

Fiber Training Examples

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Purpose: The purpose of this document is to have the trainee go through the process of working with call logs, tickets and scheduling jobs on Bertram Powercode.

Create a Call Log

1. Pretend that someone is calling in from phone number 555-555-5555.
2. This number should pull up a Baileys Harbor Fiber Training Account (70768).
3. Go ahead and create a call log based on a customer calling in to ask about a time frame for their installation.

Creating a Ticket

1. Again use the 70768 Baileys Harbor Fiber Training Account to pretend that a customer is calling in. However this time we are going to pretend that the call requires a followup and instead create a ticket.
2. Create a ticket with a ticket summary that begins with "Test" and add a "Problem". Select Customer Viewable as if you were going to send an email response. Assign the ticket to the Five Star Group and Category and Submit it.
3. Open up the ticket and reply to the ticket as if you were sending an email response while selecting the "Waiting" Ticket status.
4. From the Action tab update the Summary of the ticket and change the status back from Waiting to Active.
5. Finally, open up the "Ticket Board", select Five Star and note the ticket that you just created under "Active" tickets. You can resolve the ticket by clicking and dragging it to the "Resolved" section or you can select the ticket number and change the status to "Resolved"

Scheduling an Install Job

1. Again use the 70768 Baileys Harbor Fiber Training Account to create an install job.
2. For job Type use "Other", Template use "Fiber Install", and for now use the "Fiber Installation" template. (this is a placeholder template that we can update with whatever Five Star needs).
3. After entering in the information, checkGo to "put in standby" and "create the job".
4. Go to the Schedule and change the date to tomorrow's date.
5. Move the job from standby to the workbench and then schedule the job for Brad Wilkinson (once 5 Star's installers have been added to the schedule you would see your installers as well). Don't forget to save the job.
6. After the job has been saved, click the 3 lines next to the job to Edit the Job notes.
7. Follow the process to move the job from tomorrow to the day after tomorrow. (Move the job to workbench, save, change date, drag job to schedule and save again).
8. Finally, go ahead and Delete the job.
9. Go to the customer's account (70768). You will see that each of the steps that you followed, from creating the job, scheduling the job, rescheduling the job and deleting the job will show up in the Customer Event Log.