

# Contractor Request Form for Web Service Integration with Clients

## INSTRUCTIONS

ServiceChannel is a collaborative environment, so it is critical that all parties explicitly approve any data changes/ transfers. Please (1) fill in the **Requested by Contractor** column, (2) have the Client fill in the **Agreed by Client** column, (3) sign this document and have the client sign this document and (4) return the completed document to [scintegration@servicechannel.com](mailto:scintegration@servicechannel.com).

## NOTES

Please note the following specifics about Web Service Integration:

1. Work order updates via ServiceChannel's Web Services follow the same rules as on the website, with the primary purpose of removing double entry between contractor and ServiceChannel systems
2. IVR check in/out and/or transferred internal check in/out data will be posted to IVR data for the contractor
3. The contractor will be able to update notes in the system immediately and improve overall communication via web service integration.
4. In the future we may ask you to remove 'AUTO-DISPATCH' from our PM Schedule.

## Agreement Document

Contractor/Representative Name: \_\_\_\_\_

Provider ID(s): \_\_\_\_\_

Client: \_\_\_\_\_

Subscriber ID(s): \_\_\_\_\_

Type of Transfer	Requested by Contractor	Agreed by Client
Allow contractor to complete work order and put it directly into billable status Completed or Completed - Confirmed. (Typically Clients check <b>No</b> here.)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Allow contractor to complete work order and put it into non-billable status of Completed - Pending Confirmation (Pending CFC report, etc.)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Allow contractor to update work order and put it into non-billable status other than Completed - Pending Confirmation (On Site, Parts on Order, etc.)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Allow contractor to transfer internal check in/out data, in lieu of IVR check in/out. (If caller ID from the store phone is <b>required</b> , you may want to check <b>No</b> .)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Allow contractor to post notes and/or scheduled date changes from their internal system	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Allow contractors to use Web Services to create Work Orders (only for locations / trades provider is assigned)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Allow contractors to use Web Services to set non-zero NTE value (only for Work Orders contractor is allowed to create)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Comments: \_\_\_\_\_

Contractor/Representative Signature (Full Name) \_\_\_\_\_ Date: \_\_\_\_\_

Contractor/Representative Signee (Print Name) \_\_\_\_\_

Client Signature (Full Name) \_\_\_\_\_ Date: \_\_\_\_\_

Client Signee (Print Name) \_\_\_\_\_