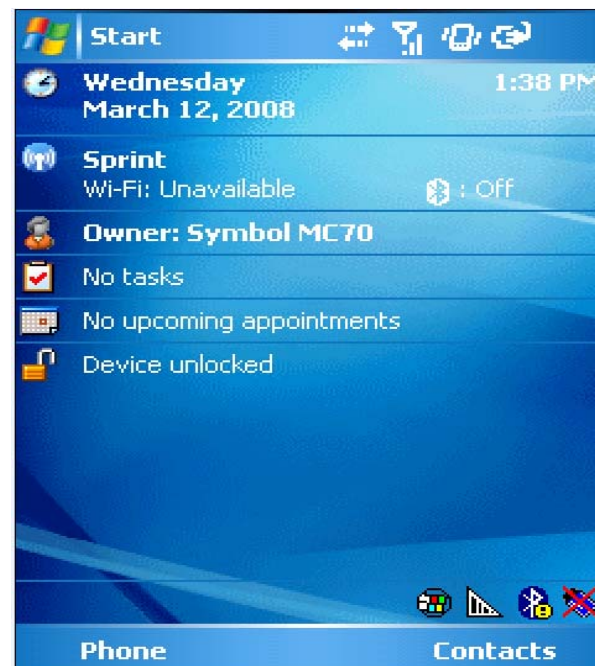
At the Rio login page, you will be prompted to enter your user ID and Password. This logs you into Rio.

Since you will be using a computer mouse to complete the lessons, we will use the term “click” to refer to the action needed. On the handheld, you will tap the screen with the stylus.

Let’s learn how to log into Rio — Wireless.

#### Exercise steps

1. Click on the **Start** button on the top left of the screen. A drop-down menu appears with your choices.



*Continued on next page*

**Notes**

**Detail**

## Logging Into Rio — Wireless *(continued)*

Exercise steps	
2.	Click on <b>Internet Explorer</b> from the drop-down field.
3.	Press the <b>Delete</b> key to clear the URL field. You will be provided with the URL and will need to type it in the first time. After that it can be saved in the <b>Favorites</b> list.
4.	For this lesson type <b>https://wls.rio.directv.com/wireless</b> in the <b>URL</b> field and click on the <b>Green Arrow</b> (to the right of the URL field) to submit the address.
5.	To save the URL as a <b>Favorite</b> , click the <b>Menu</b> Hyperlink on the bottom <b>Menu Bar</b> .
6.	Click on the <b>Add / Delete</b> tab.
7.	Click on <b>Favorites</b> from the pop-up menu.
8.	Click the <b>Add</b> button.
9.	Press the <b>Delete</b> key to clear the <b>Name</b> field.
10.	Type <b>Siebel Wireless</b> in the <b>Name</b> field and click on the <b>Add</b> button.
11.	Siebel Wireless has been added to the <b>Mobile Favorites</b> list. Click the <b>OK</b> button on the top right to return to the Login screen.
12.	Type your Username in the <b>Username</b> field. Then click in the <b>Password</b> field.
13.	Type your Password in the <b>Password</b> field. Then click the <b>Login</b> button.

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Notes

Detail

## Logging Into Rio — Wireless *(continued)*

### Exercise steps

14. Click on the **Go to Wireless** Hyperlink. This brings up the SiteMinder screen to connect you to the Siebel Wireless Application.



The **DIRECTV Main Menu** is displayed.

## Notes

## Detail

# Task 13.2

# Using the Main Menu — Wireless

## Guided Exercise

- Discuss business scenario with students before performing Guided Exercise.
- [Review DIRECTV Rio Basics – Wireless QRC.](#)
- [Review CBT 13.2.](#)

When users first log into Rio, they are taken to the Main Menu, which provides access to the three main areas of the Application:

- **My Activities** — A list of the Activities assigned to the technician for today. This screen also provides a list of Past Open Activities for Activities not closed within the past two days.
- **Truck Inventory** — A read-only view of the technician's truck inventory. This Hyperlink is only visible if equipment is tracked at the truck level (Truck-to-Truck) instead of the Fulfillment Center (Tech Pooling).
- **Today's Equipment** — A read-only view of equipment available and equipment required for all of Today's Activities. This Hyperlink is only visible if equipment is tracked at the truck level (Truck-to-Truck) instead of the Fulfillment Center (Tech Pooling).

Users can click on the area they wish to access. Each screen in Rio provides a Hyperlink to navigate back to the Main Menu.

Let's learn how to use the Main Menu — Wireless.

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Notes

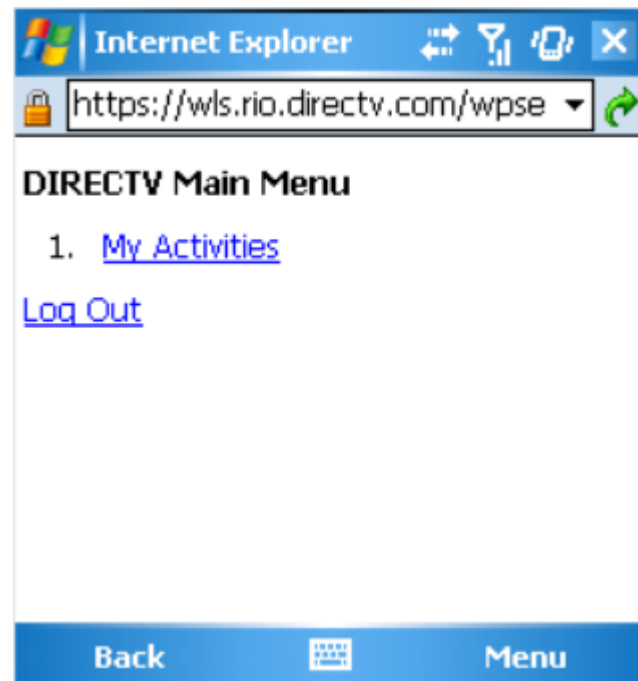
Detail

## Using the Main Menu — Wireless *(continued)*

### Exercise steps

The **DIRECTV Main Menu** provides access to the three main areas of the Application.

#### DIRECTV Main Menu



1. Click the **My Activities** Hyperlink to access the list of scheduled Activities.

**Note:** The **Truck Inventory** and **Today's Equipment** Hyperlinks are only visible if equipment is tracked at the truck level (Truck-to-Truck) instead of the Fulfillment Center (Tech Pooling).

The **Activity List** is a list of the activities assigned to the technician for today.

2. Click the **Main Menu** Hyperlink to return to the main menu.

*Continued on next page*

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**Notes**

**Detail**

## Using the Main Menu — Wireless *(continued)*

Exercise steps	
3.	Click the <b>Truck Inventory</b> Hyperlink to access a read-only view of the technician's truck inventory. This view lists the inventory items currently in the technician's truck.
4.	Click on the <b>Main Menu</b> Hyperlink.
5.	Click on the <b>Today's Equipment</b> Hyperlink. This view lists the current <b>Equipment Covered (On Truck)</b> and the <b>Equipment Required (Additional)</b> for all of today's Activities.
6.	Click on the <b>Main Menu</b> Hyperlink.

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## Notes

## Detail

### Task 13.3

### Using the Menu Link — Wireless

#### Guided Exercise

- Discuss business scenario with students before performing Guided Exercise.
- Review [DIRECTV Rio Basics – Wireless QRC](#).
- Review [CBT 13.3](#).

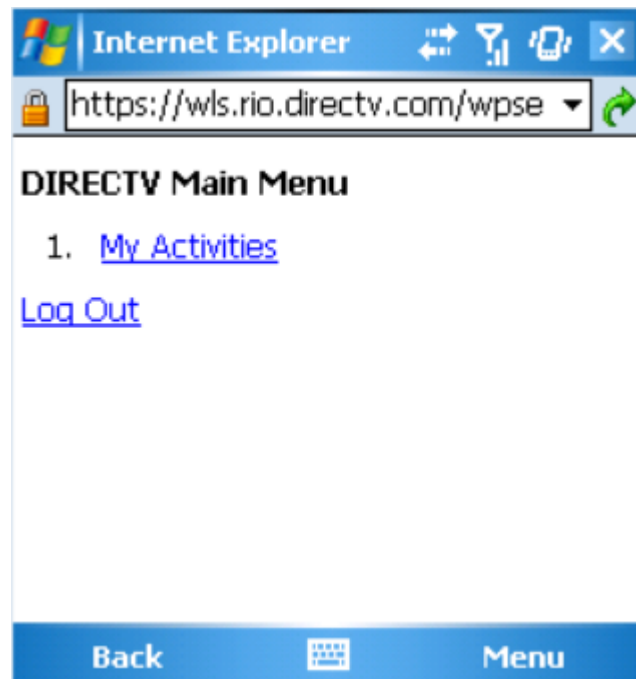
The Menu Hyperlink is located at the bottom of the screen and provides access to general features that can be used in the Application.

Let's learn how to use the Menu Hyperlink — Wireless in Rio.

#### Exercise steps

1. Click on the **Menu** Hyperlink to display a list of options. This menu provides access to change display properties and to view the history list.

#### DIRECTV Main Menu



*Continued on next page*

**Notes**

**Detail**

**Using the Menu Link — Wireless** *(continued)*

<b>Exercise steps</b>	
2. Click on the <b>Tools</b> menu to view the Internet Explorer options. From here you can access the Internet Explorer properties and options.	
3. Review the links and description found on the Menu Hyperlink.	
<b>Element</b>	<b>Description</b>
<b>Menu Hyperlink</b>	Displays a list of menu options.
<b>Back Hyperlink</b>	Allows the user to navigate back to the last page visited.
<b>Home Hyperlink</b>	Navigates to the Website designated as the Home Page in Internet Explorer.
<b>Favorites Hyperlink</b>	Users can navigate to a bookmarked Website by selecting it from the Favorites list.
<b>Add Favorites Hyperlink</b>	Allows the user to bookmark Websites and save them as favorites.
<b>Refresh Hyperlink</b>	Refreshes the Web page.
<b>History Hyperlink</b>	Provides a history of previously viewed Websites.
<b>View menu</b>	Provides access to change display properties and to view the history list.
<b>Tools menu</b>	Provides access to Internet Explorer options.
<b>Edit menu</b>	Provides access to Internet Explorer edit options.

Notes

Detail

Task 13.4

Using Links — Wireless

Guided Exercise

- Discuss business scenario with students before performing Guided Exercise.
- Review CBT 13.4.

Links are provided throughout the Application for users to navigate through the various screens. Links appear as blue underlined text and provide one-click access to another screen in the Application.

For example, on the Main Menu, there are links to the three main areas of the Application. On the top right of each screen in the Application, users are typically provided with links back to the Main Menu, back to the main screen for that area or to a related Record. Fields that can be updated by users are also displayed as links. Clicking on these links allows the user to add or change the value in the field.

Let's learn how to use links — Wireless.

Links are provided at the top of each screen to navigate to other places in the application

Editable fields appear as Hyperlinks

**Activity Detail View**

Activity Detail

04:00 PM  
EL SEGUNDO

[Acknowledge](#)  
[En Route](#)  
[On Site](#)  
[Close](#)  
[Activation Approval](#)

[Activity List](#)  
[OLI List](#)  
[Receiver List](#)  
[Main Menu](#)

Activity #: 1-1LWWARL  
Customer: HUNDREDFORTYSIX, TEST  
Account #: 69098183  
Phone #: (310) 964-0000  
Alt Phone #:  
Area: Installation - Home Services  
Sub Area: New Install  
Planned Start: 04:00 PM  
Earliest Start: 04:00 PM  
Due By: 08:00 PM  
Address: 2250 E IMPERIAL HWY  
City: EL SEGUNDO  
Zip: 90245  
Directions:  
Map: [Mapquest](#)  
Duration: 155 minutes  
Status: Scheduled  
Note to Tech:  
Comment:  
VIP/OOP:  
MAS Programming:  
Dwelling: Residential  
Repeat Service: N  
Service Within 7: N  
Activation Approved: Y  
[Resolution Code](#):  
DPP: N  
[Customer Wants DPP](#):  
[Activity ETA](#):  
OMS Order #: 100316098  
SWM:  
Previous Activity End:  
[Previous Resolution](#):  
[Log Out](#)

Continued on next page

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**Notes**

**Detail**

## Using Links — Wireless *(continued)*

Exercise steps
1. Navigate to the <b>Truck Inventory</b> screen by clicking on the <b>Truck Inventory</b> Hyperlink.
2. Click on the <b>DIRECTV R15</b> Hyperlink.
3. Click on the <b>Good New</b> Hyperlink.
4. Click on the <b>Main Menu</b> button, located at the top of the screen, to navigate back to the Main Menu.



Notes

Detail

## Task 13.5

## Working with Lists and Forms — Wireless

### Guided Exercise

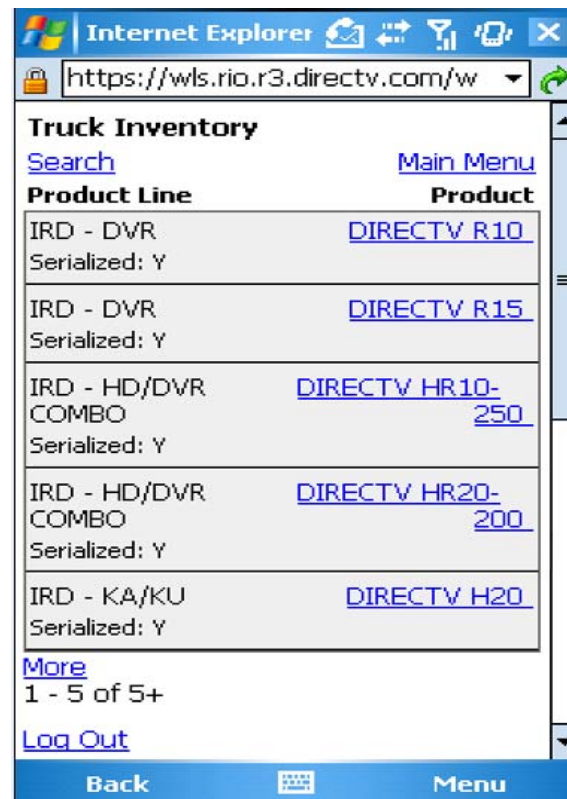
- Discuss business scenario with students before performing Guided Exercise.
- [Review CBT 13.5.](#)

In each screen of the Rio Application, data is typically displayed in either a List or Form. A List consists of multiple Records presented as rows. For example, a technician might view a List of the customer's Order Line Items on an Activity. There may be more Records in a List than displayed. A count is displayed at the bottom of the List. If there are more Records than are visible in the List a + sign after the number displays. Users can click on the **More** Hyperlink, which is used to view the next set of Records in the List.

Let's learn how to work with Lists and Forms — Wireless.

### Exercise steps

#### List



*Continued on next page*

**Notes**

**Detail**

**Working with Lists and Forms — Wireless** *(continued)*

**Exercise steps**

1. Click the **Main Menu** Hyperlink.
  2. Click the **My Activities** Hyperlink.
  3. In the **Activity List** screen, select the appropriate Activity by clicking on the **Time** Hyperlink in the **Planned** column.
- A Form displays a single Record at a time, for example, one Activity. In a Form, users can scroll up and down to view all the fields in the Record. Fields which are editable appear as links.
4. Scroll down to view the rest of the Form.

**Form**

Use the scroll bar to move up and down the screen

**Activity Detail** 02:26 PM  
EL SEGUNDO

[En Route](#) [Activity List](#)  
[On Site](#) [OLI List](#)  
[Close](#) [Receiver List](#)  
[Activation Approval](#) [Main Menu](#)

Activity #:	1-1LSKPV
Customer:	AUTOMATION, FSS
Account #:	69093339
Phone #:	(987) 654-3210
Alt Phone #:	
Area:	Installation - Home Services
Sub Area:	New Install
Planned Start:	02:26 PM
Earliest Start:	02:26 PM
Due By:	04:00 PM
Address:	2250 E IMPERIAL HWY
City:	EL SEGUNDO
Zip:	90245
Directions:	Test Update
Map:	<a href="#">Mapquest</a>
Duration:	245 minutes
Status:	Acknowledged
Note to Tech:	Call IVR 1-800-566-6074 to activate. Test Update

[Comment](#)  
 VIP/OOP:  
 MAS Programming:  
 Dwelling: Residential  
 Repeat Service: N  
 Service Within 7: N  
 Activation Approved: N  
[Resolution Code](#):  
 DPP: N  
[Customer Wants](#)  
[DPP](#):  
[Activity ETA](#):  
 OMS Order #: 2450018  
 SWM:  
 Previous Activity End:  
[Previous Resolution](#):

[Log Out](#)

Notes

Detail

Task 13.6

Working with Records and Fields  
— Wireless

Guided Exercise

- Discuss business scenario with students before performing Guided Exercise.
- Review CBT 13.6.

A **Record** is a group of related fields displayed in a list or Form. For example, information about an Activity, including the Activity type, planned start time, customer name and address, makes up an Activity (or job) Record.

A **Field** contains a single unit of information such as a name or telephone number. Fields, such as **Customer** and **Sub Area**, are read-only and cannot be changed. Fields that are editable, such as **Customer wants DPP** and **Activity ETA** (estimated time of arrival), appear as links. Users can click on the Hyperlink which navigates to a different screen where users can add a value or change the value in the field. When users save the new value, they are taken back to the Record.

Fields, such as **Comment** and **Resolution Code**, are multi-value group (MVG) fields which means more than one value can be added in that field. Users can click on the Hyperlink which navigates to a screen that allows them to add one or more values. For example, a technician can select more than one **Comment** and more than one **Resolution Code** on an Activity. The first value selected is the one that is displayed on the Record; in order to view all selected values for the field, users must drill down on the Hyperlink.

Let's learn how to work with Records and Fields — Wireless.

Exercise steps

Some fields, such as **Duration** and **Note to Tech**, are read-only and cannot be changed. Fields that are editable, such as **Status** and **Comment**, appear as Hyperlinks. Users can click on the Hyperlink to navigate to a screen where users can add a value or change the value in the Field.

1. Click on the **Status** field Hyperlink.
2. Click on the drop-down arrow in the **Status** field.

*Continued on next page*

Notes

Detail

# Working with Records and Fields — Wireless

(continued)

## Exercise steps

A technician can select more than one Comment and more than one Resolution Code on an Activity. The first value selected is the one that is displayed on the Record. In order to view all selected values for the Field, click on the Hyperlink.

3. Select **En Route with ETA** from the list.

4. Click on the **Save** button.

Notice the **Status** field value changed to **En Route with ETA**.

Some fields, such as **Comment**, are multi-value group (MVG) fields which means more than one value can be added in that field.

## Activity Detail View

<b>Activity Detail</b>	04:00 PM EL SEGUNDO
<a href="#">Acknowledge</a>	<a href="#">Activity List</a>
<a href="#">En Route</a>	<a href="#">OLL List</a>
<a href="#">On Site</a>	<a href="#">Receiver List</a>
<a href="#">Close</a>	<a href="#">Main Menu</a>
<a href="#">Activation Approval</a>	

Activity #:	1-1LWWARL
Customer:	HUNDREDFORTYSIX, TEST
Account #:	69098183
Phone #:	(310) 964-0000
Alt Phone #:	
Area:	Installation - Home Services
Sub Area:	New Install
Planned Start:	04:00 PM
Earliest Start:	04:00 PM
Due By:	08:00 PM
Address:	2250 E IMPERIAL HWY
City:	EL SEGUNDO
Zip:	90245
Directions:	
Map:	<a href="#">Mapquest</a>
Duration:	155 minutes
<a href="#">Status:</a>	Scheduled
Note to Tech:	
<a href="#">Comment:</a>	
VIP/OOP:	
MAS Programming:	
Dwelling:	Residential
Repeat Service:	N
Service Within 7:	N
Activation Approved:	Y
<a href="#">Resolution Code:</a>	
DPP:	N
<a href="#">Customer Wants DPP:</a>	
<a href="#">Activity ETA:</a>	
OMS Order #:	100316098
SWM:	
Previous Activity End:	
<a href="#">Previous Resolution:</a>	

[Log Out](#)

Read-only fields appear as black text

Editable fields appear as blue Hyperlinks

6. Notice that there are two comments selected for this Activity. Click on the **Activity Detail** Hyperlink to return to the Activity.

## Notes

## Detail

# Task 13.8

# Logging Out — Wireless

## Guided Exercise

- Discuss business scenario with students before performing Guided Exercise.
- Review [DIRECTV Rio Basics – Wireless QRC](#).
- Review [CBT 13.8](#).

When users are finished working in Rio, they can log out of the Application by clicking on the **Log Out** Hyperlink. This logs the user out of Rio. Users can the click on the **Close this window** button to log out of their browser and eTrust.

Let's learn how to log out — Wireless.

- Point out the difference between closing the Rio Application window and closing the Internet Explorer browser window.

### Exercise steps

1. Click on the **Log Out** Hyperlink to close the Rio Application. This logs you out of the Rio Application.

### Main Menu



Click on the Log Out Hyperlink to log out of Rio

2. Click on the **Close this window** button.

*Note:* The **Close this window** button also logs the user out of eTrust.

## Notes

## Detail

### Task 13.9

## Reviewing and Acknowledging Today's Activities — Wireless

### Guided Exercise

- Discuss business scenario with students before performing Guided Exercise.
- [Review DIRECTV Rio Basics – Wireless QRC.](#)
- [Review CBT 13.9.](#)

At the beginning of each day, technicians can review the Activities (jobs) assigned to them for the day. In the Activity detail, they can view information such as the customer name, address and phone number, type of Activity, the window of time in which they are scheduled to arrive, when the Activity is estimated to start based on other scheduled Activities and the current status of the Activity.

Technicians can drill down to view the equipment required for each Activity.

Technicians are required to acknowledge each Activity to confirm that they have received it and have the necessary equipment to complete the Activity. This is accomplished by updating the status to Acknowledged and can be done as the technician reviews each Activity for the day.

Let's learn how to review and acknowledge today's Activities — Wireless.

### Exercise steps

1. From the DIRECTV Main Menu, click the **My Activities** Hyperlink.

*Note:* This navigates to a list of the technician's **Activities**.

2. To view an Activity, click on the **Time** Hyperlink in the **Planned** column.

*Note:* This navigates to the **Activity Detail** view. The **Planned Start** field reflects the Service Region time zone. The **Dwelling** field allows you to quickly determine if a scheduled Activity is associated to a residential or commercial account.

*Continued on next page*

Notes

Detail

## Reviewing and Acknowledging Today's Activities — Wireless *(continued)*

- Users can also manually change the Status field, instead of using the links. This is covered in Reviewing and Updating an Activity.

### Exercise steps

There are links on the top right to view the **OLI List**, **Receiver List** and to return to **Activity List** or the **Main Menu**.

3. Click on the **OLI List** Hyperlink to navigate to a list of the equipment items required for the Activity and/or equipment that the customer currently owns.

*Note:* The **Receiver List** Hyperlink also displays a list of the customer's existing receivers.

4. Click on the **Activity Detail** Hyperlink to navigate back to the **Activity Detail** view.

5. Click on the **Acknowledge** Hyperlink. This changes the **Status** field to **Acknowledged** and the **Acknowledge** Hyperlink disappears.

*Note:* As you review your Activities for the day, you will acknowledge each Activity at this time. Updating the status of Activities is covered in more detail in Reviewing and Updating an Activity. This lesson includes the steps for acknowledging the Activity but does not go into detail about the **Status** field.

6. Click on the **Activity List** Hyperlink to navigate back to the list of today's Activities. The status changed to **Acknowledged**.

## Notes

## Detail

### Task 13.10

### Viewing Truck Inventory and Today's Equipment — Wireless

#### Guided Exercise

- Discuss business scenario with students before performing Guided Exercise.
- [Review DIRECTV Rio Basics – Wireless QRC.](#)
- [Review CBT 13.10.](#)
- This task covers viewing the truck inventory and drilling down for more details. The next task covers searching for a specific product in the truck inventory.

Inventory information for serialized and non-serialized products is tracked in Rio. This includes the location, quantities, part status, Serial Numbers and Access Card numbers for serialized products. Only IRDs are serialized. All other products, such as ODU's and Multi-Switches, are non-serialized.

Equipment is tracked in one of two methods: 1) Truck level or 2) Fulfillment Center level.

When equipment is tracked at the truck level (Truck-to-Truck), technicians will have a read-only Truck Inventory view of the inventory on their trucks. The view can be accessed from the **Truck Inventory** Hyperlink on the **Main Menu** page.

When equipment is tracked at the Fulfillment Center level (Tech Pooling), technicians will not be able to view the equipment they have on their trucks. The **Truck Inventory** Hyperlink will not be available on the **Main Menu** page.

This task is based on the Truck-to-Truck method.

After reviewing the current day's Activities, technicians can view their truck inventory and today's equipment to confirm they have the required equipment for the day's Activities. If they need additional equipment from the depot or the warehouse, they must contact the HSP warehouse clerk to create the necessary Inventory Movement Records in Rio to record the transfer of equipment from the depot or warehouse to the technician's truck. It is essential that the physical equipment that will be used to complete each Activity matches the technician's truck inventory in Rio; otherwise, the technician will not be able to successfully close the activities in Rio.

As technicians complete their Activities throughout the day, Inventory Transactions are automatically generated in Rio to transfer the equipment in and out of the technician's inventory, based on the information the technician enters for the Activity.

Let's learn how to view the Truck Inventory and Today's Equipment — Wireless.

*Continued on next page*



**Notes**

**Detail**

## Viewing Truck Inventory and Today's Equipment — Wireless *(continued)*

Exercise steps
<p>1. From the Main Menu, select the <b>Truck Inventory</b> Hyperlink. This navigates to a List of products in the technician's truck inventory. The product category, such as IRD — DVR, including make and model are displayed. A 'Y' or 'N' indicates whether or not the product is serialized. Only IRDs are serialized.</p>
<p>The number of Records displayed is shown in the lower left corner under the <b>More</b> Hyperlink. The plus sign after the last number indicates there are more Records to display.</p>
<p>2. Click on the <b>More</b> Hyperlink to display the next page.</p>
<p>3. Continue to click on the <b>More</b> Hyperlink to display the next set of page numbers. The List now displays the last five Records. The List is sorted alphabetically so the ODU's appear at the bottom of the List.</p>
<p>4. Click on the <b>Back</b> button on the bottom left of the browser to go back through the previous screens.</p> <p><i>Note:</i> You can also click on the <b>Main Menu</b> button from any screen to return back to the <b>Main Menu</b> and access previous screens from the <b>Main Menu</b> also.</p>
<p>5. Continue to click on the <b>Back</b> button to return to the first screen.</p>
<p>6. The List now displays the part status and quantity of the product on your truck. The part status can be <b>Good New</b>, <b>Good Refurbished</b>, <b>Good Used</b>, <b>Defective DOA</b> or <b>Defective Damaged</b>. If the product is serialized, like this one, you can click on the part status Hyperlink for additional information.</p>
<p>7. Click on the <b>DIRECTV D11</b> product Hyperlink to view more information on the IRD — STANDARD product.</p>

*Continued on next page*

Notes

Detail

## Viewing Truck Inventory and Today's Equipment — Wireless *(continued)*

### Exercise steps

8. Click the **Good New** Hyperlink to display the Serial Numbers of this product. The list now displays the Serial Numbers, Access Card numbers and receipt date for the selected product in the truck inventory. Again, the List displayed is limited to a maximum of five Records so you would need to use the **More** Hyperlink to display the other Records.

*Note:* The **Receipt Date** field indicates when the serialized item was received into inventory so you can prioritize aged IRDs.

9. Click on the **Back** button.

10. Click the **Truck Inventory** Hyperlink to navigate back to the List of products.

11. Continue to click on the **More** Hyperlink to display the next pages.

12. Click the **MULTI-SWITCH 3X4** product Hyperlink to view more information on the MULTI-SWITCH product. The list now displays the part status and quantity of the product on your truck. The part status can be **Good New, Good Refurbished, Good Used, Defective DOA or Defective Damaged**. If the product is non-serialized, like this one, you can only view the part status and quantity; you cannot view any additional information.

13. Click on the **Main Menu** Hyperlink.

14. From the Main Menu, select the **Today's Equipment** Hyperlink. A list of equipment required for today's Activities is displayed. You can check the equipment required for today against the **Truck Inventory**.

*Continued on next page*

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**Notes**

**Detail**

## Viewing Truck Inventory and Today's Equipment — Wireless *(continued)*

Exercise steps
15. Click on the <b>Equipment Covered (On Truck)</b> Hyperlink. A list of equipment currently available on the technician's truck for today's Activities is displayed.
16. Click on the <b>Equipment Required (Additional)</b> Hyperlink. A List of equipment that is required for today's Activities, but is not available on the technician's truck, is displayed.
17. Click on the <b>Main Menu</b> Hyperlink to return to the <b>Main Menu</b> .

**Notes**

**Detail**

**Task 13.11**

**Searching for Products in Inventory — Wireless**

**Guided Exercise**

- Discuss business scenario with students before performing Guided Exercise.
- [Review CBT 13.11.](#)
- Searches in the wireless unit have an implied asterisk at the end; users do not need to add the wildcard (\*) at the end.

A search feature is available in the Truck Inventory screen which allows technicians to search for a particular product in their truck inventory.

Let's learn how to search for products in inventory — Wireless.

Exercise steps	
1.	From the <b>Main Menu</b> , select the <b>Truck Inventory</b> Hyperlink.
2.	Click on the <b>Search</b> Hyperlink in the upper-left corner to navigate to the Search view where you can enter criteria in one or more fields. You do not have to type the entire word; you can enter just the first part of the word. Search criteria are case-sensitive; enter criteria in all capital letters.  For example, you could enter <b>IRD</b> or <b>ODU</b> in the <b>Product Line</b> field. You could also enter the name of a specific product such as <b>HNS</b> in the <b>Product</b> field. Enter “ <b>Y</b> ” in the Serialized field to search for serialized products or “ <b>N</b> ” to search for non-serialized products.
3.	Type the product name in the <b>Product Line</b> field. Click on the <b>Go</b> button to start your search. The search results are displayed. If no products in inventory match the search criteria, the results will display <b>No Records</b> .
Field	Value
<b>Product Line</b>	Enter the name of the product line such as <b>IRD</b> or <b>ODU</b> .
<b>Product</b>	Enter the name of the specific product.
<b>Serialized</b>	Enter <b>Y</b> to search for serialized products or <b>N</b> to search for non-serialized products.

*Continued on next page*

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**Notes**

**Detail**

## Searching for Products in Inventory — Wireless

*(continued)*

Exercise steps	
4.	Click the <b>Search</b> Hyperlink again to refresh the screen.
5.	To redisplay all inventory on the technician's truck, leave all of the search fields blank and then click the <b>Go</b> button.
6.	Click on the <b>Main Menu</b> Hyperlink.

## Notes

## Detail

### Task 13.12

### Reviewing and Updating an Activity — Wireless

#### Guided Exercise

- Discuss business scenario with students before performing Guided Exercise.
- **Review DTV Service Request Activity Order / Timeframes job aid.**
- **Review DIRECTV Rio Basics – Wireless QRC.**
- **Review CBT 13.12.**
- The rest of the tasks in this section are designed to break down the main steps a technician will need to do to close every Activity. For each Activity, a technician must 1) Update the Activity status; 2) Update OLI and capture parts used, 3) Fix line item errors, if applicable, and 4) Close the Activity.
- We will also discuss activating using the wireless unit. In the Wireless — Install and Upgrade Orders and Wireless — Service Orders sections, we will cover the specifics of each type of Activity scenario and reinforce the main steps.
- When the technician changes the Activity status to **En Route**, a call is **NOT** generated to the customer.
- Each time a technician updates the **Activity ETA** field, an automated call is generated to the Customer informing them of the technician's ETA.

Technicians will receive their assigned Activities by 8:00 AM local time for the day. This occurs after optimization the day before and after all unscheduled Activities have been assigned. The technician will pre-call the customer by 8:30 AM for a morning appointment and by Noon for an afternoon appointment.

Throughout the day, technicians are required to update the status of their Activities. If they have a wireless unit they will update the Activity status on the wireless unit and the dispatcher will be able to see it on the Dispatch Board. Technicians who are out of coverage range on their wireless unit or who do not have a wireless unit will call the dispatcher to update the status of their Activities.

Technicians are required to update the Activity status at the following stages:

- When the technician receives the Activities, the status for each Activity should be changed to **Acknowledged**.
- When the technician is on the way to the customer's location, the Activity status should be changed to **En Route**. The **Activity ETA** field should also be updated with the appropriate field value. When the **Activity ETA** field is populated, an automated call will be generated to inform the Customer of the technician's ETA.

When the technician has arrived at the customer's location, the Activity status should be changed to **On Site**.

*Continued on next page*

Notes

Detail

## Reviewing and Updating an Activity — Wireless

*(continued)*

When the technician has completed the Activity, the Activity status will be changed to **Closed**. Before closing an Activity, the technician must update the Order Line Items (OLIs) and capture the parts used. This is covered in more detail in the following topics.

In the Activity Detail view, there are links for each of these four stages the technician can use to quickly update the Activity status. Technicians can also manually change the Status field.

This topic refers to updating the Activity status from the time the technician receives the Activities (Acknowledged) to the time the technician arrives at the customer's location (On Site). Completing an Activity (Closed) is covered in more detail in Task 13.16 Closing an Activity — Wireless.

In the event the Activity needs to be put in a Hold, Rescheduled or Cancelled status, the Installer must have Tech Supervisor approval and then call the dispatcher or HSP Call Center. The dispatcher or HSP Call Center can update the Status of the Activity and select the applicable reason why the Activity is being put in a Hold, Rescheduled or Cancelled status.

Predefined comments can also be selected on the Activity, for example, **Job running long**.

Let's learn how to review and update an Activity — Wireless.

### Exercise steps

1. Navigate to the Activity List by clicking the **My Activities** Hyperlink.
2. In the **Activity List** screen, select the appropriate Activity by clicking on the **Time** Hyperlink in the **Planned** column.
3. To update the Activity Status, click on the appropriate Hyperlink at the top of the Activity Detail view. This updates the **Status** field and the Hyperlink disappears. The following links update the **Status** field to the corresponding values.

- If the technician skips a status, for example, skips En Route and clicks on the Hyperlink for On Site, the Status is changed to On Site and all links up through On Site disappear.

*Continued on next page*

**Notes**

**Detail**

## Reviewing and Updating an Activity — Wireless

*(continued)*

Link	Status
<u>Acknowledge</u>	Acknowledged
<u>En Route</u>	En Route with ETA
<u>On Site</u>	On Site
<u>Close</u>	Closed
Exercise steps	
4. View or update the following fields for the Activity.	
Field	Value
<b>Activity #</b>	Read-only. Contains a unique system-generated number corresponding to the Activity. If a technician needs to call the dispatcher or HSP Call Center, this number should be provided to identify the Activity.
<b>Customer</b>	Read-only. Displays the customer's name.
<b>Account #</b>	Read-only. Displays the customer's DIRECTV account number.
<b>Phone Number</b>	Read-only. Displays the customer's phone number.
<b>Alternate Number</b>	Read-only. Displays an alternate phone number for the customer.
<b>Area</b>	Read-only. Displays the type of Activity, such as Installation.
<b>Sub Area</b>	Read-only: Displays a description of the <b>Area</b> such as Install, Former Install, Service or Upgrade.

- Activity = Job.

*Continued on next page*



<b>Notes</b>	<b>Detail</b>
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## Reviewing and Updating an Activity — Wireless

*(continued)*

Field	Value
<b>Planned Start</b>	Read-only. Displays the estimated time the technician will begin the Activity based on other Activities scheduled for the day. This time should fall between the <b>Earliest Start</b> and <b>Due By</b> times.  <i>Note:</i> The <b>Planned Start</b> field reflects the Service Region time zone.
<b>Earliest Start</b>	Read-only. Displays the earliest time the technician is scheduled to arrive at the customer's location. This is the start of the timeframe communicated to the customer. The <b>Earliest Start</b> field reflects the customer's time zone.
<b>Due By</b>	Read-only. Displays the latest time the technician is scheduled to arrive at the customer's location. This is the end of the timeframe communicated to the customer. The <b>Due By</b> field reflects the customer's time zone.
<b>Address</b>	Read-only. Displays the customer's address.
<b>City</b>	Read-only. Displays the customer's city.
<b>Zip</b>	Read-only. Displays the customer's zip code.
<b>Directions</b>	Read-only. Displays any special driving directions to the customer's location, if provided by the customer.

*Continued on next page*

**Notes**

**Detail**

## Reviewing and Updating an Activity — Wireless

*(continued)*

Field	Value
<b>Map</b>	Provides a Hyperlink to MapQuest to obtain directions to the customer's address. This is covered in more detail in the Mapping the Customer's Address exercise.
<b>Duration</b>	Read-only. Displays the estimated duration of the Activity in minutes. The time is based on a combination of work time minutes and travel time minutes. Work Time = Order Sub Area + OLIs.
<b>Status</b>	<p>Displays the current stage of the Activity and can be updated by using the links at the top of the Activity Detail view.</p> <p>If the technician clicked on the wrong Hyperlink at the top of the Activity Detail view, for example, accidentally clicked On Site when En Route should have been selected, the technician can manually change the Status back to En Route.</p> <p><b>Note:</b> To manually change the Status field, click on the Status Hyperlink. Click on the Status drop-down field and select the appropriate status. Click on Save.</p>
<b>Note to Tech</b>	Read-only. Displays special instructions for the technician.

*Continued on next page*

**Notes**

**Detail**

## Reviewing and Updating an Activity — Wireless

*(continued)*

Field	Value
<b>Comments</b>	The technician can add one or more predefined comments for the Activity in the <b>Comment</b> field, such as <b>Job running long</b> .
<b>Exercise steps</b>	
5. Click on the <b>Comment</b> Hyperlink.	
6. To add a comment, click on the <b>New</b> Hyperlink.	
7. Click on the drop-down arrow in the <b>Comment</b> field. Select <b>Job running long</b> from the list.	
8. To add additional comments, repeat the previous steps. The first comment added is the one that will be displayed in the <b>Activity Detail</b> view.	
9. Click on the <b>Save</b> button.	
10. The Comment <b>Job running long</b> has been added. Click on the <b>Activity Detail</b> Hyperlink to return to the <b>Activity Detail</b> view.	
Field	Value
<b>VIP/OOP</b>	Read-only. Displays whether or not the Activity is a VIP, VIP1, VIP2, VIP3 or OOP order.
<b>MAS Programming</b>	Read-only. Displays whether or not the customer ordered Spanish Programming.
<b>Dwelling</b>	Read-only. Displays whether the account is Residential, Commercial or Multi-Dwelling Unit (MDU).
<b>Repeat Service</b>	Read-only. Displays whether or not the Activity is a repeat service.

*Continued on next page*

<b>Notes</b>	<b>Detail</b>
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## Reviewing and Updating an Activity — Wireless

*(continued)*

- Technicians are able to activate from the wireless unit for those Activities that are Activation Approved (installs and upgrades) or that allow automation (service orders).

Field	Value
<b>Service Within &amp;</b>	Read-only. Displays whether or not the Activity is within 7 days of the prior Activity.
<b>Activation Approved</b>	<p>Read-only. Indicates whether or not the technician is able to activate and deactivate service from the wireless unit. “Y” means that service can be activated when the technician successfully submits the Order Line Items and closes the Activity.</p> <p>When the <b>Activation Approved</b> field is marked with a “Y”, the technician can activate each IRD and close the Activity using their wireless unit.</p> <p>When the Activation Approved field is marked with an “N”, the technician needs to follow the applicable scenario to activate the IRDs. These scenarios are covered in more detail in the Install and Upgrade Orders, DOA Replacements and Former Install sections.</p> <p>Activation Approved “Y” is only indicated for installs and upgrades not for Service orders.</p> <p>For Service orders, we use the term “automation allowed”. Automation is allowed for secondary receivers and not for primary receivers. This will be covered in more detail in the Service Orders — Wireless sections.</p>

*Continued on next page*

**Notes**

**Detail**

## Reviewing and Updating an Activity — Wireless

*(continued)*

- A Resolution **Code** is only required in order to close a Service or QA Activity.

Field	Value
<b>Resolution Code</b>	Technicians can add one or more resolutions in the <b>Resolution Code</b> field for the Activity upon completion. The <b>Resolution Code</b> indicates the action taken on the Activity. At least one Resolution Code is required for Service Activities. The codes are covered in more detail in the Service Orders — Wireless sections.
<b>DPP</b>	Read-only. Displays whether or not the customer has the DIRECTV Protection Plan (DPP). “N” means the customer does not have the Protection Plan and the technician can sell the plan to the customer. “Y” means the customer currently has the Protection Plan and technician does not need to discuss the plan with the customer.
<b>Customer Wants DPP</b>	Technicians must click on the <b>Customer Wants DPP</b> field and choose <b>Yes</b> or <b>No</b> . This will indicate whether or not the technician sold DPP to the customer. The Activity cannot be closed if this field is not populated.

- Technicians must ensure they populate the Customer Wants DPP field in order to close the Activity.

*Continued on next page*

<b>Notes</b>	<b>Detail</b>
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## Reviewing and Updating an Activity — Wireless

*(continued)*

- This field includes six values representing 15 minute increments (15, 30, 45, 60, 75 and 90).

Field	Value
<b>Activity ETA</b>	When the <b>Status</b> field is updated to <b>En Route</b> , a value may be selected from the <b>Activity ETA</b> field. Each time the field is updated with one of the values, a call from the IVR will be triggered to notify the customer of the technician's Estimated Time of Arrival (ETA).
<b>Exercise steps</b>	
11. Click on the <b>En Route</b> Hyperlink.	
12. Click on the <b>Activity ETA</b> Hyperlink.	
13. Click on the drop-down arrow in the <b>Activity ETA</b> field.	
14. Select one of the six values listed in the drop-down list of minutes. The values represent 15 minute increments up to 90 minutes.	
15. Click on the <b>Save</b> button.	
16. Scroll down to view additional fields.	
Field	Value
<b>OMS Order</b>	Read-only. Contains a unique OMS system-generated number corresponding to the Activity. This number may also be required for IRD self-activations, WildBlue provisioning, IVR activations or from the dispatcher or HSP Call Center.

- OMS = Order Management System.

*Continued on next page*

**Notes**

**Detail**

## Reviewing and Updating an Activity — Wireless

*(continued)*

- Review Single Wire Multi-Switch job aid.

Field	Value
<b>SWM</b>	Read-only. Indicates if the customer has a SWM installed. The SWM is a Multi-Switch which is only compatible with specific IRD types. This field is auto-populated once the SWM OLI has been successfully closed.
<b>Previous Activity End</b>	Read only. Automatically populates when a new Service Activity is created, if there was a previously closed Activity of any type within the last 7 calendar days.
<b>Previous Resolution</b>	Read only. Includes all previous Resolutions on the account. When the user clicks on this field, a list of the previous Resolutions will appear.

**Notes**

**Detail**

**Task 13.13**

**Mapping the Customer's Address — Wireless**

**Guided Exercise**

- Discuss business scenario with students before performing Guided Exercise.
- Review [DIRECTV Rio Basics – Wireless QRC](#).
- Review [CBT 13.13](#).

In the Activity Detail view, technicians are provided with a Hyperlink to MapQuest. This is an online mapping site, where technicians can view a map and obtain directions to the customer's location.

Let's learn how to map the customer's address — Wireless.

**Exercise steps**

1. In the **Activity Detail** screen, select the **Mapquest** Hyperlink.
2. Click on the **Directions To** Hyperlink to view driving directions.  
*Note:* Notice the customer's address is populated next to the red star.
3. Type the customer's address in the **Address** or **Intersection** field and click in the **City** field.
4. Type the city in the **City** field and click on the **State** field.
5. Type the state in the **State** field and click on the **Get Directions** button.
6. Scroll down to view the map.
7. Click on the **Back** button on the bottom left of the browser.
8. Continue to click on the **Back** button until you navigate back to the **Activity Detail** view.



## Notes

## Detail

### Task 13.14

### Updating Order Line Items and Capturing Parts Used — Wireless

#### Guided Exercise

- Discuss business scenario with students before performing Guided Exercise.
- Review IRD Actions by Sub Type job aid.
- Review DIRECTV Update OLIs and Activity Closure Steps / Scenarios - Wireless QRC.
- Review How to Submit Order Line Items by Sub Type job aid.
- Review CBT 13.14.
- Order Line Items = equipment items.
- If the technician is out of coverage range on the wireless unit and the Activity is not Activation Approved, the technician makes two phone calls: 1) to the designated number to activate and 2) to the HSP dispatcher to update Order Line Items and close the Activity.
- If the technician has a wireless unit with a scanner, he can scan the bar codes of the assets. If not, the technician can manually enter the Serial Numbers. Since inventory is being tracked, the technician can search for the correct asset by entering Serial Numbers in the IRD Serial # field.

Each Activity lists all of the customer's equipment in Order Line Items including the serialized assets and non-serialized products that must be installed, used or serviced for an order.

After the technician completes the Activity, each of the Order Line Items must be updated with the action taken. If the equipment is a serialized asset, such as an IRD, the technician must also capture the IRD Serial #, Access Card # and RID #, if applicable. For non-serialized products, the product and quantity are captured.

For Activities that involve a swap, the technician would create an Order Line Item for the new asset and capture the new asset information.

After updating the required information on the Order Line Item, the technician submits the Order Line Item. If the Activity is marked as Activation Approved, the information is sent for activation when the Order Line Item is successfully processed.

If an Activity is not marked Activation Approved, technicians are required to provide a new install customer with a Welcome Kit brochure to order programming prior to beginning the installation. If the customer called to add their services to their account during the installation, technicians can click the Activation Approval Hyperlink in the Activity Detail view.

If the customer did not order their programming, the technician must call the designated number to activate the customer's services then contact their HSP Call Center to close the Activity.

Let's learn how to update Order Line Items and capture parts used — Wireless.

*Continued on next page*

Notes

Detail

## Updating Order Line Items and Capturing Parts Used — Wireless *(continued)*

When the Order Line Items are submitted, Inventory Transactions are automatically generated to move the inventory from one location to another. For example, when an IRD is activated, an Inventory Transaction is generated to move the asset from the technician's truck inventory or Fulfillment Center to the customer's home, considered an external location. Similarly, if a technician picks up equipment, an Inventory Transaction is generated to move the parts from an external location to the technician's truck or Fulfillment Center. In this way, inventory is automatically tracked as parts are captured.

Let's learn how to update Order Line Items and capture parts used.

### Exercise steps

1. In the **Activity List** screen, select the appropriate Activity by clicking on the **Time** Hyperlink in the **Planned** column.

If the Activity is marked as Activation Approved, the information is sent for activation when the Order Line Item is successfully processed. If an Activity is not marked Activation Approved, technicians are required to provide a new install / former install customer reconnecting their service with a Welcome Kit brochure to order programming prior to beginning the installation. If the customer called to add their services to their account during the installation, technicians can click the Activation Approval Hyperlink in the Activity Detail view.

If the customer did not order their programming, the technician must call the designated number to activate the customer's services then contact the dispatcher or HSP Call Center to close the Activity.

If the technician is out of coverage range on the wireless unit and the Activity is not Activation Approved, the technician makes two phone calls: 1) to the designated number to activate and 2) to the dispatcher or HSP Call Center to update the Order Line items and close the Activity.

*Continued on next page*

<b>Notes</b>	<b>Detail</b>
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## Updating Order Line Items and Capturing Parts Used — Wireless *(continued)*

- This topic is meant to cover the general fields that should be updated. The specific values they should choose in different situations will be covered in the Install/Upgrade and Service sections, according to each scenario.

Exercise steps	
<p>If the technician has a wireless unit with a scanner, he can scan the bar codes of the assets. If not, the technician can manually enter the Serial Numbers. Since inventory is being tracked, the technician can search for the correct asset by entering Serial Numbers in the IRD Serial # field.</p>	
<p>2. Click on the <b>OLI List</b> Hyperlink.</p> <p><i>Note:</i> Technicians can <b>delete</b> all <b>non-serialized</b> OLIs (Multi-Switches and ODUs) from all Activity types: New Install, Former Install, Upgrade and Service.</p> <p><i>Note:</i> Technicians can <b>add non-serialized</b> OLIs (Multi-Switches and ODUs) to <b>ONLY</b> Service Activities when replacing defective equipment.</p>	
<p>3. Click on the <b>IRD</b> Order Line Item by clicking on the Hyperlink in the <b>Product</b> field.</p>	
<p>4. Complete the following fields one at a time by clicking on the Hyperlink for the field, selecting or entering the appropriate value and clicking on <b>Save</b>.</p>	
Field	Value
<b>Product Line</b>	<p>Auto-populated for existing Order Line items. Do not change.</p> <p>The <b>Product Line</b> field is set by OMS for existing Order Line Items and should not be changed. Additionally, the <b>Product</b> field is automatically updated when the <b>IRD Serial #</b> is entered. Do not change.</p> <p>Finally, the <b>Access Card #</b> should auto-populate when the <b>IRD Serial #</b> is entered.</p>

*Continued on next page*

<b>Notes</b>	<b>Detail</b>
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## Updating Order Line Items and Capturing Parts Used — Wireless *(continued)*

Field	Value
<b>IRD Serial #</b>	<p>Scan the bar code by placing the cursor in the field and then scanning. The technician can also manually enter the Serial Number.</p> <p>Click on the <b>Check Inventory</b> button.</p> <p>Clicking on the <b>Check Inventory</b> button auto-populates several other fields. Click on the <b>Save</b> button.</p>
<b>Exercise steps</b>	
5. Verify the <b>Product</b> , <b>Access Card #</b> and <b>Part Status</b> fields are correct. The fields can be edited if necessary.	
Field	Value
<b>Product</b>	Automatically updated when the IRD Serial # is entered. Do not change.
<b>Access Card #</b>	For a new IRD, the Access Card number should auto-populate when the IRD Serial # is entered. If necessary, the technician can manually enter the Access Card number.
<b>Part Status</b>	Auto-populates when the IRD Serial # is entered. Do not change.
<b>Exercise steps</b>	
6. Complete the following fields one at a time by clicking on the Hyperlink for the field, selecting or entering the appropriate value and clicking on <b>Save</b> .	

- This indicates the status of the asset/product. This is auto-populated based on inventory information for that asset/product.

*Continued on next page*

<b>Notes</b>	<b>Detail</b>
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## Updating Order Line Items and Capturing Parts Used — Wireless *(continued)*

- Point out the **RID Required** field above the **RID #** field. It is auto-populated with a **Y** or **N** based on the product.
- The Install, Upgrade and Service scenarios will instruct them on which values to choose in this field for each scenario.

Field	Value
<b>RID #</b>	Enter the <b>RID #</b> if the <b>RID Required</b> field is <b>Y</b> .
<b>Tech Action</b>	This field is required for every Order Line Item and should be auto-populated with the correct value. Always confirm the appropriate value has been selected, based on the action taken, such as <b>Installed</b> . If no action is required, select <b>No Action Taken</b> .
<b>Location</b>	Select the location where the IRD was installed, such as <b>FAMILY RM</b> .

- Review **Troubleshooting Failed Line Item Errors** in Siebel job aid.

Exercise steps	
7.	Click on the <b>Submit</b> Hyperlink to submit the Order Line Item.  <i>Note:</i> The Status automatically changes to Submitted, then In Transit, then Closed, if successful.
8.	If there is an error when an Order Line Item is submitted, the <b>Status</b> will be changed to <b>Failed</b> and details of the error will be in the <b>Integration Status</b> and/or the <b>Description</b> field. Errors can include missing or incorrect Serial Numbers, Access Card numbers or RID numbers. The technician should correct the Order Line Item fields according to the error and resubmit the item.  <i>Note:</i> When an Order Line Item is unsuccessful an error will appear in the Integration Status / Description fields. Refer to the <b>Troubleshooting Failed Line Item Errors</b> job aid.

*Continued on next page*

**Notes**

**Detail**

## Updating Order Line Items and Capturing Parts Used — Wireless *(continued)*

**Exercise steps**

9. Click on the **Check Status** Hyperlink to refresh the screen and view the updated **Status** field. Do this after submitting each Order Line Item until it successfully closes before continuing. You can click on the **Check Status** Hyperlink several times to keep refreshing the screen until the **Status** is **Closed**.

*Note:* If the Order Line Item becomes locked in a **Submitted** status after clicking on the **Check Status** Hyperlink several times, click on the **Reset Status** Hyperlink. The **Status** will update to **Failed** and the OLI will need to be resubmitted.

*Note:* Closed Order Line Items cannot be reopened.

10. Click on the **OLI List** Hyperlink to return to the list of Order Line Items.

11. Repeat steps 3-10 for each serialized Order Line Item on the order.

12. For non-serialized equipment, select the Order Line Item by clicking on the **Product** Hyperlink. Complete the following field, as appropriate for the Activity; by clicking on the Hyperlink for the field, selecting or entering the appropriate value and clicking on the **Save** button.

Field	Value
<b>Tech Action</b>	Verify the auto-populated value is correct and, if necessary, select the appropriate value, such as <b>Support Hardware Installed</b> . For non-serialized Order Line Items, no other fields need to be updated.

*Continued on next page*

<b>Notes</b>	<b>Detail</b>
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## Updating Order Line Items and Capturing Parts Used — Wireless *(continued)*

Field	Value
<b>Tech Action</b>	Verify the auto-populated value is correct and, if necessary, select the appropriate value, such as <b>Support Hardware Installed</b> . For non-serialized Order Line Items, no other fields need to be updated.
<b>Exercise steps</b>	
13. Click on the <b>Submit</b> Hyperlink to submit the Order Line Item. <i>Note:</i> The Status automatically changes to Submitted, then In Transit, then Closed, if successful.	
14. Click on the <b>Check Status</b> Hyperlink to refresh the screen and view the updated <b>Status</b> field. Do this after submitting each Order Line Item until it successfully closes before continuing.	
15. Click on the <b>OLI List</b> Hyperlink to return to the list of Order Line Items.	
16. Repeat steps 13-15 for each non-serialized Order Line Item on the order.	
<p>The technician can add certain Order Line Items in some cases. For example, if the Service Activity involves swapping out a defective secondary IRD with a new IRD, they will create a new Order Line Item to enter the new asset information. These steps will be covered in those specific Activity scenarios. Basically, they would create a new Record and complete similar fields to what they updated here.</p> <p>If the technician needs to make changes to the Activity, he must contact the dispatcher or HSP Call Center who will contact DIRECTV Support Operations to make the changes for them.</p>	

*Continued on next page*

## Notes

## Detail

# Updating Order Line Items and Capturing Parts Used — Wireless *(continued)*

## Updating Fields

- Discuss the two different methods of updating Order Line Item fields.

- When users choose to update fields all at once, they can refresh the screen in order to view any auto-populated fields after selecting a value, such as Serial #. To refresh, they need to click on Save, and then click on the Update All Fields Hyperlink again. If they manually update each field one at a time by clicking on the Hyperlink for that field, the screen is automatically refreshed when they save that field. This is because the wireless unit is using standard interactivity instead of high interactivity.

Technicians can update Order Line Item fields in one of two ways:

1. First, update each editable field one at a time by clicking on the Hyperlink for that field, selecting or entering the appropriate value and clicking on **Save**. This returns the user to the **OLI Detail** view where any auto-populated fields are immediately displayed. For example, entering the **IRD Serial #** auto-populates other fields (**Access Card #** and **Part Status**). When the user saves the **IRD Serial #**, the auto-populated values in the other fields are immediately displayed in the **OLI Detail** view.
2. Secondly, a technician can click on the **Update All Fields** Hyperlink at the top of the **OLI Detail** view. This presents the user with a view containing all the editable fields across 5 steps. When users choose this method, they must enter the appropriate information and click on **Next** to move through the steps. When finished updating all fields, the user can click on **Save** and return to the **OLI Detail** view.



## Notes

## Detail

### Task 13.15

### Activating Using the Wireless Unit — Wireless

#### Guided Exercise

- Discuss business scenario with students before performing Guided Exercise.
- [Review DIRECTV Rio Basics – Wireless QRC.](#)
- [NO CBT to review with this task.](#)
- In general, we refer to activating but Activation Approved and automation allowed also include the ability to deactivate using the wireless unit.

Technicians can activate from the wireless unit for those activities that are Activation Approved (installs and upgrades) or that allow automation (service orders). The Activation Approved field is found on the Activity Detail view and displays a ‘Y’ if the Activity is activation approved or an ‘N’ if the Activity is not activation approved.

The Activation Approved flag is only indicated on new install and upgrade activities. It is not indicated on Service Activities, so we use the term “automation allowed” instead of “activation approved” to distinguish between the two. Both terms refer to the ability to activate service upon successfully submitting Order Line Items.

For install and upgrade activities, technicians can check the Activation Approved field to see whether or not they can activate using the wireless unit. For Service Activities, there is no indicator. However, automation is generally allowed for secondary receivers and not allowed for primary receivers.

If an Activity is not marked Activation Approved, technicians are required to provide a new install / former install customer reconnecting their service with a Welcome Kit brochure to order programming prior to beginning the installation. If the customer called to add their services to their account during the installation, technicians can click the Activation Approval Hyperlink in the Activity Detail view.

If the customer did not order their programming, the technician must call the designated number to activate the customer’s services then contact their dispatcher or HSP Call Center to close the Activity.

**Note:** For reporting purposes, the **Call Center Action** field displays a “Y” when the technician activates the customer’s services via the designated phone number.

Let’s learn how to activate using the wireless unit — Wireless.

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**Notes****Detail**

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## Activating Using the Wireless Unit *(continued)*

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If an Activity is marked Activation Approved, service is activated through the wireless unit when Order Line Items are successfully submitted

After activation, the technician can update the Order Line Items on the wireless unit and close the Activity. Service must first be activated before the technician can submit the Order Line Items on the wireless unit.

If the technician does not have a wireless device or is out of coverage range on the wireless unit, the technician will call the dispatcher or HSP Call Center to update the Order Line Items and close the Activity in Rio.

We will cover each scenario in more detail in the Wireless orders sections.

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**Notes**

**Detail**

**Task 13.16**

**Closing an Activity — Wireless**

**Guided Exercise**

- Discuss business scenario with students before performing Guided Exercise.
- Review IRD Actions by Sub Type job aid.
- Review DIRECTV Wireless – Closure Scenarios QRC.
- Review CBT 13.16.
- Closing the Activity automatically closes the Activity.
- Technicians will continue to obtain customer signature on a paper Form.
- DPP was **not** sold to the customer.

After all Order Line Items have been updated and successfully submitted, the technician can close the Activity. Resolution codes are not required when completing New Install, Former Install and Upgrade Activities. Resolution codes are, however, still required for Service and QA Activities. The technician can also add one or more comments, if appropriate.

If the technician sold DPP to the customer while on site, the DPP must have been added as an Order Line Item. The Protection Plan option must be selected for both Product Line and the Product. Add Service must be selected for the Tech Action. The Order Line Item must be closed prior to closing the Activity

When the Activity is closed, the Activity is also automatically closed and both Records become read-only.

Let’s learn how to close an Activity — Wireless.

**Exercise steps**

When all Order Line Items have been successfully submitted, the technician can return to the Activity and close. The status of all Order Line Items must be **Closed** before the Activity can be closed. The only exception is for those line items where the Tech Action field is set to **No Action Taken**.

1. Click on the **Activity Detail** Hyperlink.
2. Click on the **Customer Wants DPP** Hyperlink and select **No**. Click on **Save**.

*Note:* An error notification will appear if this field is not completed prior to closing the Activity.

*Note:* If DPP was already added as a new Order Line Item, this step can be skipped.

- Review Adding Protection Plan OLI — Wireless job aid.

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**Notes**

**Detail**

**Closing an Activity — Wireless** *(continued)*

- Users should complete all other fields before changing the Status to Closed, since this makes the Record read-only.

- Users can also manually change the **Status** field to **Closed** by clicking on the **Status** Hyperlink, selecting **Closed** in the drop-down list and clicking on **Save**.

**Exercise steps**

3. Click on the **Comment** Hyperlink. Click on the **New Hyperlink**. Click on the **Comment** drop-down list and select the appropriate comment, such as **Job running long**. Click on **Save**.

If needed, additional comments can be added by repeating the steps to add a Comment. The first Comment added is the one that will be displayed in the **Activity Detail** view. To view all Comments, click on the Comments field Hyperlink and a list will be displayed.

*Note:* A Resolution **Code** is only required in order to close a Service or QA Activity.

4. Click on the **Activity Detail** Hyperlink.

The **Status** must be changed from **On Site** to **Closed**. You do this by clicking the **En Route** and **On Site** links in the Activity Detail header. Once this has been done, the links are no longer visible. The Activity Status was changed to **En Route** when on the way to the customer's home and then again to **On Site** when the technician arrived at this customer's site.

The dispatcher or HSP Call Center will see **Actual Start** and **Actual End** fields, which are auto-populated with date and time, based on when the status is changed to **On Site** and to **Closed**. For accurate metrics and reporting, technicians should be sure to update the status at the appropriate stages.

If the status was never changed to **On Site** and the Hyperlink is still visible, it must be changed to **On Site** first, then to **Closed**. If you try to change the status to **Closed** without changing to **On Site** first, an error message will appear at the top of the screen with instructions to change the Activity Status to **On Site** first.

5. Click on the **Close** Hyperlink. This changes the **Status** to **Closed**.

*Note:* This closes the Activity. The related Activity is automatically closed.

6. Click on the **Activity List** Hyperlink.

*Note:* Notice the closed Activity is no longer available on the Activity List view.

## Notes

## Detail

### Section 14

3 hours 30 minutes

### Install and Upgrade Orders — Wireless

#### Process Objectives

- Discuss process objectives.
  - This section covers specific install and upgrade scenarios and how the technician should complete the Order Line Items for each scenario.
  - **Review DIRECTV Update OLIs and Activity Closure Steps / Scenarios - Wireless QRC.**
- Learn how to complete an install order
  - Learn how to complete an install order without pending services
  - Learn how to complete an upgrade relocate order
  - Learn how to complete an upgrade swap relocate a receiver (activation approved)
  - Learn how to complete an upgrade swap replace order on a receiver (activation approved)
  - Learn how to complete an upgrade order on a new unit
  - Learn how to complete a DOA replacement on a secondary card receiver
  - Learn how to complete a DOA replacement on a primary card receiver
  - Learn how to complete a DOA replacement on a secondary card receiver for new IRDs for customer-owned equipment
  - Learn how to complete a DOA replacement on a primary card receiver for customer-owned equipment
  - Learn how to complete a former install

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## Notes

## Detail

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# Install and Upgrade Orders — Wireless *(continued)*

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## Key Points

- Discuss key business rules.

If an Activity is marked Activation Approved, service is activated through the wireless unit when Order Line Items are successfully submitted

If an Activity is not marked Activation Approved, technicians are required to provide a new install customer with a Welcome Kit brochure to order programming prior to beginning the installation. If the customer called to add their services to their account during the installation, technicians can click the Activation Approval Hyperlink in the Activity Detail view.

If the customer did not order their programming, the technician must call the designated number to activate the customer's services then contact their HSP Call Center to close the Activity.

If technicians are out of coverage range on their wireless unit, they will call the dispatcher or HSP Call Center to update the Order Line Items and close the Activity for them.

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**Notes**

**Detail**

**Task 14.1**

**Install — Wireless**

**Guided Exercise**

- Discuss business scenario with students before performing Guided Exercise.
- [Review CBT 14.1.](#)
- This scenario starts with updating Order Line Items. This presumes the technician updated the status to On Site when he arrived at the customer's location and has now finished the install.
- DPP was **not** sold to the customer.

The technician has just completed a new install for a customer.

The Activity is Activation Approved.

Let's learn how to install — Wireless by updating the Order Line Items, capturing the parts used and closing the Activity.

**Exercise steps**

1. In the **Activity List** screen, select the appropriate Activity by clicking on the **Time** Hyperlink in the **Planned** column.
2. Click on the **OLI List** Hyperlink. The Order Line Items will be populated from the original order in OMS. The first IRD that is activated becomes the primary. All successive IRDs that are activated are secondary.
3. Click on an **IRD** Order Line Item Hyperlink.
4. Complete the following fields one at a time by clicking on the Hyperlink for the field, selecting or entering the appropriate value and clicking on **Save**.

If the technician has a wireless unit with a scanner, he can scan the bar code. He could also manually type the number and it will be accepted.

This captures the parts used. Inventory Transactions are automatically generated to move the inventory from the technician's truck or Fulfillment Center, to the customer's home (external location).

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Notes	Detail
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## Install — Wireless *(continued)*

Field	Value
<b>IRD Serial #</b>	<p>Scan the bar code. The technician can also manually type the Serial Number.</p> <p>Click on the <b>Check Inventory</b> button.</p> <p>Clicking on the <b>Check Inventory</b> button auto-populates several other fields. Click on the <b>Save</b> button.</p>
<b>Access Card #</b>	<p>For a new IRD, the Access Card number should auto-populate when the IRD Serial # is entered. If necessary, the user can manually enter the Access Card number.</p>
<b>RID #</b>	<p>Enter the <b>RID #</b> if the <b>RID Required</b> field is <b>Y</b>.</p>
<b>Tech Action</b>	<p>The <b>Tech Action</b> field should auto-populate with the correct value, <b>Installed</b>. You should confirm it is correct and, if necessary, change it.</p> <p>All Order Line Items require a value in the <b>Tech Action</b> field. If no action is required, you can select <b>No Action Taken</b>.</p> <p>Select <b>Installed</b>.</p>

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<b>Notes</b>	<b>Detail</b>
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## Install — Wireless *(continued)*

Field	Value
<b>Part Status</b>	<p>When the IRD Serial # is entered, <b>Product</b> and <b>Part Status</b> are also auto-populated. The <b>Product</b> field is initially populated from OMS and is automatically updated when the IRD Serial # is entered. This should not be changed.</p> <p>Auto-populates when the IRD Serial # is entered. Do not change.</p>
<b>Location</b>	Select the location where the IRD was installed, such as <b>LIVING RM.</b>

- Repeat steps for each IRD.

Exercise steps	
5.	<p>Click on the <b>Submit</b> Hyperlink to submit the Order Line Item.</p> <p><i>Note:</i> The <b>Status</b> changes to <b>Submitted</b>. If the transaction is successful, the status changes to <b>In Transit</b>, then <b>Closed</b>. This completes the activation.</p>
6.	<p>Click on the <b>Check Status</b> Hyperlink at the top to refresh the screen and view the updated <b>Status</b> field. Do this after submitting each Order Line Item to ensure that it successfully closes before continuing. You can click on the <b>Check Status</b> Hyperlink several times to keep refreshing the screen until the <b>Status</b> is <b>Closed</b>.</p>
7.	<p>Click on the <b>OLI List</b> Hyperlink to return to the list of Order Line Items.</p>

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<b>Notes</b>	<b>Detail</b>
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## Install — Wireless *(continued)*

- Each successive IRD that is activated becomes a secondary receiver.

Exercise steps	
8. Repeat steps 3-6 for each IRD Order Line Item on the order.	
9. Click on the <b>MULTI-SWITCH</b> Order Line Item Hyperlink.	
10. Complete the following field by clicking on the Hyperlink for the field, selecting or entering the appropriate value and clicking on <b>Save</b> .	
Field	Value
<b>Tech Action</b>	<p>The Tech Action field should auto-populate with the correct value. You should confirm that the Tech Action is <b>Support Hardware Installed</b>.</p> <p>For non-serialized equipment, no other fields need to be updated.</p> <p>Select <b>Support Hardware Installed</b>.</p>
Exercise steps	
11. Click on the <b>Submit</b> Hyperlink to submit the Order Line Item.	
<i>Note:</i> The Status automatically changes to Submitted, then In Transit, then Closed, if successful.	
12. Click on the <b>Check Status</b> Hyperlink at the top to refresh the screen and view the updated <b>Status</b> field. Do this after submitting each Order Line Item until it successfully closes before continuing.	
13. Click on the <b>OLI List</b> Hyperlink to return to the list of Order Line Items.	
14. Click on the <b>ODU</b> Order Line Item Hyperlink.	

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<b>Notes</b>	<b>Detail</b>
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## Install — Wireless *(continued)*

- If changes need to be made to the order, the technician should call the dispatcher or HSP Call Center who will contact DIRECTV to make the changes. If an IRD needs to be deleted and DIRECTV makes this change, the Category would show Deleted.
- If the Status fails, the technician will either get a message instructing them what to correct. The technician can then correct and resubmit. Or they may need to call DIRECTV to complete; automation may not be allowed.

Exercise steps	
15. Complete the following field by clicking on the Hyperlink for the field, selecting or entering the appropriate value and clicking on <b>Save</b> .	
Field	Value
<b>Tech Action</b>	<p>The Tech Action field should auto-populate with the correct value. You should confirm that the Tech Action is <b>Support Hardware Installed</b>.</p> <p>For non-serialized equipment, no other fields need to be updated.</p> <p>Select <b>Support Hardware Installed</b>.</p>
Exercise steps	
16. Click on the <b>Submit</b> Hyperlink to submit the Order Line Item.	
<i>Note:</i> The Status automatically changes to Submitted, then In Transit, then Closed, if successful.	
17. Click on the Check Status Hyperlink at the top to refresh the screen and view the updated Status field. Do this after submitting each Order Line Item until it successfully closes before continuing.	
<p>When all Order Line Items have been successfully submitted, the technician can return to the Activity and close.</p> <p>The status of all Order Line Items must be Closed before the Activity can be closed. The only exception is for those line items where the Tech Action field is set to No Action Taken.</p>	

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**Notes**

**Detail**

**Install — Wireless** *(continued)*

- **Status** must be changed from **On Site** to **Closed**. Technician should have changed the status to **En Route with ETA** when on the way to this customer and then again to **On Site** when he arrived at this customer's site.
- The dispatcher or HSP Call Center will see Actual Start and Actual End fields, which are auto-populated with date and time, based on when the status is changed to On Site then to Closed. For accurate metrics and reporting, technicians should be sure to update the status at the appropriate stages.
- If the technician has Comments to enter on the Activity, he could select one or more comments before closing the Activity.

**Exercise steps**

18. Click on the **Activity Detail** Hyperlink.

*Note:* This navigates back to the Activity Detail view.

*Note:* A **Resolution Code** is only required in order to close a Service Activity.

19. Click on the **Customer wants DPP** Hyperlink and select **No**. Click on **Save**.

*Note:* An error notification will appear if this field is not completed prior to closing the Activity.

*Note:* If DPP was already added as a new Order Line Item, this step can be skipped.

If the status was never changed to **On Site** and the Hyperlink is still visible, it must be changed to **On Site** first, then to **Closed**. If you try to change the status to Closed without changing it to On Site first, you will receive an error message telling you to change it to On Site first.

20. Click on the **Close** Hyperlink. This changes the **Status** to **Closed**.

*Note:* This closes the Activity. The related Activity is automatically closed.

**Notes**

**Detail**

**Task 14.3**

**Upgrade Relocate — Wireless**

**Guided Exercise**

- Discuss business scenario with students before performing Guided Exercise.
- Review [DIRECTV Update OLIs and Activity Closure Steps / Scenarios - Wireless QRC](#).
- Review [CBT 14.3](#).
- The technician does not need to capture parts used since no new assets are involved. No Inventory Transactions are required since the IRD is only moving within the customer's home.
- DPP **was sold** to the customer.

The technician has just completed an Activity for a customer to relocate an existing IRD.

He also sold DPP to the customer.

The Activity is Activation Approved.

Let's learn how to upgrade relocation — Wireless by updating the Order Line Item and closing the Activity.

- For all upgrade orders, all of the customer's assets will be in the Order Line Items.
- In all the previous scenarios, the **Action Required** field would have been **New**.
- The technician must select the appropriate Order Line Item based on which IRD was moved. For example, if the IRD in the Den was moved, the technician must select the IRD Order Line Item that has Den in the Location field.

**Exercise steps**

1. In the **Activity List** screen, select the appropriate Activity by clicking on the **Time** Hyperlink in the **Planned** column.
2. Click on the **OLI List** Hyperlink. This is a simple relocate scenario where the technician is relocating one IRD to another location in the customer's home. You will also practice adding DPP as an Order Line Item.  
  
Review the Order Line Items. All of the customer's existing assets will be listed in the **OLI List**. In addition, there is a relocate line item from OMS for informational purposes only, to instruct the technician what to do. When the user selects this Order Line Item and navigates to the OLI List view, the **Action Required** field will be **Relocate**. No updates are required on this Order Line Item.
3. Select the **IRD** Order Line Item that was moved by clicking on the Hyperlink in the **Product** field.

*Continued on next page*

<b>Notes</b>	<b>Detail</b>
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## Upgrade Relocate — Wireless *(continued)*

- Review IRD Actions by Sub Type job aid.
- No information should change for the IRD Serial #, Access Card # or RID #.

Exercise steps	
4. Complete the following fields one at a time by clicking on the Hyperlink for the field, selecting or entering the appropriate value and clicking on <b>Save</b> .	
Field	Value
<b>Tech Action</b>	Select <b>Relocated</b> .
<b>Part Status</b>	Select <b>Good Used</b> .
<b>Location</b>	Change the location to where the IRD was moved.
Exercise steps	
5. Click on the <b>Submit</b> Hyperlink to submit the Order Line Item. <i>Note:</i> The Status automatically changes to Submitted, then In Transit, then Closed, if successful.	
6. Click on the <b>Check Status</b> Hyperlink at the top to refresh the screen and view the updated <b>Status</b> field. Do this after submitting each Order Line Item until it successfully closes before continuing.  Only the IRD Order Line Item that is being relocated needs to be updated. The rest of the customer's existing Order Line Items on the order do not need to be updated or submitted. The <b>Tech Action</b> for those items should default to <b>No Action Taken</b> .	
7. Click on the <b>Activity Detail</b> Hyperlink. <i>Note:</i> This navigates back to the Activity Detail view.	
8. Click on the <b>Comment</b> Hyperlink. Click on the <b>New Hyperlink</b> . Click on the <b>Comment</b> drop-down list and select the appropriate comment, such as <b>Job running long</b> . Click on <b>Save</b> .	
9. Click on the <b>Activity Detail</b> Hyperlink.	

- Discuss some of the comments that can be added such as if an Activity is running long, customer cancels or is not home.

*Continued on next page*

<b>Notes</b>	<b>Detail</b>
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## Upgrade Relocate — Wireless *(continued)*

Exercise steps	
10. If the technician sells DPP to the customer, this must be added as an Order Line Item. Click on the <b>OLI List</b> Hyperlink.	
Field	Value
<b>Product Line</b>	Click on the <b>New</b> Hyperlink. Select <b>Protection Plan</b> from the <b>Product Line</b> field. Click on <b>Next</b> . Click on <b>Check Inventory</b> . Click on <b>Next</b> . Click on the drop-down arrow in the <b>Product</b> field. Select <b>Protection Plan</b> from the list. Click on <b>Next</b> . Click on <b>Save</b> .
Exercise steps	
11. Click on the <b>Protection Plan</b> Hyperlink in the <b>OLI List</b> view.	
12. Click on the <b>Submit Hyperlink</b> . Click on the <b>Check Status</b> Hyperlink until the Status changes to In Transit, then Closed.  <i>Note:</i> When adding the <b>Protection Plan</b> to a customer's account, an error message may appear stating that the customer is not eligible for the Protection Plan. The <b>Category</b> field will change to ' <b>Deleted</b> '. The customer should be instructed to contact customer service for additional information.	
13. Click on the <b>Activity Detail</b> Hyperlink.  <i>Note:</i> A <b>Resolution Code</b> is only required in order to close a Service Activity.	

*Continued on next page*

**Notes**

**Detail**

## Upgrade Relocate — Wireless *(continued)*

### Exercise steps

14. Click on the **Customer wants DPP** Hyperlink. Select **Yes**. Click on **Save**.

*Note:* An error notification will appear if this field is not completed prior to closing the Activity.

*Note:* If DPP was already added as a new Order Line Item, this step can be skipped.

If **DPP** is submitted and closed by the HSP at the time of the pre-call, the **Protection** field will appear on the Activity with a **'P'** for **Pending**. If **DPP** is added but not submitted, the **Protection** field will appear on the Activity with an **'N'** for **No** until the line item is submitted. After 30 days, the **Protection** field will appear with a **'Y'** for **Yes**.

15. Click on the **Close** Hyperlink. This changes the **Status** to **Closed**. All Order Line Items must be successfully closed or have a Tech Action of No Action Taken before the Activity can be closed.

*Note:* This closes the Activity. The related Activity is automatically closed.



## Notes

## Detail

### Task 14.4

### Upgrade Swap Relocate a Receiver — Wireless

#### Guided Exercise

- Discuss business scenario with students before performing Guided Exercise.
- [Review CBT 14.4.](#)
- This is a combination of a relocate and install scenario. The technician relocates an existing IRD to another location in the home and then installs a new receiver. Activation is Approved.
- DPP was **not** sold to the customer.

- The new IRD Order Line Item to be installed will be from OMS and will have Swap Relocate in the Action Required field.

A technician has just completed an Activity for a customer to relocate an existing IRD and to install a new receiver.

The Activity is Activation Approved.

Let's learn how to upgrade swap relocate on a receiver — Wireless by updating the Order Line Items, capturing the parts used and closing the Activity.

#### Exercise steps

1. In the **Activity List** screen, select the appropriate Activity by clicking on the **Time** Hyperlink in the **Planned** column.
2. Click on the **OLI List** Hyperlink.

Review the Order Line Items. All of the customer's existing assets are in the **OLI List**. In addition, there is a new Order Line Item for the new IRD that is to be installed; this Order Line Item is from OMS. When the user selects this Order Line Item and navigates to the OLI Detail view, the **Action Required** field will be **Swap Relocate**.

The Swap Relocate Process must follow three steps.

- Activate the new receiver ordered on an Upgrade Order.
- Relocate the customer owned receiver.
- Validate the Action Required and Tech Action Taken for the new and existing OLIs.

The technician must select the appropriate Order Line Item based on the IRD relocated. If the IRD in the Bedroom was relocated, the IRD Order Line Item with Bedroom in the Location field must be selected.

The existing IRD Order Line Item has the Serial Number and Access Card information populated, whereas, the new IRD Order Line Item does not have this information populated yet.

*Continued on next page*

**Notes**

**Detail**

## Upgrade Swap Relocate a Receiver — Wireless

*(continued)*

- If the wrong Product appears, select the appropriate Product and then click on the **Next** button.

Exercise steps	
<p>3. Select the new <b>IRD</b> Order Line Item to be installed by clicking on the Hyperlink in the <b>Product</b> field.</p> <p><i>Note:</i> Notice the Action Required field for this line item is Swap Replace.</p>	
<p>4. Click on the <b>Update All Fields</b> Hyperlink to update several fields at a time.</p>	
<p>5. Verify the <b>Product Line</b> field. Click on the <b>Next</b> button.</p>	
<p>6. Complete the following fields.</p>	
Field	Value
<b>IRD Serial #</b>	<p>Scan the bar code. The technician can also manually type the Serial Number.</p> <p>Click on the <b>Check Inventory</b> button.</p> <p>Clicking on the <b>Check Inventory</b> button auto-populates several other fields. Click on the <b>Save</b> button.</p>
<b>Access Card #</b>	<p>For a new IRD, the Access Card number should auto-populate when the IRD Serial # is entered. If necessary, the user can manually enter the Access Card number.</p>

*Continued on next page*

<b>Notes</b>	<b>Detail</b>
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## Upgrade Swap Relocate a Receiver — Wireless

*(continued)*

- **Note:** If the wrong Product appears, select the appropriate Product and then click on the **Next** button.

Exercise steps	
7.	Verify the <b>Product</b> , <b>Access Card #</b> and <b>Part Status</b> field. Click on the <b>Next</b> button.
8.	Complete the following fields one at a time by clicking on the Hyperlink for the field, selecting or entering the appropriate value and clicking on <b>Save</b> .
Field	Value
<b>Location</b>	Select the location where the new IRD was installed.
<b>Tech Action</b>	Verify the value is <b>Installed</b> .
<b>RID #</b>	Enter the <b>RID #</b> if the <b>RID Required</b> field is <b>Y</b> .
Exercise steps	
9.	Click on the <b>Submit</b> Hyperlink to submit the Order Line Item.  <i>Note:</i> The Status automatically changes to Submitted, then In Transit, then Closed, if successful.
10.	Click on the <b>Check Status</b> Hyperlink at the top to refresh the screen and view the updated <b>Status</b> field. Do this after submitting each Order Line Item until it successfully closes before continuing.
11.	Click on the <b>OLI List</b> Hyperlink to return to the list of Order Line Items.
12.	Select the <b>IRD</b> Order Line Item that was moved by clicking on the Hyperlink in the <b>Product</b> field.

- If the transaction is successful, the Order Line Item closes. This completes the activation.

- The technician must select the appropriate Order Line Item based on which IRD was moved. For example, if the IRD in the Den was moved, the technician must select the IRD Order Line Item that is located in the Den.

*Continued on next page*

**Notes**

**Detail**

## Upgrade Swap Relocate a Receiver — Wireless

*(continued)*

- No information should change for the IRD Serial #, Access Card # or RID #.
- Location field should already be populated with the current location of the IRD. Change to the new location.

Exercise steps	
13. Complete the following fields one at a time by clicking on the Hyperlink for the field, selecting or entering the appropriate value and clicking on <b>Save</b> .	
Field	Value
<b>Tech Action</b>	Select <b>Relocated</b> .
<b>Part Status</b>	Select <b>Good Used</b> .
<b>Location</b>	Change the location to where the IRD was moved.
Exercise steps	
14. Click on the <b>Submit</b> Hyperlink to submit the Order Line Item. <i>Note:</i> The Status automatically changes to Submitted, then In Transit, then Closed, if successful.	
15. Click on the <b>Check Status</b> Hyperlink at the top to refresh the screen and view the updated <b>Status</b> field. Do this after submitting each Order Line Item until it successfully closes before continuing.	
16. Click on the <b>OLI List</b> Hyperlink to return to the list of Order Line Items. The new equipment location is now populated.  The technician only needs to submit the two Order Line Items that were updated for this upgrade order. The Order Line Items for the customer's other assets do not need to be updated or submitted. The Tech Action for those items should default to No Action Taken.	
17. Click on the <b>Activity Detail</b> Hyperlink. <i>Note:</i> This navigates back to the Activity Detail view. <i>Note:</i> A <b>Resolution Code</b> is only required in order to close a Service Activity.	

*Continued on next page*

## Notes

## Detail

# Upgrade Swap Relocate a Receiver — Wireless

*(continued)*

- All Order Line Items must be successfully closed or have a Tech Action of No Action Taken before the Activity can be closed.

### Exercise steps

18. Click on the **Customer wants DPP** Hyperlink. Select **No**. Click on **Save**.

*Note:* An error notification will appear if this field is not completed prior to closing the Activity.

*Note:* If DPP was already added as a new Order Line Item, this step can be skipped.

19. Click on the **Close** Hyperlink. This changes the **Status** to **Closed**.

*Note:* This closes the Activity. The related Activity is automatically closed.

**Notes**

**Detail**

**Task 14.5**

**Upgrade Swap Replace a Receiver — Wireless**

**Guided Exercise**

- Discuss business scenario with students before performing Guided Exercise.
- [Review CBT 14.5.](#)
- In this scenario, the customer is upgrading to a new receiver. The technician disconnects the existing IRD and installs a new receiver. Activation is approved.
- DPP was **not** sold to the customer.

A technician has just completed an Activity for a customer to replace an existing receiver with an upgrade. The new IRD is installed and the existing IRD is disconnected.

The Activity is Activation Approved.

Let’s learn how to upgrade swap replace on a receiver — Wireless by updating the Order Line Items, capturing the parts used and closing the Activity.

- The new IRD Order Line Item to be installed will be from OMS and will have Swap Replace in the **Action Required** field.

**Exercise steps**

1. In the **Activity List** screen, select the appropriate Activity by clicking on the **Time** Hyperlink in the **Planned** column.
2. Click on the **OLI List** Hyperlink.

Review the Order Line Items. All of the customer’s existing assets are in the **OLI List**. In addition, there is a new Order Line Item for the new IRD that is to be installed; this Order Line Item is from OMS. When the user selects this Order Line Item and navigates to the OLI Detail view, the **Action Required** field will be **Swap Replace**.

The Swap Replace Process must follow three steps.

- Activate the new replacement receiver ordered on an Upgrade Order.
- Deactivate the customer owned receiver.
- Validate the Action Required and Tech Action Taken for the new and existing OLIs.

The technician must select the appropriate Order Line Item based on the IRD replaced. If the IRD in the Bedroom was replaced, the IRD Order Line Item with Bedroom in the Location field must be selected.

The existing IRD Order Line Item has the Serial Number and Access Card information populated, whereas, the new IRD Order Line Item does not have this information populated yet.

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**Notes**

**Detail**

## Upgrade Swap Replace a Receiver — Wireless

*(continued)*

Exercise steps	
<p>3. Select the new <b>IRD</b> Order Line Item to be installed by clicking on the Hyperlink in the <b>Product</b> field.</p> <p><i>Note:</i> Notice the Action Required field for this line item is Swap Replace.</p>	
<p>4. Complete the following fields one at a time by clicking on the Hyperlink for the field, selecting or entering the appropriate value and clicking on <b>Save</b>.</p>	
Field	Value
<b>IRD Serial #</b>	<p>Scan the bar code. The technician can also manually type the Serial Number.</p> <p>Click on the <b>Check Inventory</b> button.</p> <p>Clicking on the <b>Check Inventory</b> button auto-populates several other fields. Click on the <b>Save</b> button.</p>
<b>Access Card #</b>	<p>For a new IRD, the Access Card number should auto-populate when the IRD Serial # is entered. If necessary, the user can manually enter the Access Card number.</p>
<b>RID #</b>	<p>Enter the <b>RID #</b> if the <b>RID Required</b> field is <b>Y</b>.</p>
<b>Location</b>	<p>Select the location where the new IRD was installed.</p>

*Continued on next page*

**Notes**

**Detail**

## Upgrade Swap Replace a Receiver — Wireless

*(continued)*

- If the transaction is successful, the Order Line Item closes. This completes the activation.

- Review IRD Actions by Sub Type job aid.
- No other fields need to be updated.

Exercise steps	
5. Click on the <b>Submit</b> Hyperlink to submit the Order Line Item. <i>Note:</i> The Status automatically changes to Submitted, then In Transit, then Closed, if successful.	
6. Click on the <b>Check Status</b> Hyperlink at the top to refresh the screen and view the updated <b>Status</b> field. Do this after submitting each Order Line Item until it successfully closes before continuing.	
7. Click on the <b>OLI List</b> Hyperlink to return to the list of Order Line Items.	
8. Select the <b>IRD</b> Order Line Item that was replaced (disconnected) by clicking on the Hyperlink in the <b>Product</b> field.	
9. Complete the following fields by clicking on the Hyperlink for the field, selecting or entering the appropriate value and clicking on <b>Save</b> .	
Field	Value
<b>Tech Action</b>	Select <b>Replaced</b> .
<b>Part Status</b>	Select <b>Good Used</b> .

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**Notes**

**Detail**

## Upgrade Swap Replace a Receiver — Wireless

*(continued)*

Exercise steps	
<ul style="list-style-type: none"> <li>If the transaction is successful, the Order Line Item closes. This completes the activation.</li> </ul>	<p>10. Click on the <b>Submit</b> Hyperlink to submit the Order Line Item.</p> <p><i>Note:</i> The Status automatically changes to Submitted, then In Transit, then Closed, if successful.</p>
	<p>11. Click on the <b>Check Status</b> Hyperlink at the top to refresh the screen and view the updated <b>Status</b> field. Do this after submitting each Order Line Item until it successfully closes before continuing.</p>
	<p>The technician only needs to submit the two Order Line Items that were updated for this upgrade order. The Order Line Items for the customer's other assets do not need to be updated or submitted. The Tech Action for those items should default to No Action Taken.</p>
<ul style="list-style-type: none"> <li>This navigates back to the Activity Detail view.</li> </ul>	<p>12. Click on the <b>Activity Detail</b> Hyperlink.</p> <p><i>Note:</i> A <b>Resolution Code</b> is only required in order to close a Service Activity.</p>
	<p>13. Click on the <b>Customer wants DPP</b> Hyperlink. Select <b>No</b>. Click on <b>Save</b>.</p> <p><i>Note:</i> An error notification will appear if this field is not completed prior to closing the Activity.</p> <p><i>Note:</i> If DPP was already added as a new Order Line Item, this step can be skipped.</p>
<ul style="list-style-type: none"> <li>All Order Line Items must be successfully closed or have a Tech Action of No Action Taken before the Activity can be closed.</li> </ul>	<p>14. Click on the <b>Close</b> Hyperlink. This changes the <b>Status</b> to <b>Closed</b>.</p> <p><i>Note:</i> This closes the Activity. The related Activity is automatically closed.</p>

**Notes**

**Detail**

**Task 14.6**

**Upgrade New Unit — Wireless**

**Guided Exercise**

- Discuss business scenario with students before performing Guided Exercise.
- [Review CBT 14.6.](#)
- In this scenario, the technician is adding a new receiver to a customer's existing installation. This is an additional secondary receiver. Activation is approved.
- DPP **was sold** to the customer.

A technician has just completed an Activity for a customer to install an additional secondary receiver.

He also sold DPP to the customer.

The Activity is Activation Approved.

Let's learn how to update new unit — Wireless by updating the Order Line Items, capturing the parts used and closing the Activity.

- The existing installed receivers have this information populated.

**Exercise steps**

1. In the **Activity List** screen, select the appropriate Activity by clicking on the **Time** Hyperlink in the **Planned** column.

2. Click on the **OLI List** Hyperlink.

Review the Order Line Items. All of the customer's existing assets are in the **OLI List**. In addition, there is a new Order Line Item for the new IRD that is to be installed; this Order Line Item is from OMS. When the user selects this Order Line Item and navigates to the OLI List view, the **Action Required** field will be **New**.

3. Select the new **IRD** Order Line Item that was installed by clicking on the Hyperlink in the **Product** field. The Serial Number, Access Card number and location information are not yet populated since it is a new receiver.

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<b>Notes</b>	<b>Detail</b>
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## Upgrade New Unit — Wireless *(continued)*

Exercise steps	
<p>4. Complete the following fields one at a time by clicking on the Hyperlink for the field, selecting or entering the appropriate value and clicking on <b>Save</b>.</p>	
Field	Value
<b>IRD Serial #</b>	<p>Scan the bar code. The technician can also manually type the Serial Number.</p> <p>Click on the <b>Check Inventory</b> button.</p> <p>Clicking on the <b>Check Inventory</b> button auto-populates several other fields. Click on the <b>Save</b> button.</p>
<b>Access Card #</b>	<p>For a new IRD, the Access Card number should auto-populate when the IRD Serial # is entered. If necessary, the user can manually enter the Access Card number.</p>
<b>RID #</b>	<p>Enter the <b>RID #</b> if the <b>RID Required</b> field is <b>Y</b>.</p>
<b>Location</b>	<p>Select the location where the new IRD was installed.</p>
Exercise steps	
<p>5. Click on the <b>Submit</b> Hyperlink to submit the Order Line Item.</p> <p><i>Note:</i> The Status automatically changes to Submitted, then In Transit, then Closed, if successful.</p>	
<p>6. Click on the <b>Check Status</b> Hyperlink at the top to refresh the screen and view the updated <b>Status</b> field. Do this after submitting each Order Line Item until it successfully closes before continuing.</p>	

- If the transaction is successful, the Order Line Item closes. This completes the activation.

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**Notes**

**Detail**

## Upgrade New Unit — Wireless *(continued)*

- If the technician sells DPP to the customer, this must be added as an Order Line Item.
- **Review Adding Protection Plan OLI — Wireless job aid.**
- When adding the **Protection Plan** to a customer's account, an error message may appear stating that the customer is not eligible for the Protection Plan. The **Category** field will change to **'Deleted'**. The customer should be instructed to contact customer service for additional information.

- If **DPP** is submitted and closed by the HSP at the time of the pre-call, the **Protection** field will appear on the Activity with a **'P'** for **Pending**. If **DPP** is added but not submitted, the **Protection** field will appear on the Activity with an **'N'** for **No** until the line item is submitted. After 30 days, the **Protection** field will appear with a **'Y'** for **Yes**.

Exercise steps	
7. Click on the <b>OLI List</b> Hyperlink.	
Field	Value
<b>Product Line</b>	<p>Click on the <b>New</b> Hyperlink.</p> <p>Select <b>Protection Plan</b> from the <b>Product Line</b> field.</p> <p>Click on <b>Next</b>. Click on <b>Check Inventory</b>.</p> <p>Click on <b>Next</b>. Click on the drop-down arrow in the <b>Product</b> field.</p> <p>Select <b>Protection Plan</b> from the list.</p> <p>Click on <b>Next</b>.</p> <p>Click on <b>Save</b>.</p>
Exercise steps	
8. Click on the <b>Protection Plan</b> Hyperlink in the <b>OLI List</b> view.	
9. Click on the <b>Submit Hyperlink</b> . Click on the <b>Check Status</b> Hyperlink until the Status changes to In Transit, then Closed.	

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## Notes

## Detail

### Upgrade New Unit — Wireless *(continued)*

- The technician only needs to submit the one Order Line Item that was installed for this upgrade order. The Order Line Items for the customer's other assets do not need to be updated or submitted. The Tech Action for those items should default to No Action Taken.

#### Exercise steps

10. Click on the **Activity Detail** Hyperlink.

*Note:* This navigates back to the Activity Detail view.

*Note:* A **Resolution Code** is only required in order to close a Service Activity.

11. Click on the **Customer wants DPP** Hyperlink. Select **Yes**. Click on **Save**.

*Note:* An error notification will appear if this field is not completed prior to closing the Activity.

*Note:* If DPP was already added as a new Order Line Item, this step can be skipped.

All Order Line Items must be successfully closed in order to close the Activity. If all Order Line Items have not been closed, go back and close the remaining Order Line Items before closing the Activity.

12. Click on the **Close** Hyperlink. This changes the **Status** to **Closed**.

*Note:* This closes the Activity. The related Activity is automatically closed.

## Notes

## Detail

### Task 14.7

### DOA Replacement on Secondary Receiver — Wireless

#### Guided Exercise

- Discuss business scenario with students before performing Guided Exercise.
- Review [DIRECTV Update OLIs and Activity Closure Steps / Scenarios - Wireless QRC](#).
- Review [DOA Replacement – Wireless Job Aid](#).
- Review [CBT 14.7](#).
- The following four DOA scenarios presume the technician has updated, submitted and activated / closed the Order Line Items successfully but NOT closed the Activity. He then discovers a unit is DOA.
  - If a technician discovers a unit is DOA before activation, he would put the DOA unit back in the truck and install another unit that works. The information for the DOA unit would not be entered in the Order Line Items in Rio. The technician would take the DOA unit back to the warehouse and an Inventory Movement would be created to change the part status from good to defective.
  - The technician should always ensure the customer can receive a picture on all IRDs installed prior to closing the Activity.
- In this scenario, the technician has to replace a DOA secondary receiver. Automation is allowed, meaning the technician can submit the Order Line Items without calling the designated number to activate.
- DPP was **not** sold to the customer.

A technician may find a unit to be DOA in any Activity situation (install, upgrade or service). The following four DOA replacement scenarios address the steps required to perform the DOA replacement portion of the Activity. If the DOA replacement is part of a larger install, upgrade or service Activity, the steps for the other assets being installed, upgraded or serviced are not covered in these scenarios. Refer to the install, upgrade and service scenarios for those steps.

In general, automation can be used for secondary receivers and cannot be used for primary receivers. Automation refers to the ability to activate by successfully submitting Order Line Items and closing the Activity (without calling the designated number); the result is the same as Activation Approved, but Activation Approved is only indicated on install and upgrade Activities. When automation is allowed or if the DOA replacement is part of an install or upgrade Activity that is Activation Approved, the technician can update and submit the Order Line Items on the wireless unit without calling the designated number to activate. If automation is not allowed or if the DOA replacement is part of an install or upgrade Activity that is not Activation Approved, the technician must first call the designated number to activate, then submit the Order Line Items and close the Activity on the wireless unit.

A technician has just completed an Activity for a customer where he had to replace a secondary receiver that was DOA. Automation is allowed. This scenario presumes that the technician has updated and submitted the Order Line Items and activated through the wireless unit. However, upon testing, the technician found that a secondary receiver was DOA. The technician has replaced the DOA receiver with a new receiver. The technician will update the DOA IRD Order Line Item and create a new Order Line Item for the new replacement IRD that was installed.

Let's learn how to DOA replacement on secondary receiver — Wireless by updating the Order Line Items, capturing the parts used and closing the Activity.

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<b>Notes</b>	<b>Detail</b>
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## DOA Replacement on Secondary Receiver — Wireless *(continued)*

- This presumes the technician already entered the Order Line Item information for the IRD and activated it before discovering it was DOA. The technician must select the appropriate Order Line Item based on which IRD was DOA.

- Review IRD Actions by Sub Type job aid.

Exercise steps	
1.	In the <b>Activity List</b> screen, select the appropriate Activity by clicking on the <b>Time</b> Hyperlink in the <b>Planned</b> column.
2.	Click on the <b>OLI List</b> Hyperlink. The technician will update the one DOA IRD Order Line Item and create a new Order Line Item for the new DOA replacement IRD that is installed.
3.	Select the <b>IRD</b> Order Line Item that is DOA by clicking on the Hyperlink in the <b>Product</b> field.
4.	Complete the following field by clicking on the Hyperlink for the field, selecting or entering the appropriate value and clicking on <b>Save</b> .
Field	Value
<b>Tech Action</b>	Select <b>DOA1</b> .
<b>Part Status</b>	Select <b>Defective DOA</b> .
Exercise steps	
No other fields need to be updated since all the other information was previously entered when the technician activated the IRD.	
5.	Click on the <b>Submit</b> Hyperlink to submit the Order Line Item.  <i>Note:</i> The Status automatically changes to Submitted, then In Transit, then Closed, if successful.
6.	Click on the <b>Check Status</b> Hyperlink at the top to refresh the screen and view the updated <b>Status</b> field. Do this after submitting each Order Line Item until it successfully closes before continuing.

*Continued on next page*

**Notes**

**Detail**

## DOA Replacement on Secondary Receiver — Wireless *(continued)*

- This will allow you to create an Order Line Item for the new DOA replacement.
- Technicians can **delete** all **non-serialized** OLI's (Multi-Switches and ODU's) from all Activity types: New Install, Former Install, Upgrade and Service.
- Technicians can **add non-serialized** OLI's (**Multi-Switches and ODU's**) to **ONLY** Service Activities when replacing defective equipment.

**Exercise steps**

7. Click on the **OLI List** Hyperlink to return to the list of Order Line Items.

8. Click on the **New** Hyperlink.

**Note:** Technicians will have the ability to add Multi-Switches on only Service Activities by adding an Order Line Item for each Multi-Switch.

9. Select the appropriate **Product Line**. Click on the **Next** button.

Field	Value
<b>IRD Serial #</b>	Scan the bar code. The technician can also manually type the Serial Number.  Click on the <b>Check Inventory</b> button.  Clicking on the <b>Check Inventory</b> button auto-populates several other fields. Click on the <b>Save</b> button.
<b>Access Card #</b>	For a new IRD, the Access Card number should auto-populate when the IRD Serial # is entered. If necessary, the user can manually enter the Access Card number.

*Continued on next page*



<b>Notes</b>	<b>Detail</b>
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## DOA Replacement on Secondary Receiver — Wireless *(continued)*

- **Note:** If the wrong **Product** appears, select the appropriate Product and then click on the **Next** button.

- Review IRD Actions by Sub Type job aid.

- This navigates back to the OLI List view.
- The user can now view the fields that were auto-populated when the IRD Serial # was entered.

- If the transaction is successful, the Order Line Item closes. This activates the new DOA replacement IRD.

Exercise steps	
10. Verify the <b>Product</b> , <b>Access Card #</b> and <b>Part Status</b> field. Click on the <b>Next</b> button.	
11. Complete the following fields in the Form.	
Field	Value
<b>Location</b>	Select the location where the new DOA replacement IRD was installed.
<b>Tech Action</b>	Select <b>DOA Installed</b> .
<b>RID #</b>	Enter the <b>RID #</b> if the <b>RID Required</b> field is <b>Y</b> .
Exercise steps	
12. Click on <b>Save</b> . The Order Line Item you just created automatically displays at the top of the list.	
13. Select the Order Line Item that was just created for the new DOA replacement IRD by clicking on the Hyperlink in the <b>Product</b> field.	
14. Click on the <b>Submit</b> Hyperlink to submit the Order Line Item.  <i>Note:</i> The Status automatically changes to Submitted, then In Transit, then Closed, if successful.	
15. Click on the <b>Check Status</b> Hyperlink at the top to refresh the screen and view the updated <b>Status</b> field. Do this after submitting each Order Line Item until it successfully closes before continuing.	

*Continued on next page*

**Notes**

**Detail**

## DOA Replacement on Secondary Receiver — Wireless *(continued)*

- This navigates back to the Activity Detail view.

**Exercise steps**

16. Click on the **Activity Detail** Hyperlink.

*Note:* A **Resolution Code** is only required in order to close a Service Activity.

17. Click on the **Customer wants DPP** Hyperlink. Select **No**. Click on **Save**.

*Note:* An error notification will appear if this field is not completed prior to closing the Activity.

*Note:* If DPP was already added as a new Order Line Item, this step can be skipped.

18. Click on the **Close** Hyperlink. This changes the **Status** to **Closed**. All Order Line Items must be successfully closed or have a Tech Action of No Action Taken before the Activity can be closed.

## Notes

## Detail

### Task 14.8

### DOA Replacement on Primary Receiver — Wireless

#### Guided Exercise

- Discuss business scenario with students before performing Guided Exercise.
- [Review CBT 14.8.](#)
- In this scenario, the technician has to replace a DOA primary receiver. Automation is not allowed, so the technician must call the designated number to activate.
- Since a customer's programming is associated with the primary receiver, a DIRECTV CSR must handle changes to the Primary IRD.
- Technicians can determine whether or not an existing IRD is Primary 'P' or Secondary 'S' by viewing the AC Type field on the OLI List and the OLI Detail views.
- DPP was **not** sold to the customer.

A technician has just completed an Activity for a customer to replace a primary IRD that was DOA.

In general, automation can be used for secondary receivers and cannot be used for primary receivers. Automation refers to the ability to activate by successfully submitting order line items and closing the Activity (without calling the designated number); the result is the same as Activation Approved, but the Activation Approved check mark only appears on install and upgrade orders. When automation is allowed or if the DOA replacement is part of an install or upgrade order that is Activation Approved, the technician can update and submit the Order Line Items without calling the designated number to activate. If automation is not allowed or if the DOA replacement is part of an install or upgrade order that is not Activation Approved, the technician must first call the designated number to activate and then close the Activity.

Automation is not allowed for this Activity. This scenario presumes the technician has already called the designated number to activate the primary IRD and then updated and submitted the Order Line Item for the primary IRD on the wireless unit. The technician then found that the primary IRD was DOA upon testing. He replaced the primary DOA IRD with a new replacement IRD and called the designated number back to activate. DIRECTV will make the defective IRD DOA, create the pending Access Card and activate the new replacement IRD. After activation, the technician can then update the primary DOA IRD Order Line Item on the wireless unit and create one new Order Line Item for the new replacement IRD that was installed.

This exercise focuses on the DOA replacement portion of the Activity and does not include other equipment which may be installed, upgraded or serviced on the order.

Let's learn how to DOA replacement on primary receiver — Wireless by updating the Order Line Items, capturing the parts used and closing the Activity.

*Continued on next page*

<b>Notes</b>	<b>Detail</b>
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## DOA Replacement on Primary Receiver — Wireless (continued)

- Since the technician now has to replace the primary IRD, he will add a comment stating the Job is running long.

- Entering the information for the DOA IRD generates Inventory Transactions which change the status of the unit to defective.
- This presumes the technician already entered the Order Line Item information for the IRD and activated it before discovering it was DOA. The technician must select the appropriate Order Line Item based on which IRD was DOA.

- **Review IRD Actions by Sub Type job aid.**
- No other fields need to be updated since all the other information was previously entered when the technician activated the IRD.

Exercise steps	
1.	In the <b>Activity List</b> screen, select the appropriate Activity by clicking on the <b>Time</b> Hyperlink in the <b>Planned</b> column.
2.	Before removing and adding the Order Line Items, you will perform the process to add a <b>Comment</b> . Click on the <b>Comment</b> Hyperlink. Click on the <b>New</b> Hyperlink. Click on the <b>Comment</b> drop-down list and select the appropriate comment, such as <b>Job running long</b> . Click on <b>Save</b> .
3.	Click on the <b>Activity Detail</b> Hyperlink. The added <b>Comment</b> now appears in the <b>Comment</b> section of the <b>Activity Detail</b> view.
4.	Click on the <b>OLI List</b> Hyperlink. The technician will update the DOA IRD Order Line Item and create a new DOA replacement IRD that is installed.
5.	Select the <b>IRD</b> Order Line Item that is DOA by clicking on the Hyperlink in the <b>Product</b> field.
6.	Complete the following fields by clicking on the Hyperlink for the field, selecting or entering the appropriate value and clicking on <b>Save</b> .
Field	Value
<b>Tech Action</b>	Select <b>Call Center DOA</b> .
<b>Part Status</b>	Select <b>Defective DOA</b> .

*Continued on next page*

**Notes**

**Detail**

## DOA Replacement on Primary Receiver — Wireless (continued)

- Technicians can **delete** all **non-serialized** OLI's (Multi-Switches and ODU's) from all Activity types: New Install, Former Install, Upgrade and Service.
- Technicians can **add non-serialized** OLI's (**Multi-Switches and ODU's**) to **ONLY** Service Activities when replacing defective equipment.

**Exercise steps**

7. Click on the **Submit** Hyperlink to submit the Order Line Item.  
*Note:* The Status automatically changes to Submitted, then In Transit, then Closed, if successful.
8. Click on **Check Status** Hyperlink at the top to refresh the screen and view the updated **Status** field. Do this after submitting each Order Line Item until it successfully closes before continuing.
9. Click on the **OLI List** Hyperlink to return to the list of Order Line Items. Note the **Status** of the DOA IRD Order Line Item is **DCRD**. This indicates the defective DOA primary IRD being replaced has been deactivated.
10. Click on the **New** to create an Order Line Item for the new DOA replacement IRD that was installed.  
*Note:* Technicians will have the ability to add Multi-Switches on only Service Activities by adding an Order Line Item for each Multi-Switch.
11. Select the appropriate **Product Line**. Click on the **Next** button.

*Continued on next page*

<b>Notes</b>	<b>Detail</b>
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## DOA Replacement on Primary Receiver — Wireless (continued)

- This should be the serial # of the new DOA replacement IRD.

Exercise steps	
12. Complete the following field in the Form.	
Field	Value
<b>IRD Serial #</b>	Scan the bar code. The technician can also manually type the Serial Number.  Click on the <b>Check Inventory</b> button.  Clicking on the <b>Check Inventory</b> button auto-populates several other fields. Click on the <b>Save</b> button.
Exercise steps	
13. Click on the <b>Next</b> button.	
14. Verify the <b>Product</b> , <b>Access Card #</b> and <b>Part Status</b> field. Click on the <b>Next</b> button.	
15. Complete the following fields in the Form.	
Field	Value
<b>Location</b>	Select the location. This should be the location where the new DOA replacement IRD was installed.
<b>Tech Action</b>	Select <b>Call Center DOA Activation</b> .
<b>RID #</b>	Enter the <b>RID #</b> if the <b>RID Required</b> field is <b>Y</b> .

- Note:** If the wrong **Product** appears, select the appropriate Product and then click on the **Next** button.

- Review IRD Actions by Sub Type job aid.

*Continued on next page*

<b>Notes</b>	<b>Detail</b>
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## DOA Replacement on Primary Receiver — Wireless (continued)

- This saves the new Order Line Item. User must go back in to complete the rest of the fields and submit the Order Line Item.
- The user can now view the fields that were auto-populated when the IRD Serial # was entered.

Exercise steps	
16. Click on <b>Save</b> . <i>Note:</i> This navigates back to the <b>OLI List</b> view.	
17. Click on the IRD Order Line Item Hyperlink in the first row to open the <b>OLI Details</b> view for the new Order Line Item.	
Field	Value
<b>Access Card #</b>	For a new IRD, the Access Card number should auto-populate when the IRD Serial # is entered. If necessary, the user can manually enter the Access Card number.  This should be the Access Card # of the new DOA replacement IRD.
Exercise steps	
18. Click on the <b>Submit</b> Hyperlink to submit the Order Line Item. <i>Note:</i> The Status automatically changes to Submitted, then In Transit, then Closed, if successful.	
19. Click on the <b>Check Status</b> Hyperlink at the top to refresh the screen and view the updated <b>Status</b> field. Do this after submitting each Order Line Item until it successfully closes before continuing.	
20. Click on the <b>Activity Detail</b> Hyperlink. <i>Note:</i> This navigates back to the Activity Detail view. <i>Note:</i> A <b>Resolution Code</b> is only required in order to close a Service Activity.	

- Depending on whether or not the DOA is part of a larger install, upgrade or service order, where actions were taken on other assets, there may be other Order Line Items to submit.

*Continued on next page*

Notes

Detail

## DOA Replacement on Primary Receiver — Wireless

*(continued)*

- All Order Line Items must be successfully closed or have a Tech Action of No Action Taken before the Activity can be closed.

### Exercise steps

21. Click on the **Customer wants DPP** Hyperlink. Select **No**. Click on **Save**.

*Note:* An error notification will appear if this field is not completed prior to closing the Activity.

*Note:* If DPP was already added as a new Order Line Item, this step can be skipped.

22. Click on the **Close** Hyperlink. This changes the **Status** to **Closed**.

*Note:* This closes the Activity. The related Activity is automatically closed.



**Notes**

**Detail**

**Task 14.9**

**DOA Replacement on Secondary Receiver — Customer-Owned Equipment — Wireless**

**Guided Exercise**

- Discuss business scenario with students before performing Guided Exercise.
- [Review CBT 14.9.](#)
- In this scenario, the technician has to replace a DOA secondary receiver that is a new IRD and is customer-owned equipment. Automation is allowed, meaning the technician can submit the Order Line Items without calling the designated number to activate.
- DPP was **not** sold to the customer.

A technician has just completed an Activity for a customer where he had to replace a secondary receiver that was DOA. It is a new IRD and is customer-owned equipment that was purchased at a retail location. Automation is allowed.

This scenario presumes that the technician has updated and submitted the Order Line Items and activated through the wireless unit. However, upon testing, the technician found that a secondary receiver was DOA. The technician has replaced the DOA receiver with a new receiver. The technician will update the DOA IRD Order Line Item and create a new Order Line Item for the new replacement IRD that was installed.

This scenario only applies to former customers that are installing a standard IRD. Otherwise, the technician does not replace the DOA IRD with a new one and only updates the DOA IRD Order Line Item.

This exercise focuses on the DOA replacement portion of the Activity and does not include other equipment which may be installed, upgraded or serviced on the Activity.

Let's learn how to DOA replacement on secondary receiver — customer-owned equipment — Wireless by updating the Order Line Items, capturing the parts used and closing the Activity.

**Exercise steps**

1. In the **Activity List** screen, select the appropriate Activity by clicking on the **Time** Hyperlink in the **Planned** column.
2. Click on the **OLI List** Hyperlink.

*Continued on next page*

<b>Notes</b>	<b>Detail</b>
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## DOA Replacement on Secondary Receiver — Customer-Owned Equipment — Wireless *(continued)*

- Review IRD Actions by Sub Type job aid.
- No other fields need to be updated.
- Fields, such as Part Status and Access Card #, are not auto-populated until the user saves. The auto-populated fields can be seen in the OLI Detail view.

Exercise steps	
<p>The Technician will update the one DOA IRD Order Line Item and create a new Order Line Item for the new DOA replacement IRD that is installed.</p> <p>The Delivery Method field would be Dropped Shipped or Customer Owned if the IRD was just installed or upgraded on this order (which is the assumption in our scenario). If the IRD was an existing customer asset, the Delivery Method field would not be populated.</p>	
<p>3. Select the <b>IRD</b> Order Line Item that is DOA by clicking on the Hyperlink in the <b>Product</b> field.</p> <p><i>Note:</i> This presumes the technician already entered the Order Line Item information for the IRD and activated it before discovering it was DOA. The technician must select the appropriate Order Line Item based on which IRD was DOA.</p>	
<p>4. Complete the following fields by clicking on the Hyperlink for the field, selecting or entering the appropriate value and clicking on <b>Save</b>.</p>	
Field	Value
<b>Tech Action</b>	Select <b>DOA Retail</b> .
<b>Part Status</b>	Select <b>Defective DOA</b> .
Exercise steps	
<p>5. Click on the <b>Submit</b> Hyperlink to submit the Order Line Item.</p> <p><i>Note:</i> The Status automatically changes to Submitted, then In Transit, then Closed, if successful.</p>	

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**Notes**

**Detail**

## DOA Replacement on Secondary Receiver — Customer-Owned Equipment — Wireless *(continued)*

- Steps 8-17 (creating a new Order Line Item for a replacement IRD) only apply to former customers installing a standard IRD. Otherwise, the technician only updates the DOA IRD Order Line Item and skips to step 18 to close the Activity.
- Technicians can **delete** all **non-serialized** OLI (Multi-Switches and ODUs) from all Activity types: New Install, Former Install, Upgrade and Service.
- Technicians can **add non-serialized** OLI (Multi-Switches and ODUs) to **ONLY** Service Activities when replacing defective equipment.
- The new replacement receiver should be in the same product line as the DOA receiver.

**Exercise steps**

6. Click on the **Check Status** Hyperlink at the top to refresh the screen and view the updated **Status** field. Do this after submitting each Order Line Item until it successfully closes before continuing. You can click on the **Check Status** Hyperlink several times to keep refreshing the screen until the **Status** is **Closed**.

7. Click on the **OLI List** Hyperlink to return to the list of Order Line Items.

8. Click on the **New** Hyperlink to create an Order Line Item for the new DOA replacement IRD that was installed.

**Note:** Technicians will have the ability to add Multi-Switches on only Service Activities by adding an Order Line Item for each Multi-Switch.

9. Select the appropriate **Product Line**. Click on the **Next** button.

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<b>Notes</b>	<b>Detail</b>
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## DOA Replacement on Secondary Receiver — Customer-Owned Equipment — Wireless *(continued)*

- The **Verify Information** screen summarizes the product information.

- If the wrong **Product** appears, select the appropriate Product and then click on the **Next** button.
- This saves the new Order Line Item. User must go back in to complete the rest of the fields and to submit the Order Line Item.
- This navigates back to the OLI List view.

- Review IRD Actions by Sub Type job aid.

Exercise steps	
10. Complete the following field in the Form.	
Field	Value
<b>IRD Serial #</b>	Scan the bar code. The technician can also manually type the Serial Number.  Click on the <b>Check Inventory</b> button.  Clicking on the <b>Check Inventory</b> button auto-populates several other fields. Click on the <b>Save</b> button.  This should be the serial # of the new DOA replacement IRD.
Exercise steps	
11. Verify the <b>Product</b> , <b>Access Card #</b> and <b>Part Status</b> field. Click on the <b>Next</b> button.	
12. Complete the following fields by clicking on the Hyperlink for the field, selecting or entering the appropriate value and clicking on <b>Save</b> .	
Field	Value
<b>Location</b>	Select the location where the new DOA replacement IRD was installed.
<b>Tech Action</b>	Select <b>DOA Installed</b> .
<b>RID #</b>	Enter the <b>RID #</b> if the <b>RID Required</b> field is <b>Y</b> .

*Continued on next page*

**Notes**

**Detail**

## DOA Replacement on Secondary Receiver — Customer-Owned Equipment — Wireless *(continued)*

- Depending on whether or not the DOA is part of a larger install, upgrade or service order, where actions were taken on other assets, there may be other Order Line Items to submit.

**Exercise steps**

The Order Line Item just created automatically displays at the top of the list.

- Select the Order Line Item that was just created for the new DOA replacement IRD by clicking on the Hyperlink in the **Product** field.

*Note:* For a new IRD, the **Access Card #** should auto-populate when the IRD Serial # is entered. If necessary, the user can manually enter the Access Card number. This should be the **Access Card #** of the new DOA replacement IRD.

- Click on the **Submit** Hyperlink to submit the Order Line Item.

*Note:* The Status automatically changes to Submitted, then In Transit, then Closed, if successful.

- Click on the **Check Status** Hyperlink to refresh the screen and view the updated **Status** field.

- Click on the **Activity Detail** Hyperlink.

*Note:* This navigates back to the Activity Detail view.

*Note:* A **Resolution Code** is only required in order to close a Service Activity.

- Click on the **Customer wants DPP** Hyperlink. Select **No**. Click on **Save**.

*Note:* An error notification will appear if this field is not completed prior to closing the Activity.

*Note:* If DPP was already added as a new Order Line Item, this step can be skipped.

- Click on the **Close** Hyperlink. This changes the **Status** to **Closed**.

All Order Line Items must be successfully closed or have a Tech Action of No Action Taken before the Activity can be closed.

*Note:* This closes the Activity. The related Activity is automatically closed.

**Notes**

**Detail**

**Task 14.10**

**DOA Replacement on Primary Receiver — Customer-Owned Equipment — Wireless**

**Guided Exercise**

- Discuss business scenario with students before performing Guided Exercise.
- [Review CBT 14.10.](#)
- In this scenario, the technician has to replace a DOA primary receiver that is a new IRD and is customer-owned equipment. Automation is not allowed, so the technician must call the designated number to activate.
- Since a customer's programming is associated with the primary receiver, a DIRECTV CSR must handle changes to the Primary IRD.
- Technicians can determine whether or not an existing IRD is Primary 'P' or Secondary 'S' by viewing the AC Type field on the OLI List and the OLI Detail views.
- DPP was **not** sold to the customer.

A technician has just completed an Activity for a customer to replace a primary IRD that was DOA. It is a new IRD and is customer-owned equipment and purchased at a retail location. This scenario only applies to former customers that are installing a standard IRD. Otherwise, the technician does not replace the DOA IRD with a new one and only updates the DOA IRD equipment item.

Automation is not allowed for this Activity. This scenario presumes the technician has already called the designated number to activate the primary IRD and then updated and submitted the equipment item for the primary IRD on the wireless unit. The technician then found the primary IRD was DOA upon testing. He has replaced the primary DOA IRD with a new replacement IRD and called the designated number again to activate. DIRECTV will make the defective IRD DOA, create the pending Access Card and activate the new IRD. After activation, the technician can then update the primary DOA IRD equipment item on the wireless unit and create one new Order Line Item for the new replacement IRD that was installed.

This exercise focuses on the DOA replacement portion of the Activity and does not include other equipment which may be installed, upgraded or serviced on the order.

Let's learn how to DOA replacement on primary receiver — customer-owned equipment — Wireless by creating the equipment item, capturing parts used and closing the Activity.

**Exercise steps**

1. In the **Activity List** screen, select the appropriate Activity by clicking on the **Time** Hyperlink in the **Planned** column.
2. Click on the **OLI List** Hyperlink.

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**Notes**

**Detail**

## DOA Replacement on Primary Receiver — Customer-Owned Equipment — Wireless *(continued)*

- Since activation is done by DIRECTV, the technician does not need to create a pending Access Card.
- Entering the information for the DOA IRD generates Inventory Transactions which change the status of the unit to defective.
- **Review IRD Actions by Sub Type job aid.**
- No other fields need to be updated.

Exercise steps	
The technician will update the DOA IRD Order Line Item to make it DOA and create one new Order Line Item for the new DOA replacement IRD that was installed.	
<p>3. Select the <b>IRD</b> Order Line Item that is DOA by clicking on the Hyperlink in the <b>Product</b> field.</p> <p><i>Note:</i> This presumes the technician already entered the Order Line Item information for the IRD and activated it before discovering it was DOA. The technician must select the appropriate Order Line Item based on which IRD was DOA.</p>	
4. Complete the following fields by clicking on the Hyperlink for the field, selecting or entering the appropriate value and clicking on <b>Save</b> .	
Field	Value
<b>Tech Action</b>	Select <b>Call Center DOA Retail</b> from the list.
<b>Part Status</b>	Click on the <b>Part Status</b> Hyperlink to submit the Order Line Item.  Select <b>Defective DOA</b> from the list.
Exercise steps	
5. Click on the <b>Submit</b> Hyperlink to submit the Order Line Item. The <b>Status</b> is now <b>Submitted</b> .	
<i>Note:</i> The Status automatically changes to Submitted, then In Transit, then Closed, if successful on refreshing the screen.	

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<b>Notes</b>	<b>Detail</b>
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## DOA Replacement on Primary Receiver — Customer-Owned Equipment — Wireless *(continued)*

- Technicians can **delete** all **non-serialized** OLIs (Multi-Switches and ODU) from all Activity types: New Install, Former Install, Upgrade and Service.
- Technicians can **add non-serialized** OLIs (**Multi-Switches and ODUs**) to **ONLY** Service Activities when replacing defective equipment.
- The new replacement receiver should be in the same product line as the DOA receiver.
- This should be the serial # of the new DOA replacement IRD.

Exercise steps	
6.	Click on the <b>Check Status</b> Hyperlink to refresh the screen. The <b>Status</b> changes to <b>In Transit</b> . Click on the <b>Check Status</b> Hyperlink again until the Order Line Item is successfully closed before continuing.  <i>Note:</i> Next you will create a new Order Line Item for the replacement IRD.
7.	Click on the <b>OLI List</b> Hyperlink to return to the list of Order Line Items.
8.	Click on the <b>New</b> Hyperlink to create an Order Line Item for the new DOA replacement IRD that was installed.  <i>Note:</i> Technicians will have the ability to add Multi-Switches on Service Activities by adding an Order Line Item for each Multi-Switch.  <i>Note:</i> Creating a new Order Line Item for a replacement IRD only applies to former customers installing a standard IRD. Otherwise, the technician only updates the DOA IRD Order Line Item and closes the Activity.
9.	Select the appropriate <b>Product Line</b> . Click on the <b>Next</b> button.
10.	Select the appropriate <b>Product</b> . Click on the <b>Next</b> button.
11.	Complete the following field in the Form.
Field	Value
<b>IRD Serial #</b>	Scan the bar code. The technician can also manually type the Serial Number.  Click on the <b>Check Inventory</b> button.  Clicking on the <b>Check Inventory</b> button auto-populates several other fields. Click on the <b>Save</b> button.

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**Notes**

**Detail**

## DOA Replacement on Primary Receiver — Customer-Owned Equipment — Wireless *(continued)*

- If the wrong **Product** appears, select the appropriate Product and then click on the **Next** button.

- Review IRD Actions by Sub Type job aid.

Exercise steps	
12. Verify the <b>Product</b> , <b>Access Card #</b> and <b>Part Status</b> fields. Click on the <b>Next</b> button.	
13. Complete the following fields in the Form.	
Field	Value
<b>Location</b>	Select the location where the new DOA replacement IRD was installed.
<b>Tech Action</b>	Select <b>Call Center DOA Activation</b> .
<b>RID #</b>	Enter the <b>RID #</b> if the <b>RID Required</b> field is <b>Y</b> .
Exercise steps	
14. Click on the <b>Save</b> button. <i>Note:</i> This navigates back to the OLI List view. <i>Note:</i> Fields, such as Part Status and Access Card #, are not auto-populated until the user saves. The auto-populated fields can be seen in the OLI List view.	
15. Select the Order Line Item that was just created for the new DOA replacement IRD by clicking on the Hyperlink in the <b>Product</b> field. <i>Note:</i> The user can now view the fields that were auto-populated when the IRD Serial # was entered.	

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**Notes**

**Detail**

## DOA Replacement on Primary Receiver — Customer-Owned Equipment — Wireless *(continued)*

**Exercise steps**

16. Complete the following field by clicking on the Hyperlink for the field, selecting or entering the appropriate value and clicking on **Save**.

Field	Value
Access Card #	For a new IRD, the Access Card number should auto-populate when the IRD Serial # is entered. If necessary, the user can manually enter the Access Card number.  This should be the Access Card # of the new DOA replacement IRD.

**Exercise steps**

17. Click on the **Submit** Hyperlink to submit the Order Line Item.

*Note:* The Status automatically changes to Submitted, then In Transit, then Closed, if successful.

18. Click on the **Check Status** Hyperlink at the top to refresh the screen and view the updated **Status** field. Do this after submitting each Order Line Item until it successfully closes before continuing.

19. Click on the **Activity Detail** Hyperlink.

*Note:* This navigates back to the Activity Detail view.

*Note:* A **Resolution Code** is only required in order to close a Service Activity.

- Depending on whether or not the DOA is part of a larger install, upgrade or service order, where actions were taken on other assets, there may be other Order Line Items to submit.

*Continued on next page*

## Notes

## Detail

# DOA Replacement on Primary Receiver — Customer-Owned Equipment — Wireless *(continued)*

- All Order Line Items must be successfully closed or have a Tech Action of No Action Taken before the Activity can be closed.

### Exercise steps

20. Click on the **Customer wants DPP** Hyperlink. Select **No**. Click on **Save**.

*Note:* An error notification will appear if this field is not completed prior to closing the Activity.

*Note:* If DPP was already added as a new Order Line Item, this step can be skipped.

21. Click on the **Close** Hyperlink. This changes the **Status** to **Closed**.

*Note:* This closes the Activity. The related Activity is automatically closed.

## Notes

## Detail

### Task 14.11

### Former Install — Wireless

#### Guided Exercise

- Discuss business scenario with students before performing Guided Exercise.
- Review [DIRECTV Update OLIs and Activity Closure Steps / Scenarios - Wireless QRC](#).
- Review [CBT 14.11](#).
- Technicians are required to provide an Upgrade Kit to Former Customers reconnecting their service and Movers Customers moving to new homes.
- Review [Former Install – Wireless job aid](#).
- DPP was **not** sold to the customer.

Former Install Activities are categorized in one of two ways and can be recognized by the **Order Class** field on the **Activity Detail** screen. The Order Class descriptions are outlined below.

#### Order Class

**Movers** – An existing DIRECTV customer who moves to a new home and requires a professional installation at their new location.

- Movers Activities will be Activation Approved and appear as **Activation Approved “Y”**.

**Former Customers** – DIRECTV customers who have disconnected and want to reconnect their DIRECTV service at the same location.

- Former Customer Activities will not be Activation Approved and appear as **Activation Approved “N”**.

**Note:** Accounts in **SUSP** (Suspend) status with a Movers order will become **ACTV** (Active Status) once the Order Line Items are submitted successfully. Accounts in **PSUSP** (Pending Suspend) status will require a call to the IVR to complete the activation process.

**Important Note:** If the customer has existing active IRDs, they will be listed in the OLI List as **ACTV** and **Existing** (Category – seen only when you click on the ACTV OLI and are taken to the OLI Detail view). **These order line items should not be submitted!** They exist for informational purposes only.

A technician has just completed a former install for a Movers Customer.

The Activity is Activation Approved.

Let’s learn how to former install — Wireless by updating the order line items, capturing the parts used and closing the Activity.

*Continued on next page*

Notes

Detail

## Former Install — Wireless *(continued)*

Exercise steps
1. In the <b>Activity List</b> screen, select the appropriate Activity by clicking on the <b>Time</b> in the <b>Planned</b> column.
2. Click on the <b>OLI List</b> Hyperlink.
3. All of the customer's existing assets are in the OLI List. In addition, there are new Order Line Items for the new IRDs to be installed. When the user selects the new Order Line Items and navigates to the OLI Detail view, the <b>Action Required</b> field will be <b>New</b> .  <i>Note:</i> Additional IRDs to be installed will appear with a <b>Delivery Method</b> field value of <b>Tech Delivers</b> . These Order Line Items should be handled following the standard Install process.  <i>Note:</i> Existing Order Line Items have a <b>Status</b> of <b>Active</b> and <b>Category</b> of <b>Existing</b> . <b>These Order Line Items are for informational purposes only and should not be submitted.</b> Existing Order Line Items may also appear as new Order Line Items. Fields from the Existing Order Line Items can be copied into fields for the new Order Line Items.
There are three methods for a user to enter the <b>Serial Number</b> , <b>Access Card #</b> and <b>RID #</b> from the existing IRD OLI to the new IRD OLI. <ol style="list-style-type: none"><li>1. Scan the number from the existing IRD into the applicable field of the new IRD OLI.</li><li>2. Enter the information in the applicable field of the new IRD OLI.</li><li>3. Copy / paste from the existing IRD OLI field to the new IRD OLI field.</li></ol> The method which will be used in this scenario will be copy / paste from the existing to the new.

*Continued on next page*

**Notes**

**Detail**

**Former Install — Wireless** *(continued)*

- The Scan or Copy / Paste method can be used to populate the fields.

Exercise steps				
	<p>4. Select the ACTV existing <b>IRD</b> Order Line Item by clicking on the Hyperlink in the <b>Product</b> field.</p>			
	<p>5. Scroll down to view the <b>Category, Tech Action</b> and <b>Delivery Method</b> fields.</p> <table border="1" style="margin-left: 40px;"> <tr> <td style="padding: 2px;">Category &gt; <b>Existing</b></td> </tr> <tr> <td style="padding: 2px;">Tech Action &gt; <b>No Action Taken</b></td> </tr> <tr> <td style="padding: 2px;">Delivery Method &gt; <b>Blank</b></td> </tr> </table> <p><i>Note:</i> If the Category is New, the user chose the new OLI not the existing.</p>	Category > <b>Existing</b>	Tech Action > <b>No Action Taken</b>	Delivery Method > <b>Blank</b>
Category > <b>Existing</b>				
Tech Action > <b>No Action Taken</b>				
Delivery Method > <b>Blank</b>				
	<p>6. Click on the <b>IRD Serial #</b> field.</p>			
	<p>7. Drag the stylus across the <b>IRD Serial #</b> to highlight. Tap, hold and select <b>Copy</b> to copy the value from the <b>IRD Serial #</b> field.</p> <p><i>Note:</i> Each required field value from the existing Order Line Item will need to be copied to the new Order Line Item.</p>			
	<p>8. Click on the <b>OLI List</b> Hyperlink to return to the list of Order Line Items.</p>			
	<p>9. Select the new <b>IRD</b> Order Line Item that was installed by clicking on the Hyperlink in the <b>Product</b> field.</p> <p><i>Note:</i> The Serial Number, Access Card number and location information are not yet populated since it is a new receiver; whereas the existing installed receivers have this information populated.</p>			

*Continued on next page*

<b>Notes</b>	<b>Detail</b>
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## Former Install — Wireless *(continued)*

Exercise steps	
10. Complete the following fields one at a time by clicking on the Hyperlink for the field, scanning, pasting or entering the appropriate value and clicking on <b>Save</b> .	
Field	Value
<b>Product</b>	The <b>Product</b> should be the same <b>Product</b> as the existing Order Line Item.
<b>IRD Serial #</b>	<p>Click in the <b>IRD Serial #</b> field. Tap and hold stylus to paste the previously copied value from the existing Order Line Item in the <b>IRD Serial #</b> field. If necessary, user can also manually type the Serial Number.</p> <p>Click on the <b>Check Inventory</b> button.</p> <p>Since the equipment was provided by the customer, it will not be in Truck Inventory and will not auto populate all the fields.</p>
<b>Product Line</b>	The <b>Product Line</b> should be the same <b>Product Line</b> as the existing Order Line Item.
Exercise steps	
11. Click on the <b>OLI List</b> Hyperlink to return to the list of Order Line Items.	
12. Select the existing <b>IRD</b> Order Line Item by clicking on the Hyperlink in the <b>Product</b> field.	

*Continued on next page*

<b>Notes</b>	<b>Detail</b>
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## Former Install — Wireless *(continued)*

- If installing a new IRD, Access Card should auto-populate when the IRD Serial # is entered. There are other situations where they would have to select both the IRD Serial # and Access Card #.

Exercise steps	
<p>13. Drag the stylus across the <b>Access Card #</b> to highlight. Tap, hold and select <b>Copy</b> to copy the value from the <b>Access Card #</b> field.</p> <p><i>Note:</i> Each required field value from the existing Order Line Item will need to be copied to the new Order Line Item.</p>	
<p>14. Click on the <b>OLI List</b> Hyperlink to return to the list of Order Line Items.</p>	
<p>15. Select the new <b>IRD</b> Order Line Item that was installed by clicking on the Hyperlink in the <b>Product</b> field.</p>	
<p>16. Complete the following field by clicking on the Hyperlink for the field, pasting or entering the appropriate value and clicking on <b>Save</b>.</p>	
Field	Value
<b>Access Card #</b>	<p>Click in the <b>Access Card #</b> field. Tap and hold stylus to paste the previously copied value from the existing Order Line Item in the <b>Access Card #</b> field. If necessary, user can also manually type the <b>Access Card #</b>.</p>
Exercise steps	
<p>17. Click on the <b>OLI List</b> Hyperlink to return to the list of Order Line Items.</p>	
<p>18. Select the existing <b>IRD</b> Order Line Item by clicking on the Hyperlink in the <b>Product</b> field.</p>	
<p>19. Drag the stylus across the <b>RID #</b> to highlight. Tap, hold and select <b>Copy</b> to copy the value from the <b>RID #</b> field.</p> <p><i>Note:</i> Each required field value from the existing Order Line Item should be copied to the new Order Line Item.</p>	
<p>20. Click on the <b>OLI List</b> Hyperlink to return to the list of Order Line Items.</p>	

*Continued on next page*



<b>Notes</b>	<b>Detail</b>
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## Former Install — Wireless *(continued)*

Exercise steps	
21. Select the new <b>IRD</b> Order Line Item that was installed by clicking on the Hyperlink in the <b>Product</b> field.	
22. Complete the following fields by clicking on the Hyperlink for the fields, pasting or entering the appropriate values and clicking on <b>Save</b> .	
Field	Value
<b>RID #</b>	Click in the <b>RID #</b> field. Tap and hold stylus to paste the previously copied value from the existing Order Line Item in the <b>RID #</b> field. If necessary, user can also manually type the <b>RID #</b> .
<b>Part Status</b>	Select <b>Good Used</b> .
<b>Location</b>	Select the same location where the existing IRD was installed.
Exercise steps	
23. Click on the <b>Submit</b> Hyperlink to submit the Order Line Item. <i>Note:</i> The Status automatically changes to Submitted, then In Transit, then Closed if successful.	
24. Click on the <b>Check Status</b> Hyperlink at the top to refresh the screen and view the updated <b>Status</b> field. Do this after submitting each Order Line Item until it successfully closes before continuing. You can click on the <b>Check Status</b> Hyperlink several times to keep refreshing the screen until the <b>Status</b> is <b>Closed</b> .	
25. Repeat steps 4-24 for each ACTV existing IRD Order Line Item.	
The existing Order Line Items will continue to have a <b>Status</b> of <b>ACTV</b> and <b>Category</b> of <b>Existing</b> . <b>These Order Line Items are for informational purposes only — DO NOT Submit.</b>	

- If the transaction is successful, the Order Line Item closes. This completes the activation.
- Each successive IRD that is activated becomes a secondary receiver.

*Continued on next page*

<b>Notes</b>	<b>Detail</b>
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## Former Install — Wireless *(continued)*

	Exercise steps				
	26. Click on the <b>OLI List</b> Hyperlink to return to the list of Order Line Items.				
	27. Select the <b>ODU</b> Order Line Item by clicking on the Hyperlink in the <b>Product</b> field.				
	28. Verify the following field by clicking on the Hyperlink for the field.				
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%; background-color: #000080; color: white;">Field</th> <th style="width: 50%; background-color: #000080; color: white;">Value</th> </tr> </thead> <tbody> <tr> <td style="background-color: #000080; color: white; font-weight: bold;">Tech Action</td> <td>Select <b>Support Hardware Installed</b>.</td> </tr> </tbody> </table>	Field	Value	Tech Action	Select <b>Support Hardware Installed</b> .
Field	Value				
Tech Action	Select <b>Support Hardware Installed</b> .				
<ul style="list-style-type: none"> <li>• Review IRD Actions by Sub Type job aid.</li> </ul>	Exercise steps				
<ul style="list-style-type: none"> <li>• To delete an IRD the customer no longer wants or is not installed, DIRECTV must change the order in OMS which would auto-update the Order Line Item in Rio and the Category would show Deleted. For Tech Action, would select No Action Taken.</li> </ul>	29. Click on the <b>Submit</b> Hyperlink to submit the Order Line Item. <i>Note:</i> The Status automatically changes to Submitted, then In Transit, then Closed if successful.				
	30. Click on the <b>Check Status</b> Hyperlink at the top to refresh the screen and view the updated <b>Status</b> field. Do this after submitting each Order Line Item until it successfully closes before continuing. You can click on the <b>Check Status</b> Hyperlink several times to keep refreshing the screen until the <b>Status</b> is <b>Closed</b> .				
<ul style="list-style-type: none"> <li>• <b>Status</b> must be changed from <b>On Site</b> to <b>Closed</b>. Technician should have changed the Activity status to <b>En Route with ETA</b> when on the way to this customer and then again to <b>On Site</b> when he arrived at this customer's site.</li> </ul>	31. Repeat steps 26-30 for each non-serialized Order Line Item.  When all Order Line Items have been successfully submitted, the technician can return to the Activity and close. The status of all Order Line Items must be <b>Closed</b> before the Activity can be closed. The only exception is for those line items where the Tech Action field is set to <b>No Action Taken</b> .				
	32. Click on the <b>Activity Detail</b> Hyperlink. <i>Note:</i> This navigates back to the Activity Detail view. <i>Note:</i> A <b>Resolution Code</b> is only required in order to close a Service Activity.				

*Continued on next page*

**Notes**

**Detail**

## Former Install — Wireless *(continued)*

- The dispatcher or HSP Call Center will see **Actual Start** and **Actual End** fields, which are auto-populated with date and time, based on when the Activity status is changed to On Site and to Closed. For accurate metrics and reporting, technicians should be sure to update the Activity status at the appropriate stages.

### Exercise steps

33. Click on the **Customer wants DPP** Hyperlink and select **No**. Click on **Save**.

*Note:* An error notification will appear if this field is not completed prior to closing the Activity.

*Note:* If DPP was already added as a new Order Line Item, this step can be skipped.

34. Click on the **Close** Hyperlink. This changes the **Status** to **Closed**.

*Note:* This closes the Activity. The related Activity is automatically closed.

### Copy / Paste Tip — Using the Word Mobile Tool

1. From the existing IRD's OLI Detail view, drag the stylus across all of the required information (Serial #; Access Card #; RID #) to highlight it.
2. Tap and hold the stylus and select **Copy**.
3. Go to the device's Start Menu (Windows logo) and select **Word Mobile** or go to programs and select **Word Mobile**.
4. Open a new document. Tap and hold the stylus inside the document and select **Paste**.
5. From the Word document, copy the Serial #, and then go back to Internet Explorer to the appropriate new IRD OLI.
6. Select the Serial # field > tap and hold to Paste > Save.
7. Go back to the Start Menu > Programs > Word Mobile, find your document and follow the steps again for the Access Card # and RID #.

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## Notes

## Detail

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### Section 15

### Service Orders — Wireless

90 minutes

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#### Process Objectives

- Discuss process objectives.
  - Learn how to complete a service order closure without Order Line Item changes
  - Learn how to complete a service replacement with a new IRD on a secondary card
  - Learn how to complete a service replacement with a new IRD on a primary card
  - Learn how to complete an equipment pickup order
- 

#### Key Points

- Discuss key business rules.
  - In general, automation can be used for secondary receivers and cannot be used for primary receivers
  - Automation refers to the ability to activate by successfully submitting Order Line Items and closing the Activity (without calling the designated number); the result is the same as Activation Approved, but Activation Approved is only indicated on install and upgrade orders
  - If automation is allowed, the technician can activate through the wireless unit
  - If automation is not allowed, the technician must first call the designated number to activate, then update and submit the Order Line Items and close the Activity
  - If technicians are out of coverage range on their wireless unit, they will call the dispatcher or HSP Call Center to update the Order Line Items and close the Activity for them
  - At least one resolution code must be selected on Service Activities before the Activity can be closed
-

**Notes**

**Detail**

**Task 15.1**

**Service Order Closure without Line Item Changes — Wireless**

**Guided Exercise**

- Discuss business scenario with students before performing Guided Exercise.
- Review [DIRECTV Update OLIs and Activity Closure Steps / Scenarios - Wireless QRC](#).
- Review [Adding Non-Serialized OLI for Service Activities job aid](#).
- Review [CBT 15.1](#).
- In this scenario, the technician completed the Service Order without equipment changes. The Activity can be closed without updating or submitting the Order Line Items.
- DPP **was sold** to the customer.

A technician has just completed a Service Order for a customer. He was able to fix the issue without replacing any equipment. No Order Line Item changes are necessary.

He also sold DPP to the customer.

The Tech Action for the Order Line Item defaults to No Action Taken. The technician does not need to update or submit the Order Line Items.

All service orders require a Resolution Code before they can be closed. The technician can select a Resolution Code and close the Activity.

Let's learn how to Service Order closure without line item changes — Wireless

**Exercise steps**

1. In the **Activity List** screen, select the appropriate Activity by clicking on the **Time** Hyperlink in the **Planned** column.
2. Click on the **OLI List** Hyperlink.
3. Select an Order Line Item by clicking on the Hyperlink in the **Product** field.  
*Note:* All of the customer's installed products are listed with the current location, status (Active) and type (Primary or Secondary). Abbreviations are: ACTV = Active status; P = Primary Receiver; S = Secondary Receiver.
4. Verify the **Tech Action** field has been updated to **No Action Taken**. This should be the default. No Order Line Item changes are necessary.  
*Note:* If there are no changes, the technician does not need to click the **Submit** Hyperlink to submit the item.
5. Click on the **Activity Detail** Hyperlink.

*Continued on next page*

**Notes**

**Detail**

## Service Order Closure without Line Item Changes — Wireless *(continued)*

- If the technician sells DPP to the customer, this must be added as an Order Line Item.
- Technicians can **delete** all **non-serialized** OLI (Multi-Switches and ODUs) from all Activity types: New Install, Former Install, Upgrade and Service.
- Technicians can **add non-serialized** OLI (Multi-Switches and ODUs) to ONLY Service Activities when replacing defective equipment.

- A Resolution Code must be selected for all Service Activities before they can be closed.
- One or more resolutions can be selected.
- The first resolution added is the one displayed on the Activity Detail view.

**Exercise steps**

6. Click on the **Customer Wants DPP** Hyperlink.  
*Note:* An error notification will appear if this field is not completed prior to closing the Activity.
7. Click on the drop-down arrow in the **Customer wants DPP** field. Select **Yes**.
8. Click on the **Save** button.
9. Click on the **OLI List** Hyperlink. Select the **Protection Plan** item by clicking on the Hyperlink in the **Product** field.
10. Click on the **Submit Hyperlink**. The **Status** changes to **Submitted**. Click on the **Check Status** Hyperlink until the Status changes to In Transit, then Closed.
11. Click on the **Activity Detail** Hyperlink. A **Resolution Code** must be selected for all Services Activities before they can be closed.
12. Click on the **Resolution Code** Hyperlink.
13. Click on the **New** Hyperlink.
14. Click on the drop-down arrow in the **Resolution Code** field.

*Continued on next page*

**Notes**

**Detail**

## Service Order Closure without Line Item Changes — Wireless *(continued)*

- All Order Line Items must be successfully closed or have a Tech Action of No Action Taken before the Activity can be closed.
- **Status** must be changed from **On Site** to **Closed**. Technician should have changed the Activity status to **En Route with ETA** when on the way to this customer and then again to **On Site** when he arrived at this customer's site. If status was never changed to **On Site**, it must be changed to **On Site** first, then to **Closed**. If the user tries to change the status to Closed without changing to On Site first, he will receive an error message telling him to change it to On Site first.
- The dispatcher or HSP Call Center will see **Actual Start** and **Actual End** fields, which are auto-populated with date and time, based on when the Activity status is changed to On Site and to Closed. For accurate metrics and reporting, technicians should be sure to update the Activity status at the appropriate stages.
- If the technician has **Comments** to enter on the Activity, he could select one or more comments before closing the Activity.

**Exercise steps**

15. Select a resolution, such as **Customer Education IRD**, from the list.

16. Click on the **Save** button.

17. Click on the **Activity Detail** Hyperlink to return to the Activity Detail view.

*Note:* Technicians have the ability to delete a Resolution Code prior to closing the Activity. If a technician enters the wrong Resolution Code, they will be able to go back to the incorrect Resolution Code, click on the Hyperlink **Delete the Resolution Code** and then go back and enter the correct Resolution Code.

18. Click on the **Close** Hyperlink. The **Status** changes to **Closed**.

*Note:* This closes the Activity. The related Activity is automatically closed.

**Notes**

**Detail**

**Task 15.2**

**Service Replacement with a New IRD — Wireless**

**Guided Exercise**

- Discuss business scenario with students before performing Guided Exercise.
- [Review CBT 15.2.](#)
- In this scenario, the technician has to replace a defective or damaged receiver.
- [Review Service IRD Replace New Replacement Receiver - Wireless job aid.](#)
- DPP was **not** sold to the customer.

A technician has just completed a Service Activity for a customer where he had to replace a defective or damaged IRD with a new replacement IRD. The existing defective or damaged IRD is removed and a new IRD is installed.

The Activity is Activation Approved.

The technician will need to activate the new replacement receiver and deactivate the customers’ defective receiver. The new replacement receiver will be consumed (receiver is moved from the inventory location to an external location) and the defective receiver will be moved to the technician’s inventory location as Defective Damaged. This will be completed using the **Tech Action Taken** of **Service Swap**.

The process will include the following steps.

- Add the new Order Line Item (OLI) for the replacement receiver.
- Select the defective receiver from a list of customer’s existing receivers.
- Submit the new Order Line Item to activate the new and deactivate the old receiver.

Let’s learn how to service replacement with a new IRD — Wireless by updating and creating the Order Line Items, capturing the parts used and closing the Activity.

<b>Exercise steps</b>	
1.	In the <b>Activity List</b> screen, select the appropriate Record by clicking on the <b>Time</b> Hyperlink in the <b>Planned</b> column.
2.	Click on the <b>OLI List</b> Hyperlink. You will create one new Order Line Item for the new replacement IRD that was installed and deactivate the defective IRD.
3.	Make note of the <b>Location</b> of the IRD being replaced.
<i>Note:</i> All of the customer’s installed products are listed with their current location.	

*Continued on next page*



<b>Notes</b>	<b>Detail</b>
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## Service Replacement with a New IRD — Wireless

*(continued)*

- Technicians can **delete** all **non-serialized** OLI (Multi-Switches and ODUs) from all Activity types: New Install, Former Install, Upgrade and Service.
- Technicians can **add non-serialized** OLI (Multi-Switches and ODUs) to **ONLY** Service Activities when replacing defective equipment.

Exercise steps	
4.	Select the Order Line Item of the IRD being replaced by clicking on the Hyperlink in the <b>Product</b> field.
5.	Make note of the <b>Access Card #</b> of the IRD being replaced. The Access Card # will be required in a later step.
6.	Click on the <b>OLI List</b> Hyperlink to return to the list of Order Line Items.
7.	Create a new Order Line Item for the new replacement IRD that was installed and deactivate the replacement receiver. Click on the <b>New</b> Hyperlink.  <i>Note:</i> Technicians will have the ability to add non-serialized OLI on only Service Activities by adding a new Order Line Item for each non-serialized OLI.
8.	Select the appropriate <b>Product Line</b> . Click on the <b>Next</b> button.  <i>Note:</i> The new replacement receiver <b>MUST</b> be the same product as the defective receiver being replaced.
Exercise steps	
9.	Complete the following field in the Form.
Field	Value
<b>IRD Serial #</b>	Scan the bar code of the new replacement IRD being installed. The technician can also manually type the Serial Number.  Click on the <b>Check Inventory</b> button.  Clicking on the <b>Check Inventory</b> button auto-populates several other fields. Click on the <b>Next</b> button.

*Continued on next page*

<b>Notes</b>	<b>Detail</b>
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## Service Replacement with a New IRD — Wireless

*(continued)*

- This indicates the status of the asset/product. This is auto-populated based on inventory information for that asset/product.
- Clicking on the Save button navigates back to the OLI List view.

- Review IRD Actions by Sub Type job aid.

Exercise steps	
10. Verify the <b>Product</b> , <b>Access Card #</b> and <b>Part Status</b> fields are correct. Click on the <b>Next</b> button. The fields can be edited if necessary.	
Field	Value
<b>Product</b>	Automatically updated when the IRD Serial # is entered. Do not change.
<b>Access Card #</b>	For a new IRD, the Access Card number should auto-populate when the IRD Serial # is entered. If necessary, the technician can manually enter the Access Card number.
<b>Part Status</b>	Auto-populates when the IRD Serial # is entered. Do not change.
11. Complete the following fields by clicking on the Hyperlink for the field, selecting or entering the appropriate value and clicking on <b>Save</b> .	
Field	Value
<b>Location</b>	Select the location where the new replacement IRD was installed.
<b>Tech Action</b>	Select <b>Service Swap</b> .
<b>RID #</b>	Enter the <b>RID #</b> if the <b>RID Required</b> field is <b>Y</b> .

*Continued on next page*

**Notes**

**Detail**

## Service Replacement with a New IRD — Wireless

*(continued)*

- The technician only needs to submit the one new Order Line Item that was updated for this service order. The Order Line Items for the customer's other assets do not need to be updated or submitted. The Tech Action for those items should default to No Action Taken.

Exercise steps	
	12. Select the Order Line Item that was just created for the new replacement IRD by clicking on the Hyperlink in the <b>Product</b> field.
	13. Scroll down to the <b>Swap Access Card #</b> field. Click on the Hyperlink.
	14. Click on the drop-down menu and select the Access Card # of the defective IRD to be deactivated.
	15. Click on the <b>Save</b> button. The chosen Access Card # will appear in the Swap Access Card # field.
	16. Click on the <b>Submit</b> Hyperlink to submit the Order Line Item.  <i>Note:</i> The Status automatically changes to Submitted, then In Transit, then Closed, if successful.
	17. Click on the <b>Check Status</b> Hyperlink at the top to refresh the screen and view the updated <b>Status</b> field. Do this after submitting each Order Line Item until it successfully closes before continuing.
	18. Click on the <b>Activity Detail</b> Hyperlink.  <i>Note:</i> This navigates back to the Activity Detail view.  <i>Note:</i> A <b>Resolution Code</b> must be selected for all Service Activities before they can be closed.

*Continued on next page*

## Notes

## Detail

# Service Replacement with a New IRD — Wireless

(continued)

### Exercise steps

19. Click on the **Resolution Code** Hyperlink. Click on the **New** Hyperlink. Select a resolution from the list, such as **IRD Replace DVR**. Click on the **Save** button. Click on the **Activity Detail** Hyperlink to return to the Activity Detail view.

*Note:* When a Resolution Code, indicating a replacement, is selected, there **MUST** be a new OLI on the OLI List for the Resolution Code to be accepted.

*Note:* Technicians have the ability to delete a **Resolution Code** prior to closing the Activity. If a technician enters the wrong Resolution Code, they will be able to go back to the incorrect Resolution Code, click on a Hyperlink to **Delete the Resolution Code** and then go back and enter the correct Resolution Code.

20. Click on the **Customer wants DPP** Hyperlink. Select **No**. Click on **Save**.

*Note:* An error notification will appear if this field is not completed prior to closing the Activity.

*Note:* If DPP was already added as a new Order Line Item, this step can be skipped.

21. Once all Order Line Items have successfully closed or have a **Tech Action of No Action Taken** you can close the Activity. Click on the **Close** Hyperlink. This changes the **Status to Closed**.

*Note:* This closes the Activity.

## Notes

## Detail

### Section 16

20 minutes

### VIP / OOP Install and Upgrade — Wireless

#### Process Objectives

- Discuss process objectives.
- Learn how to work a VIP / OOP install or upgrade Activity using a wireless unit.

#### Key Points

- Discuss key business rules.
- VIP customers are considered "high profile" and extra attention is needed to ensure all goes well.
- **VIP 1 special account customers** — VIP flags will be populated in Siebel on the SR and Activity. Equipment may be HSP-delivered or shipped to these customers who must receive "white-glove" treatment. HSP technicians must perform the install / upgrade as directed by the Activity or Activity and also perform **any custom work the customer requests at no additional charge**.
- **VIP 2 special account customers** (other high profile customers) are identified by the VIP 2 flag. HSP technicians must perform the installation / upgrade as directed by the Activity or Activity. The Activity **may** include a Custom Work OLI for additional or custom work for wall fishes, custom mounts and wireless phone jacks which must be completed without charge to the customer.
- **VIP 3 special account customers** (Friends and Family) are identified by a VIP 3 flag. The VIP 3 flag may appear on install and upgrade Activities. HSP technicians must perform the installation / upgrade as directed by the Activity. The Activity **may** include a Custom Work OLI for additional work for wall fishes, custom mounts and wireless phone jacks which must be completed without charge to the customer. There are no special requirements for VIP 3 installs — the VIP 3 code is simply a flag to notify the HSP technician that the customer is a friend or relative of an employee. Therefore, there are no special procedures as there are for VIP 1 and VIP 2 customers.
- VIP requests are sent to a Special Handling email box and a Support Operations (VIP / OOP) team member is assigned to handle them

*Continued on next page*

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**Notes****Detail**

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## VIP / OOP Install and Upgrade — Wireless *(continued)*

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- Notification is sent back to the requester within 2 hours of receipt of the email that their request has been received and will be processed
  - The VIP customer is contacted and all information regarding their request is obtained
  - The Support Operations (VIP / OOP) team member creates the order in OMS and works with the customer to book an appointment
  - The HSP, DIRECTV FPM Manager and Field Operations Manager are notified of the account by email and / or phone call with a request to send out a lead technician to complete the order on the requested date
  - If there are any changes to the order line items, the technician must call their dispatcher or HSP Call Center who must call DIRECTV and the Support Operations (VIP / OOP) team member will make the appropriate changes
  - A follow-up phone call is placed to ensure all went well and the requestor is notified of the completion
-

## Notes

## Detail

### Task 16.2

### Working a VIP / OOP Install or Upgrade Activity — Wireless

#### Guided Exercise

- Discuss business scenario with students before performing Guided Exercise.
- [Review CBT 16.2.](#)
- DPP was **not** sold to the customer.

When a technician is assigned a VIP / OOP install or upgrade Activity, the technician can view special instructions for the Activity in the Note to Tech field on the Activity. If changes need to be made to the order, the technician can call the dispatcher and the dispatcher can call the DIRECTV Support Operations (VIP / OOP) team member to make the changes.

When the technician completes the VIP / OOP install or upgrade Activity, the technician updates the Order Line Items, captures the parts used and closes the Activity as he normally would for a standard install or upgrade Activity.

If the technician does not have a wireless unit or is out of coverage range on the wireless unit, the technician will call the dispatcher or HSP Call Center and they will update the Order Line Items and close the Activity.

This lesson focuses on the difference between a standard install/upgrade and VIP / OOP install/upgrade Activity, which are:

- Note to Tech on the Activity
- Dispatchers will call a Support Operations (VIP / OOP) team member to make any order changes instead of calling Support Operations.

Let's learn how to work a VIP / OOP install or Upgrade Activity — Wireless.

*Continued on next page*

<b>Notes</b>	<b>Detail</b>
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## Working a VIP / OOP Install or Upgrade Activity — Wireless *(continued)*

Exercise steps	
1.	In the <b>Activity List</b> screen, select the appropriate Activity by clicking on the <b>Time</b> Hyperlink in the <b>Planned</b> column.
2.	Review the following fields in the <b>Activity Detail</b> view which contain information for the VIP / OOP Activity.
Field	Value
<b>Note to Tech</b>	Displays special instructions for the VIP / OOP Activity.
<b>VIP/OOP</b>	Indicates whether the Activity is VIP1, VIP2, VIP3 or OOP.
Exercise steps	
3.	Click on the <b>OLI List</b> Hyperlink.
4.	Select the <b>IRD</b> Order line Item by clicking the <b>Product</b> Hyperlink in the <b>Product</b> field.
5.	Complete the following fields one at a time by clicking on the Hyperlink for the field, selecting or entering the appropriate value and clicking on <b>Save</b> .
Field	Value
<b>IRD Serial #</b>	Scan the bar code. The technician can also manually type the Serial Number.  Click on the <b>Check Inventory</b> button.  Clicking on the <b>Check Inventory</b> button auto-populates several other fields. Click on the <b>Save</b> button.

*Continued on next page*



<b>Notes</b>	<b>Detail</b>
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## Working a VIP / OOP Install or Upgrade Activity — Wireless *(continued)*

Field	Value
<b>Access Card #</b>	For a new IRD, the Access Card number should auto-populate when the IRD Serial # is entered. If necessary, the user can manually enter the Access Card number.
<b>RID #</b>	Enter the <b>RID #</b> if the <b>RID Required</b> field is <b>Y</b> .
<b>Tech Action</b>	The <b>Tech Action</b> field should auto-populate with the correct value, <b>Installed</b> . You should confirm it is correct and, if necessary, change it.  All Order Line Items require a value in the <b>Tech Action</b> field. If no action is required, you can select <b>No Action Taken</b> .  Select <b>Installed</b> .
<b>Location</b>	Select the location where the IRD was installed, such as <b>LIVING RM</b> .
<b>Exercise steps</b>	
6. Click on the <b>Submit</b> Hyperlink to submit the Order Line Item.	
7. Click on the <b>Submit</b> Hyperlink to submit the Order Line Item.	
<i>Note:</i> The <b>Status</b> changes to <b>Submitted</b> . If the transaction is successful, the status changes to <b>In Transit</b> , then <b>Closed</b> . This completes the activation.	

- Repeat steps for each IRD.

*Continued on next page*

**Notes**

**Detail**

## Working a VIP / OOP Install or Upgrade Activity — Wireless *(continued)*

**Exercise steps**

8. Click on the **Check Status** Hyperlink at the top to refresh the screen and view the updated **Status** field. Do this after submitting each Order Line Item to ensure that it successfully closes before continuing. You can click on the **Check Status** Hyperlink several times to keep refreshing the screen until the **Status** is **Closed**.

9. Click on the **Activity Detail** Hyperlink.

*Note:* A **Resolution Code** is only required in order to close a Service Activity.

10. Click on the **Customer wants DPP** Hyperlink and select **No**. Click on **Save**.

*Note:* An error notification will appear if this field is not completed prior to closing the Activity.

*Note:* If DPP was already added as a new Order Line Item, this step can be skipped.

If you have **Comments** to enter on the Activity, you could select one or more comments before closing the Activity.

11. Click on the **Close** Hyperlink to close the Activity. The **Status** is now **Closed**.

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## Notes

## Detail

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### Section 17

### VIP / OOP Service — Wireless

20 minutes

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#### Process Objectives

- Discuss process objectives.
  - Learn how to work a VIP / OOP Service Activity using a wireless unit
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#### Key Points

- Discuss key business rules.
  - VIP / OOP requests for service are handled in a similar manner as VIP / OOP install or upgrade requests.
  - The Support Operations (VIP / OOP) team member creates the Activity and truck roll Activity in Rio and works with the customer to book an appointment.
  - If there are any changes to the Order Line Items, the technician must call their dispatcher or HSP Call Center who must call DIRECTV and the Support Operations (VIP / OOP) team member will make the appropriate changes.
  - All Service Orders require a resolution code before they can be closed.
-

**Notes**

**Detail**

**Task 17.2**

**Working a VIP / OOP Service Activity — Wireless**

**Guided Exercise**

- Discuss business scenario with students before performing Guided Exercise.
- [Review CBT 17.2.](#)
- DPP was **not** sold to the customer.

When a technician is assigned a VIP / OOP Service Activity, the technician can view special instructions for the Activity in the Note to Tech field on the Activity.

When the technician completes the VIP / OOP Service Activity, the technician updates the Order Line Items, captures the parts used and closes the Activity as he normally would for a standard Service Activity.

If the technician does not have a wireless unit or is out of coverage range on the wireless unit, the technician will call the dispatcher or HSP Call Center and they will update the Order Line Items and close the Activity.

Let's learn how to work a VIP / OOP Service Activity — Wireless.

Exercise steps	
1. In the <b>Activity List</b> screen, select the appropriate Activity by clicking on the <b>Time</b> Hyperlink in the <b>Planned</b> column.	
2. In the <b>Activity Detail</b> view, review the following fields which contain information for the VIP / OOP Activity.	
Field	Value
<b>Note to Tech</b>	Displays special instructions for the VIP / OOP Activity.
<b>VIP/OOP</b>	Indicates whether the Activity is VIP1, VIP2, VIP3 or OOP.
Exercise steps	
3. Click on the <b>OLI List</b> Hyperlink.	
<i>Note:</i> All of the customer's installed products are listed with the current location, status (Active) and type (Primary or Secondary).	

*Continued on next page*

<b>Notes</b>	<b>Detail</b>
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## Working a VIP / OOP Service Activity — Wireless

*(continued)*

- No other fields need to be updated.

Exercise steps	
<p>The technician must select the appropriate Order Line Item based on which IRD was removed. For example, if the IRD in the den was removed, the technician must select the Order Line Item that has den in the <b>Location</b> field.</p> <p>The technician will update the one removed Order Line Item and create a new Order Line Item for the new IRD that is installed.</p>	
4. Click on the secondary <b>IRD</b> Hyperlink.	
5. Complete the following fields by clicking on the Hyperlink for the field, selecting or entering the appropriate value and clicking on <b>Save</b> .	
Field	Value
<b>Tech Action</b>	Select <b>Removed</b> .
<b>Part Status</b>	Select <b>Defective Damaged</b> .
Exercise steps	
6. Click on the <b>Submit</b> Hyperlink to submit the Order Line Item.	
<i>Note:</i> The Status automatically changes to Submitted, then In Transit, then Closed, if successful.	
7. Click on the <b>Check Status</b> Hyperlink to refresh the screen and view the updated <b>Status</b> field.	
Do this after submitting each equipment item until it successfully closes before continuing.	
8. Click on the <b>OLI List</b> Hyperlink to return to the list of Order Line Items. The old line item status is updated to <b>DCRD</b> . This is the status you will see when a receiver has been disconnected. This is the status you will see when a receiver has been discarded which indicates the defective IRD being replaced has been deactivated.	

*Continued on next page*

**Notes**

**Detail**

## Working a VIP / OOP Service Activity — Wireless

*(continued)*

- Technicians can **delete** all **non-serialized** OLIs (Multi-Switches and ODUs) from all Activity types: New Install, Former Install, Upgrade and Service.
- Technicians can **add non-serialized** OLIs (**Multi-Switches and ODUs**) to **ONLY** Service Activities when replacing defective equipment.

**Exercise steps**

9. Click on the **New** Hyperlink to create an Order Line Item for the new replacement IRD that was installed.

**Note:** Technicians will have the ability to add Multi-Switches on only Service Activities by adding an Order Line Item for each Multi-Switch.

10. Click on the drop-down arrow in the **Product Line** field. Select the product line for the new receiver. The new replacement receiver should be in the same product line as the removed receiver.

11. Select the appropriate **Product** from the list.

12. Click on the **Next** button.

13. Complete the following fields in the Form.

Field	Value
<b>IRD Serial #</b>	Scan the bar code. The technician can also manually type the Serial Number.  Click on the <b>Check Inventory</b> button.  Clicking on the <b>Check Inventory</b> button auto-populates several other fields.
<b>RID #</b>	Enter the <b>RID #</b> if the <b>RID Required</b> field is <b>Y</b> .

*Continued on next page*

<b>Notes</b>	<b>Detail</b>
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## Working a VIP / OOP Service Activity — Wireless

*(continued)*

Exercise steps	
14. Click on the <b>Next</b> button.	
15. Verify the <b>Product</b> , <b>Access Card #</b> and <b>Part Status</b> fields are correct. Click on the <b>Next</b> button. The fields can be edited if necessary.	
16. Complete the following fields in the Form.	
Field	Value
<b>Location</b>	Select the location where the new replacement IRD was installed.
<b>Tech Action</b>	Select <b>Replacement Installed</b> .
<b>RID #</b>	Enter the <b>RID #</b> if the <b>RID Required</b> field is <b>Y</b> .
Exercise steps	
17. Click on the <b>Save</b> button.	
18. Select the new IRD Order Line Item by clicking on the Hyperlink in the <b>Product</b> field. Remember that the new Order Line Item is added to the top of the list and status and type are blank.	
19. Complete the following field by clicking on the Hyperlink for the field, selecting or entering the appropriate value and clicking on <b>Save</b> .	
Field	Value
<b>Access Card #</b>	For a new IRD, the <b>Access Card #</b> should auto-populate when the <b>IRD Serial #</b> is entered. If necessary, the user can manually enter the Access Card number. This should be the <b>Access Card #</b> of the new replacement IRD.

- This is the new Order Line Item created for the new replacement IRD.

*Continued on next page*

**Notes**

**Detail**

**Working a VIP / OOP Service Activity — Wireless**

*(continued)*

- If the transaction is successful, the Order Line Item closes. This activates the new replacement IRD.

- All Order Line Items must be successfully closed or have a Tech Action of No Action Taken before the Activity can be closed.

Exercise steps	
	<p>20. Click on the <b>Submit</b> Hyperlink to submit the Order Line Item.</p> <p><i>Note:</i> The Status automatically changes to Submitted, then In Transit, then Closed, if successful.</p>
	<p>21. Click on the <b>Check Status</b> Hyperlink at the top to refresh the screen and view the updated <b>Status</b> field. Do this after submitting each Order Line Item until it successfully closes before continuing.</p>
	<p>22. Click on the <b>Activity Detail</b> Hyperlink.</p> <p><i>Note:</i> This navigates back to the <b>Activity Detail</b> view.</p>
	<p>23. A Resolution Code must be selected for all service Activities before they can be closed. Click on the <b>Resolution Code</b> Hyperlink. Click on the <b>New</b> Hyperlink. Select a resolution such as <b>IRD Replace NEW</b>. Click on <b>Save</b>. Click on the <b>Activity Detail</b> Hyperlink.</p> <p><i>Note:</i> Technicians have the ability to delete a <b>Resolution Code</b> prior to closing the Activity. If a technician enters the wrong Resolution Code, they will be able to go back to the incorrect Resolution Code, click on a Hyperlink to <b>Delete the Resolution Code</b> and then go back and enter the correct Resolution Code.</p>
	<p>24. Click on the <b>Customer wants DPP</b> Hyperlink. Select <b>No</b>. Click on <b>Save</b>.</p> <p><i>Note:</i> An error notification will appear if this field is not completed prior to closing the Activity.</p> <p><i>Note:</i> If DPP was already added as a new Order Line Item, this step can be skipped.</p>
	<p>25. Click on the <b>Close</b> Hyperlink. This changes the <b>Status</b> to <b>Closed</b>.</p> <p><i>Note:</i> This closes the Activity. The related Activity is automatically closed.</p>



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## Notes

## Detail

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### Section 18

10 minutes

### Course Summary

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#### Evaluation Forms

- Distribute Evaluation Forms and have participants complete one before leaving the classroom.

Evaluation Forms provide critical feedback on the relevance and quality of each training course. This feedback is used to ensure quality training is delivered to all participants.

#### Getting Started

- Ensure participants are clear about what they should do when they return to work to get started.

After returning from training, perform the following tasks to get started:

1. Log into Rio.
2. Change your Password from the default, assigned Password.
3. Verify you have the appropriate screens and views for your job.

#### Further Support

- Discuss the support model being implemented.

If you encounter issues with Rio following training, perform the following steps to initiate support:

1. Read the appropriate sections of the Classroom Guide, job aids and Quick Reference Cards.
2. Wireless Application or Device Support contact local HSP IT support.

#### Congratulations

- Thank participants for attending course and wish them well.

Congratulations on completing Rio Wireless training!

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