



# Troubleshooting in Maintenance Essentials

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# Agenda

- » Introduction
- » Troubleshooting Tips
  - » Login Issues
  - » Email Notifications
  - » Routing
  - » Batch Features
  - » PM Schedules
- » Q&A

# Product Selection

- » Oftentimes, clients will select SchoolDude.com or MySchoolDude as the “Go To” product on the dropdown list – this tries to log them in as a user on the SchoolDude community!
  - » If a user is having trouble getting logged in – confirm that they are selecting the correct product (MaintenanceDirect, Pmdirect, etc.)

Oops! You don't have access to SchoolDude.com.

You have attempted to access a product page for which you don't have access. Below are three ways we can help solve your problem:

1. Go back to the [Login Page](#) and try again with [SchoolDude.com](#) or with some other product offering.
2. Send [Customer Support](#) an email
3. Learn more about our product: [SchoolDude.com](#)

Need help? Call us 1-877-868-DUDE (3833)

Thank you for using SchoolDude's solutions and services. We greatly appreciate your patronage to our Company.

# Invalid Login or Password

- » When a user types in an incorrect email or password, they will receive an “Invalid login or password” message.
  - » Confirm that the user is using the correct login name by viewing their account information on the User list
  - » If the login name **is not** correct, have them try again with the correct login name
  - » If the login name **is** correct, they will need to click **Forgot Password?**, enter in their email address, and follow the link they receive

## Account Login

Login Name

Elizabeth\_allen

Password

.....

Invalid login or password. Please note that passwords are case sensitive.

Go to

--Select Product--

Sign In

Forgot Password?

Login Name elizabeth.allen

Ⓐ First Name Elizabeth

Last Name Allen

Email elizabeth.allen@schoolduc

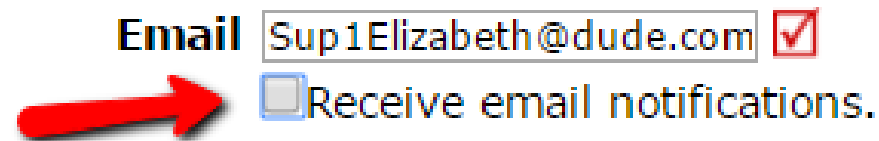
Receive email notifications.

# Submittal Password

- » As a requester, the user is required to have a personal password as well as the **Submittal Password**, which is set up by an Administrator in the account.
  - » If a requester is able to get into the Maintenance Request but is getting an Invalid Password notification when trying to submit their request – they are entering in an invalid Submittal password
    - » There is a Forgot Password link the user can click – this will send them an email that lists the Submittal Password
  - » Requesters also try to log into the request page using the Submittal Password
    - » If a user is having trouble getting into the MSB page, confirm they are using their personal password. If they are, they can also go through the Forgot Password? process!


# Not Receiving Email Notifications

- » If a user is not receiving Email Notifications, there are two things to check in the account
  - » Are email notifications turned on for the specific user?



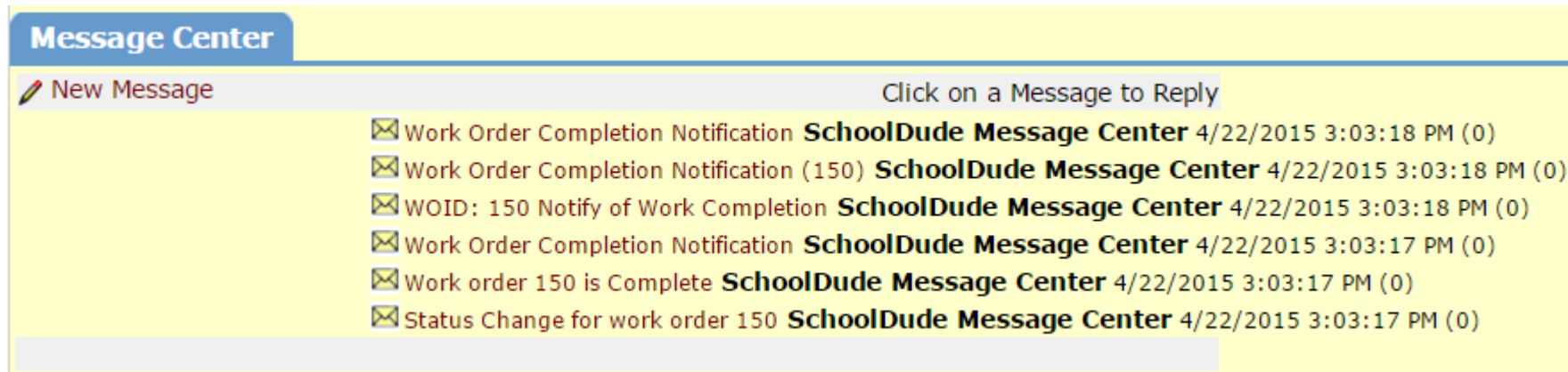
- » Are email notifications turn on for the specific user role?

## Technician

- 
- Notify of Work Order Assignment? **Sample**
  - Send email notifications when Work Order has PM Purpose Code = **Preventive Maintenance?**
  - Send email notifications when Work Order has FS Purpose Code = **Facility Events?**
  - Notify of Work Request Change in Status? e.g. On-hold, Void, Duplicate Request, Waiting Parts, etc. **Sample**

# Not Receiving Email Notifications

- » If the user is set to receive emails and the user role is set to receive emails, check the Message Center on the work order
  - » If the email shows up in the Message Center, it was sent out from our servers
    - » Make sure the user checks their Junk or Spam folder!



# Work Orders Routing Incorrectly

## » Assignment Order

- » The initial route must have “No One” listed in the **When Approved By** and the user the work order should go to in the **Route/Assign to Next**

Edit	Location <input type="checkbox"/> Building <input type="checkbox"/>	Craft <input type="checkbox"/> Purpose <input type="checkbox"/>	When Approved By <input type="checkbox"/> Route/Assign To Next <input type="checkbox"/>
Edit	On Any On Any	Plumbing On Any	District Wide, Plumber No One

## » Duplicate Routes

Edit	Location <input type="checkbox"/> Building <input type="checkbox"/>	Craft <input type="checkbox"/> Purpose <input type="checkbox"/>	When Approved By <input type="checkbox"/> Route/Assign To Next <input type="checkbox"/>
Edit	On Any On Any	Plumbing On Any	No One District Wide, Plumber
Edit	On Any On Any	Plumbing On Any	No One East Wing, Custodial Lead



# Batch Close Work Orders

- » Closing work orders is a Best Practice of MaintenanceDirect
  - » Batch Close allows you to do this 10 at a time!
    - » Work Order → Shortcuts → Batch Close Work Orders

### Batch Close Work Orders

**Filtering**  
List Work Orders for **Status**   
List Work Orders for **Purpose**   
 **Check all to submit for closing?** (Click the Submit button below to change selected work orders starting by Assigned To Last Name:  
0 1 2 3 4 5 6 7 8 9 A B C D E F G H I J K L M N O P Q R S T U V W X Y

1 - 1 of total 1 listed

Close?	Status <input type="text"/>	WOID <input type="text"/>	Requester <input type="text"/>
	Priority <input type="text"/>	Description <input type="text"/>	Location <input type="text"/>
<input checked="" type="checkbox"/>	New Request Medium	140 Need new bulbs in overhead light	Will Thompson

IMPORTANT: Please click Submit only once. It will take a few seconds to change selected work orders and then refresh this page.

# Batch Reassign Work Orders

- » When an employee leaves the district, you may need to reassign the user's open work orders
  - » You can quickly reassign a user's work orders by clicking Account Setup → Users → Prior Employee → Shortcuts → Reassign Work

**Reassign work for Elizabeth Allen**

There are total of **10 Work Order(s)** currently assigned to Elizabeth Allen.

**Select Your Status** (Note: To select multiple hold Ctrl key down.)

-- Include ALL Statuses --  
New Request  
Work In Progress  
Complete

**Reassign to** -- Select Assignee --

**Delete User**

**Disable Login?**  **Effective on**

(Note: Disabled users cannot login or receive email notifications, users need to be enabled to utilize reporting functions.)

**Are you sure want to reassign?**

# PM Schedule Didn't Generate

» Click into the PM Schedule link to get an idea of what might be going on

» Check the Next PM WO on

» Check the Status

» Check the Date Generated

## My PM Schedules

PM Schedule 1 - 20 of total 33 listed

« First

Title	Status	Craft	Classification
Date Generated	Last WOID	Next PM WO On	Location
			Type
45 Day HVAC check - EES Test 5/31/2016	Running 615	Inspections 7/4/2017	HVAC ZZDoNotUseElizabeth Elementary School Air Handler
AED Monthly Inspection 4/1/2017	Discontinued on 4/13/2017 1033		Alarm Systems

Any Other Frequently Asked Questions?



DON'T FORGET!

IN THE APP:

SESSION SURVEYS  
& LIVE POLLS