Production Process Manual

A Guide to Internal Online Systems

09

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1. Taking a Service Call

When a service call is placed, Production creates a Service Order (SO) and dispatches a Technician to the job site to diagnose the problem.

On Snow, open **WTSi**.

On the white sidebar menu on the far left, scroll down to

Sales → Job Sites → click on **List**

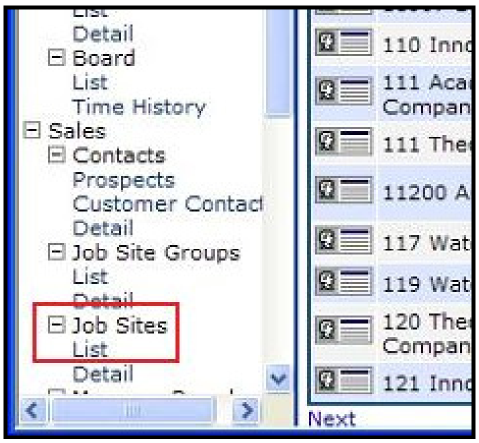

Figure 1 – WTSi Sidebar Menu (See Appendix for full screenshot)

An alphabetical list of Weatherite client job sites comes up. To find the site you need, click on the image of the binoculars in the upper left corner of the List page. This takes you to the Query page.

Figure 2 – Link to the Query page (See Appendix for full screenshot)

On the Query page, type in the **Job Site Name** in the space provided. To illustrate, we're looking at a fictitious client named Futurevue. Click the **Query Data** button.

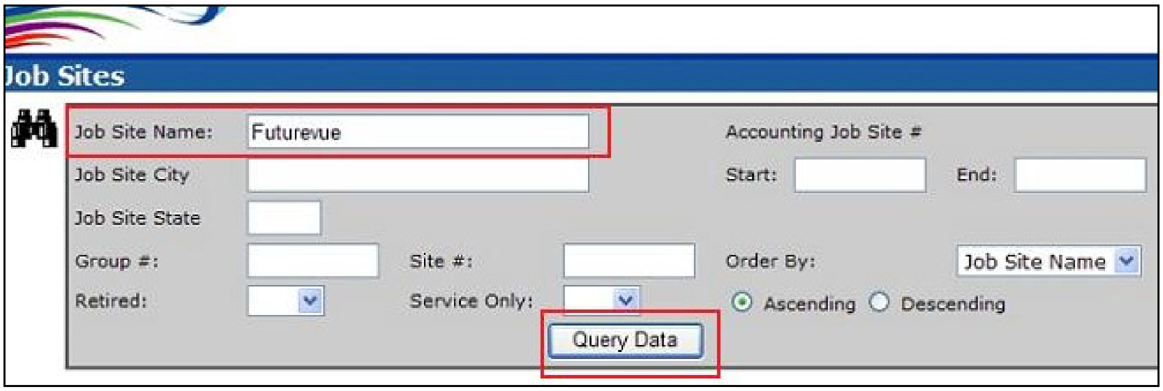

Figure 3 – Searching for a client from the Query page (See Appendix for full screenshot)

The query filters to show all relevant job sites. Click on the **icon** to the left of the of the job site location to be serviced to go to the job site Details page.

Figure 4 - Selecting the job site location (See Appendix for full screenshot)

Photos and maps are uploaded and pertinent information, including site location, contact and job site information, is stored on the job site **Details** page (see *Job Site Details*). The customer sees this information on the client website.

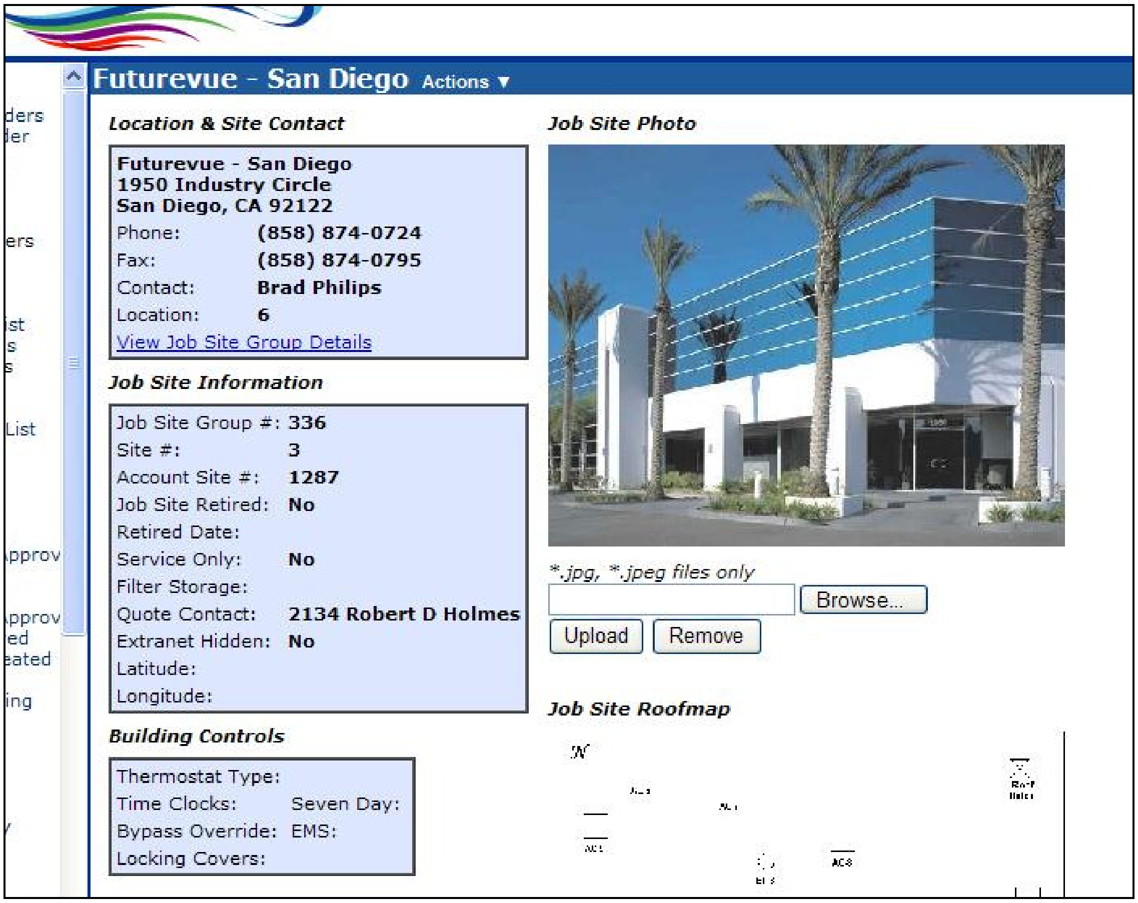

Figure 5 - Jobsite Details Page

Scroll down the Details page to view **Last 25 Service Orders**, where you can see all work that has been done at the site. Click on **Write New Service Order** above the Last 25 Service Orders section.

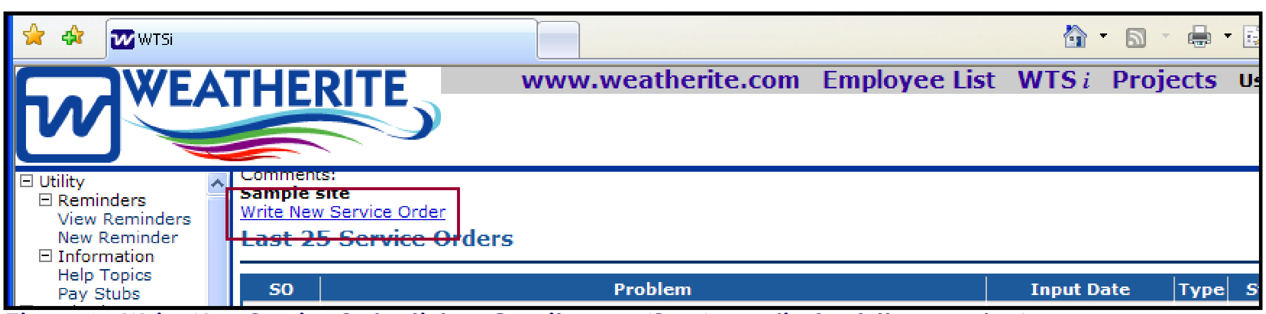

Figure 6 - Write New Service Order link on Details page (See Appendix for full screenshot)

This takes you to the Write New Service Order page.

Fill in the pertinent information as thoroughly as possible.

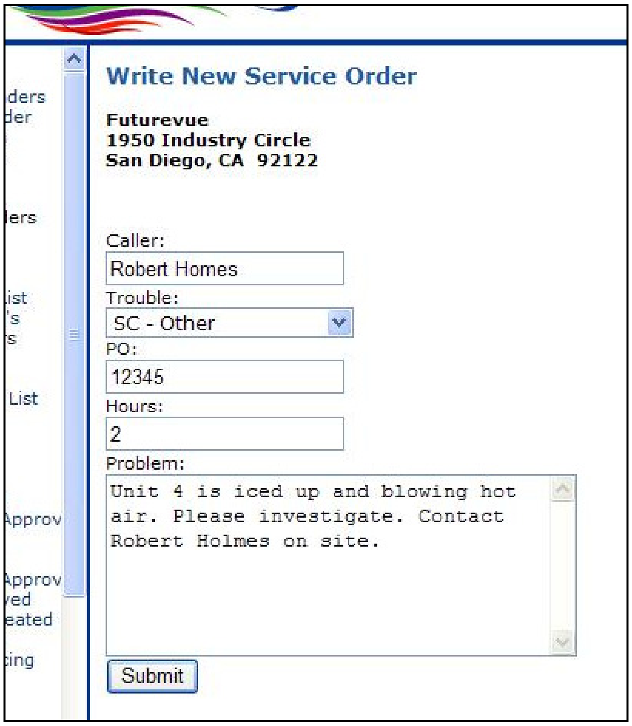

Figure 7 – Filling out the Write New Service Order Interface (See Appendix for full screenshot)

If you have a Customer PO at this time, enter it in the **PO** field. If the customer does not require a purchase order for invoicing, enter the first and last name of the person placing the call.

Two hours is the default **Hours** entry.

Explain the **Problem** as thoroughly as possible so the Technician will have a clear understanding before going on the service call. Items that should be identified are: Unit number or area served, onsite contact for check in and check out, and full description of the issue.

Click **Submit**. The Service Order (SO) is generated.

The Service Order is a key document throughout the life of a job. It provides information important to the job.

7. Equipment Verification

Periodically, a Technician may add equipment or change information about existing equipment on a job site's Equipment List. Production verifies this information, checking on the Equipment Verification interface to see if anything has been added or changed; if there are entries, Production then verifies the equipment additions or changes.

Note: Figure 21 at the end of this section illustrates the Equipment Verification process.

Open the Equipment Verification user interface and check to see if any equipment has been added or changed.

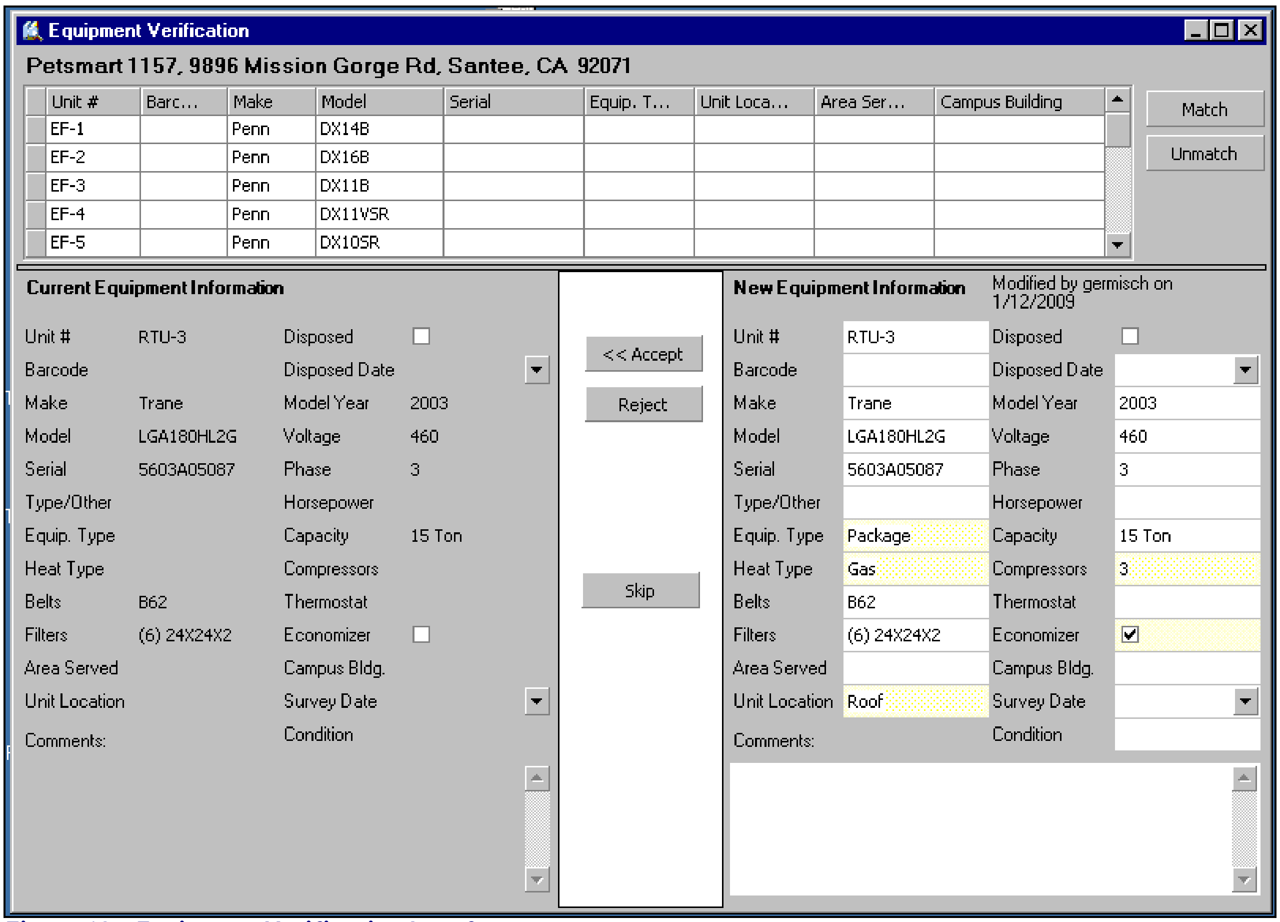

Figure 19 - Equipment Verification Interface

STEP A - If the Tech changed existing information:

When the Tech edits equipment information, it appears in the Equipment Verifier "matched" to the old entry that will be edited.

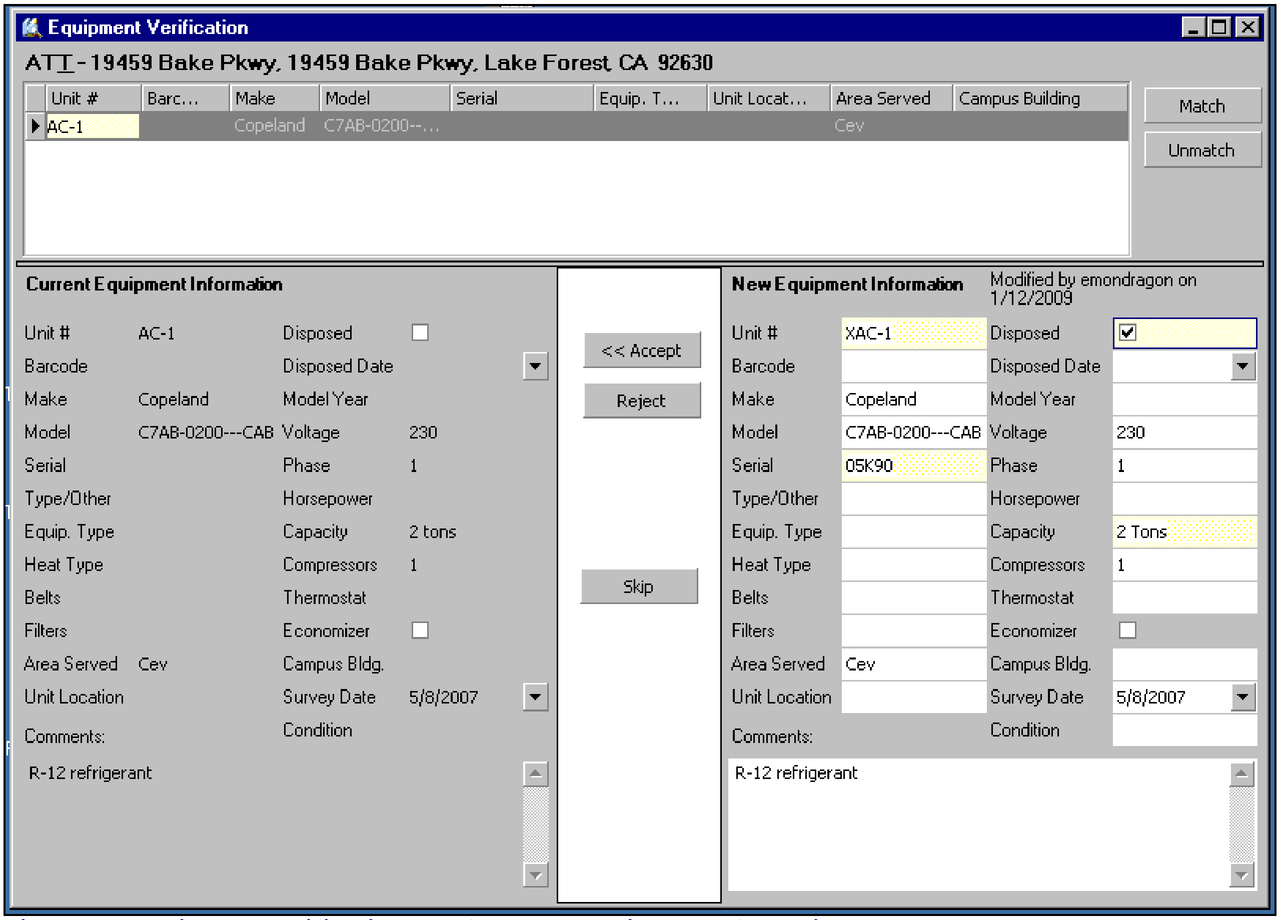

Figure 20 - Equipment Verification Interface, New Equipment Information

The edits will be seen under **New Equipment Information** on the right.

The existing information for the unit, that is, the existing unit the new information is matched to, will be under **Current Equipment Information** on the left.

Areas of information that are different, that is edited to be changed, will be highlighted in yellow (see Figure 19).

1) Verify that the data the tech sent for editing is for the same unit it is matched to.

   a. **If the tech edited the incorrect unit, click Unmatch and proceed to STEP B below.**

   b. **If the tech's new data is for an entirely new unit meant to replace the unit he matched to, click Unmatch.** It is important to retain the replaced unit's history; if the unit's information is simply updated to reflect the new unit, the new unit will show all the history for the old unit.

2) Open the **Equipment Entry** interface and find the unit that is being replaced.

3) On the Equipment Verifier, prefix the unit number with **X.**

   Mark the unit as **Disposed**.

4) When all information is correct, click on **Accept** and the changes will be made to the **Current Equipment Information**.

Click on **Reject** if the changes should not be made.

STEP B - If the Tech added a new equipment entry:

The new information will be shown under New Equipment Information on the right.

1) Check the equipment list at the top to verify that the unit the tech entered does not already exist by comparing the Unit # and Model #.

   a. **If the same physical unit, or matching unit, is found**, select the unit in the equipment list and click **Match** to verify it as Matched Equipment in STEP A above.

   b. **If this unit is not in the list**, verify that the information the tech entered is acceptable, make corrections as needed and click **Accept** to accept the entry.