NOMAD SMALL BUSINESS SUITE

Service Desk Pro - Technician / Resource Role Guide

A field-focused guide for working only on assigned tickets, including acknowledgement, updates, technical records, files, time, sign-off, Ticket AI, escalation and mobile use.

Edition: 1.1.3
Audience: Technicians, engineers and mobile resources

Contents

This guide is based on the verified product package and is written as an operational reference. Use the online version for navigation and this PDF for offline access.

1. Role purpose and access boundary

The Technician / Resource role completes work on tickets assigned to its linked resource. It provides the evidence and communication tools required for assigned jobs without exposing the organisation-wide queue, other technicians' work, reporting, financial controls or configuration.

Who should receive this access

Assign this role to a person who diagnoses or completes ticket work and should see only their own assignments. The WordPress user must remain linked to the correct active resource because that relationship determines ticket scope.

What this role can see

- Tickets where the linked resource is the assigned user, primary resource or an additional resource
- The technician's own scheduled and completed assignments
- Customer name and the contact/site information required for the assigned job
- Ticket description, public conversation and internal technical notes on assigned tickets
- Customer-visible and staff ticket files on assigned tickets
- Product, quote-required and onsite context stored on the assigned ticket
- The technician's own time, activity and sign-off records

What this role can do

- Acknowledge and update assigned work
- Change the status of an assigned ticket
- Reply to the customer and add internal technical notes
- Upload customer-visible or staff-only files to an assigned ticket
- Record time worked
- Record onsite results in notes and ticket fields available to the role
- Request reassignment or escalation
- Complete work and capture customer sign-off
- Use Ticket AI on an assigned ticket and verify its evidence

What this role cannot do

- See tickets assigned only to other resources
- Create tickets or assign resources
- Claim unassigned tickets in Pro 1.1.3
- Browse the global Customers or Resources screens
- See organisation-wide analytics, exports or other technicians' performance
- See billing, rates, financial quote controls or financial quote PDFs
- Manage settings, AI resources, users, roles, licensing or ticket deletion

2. Sign-in, navigation and account setup

Start with the correct named account and confirm that the visible workspace matches the assigned access.

First sign-in

1. Sign in with the named Technician account.
2. Confirm landing on Support Desk > Dashboard.
3. Confirm only assigned-scope Tickets are available in administration.
4. Open the mobile assigned-resource portal when that is the organisation's normal field interface.
5. Open a controlled assigned ticket and test reply, internal note, file, time, sign-off and Ticket AI.
6. Paste the URL of an unassigned or another technician's ticket and confirm access is denied.

Navigation

Area	Availability or purpose
Dashboard	Assigned-work overview
Tickets	Only tickets assigned through the linked resource relationship
Assigned-resource portal	Recommended mobile workspace for field activity
Customers / Resources	No global list
Analytics / Billing	Not available
Users / Settings / AI Resources / Licence	Not available

Account and resource relationship

The WordPress account is automatically linked to an active Technician resource. Assignment can be through the ticket's assigned user, primary resource or additional resource. If the resource is inactive, linked incorrectly or removed from the assignment, the ticket will not be in scope.

3. Daily operating routine

Use a consistent routine so ownership, communication and audit records remain current.

Start of day or session

- Open the assigned-work list
- Review new, urgent and scheduled assignments
- Confirm site/contact information before travel
- Read the complete assigned-ticket history
- Identify missing access, parts, evidence or customer availability

During the day

- Keep the current status accurate
- Separate customer replies from internal technical evidence
- Upload files with the correct visibility
- Record actual time after each work block
- Verify Ticket AI output before using it
- Escalate scope, safety, access or commercial blockers

End of day or session

- Update every active assignment
- Record work completed and remaining action
- Submit missing time and files
- Capture required sign-off
- Write a complete handover for unfinished work
- Sign out of shared or customer-controlled devices

4. Primary workflow

Complete assigned work with a traceable diagnosis, customer communication, time record and outcome.

Assigned-ticket procedure

1. Confirm the ticket is assigned to the correct linked resource.
2. Read the issue, customer conversation, internal notes and relevant files.
3. Confirm site, contact, schedule and access information where onsite work is required.
4. Acknowledge the assignment and set the correct working status.
5. Perform the approved diagnosis or work and record verified results.
6. Send the customer-visible update and add private technical evidence separately.
7. Upload files with the correct visibility and record actual time.
8. Capture sign-off when required, set the next-action status and hand over or complete the ticket.

Decision and quality rules

- Work only inside the assigned-ticket scope
- Do not use another technician's account to reach a ticket
- An internal note does not replace a customer update
- Use customer-visible files only for material the customer is authorised to receive
- A Ticket AI suggestion is not a verified result
- Request assignment through a Dispatcher, Manager or Administrator; unassigned-ticket claiming is not implemented

5. Communication, notes and records

Create records that another authorised person can understand without relying on memory or a separate email.

Record standards

Record	Required content
Technical note	Symptoms, evidence, checks, results, remaining risk and next action
Customer reply	Confirmed outcome, current status, next action, owner and customer requirement
File	Purpose, source, visibility and relationship to the work
Time entry	Actual minutes, work completed and billable choice where presented
Sign-off	Correct ticket, completed-work summary, authorised signer review and saved result

Visibility rules

Content	This role's access or responsibility
Assigned ticket public content	Visible and reply-enabled
Assigned ticket internal notes/files	Visible; use only for authorised work
Unassigned/other technicians' tickets	Not visible
Customer/resource global records	Not available
Analytics, financial and configuration data	Not available

Information protection

- Use customer contact information only for the assigned work
- Never request or store passwords in ticket content
- Remove unnecessary personal or secret information from screenshots
- Check file visibility before upload
- Do not copy internal notes into a public reply without review
- Protect site addresses and customer data on mobile devices

6. Handover and escalation

Escalate work with enough verified context for the next authorised role to act safely.

Escalate when

- The ticket is not assigned or the resource link is wrong
- Priority, scope or ownership must change
- A quote, rate, billing or approval decision is required
- A customer or site-access issue blocks work
- A privacy, file-access or cross-ticket exposure is suspected
- The diagnosis needs configuration, hosting or another specialist

Handover procedure

1. Record the latest verified state.
2. List the checks and work completed.
3. Identify the exact blocker or remaining task.
4. State the required skill, role or approval.
5. Record current customer expectation and timing.
6. Request reassignment and confirm the new owner can open the ticket.

Escalation evidence

- Ticket number and resource
- Device/product/site context
- Exact check and observed result
- Relevant non-secret logs or file IDs
- Time and status
- Customer communication and requested next owner

7. Access problems and recovery

Identify expected restrictions before treating them as faults.

Access troubleshooting

Problem	Check or action
Assigned ticket is missing	Confirm active resource link and primary/additional assignment
Another ticket is denied	Expected unless this resource is assigned
Cannot create or claim a ticket	Expected; request intake/assignment from Dispatcher, Manager or Administrator
Customers or Analytics menu missing	Expected Technician restriction
File/time/sign-off action fails	Confirm assignment, active resource, file policy and fresh session
Ticket AI unavailable	Confirm the ticket is assigned and an Administrator has configured AI

Do not bypass the role model

- Do not share accounts
- Do not add direct capabilities
- Do not ask for WordPress Administrator to gain ticket access
- Do not change URLs or identifiers to open another resource's ticket
- Do not upload customer data to personal storage
- Do not claim unassigned work outside the implemented assignment process

8. Quick reference and review

Use this checklist during onboarding, supervision and periodic access review.

Role checklist

- Named Technician account
- Correct active resource link
- Assigned-ticket scope
- Mobile portal tested
- Reply/note/file/time/sign-off tests passed
- Other-ticket isolation confirmed
- Dispatcher/Manager escalation route known

Periodic review

1. Confirm the technician's current duties and active status.
2. Review the WordPress-user/resource link.
3. Sample assigned tickets, replies, notes, files, time and sign-off.
4. Confirm no extra capabilities or broader WordPress role.
5. Retest another technician's ticket and restricted menus after updates.

Related master documentation

- Service Desk Pro Detailed User Guide
- Dispatcher / Service Coordinator Role Guide
- Service Desk Manager Role Guide
- Customer / Requester Portal Guide