PenguinData
Workforce Management Inc.

Contractor Quick Guide

Web Address: **cui.penguindata.com**

Supported Browsers to USE:

GOOGLE CHROME/SAFARI

OR

MOZILLA FIREFOX

Do NOT use:

INTERNET EXPLORER (It is Unsupported)

If used, it must be 11.0 or higher

USERNAME: **Firstname.Last Name**

(John Smith = john.smith)

PASSWORD: **Welcome1**

Changing Password -

New password MUST have:

8 Characters with 1 Capital Letter & 1 Number

Minimum of eight characters containing one capital letter and one number

1. **Log in** – enter user name and password, then submit

2. Click on "**Work Order Entry"** to set status "**AT WAREHOUSE**" or "**EN-ROUTE TO NEXT JOB**"

3. Click on "**SET ETA** " & or "**SET ON SITE**" to go to the job you want to work on

4. Click on "**ENTER JOB CODES**"

   a. Click on "**SELECT CODE TO ADD**"

   b. Select all applicable codes

   c. Update the quantity to reflect how many were completed on the job

   d. Select "**SAVE CODES**" or "**SAVE**" in top right of screen

5. Click on "**ASSIGN CPE**"

   a. Technician must have "**SET ON SITE**" status on job to add CPE

   b. Assign CPE to customer by clicking customer button next to piece of equipment

   c. Select "**SAVE EQUIPMENT**" or "**Save**" in top right of screen

6. If you have Customer Returns select "**CUSTOMER RETURNS**", input equipment type and enter serial. Select "**Save**"

7. Upload Images – (Upload all appropriate images based on company policy)

   a. Select "**Upload Images**"

   b. Click on Green "**Upload Files**" button. You will choose between Camera or Photo Gallery.

   c. Select/take photos to upload. Upload is complete when photo appears in Images section.

   d. Select "**Manage**" to return to work order.

8. THEN CLICK on "**OPEN WORK ORDER**"

   a. Be sure start and stop time is entered

   b. Select "**SUBMIT**" button and the job will be closed

9. Select **Set Not Done** **if applicable**

   a. Select Not Done Code and input required comments and select "**SUBMIT**" button

10. AT THE **END OF YOUR DAY**, **Log Out**