

SDS
2.0

Smart Digital Systems

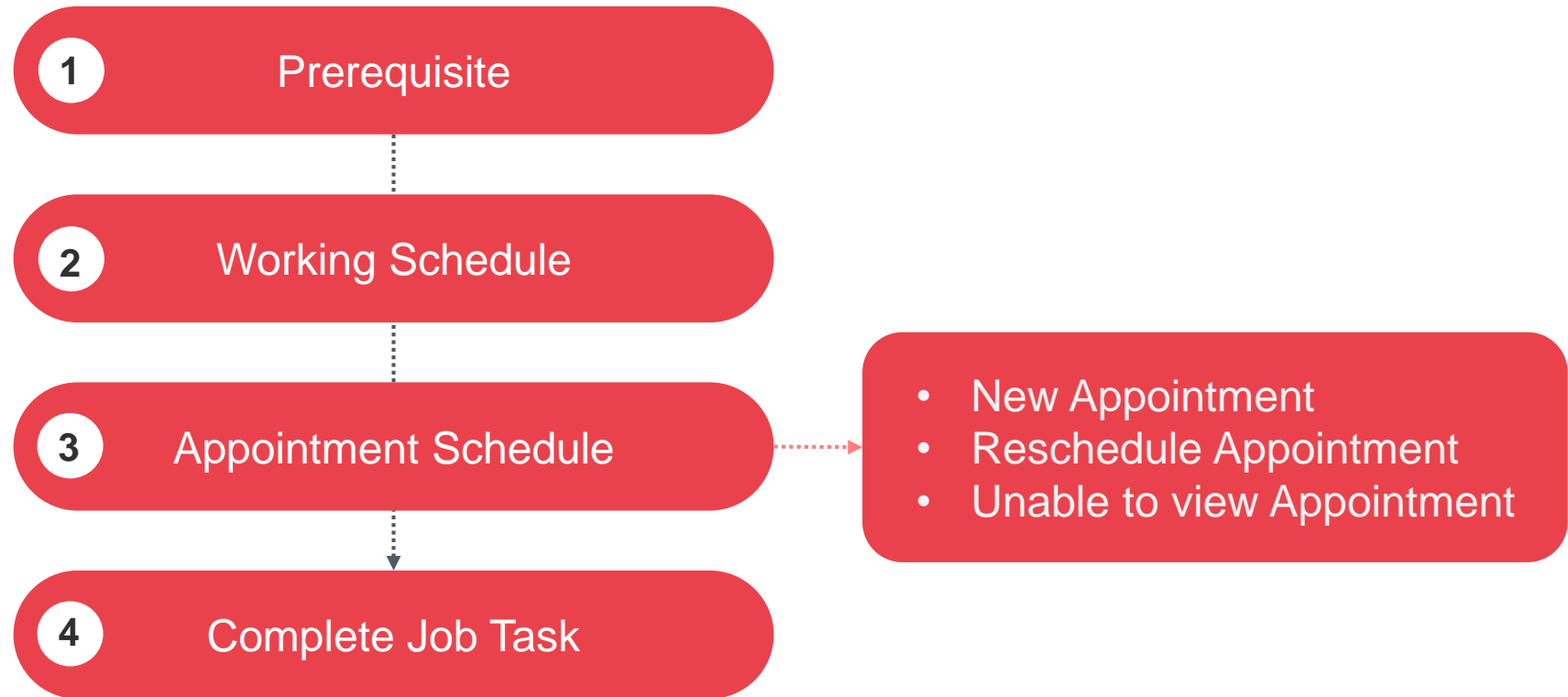
User Guide for Engineer Booking System | Appointment Booking & Task
Assignment



Co-Confidential

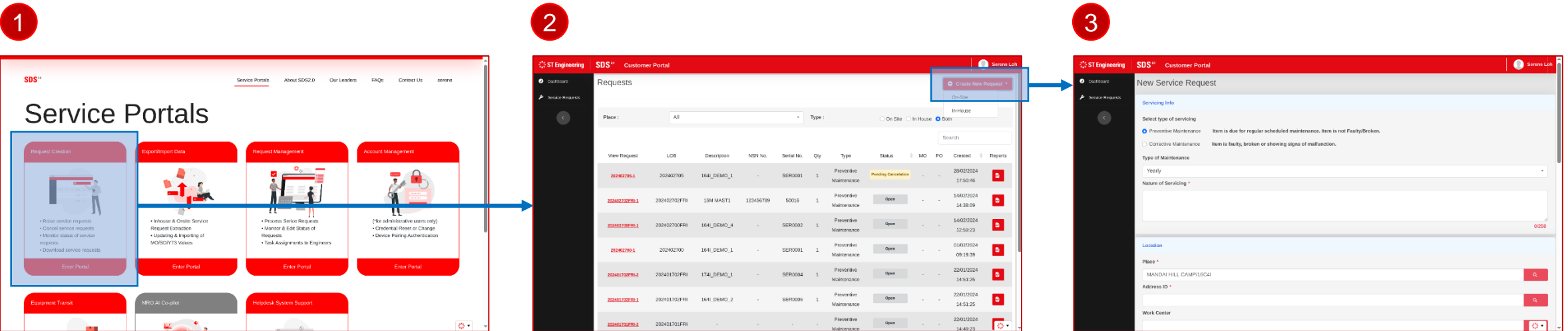
19th March 2024, Release 4 v1.0

Agenda



Prerequisite

Raise New Service Request @ Customer Portal (1)



User logs in SDS 2.0 and go to **Request Creation Site** via the Service Portal

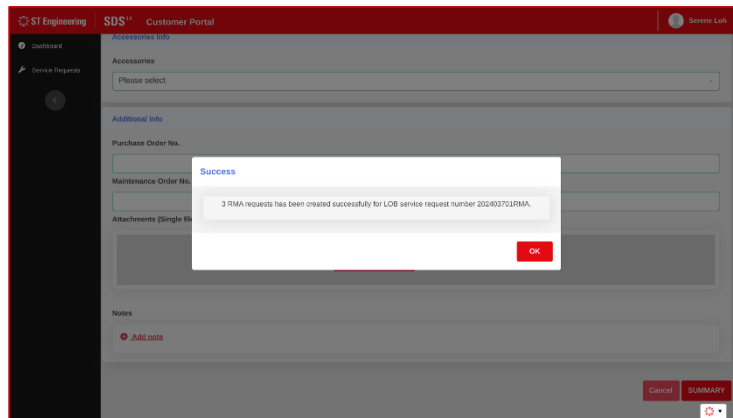
User selects **Create New Request > On-site/ In-House** in Customer Portal Site

User creates and submits a **New Request**

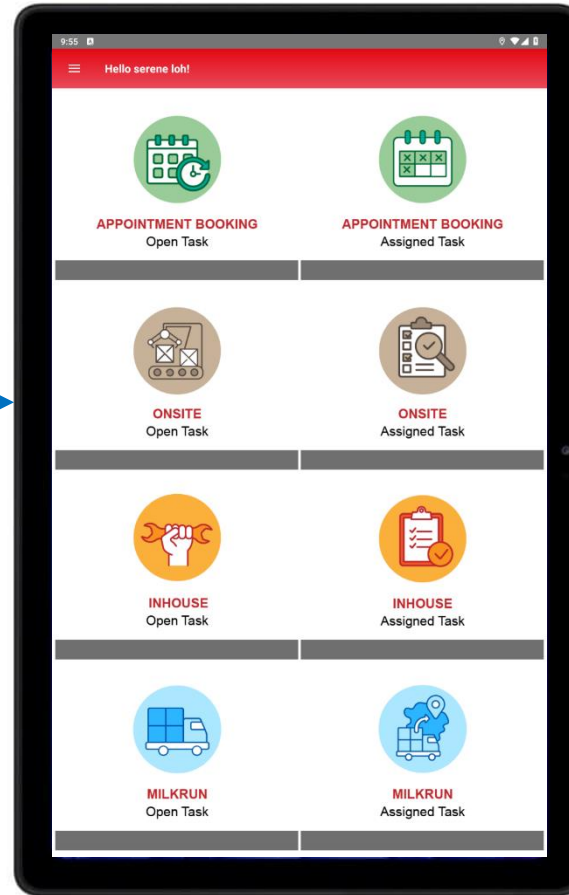
PREREQUISITE

Raise New Service Request @ Customer Portal (2)

4



LOB Service Request created



5

New **Job Task** is shown on the Engineer App for the engineer to work on it.



Working Schedule

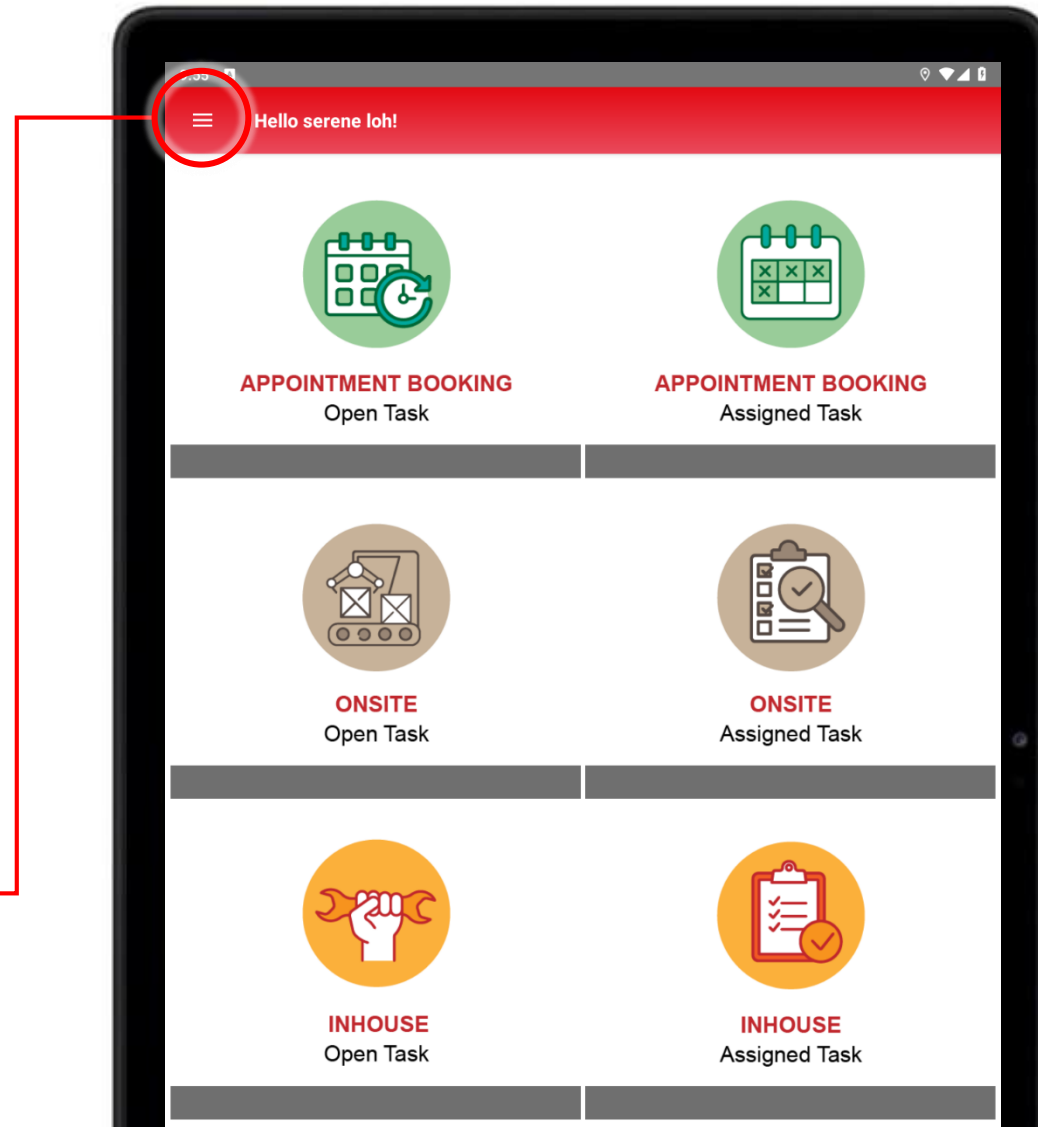
- About Working Schedule
- Set Work Unavailability

About Working Schedule

The original schedule factors in Mon-Fri.

To set exceptions for public holidays, lunch breaks, medical leave, annual leave, or other personal reasons, use the **Time Reporting** feature.

Open the **Menu bar** to view the menu list.

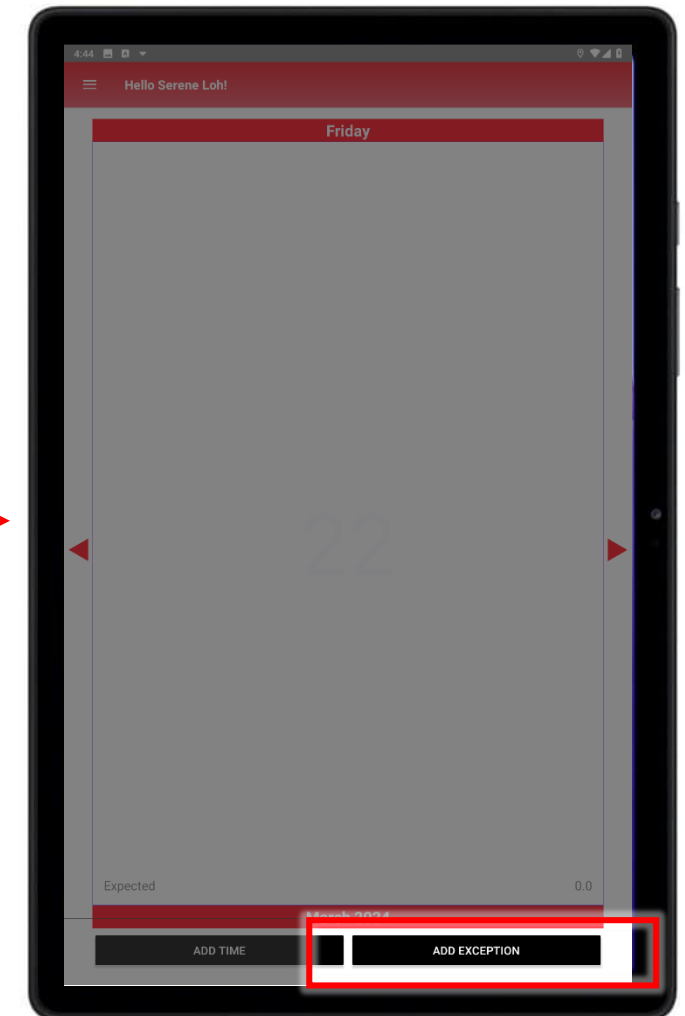
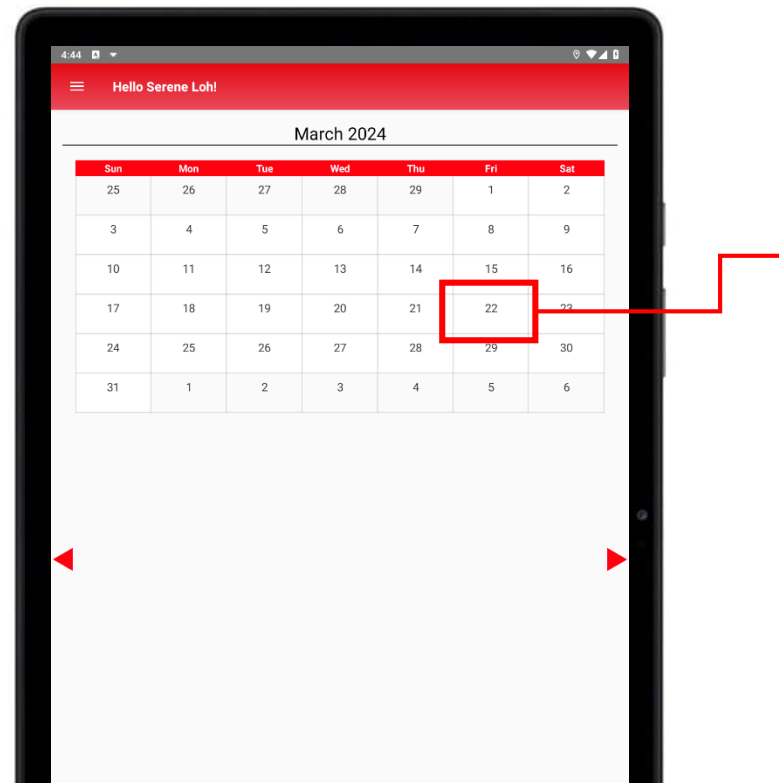
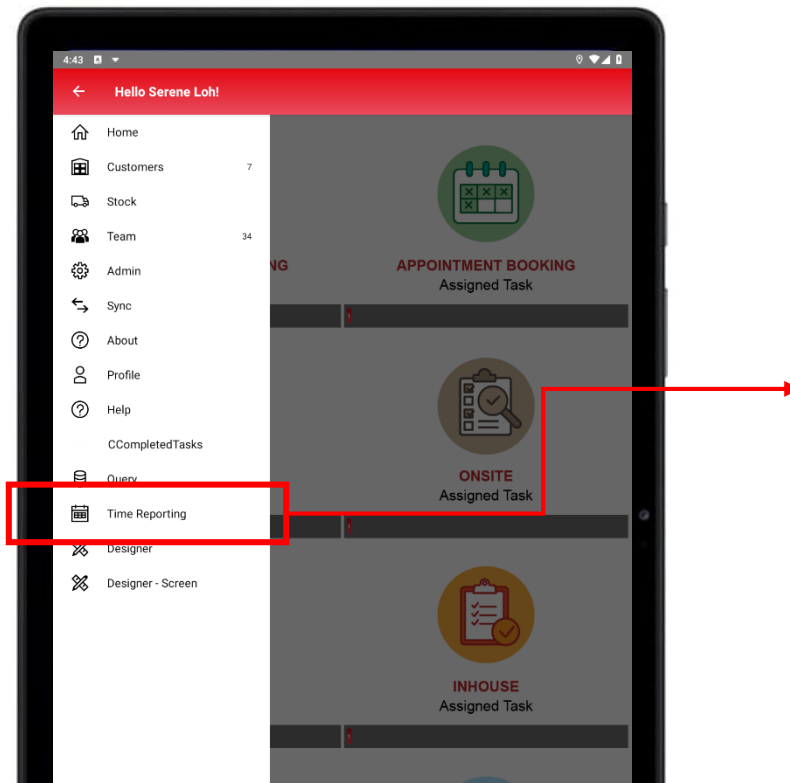


Set Work Unavailability (1)

1 Select Time Reporting to view Calendar.

2 Select a Day on the Calendar.

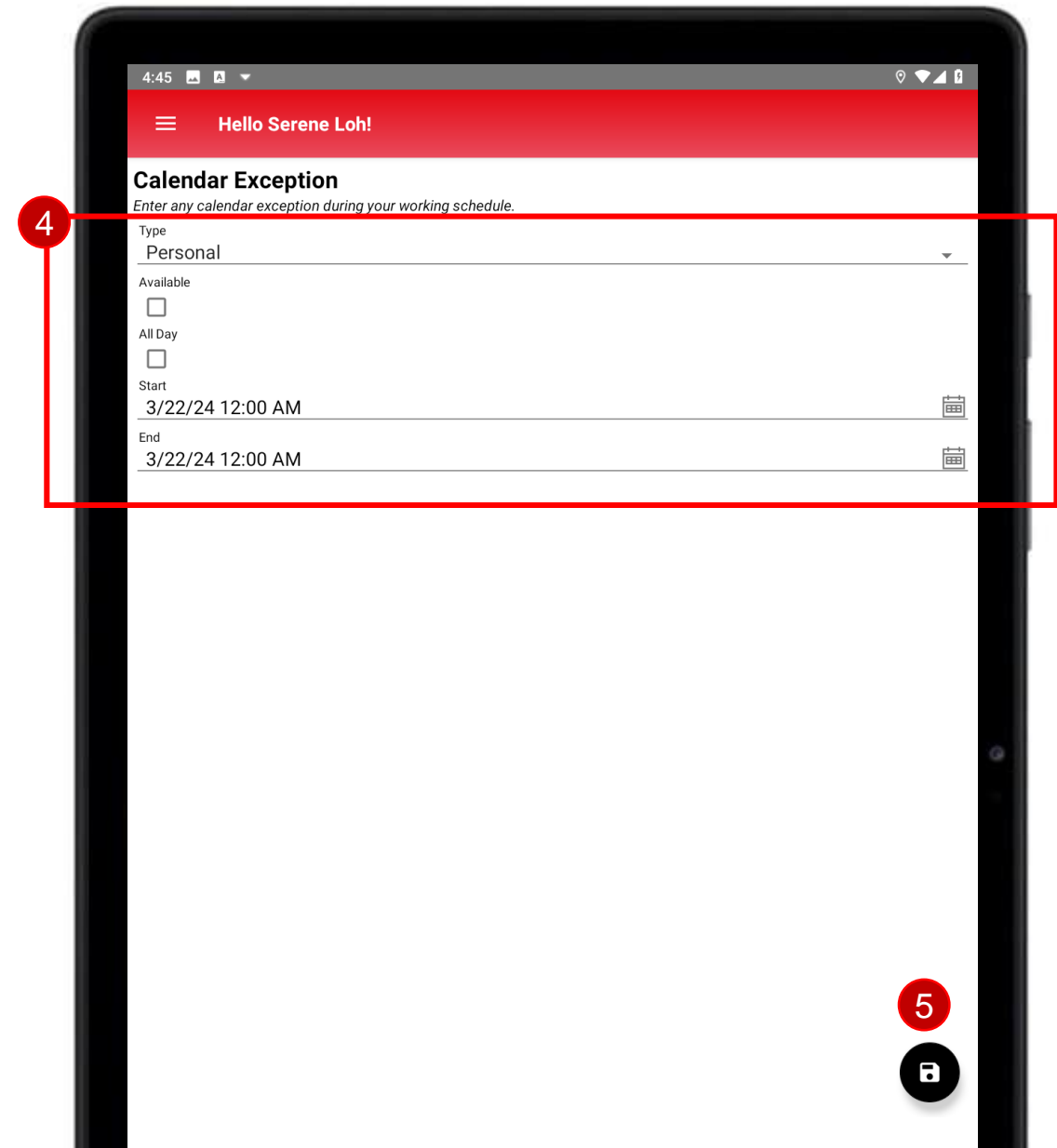
3 Select Add Exception



Set Work Unavailability (2)

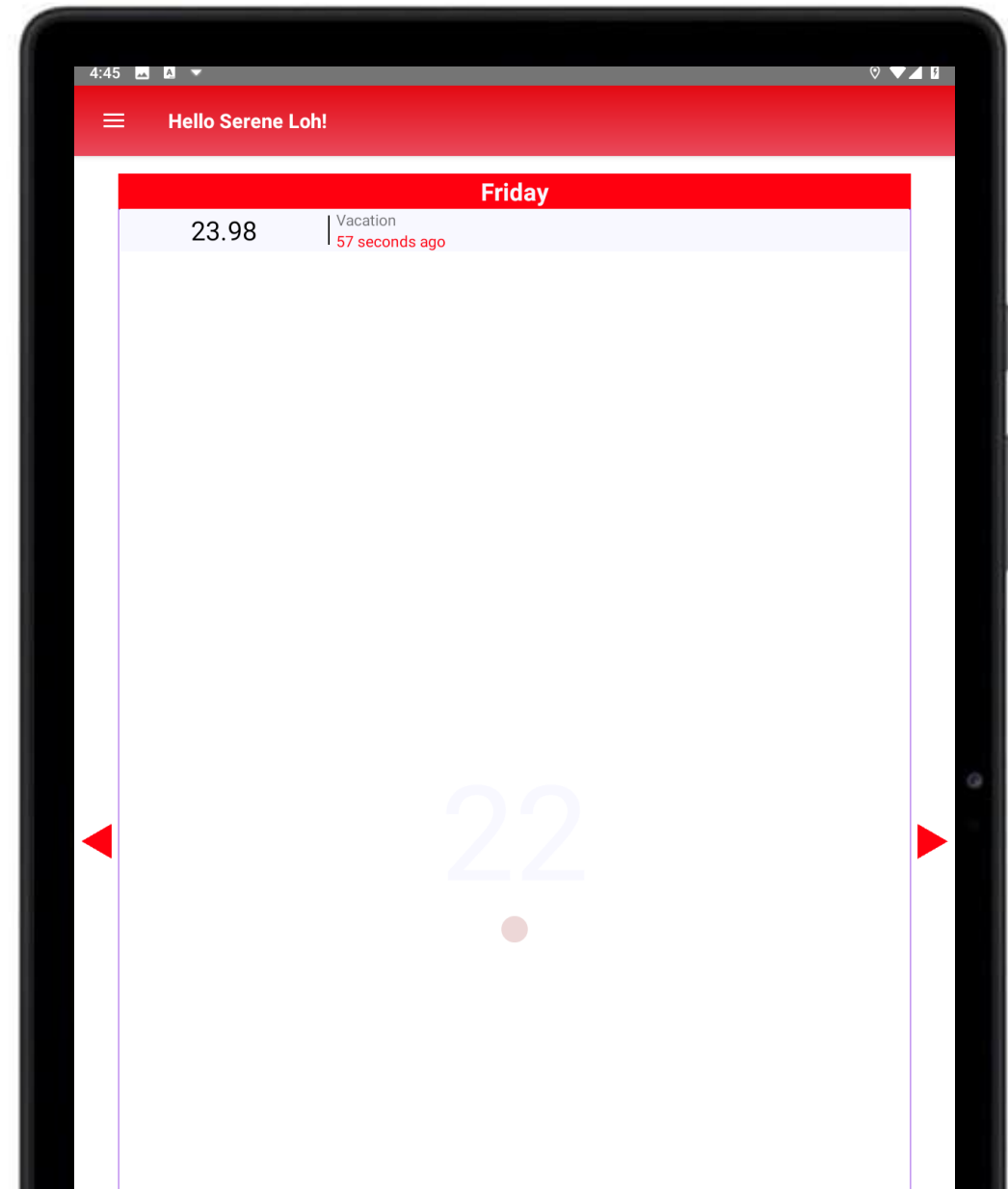
- 4 Input the Calendar Exception for
- **Type** (Holiday, Lunch, Personal, Sick or Vacation)
 - **Available** (Can be contactable)
 - **All Day** (If it is a full day event)
 - **Start Date & Time**
 - **End Date & Time**

- 5 Tap **Save** to save the record.



Set Work Unavailability (3)

The information is updated into the system and displayed in the Calendar record .



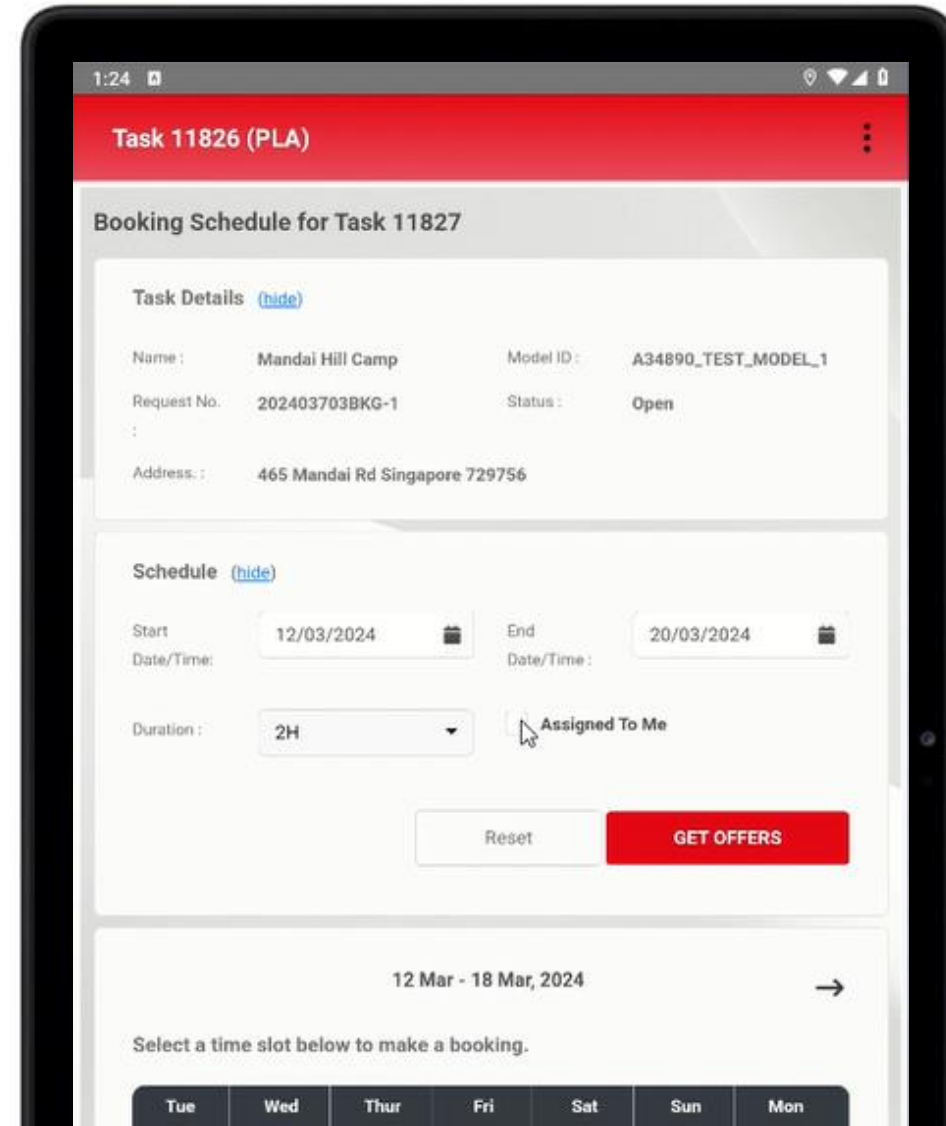
Appointment Schedule

- About Appointment Schedule

About Appointment Schedule

Appointment Schedule enables the engineer to check the available time slots for the team on the mobile app.

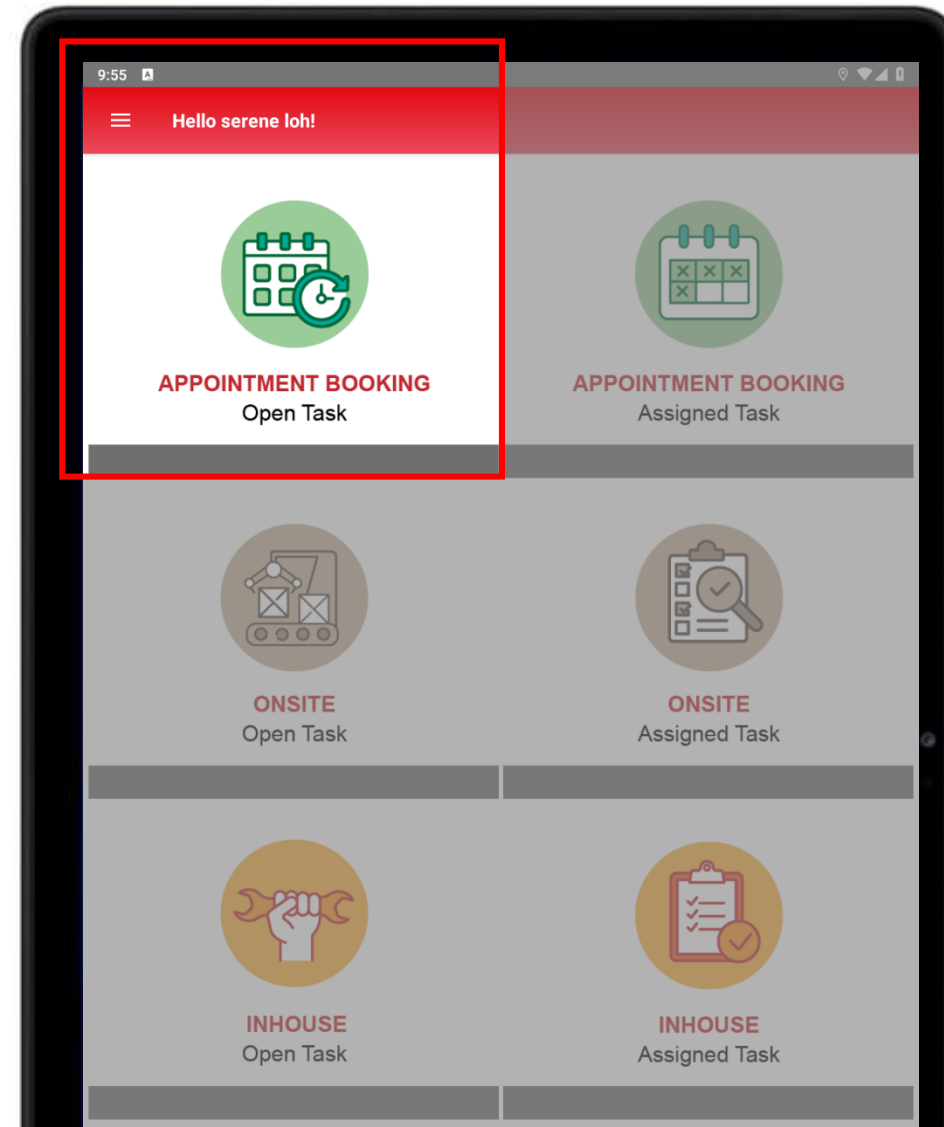
It allows the engineer to make a new appointment or reschedule an appointment with the customer.



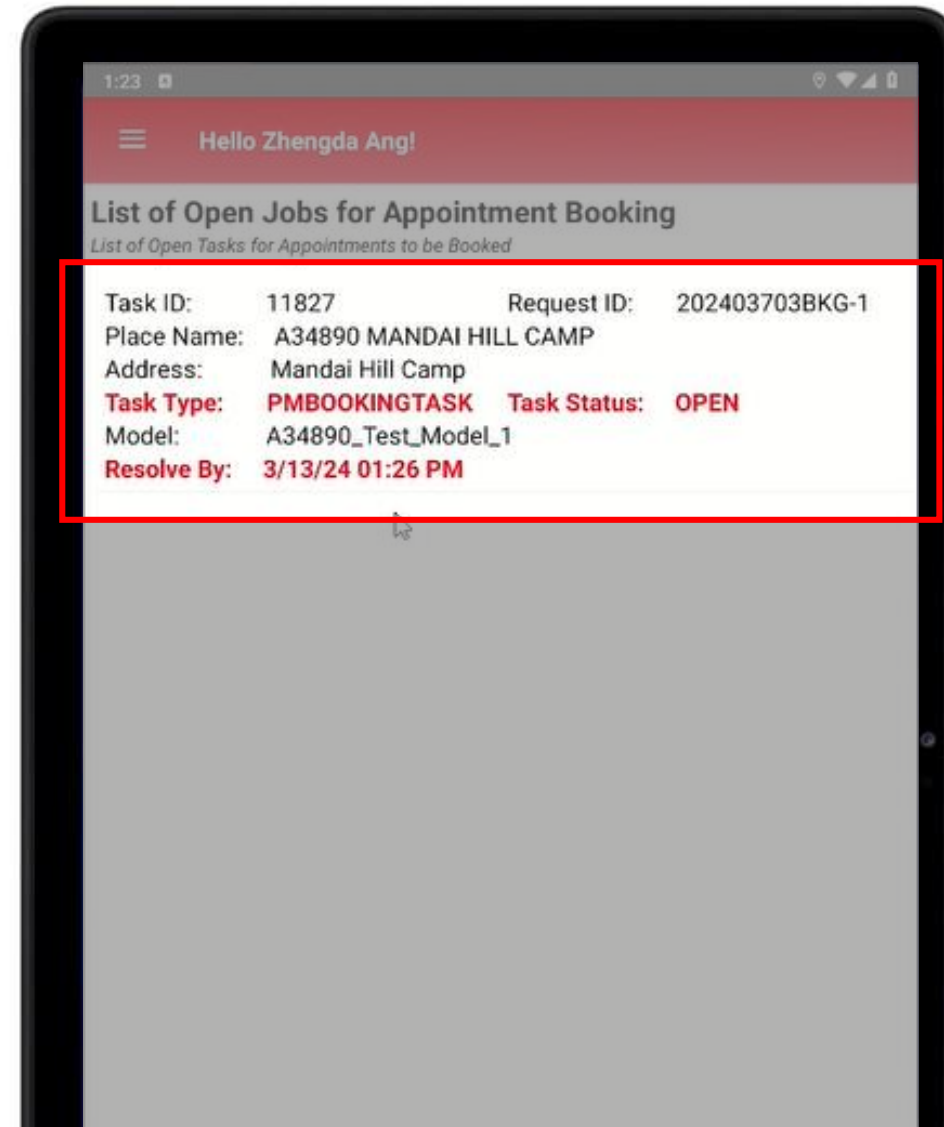
New Appointment For Appointment Schedule

Step 1: Go to Appointment Booking Open Task

Select **Appointment Booking Open Task** to view a list of unassigned job requests.



Step 2: Select and view a Job Task

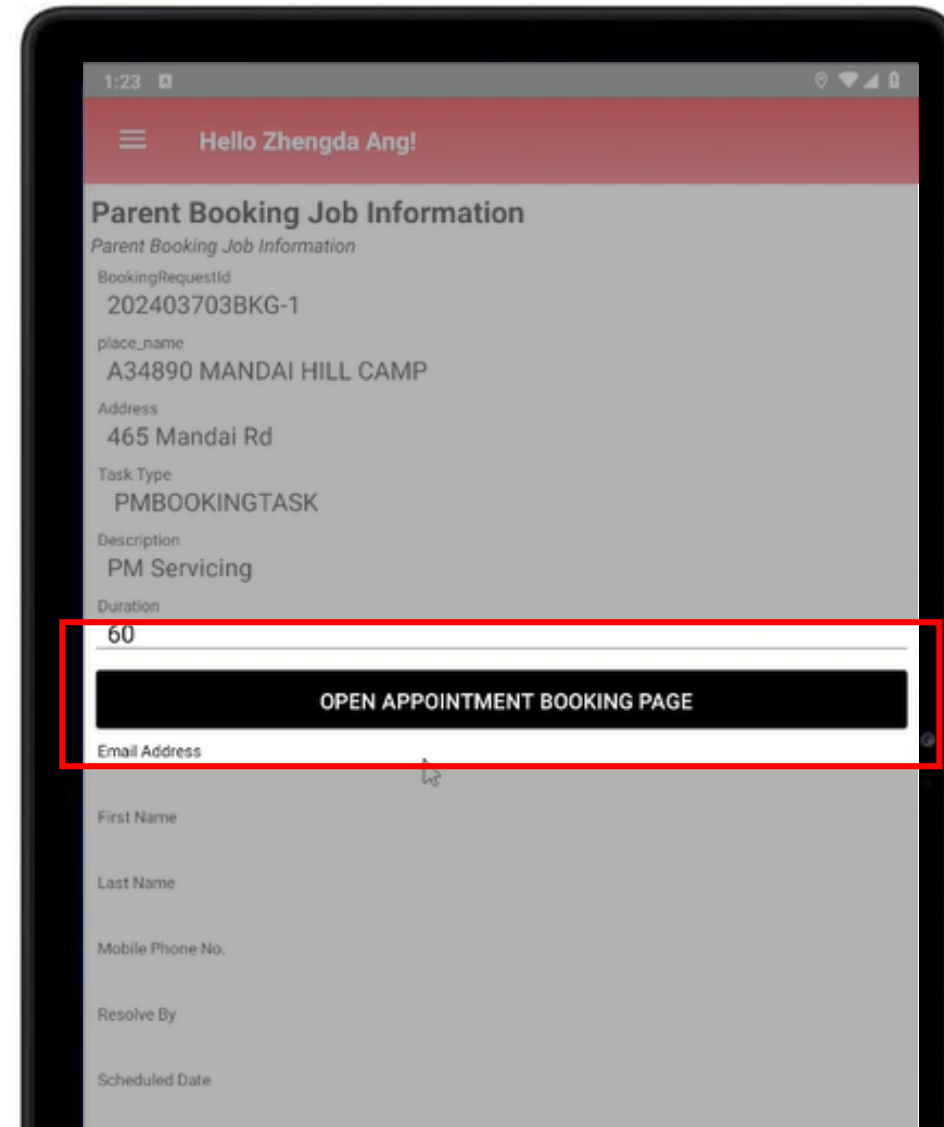


Select an open task from a list of job requests.

NEW APPOINTMENT

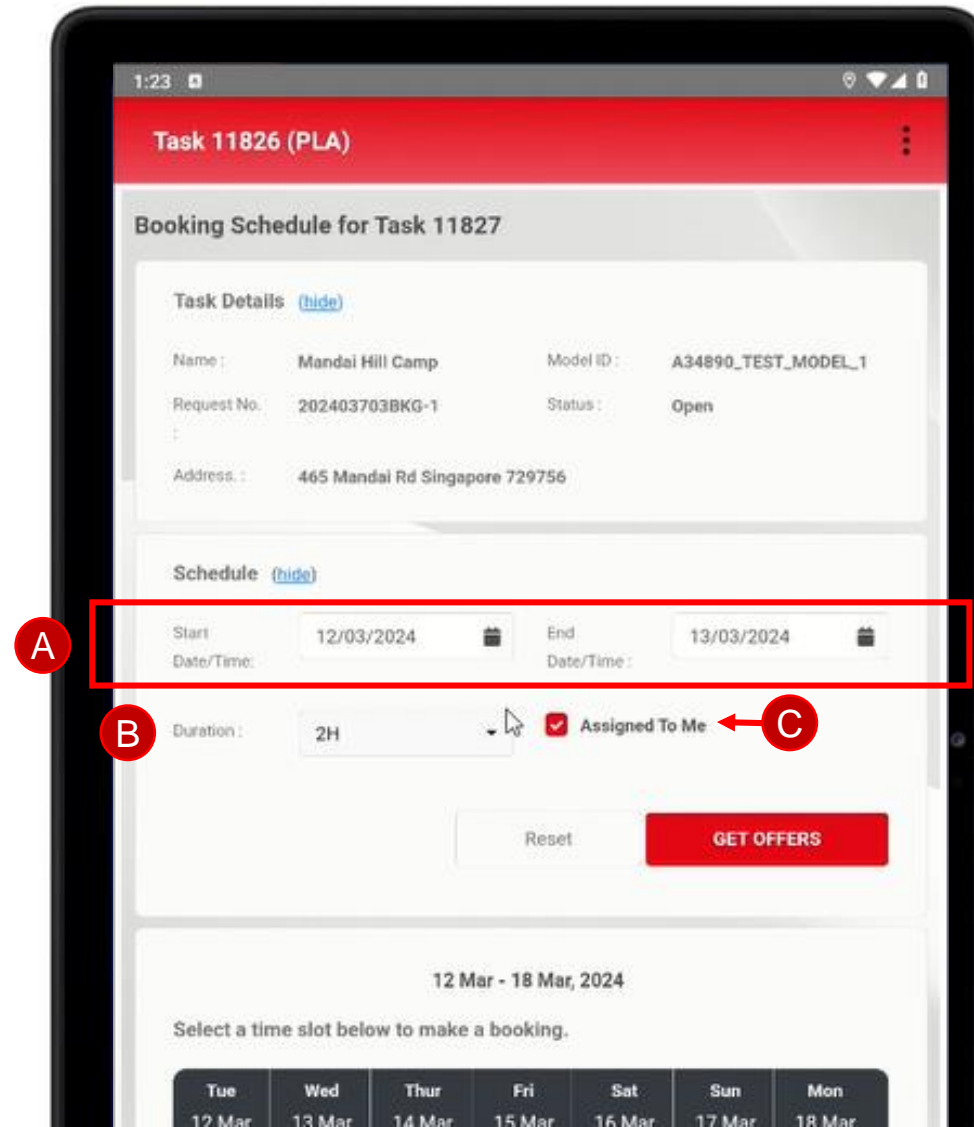
Step 3: Open Appointment Booking Page

Select **Open Appointment Booking Page** to view the schedule.



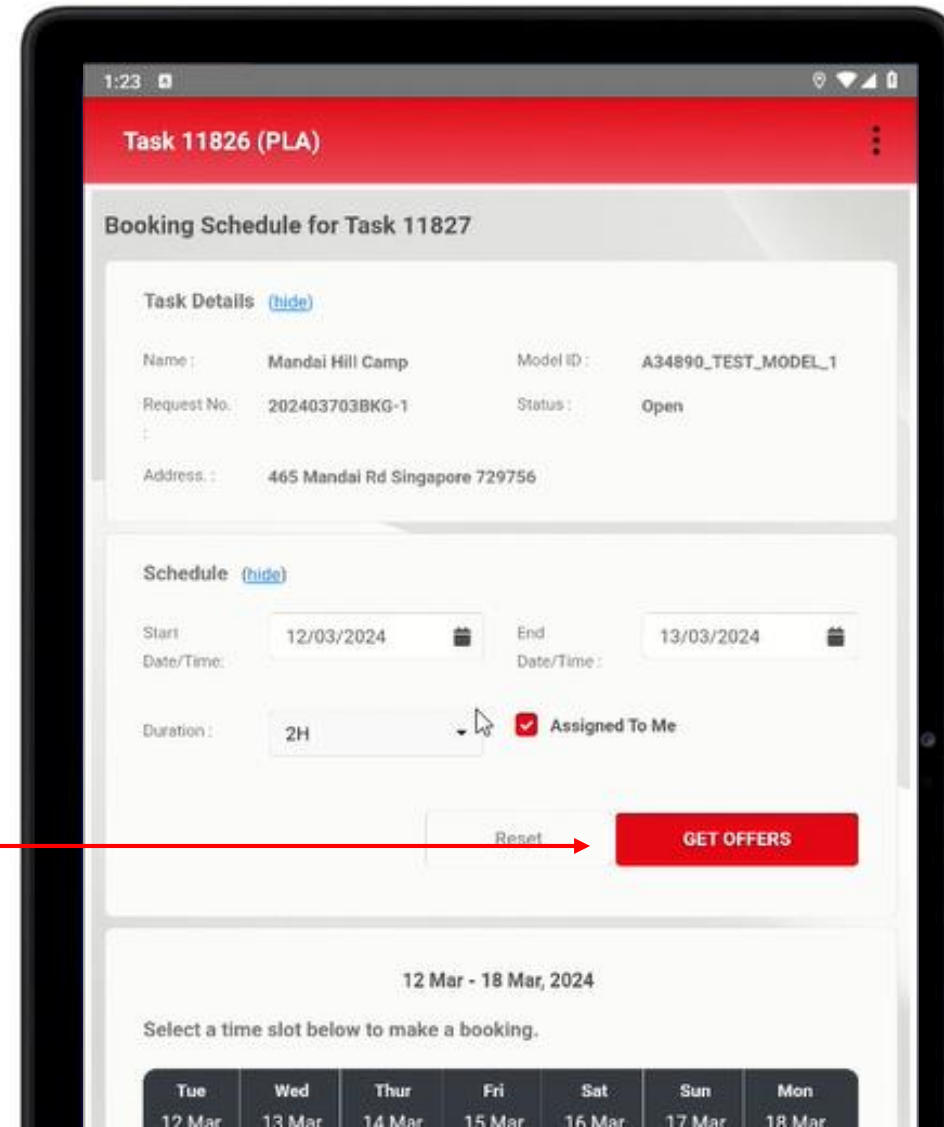
Schedule Options

- A** Timeline of the scheduler from **Start Date/ Time** to **End Date/ Time**.
- B** **Duration:** Number of hours to be spent on the appointed date.
- C** **Assigned to Me (checkbox):** Job task to be assigned to the engineer booking the date.
(If unchecked, booked task will be assigned to the next available engineer in the team)



Step 4: Get Offers

Select **Get Offers** to view the time availability for the job task.



Step 5: Select available time slot

- 1 Engineer can check with the customers on their available date and time and select the time slot that fits the schedule.
- 2 Select **Confirm Slot** to book the date and time.

12 Mar - 18 Mar, 2024 →

Select a time slot below to make a booking.

Tue 12 Mar	Wed 13 Mar	Thur 14 Mar	Fri 15 Mar	Sat 16 Mar	Sun 17 Mar	Mon 18 Mar
13:30-15:30	08:30-10:30	08:30-10:30	08:30-10:30			08:30-10:30
15:30-17:30	10:30-12:30	10:30-12:30	10:30-12:30			10:30-12:30
	13:30-15:30	13:30-15:30	13:30-15:30			13:30-15:30
	15:30-17:30	15:30-17:30	15:30-17:30			15:30-17:30

Recommended ■ Selected ■ Booked ■ Unavailable ■

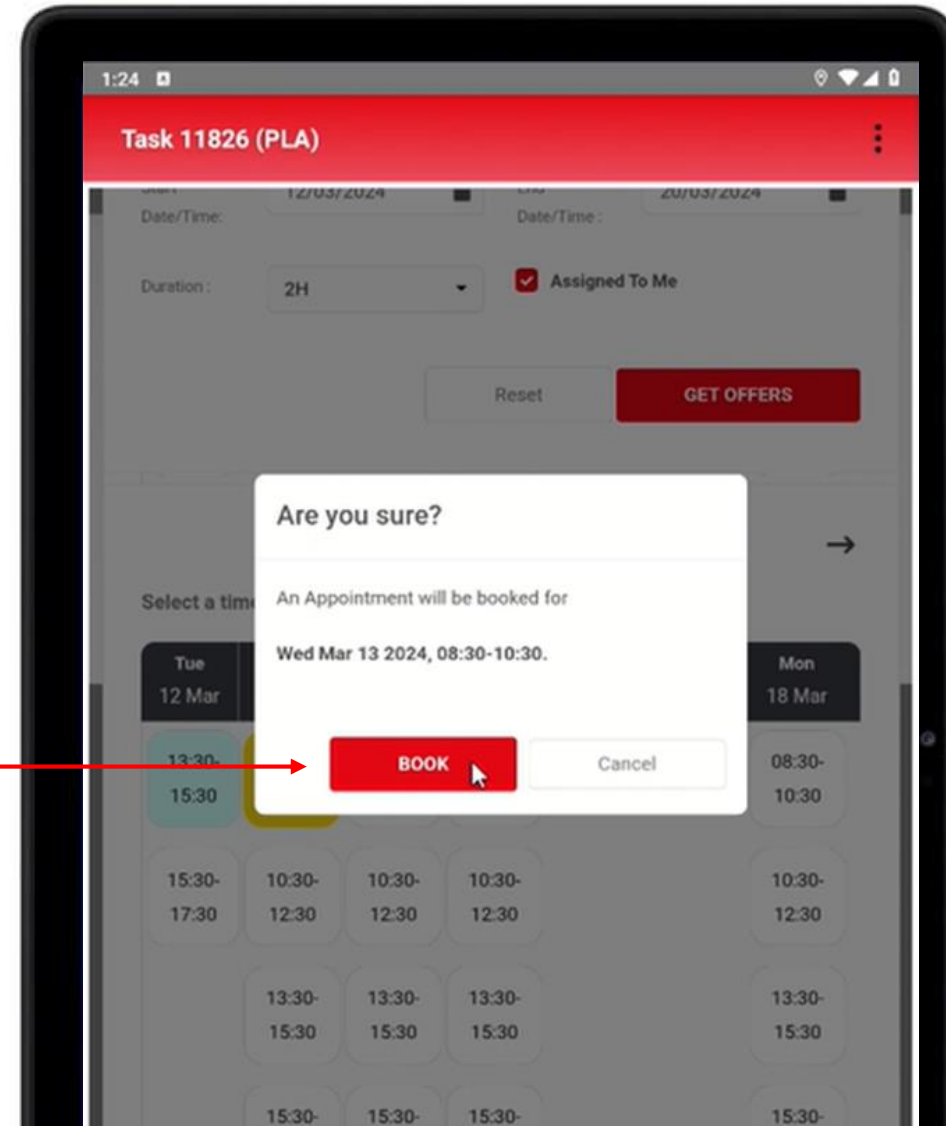
Selected date : **Wed Mar 13 2024**

Selected time : **08:30-10:30**

CONFIRM SLOT

Step 6: Confirm Booking

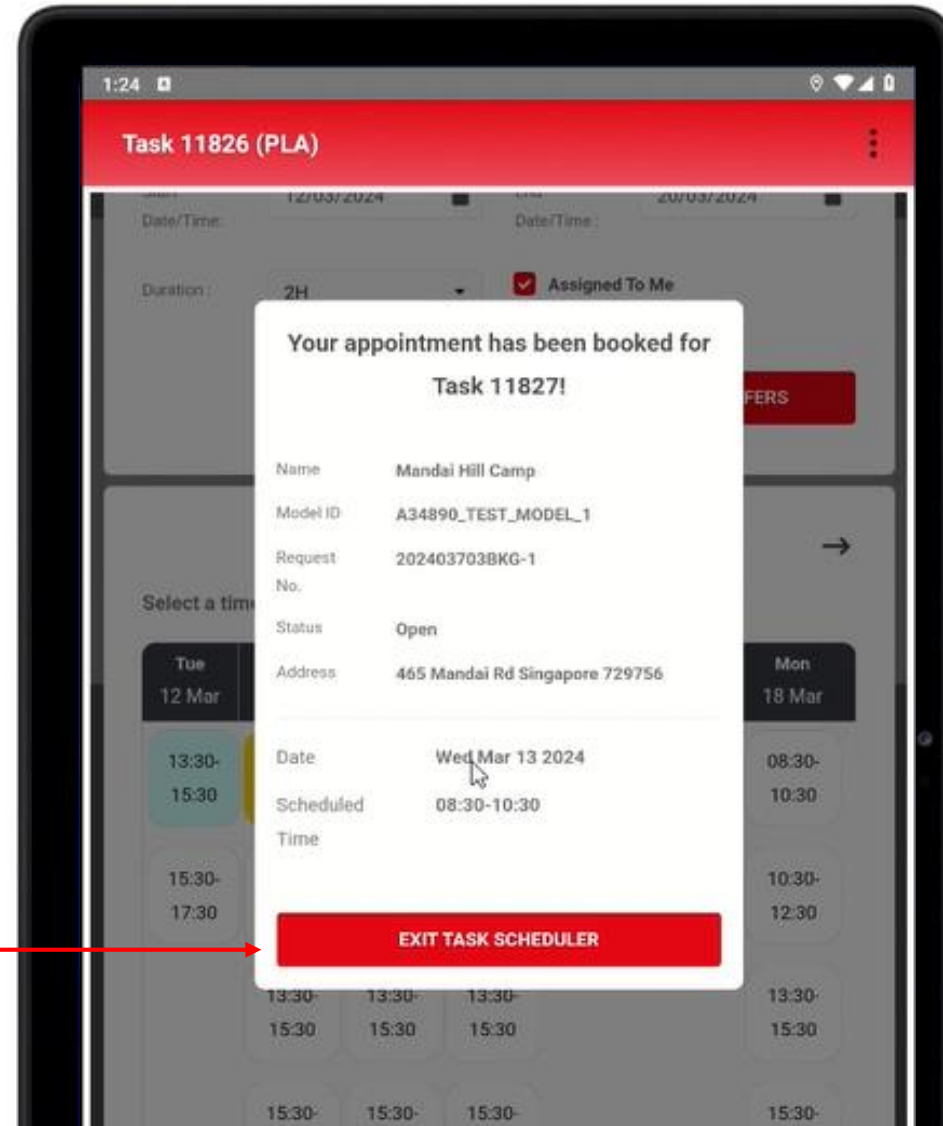
It will display a confirmation message to book the allocated slot. Select **Book** to confirm booking.



Appointment booking confirmed

It will inform the engineer that the appointment has been confirmed and booked for the task.

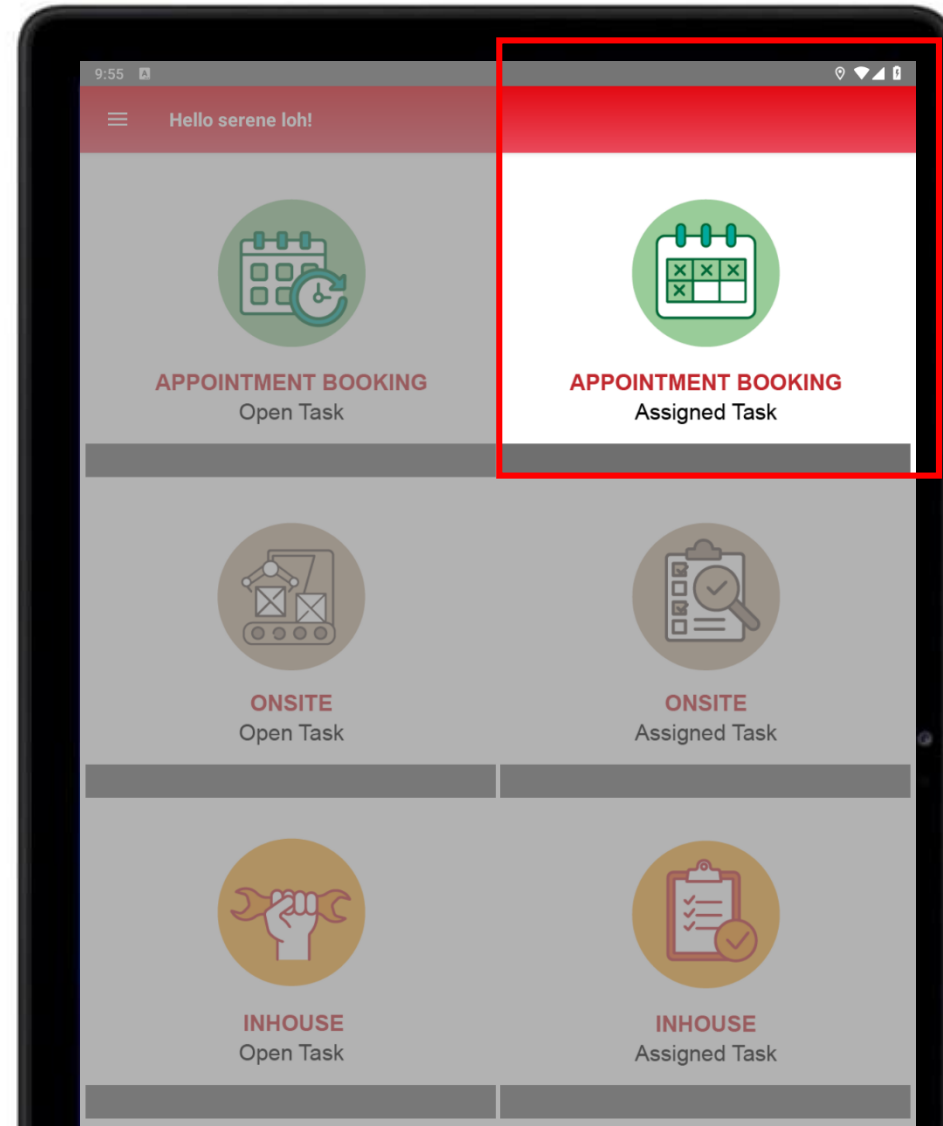
Select **Exit Task Scheduler** to leave the page.



Reschedule Appointment For Appointment Schedule

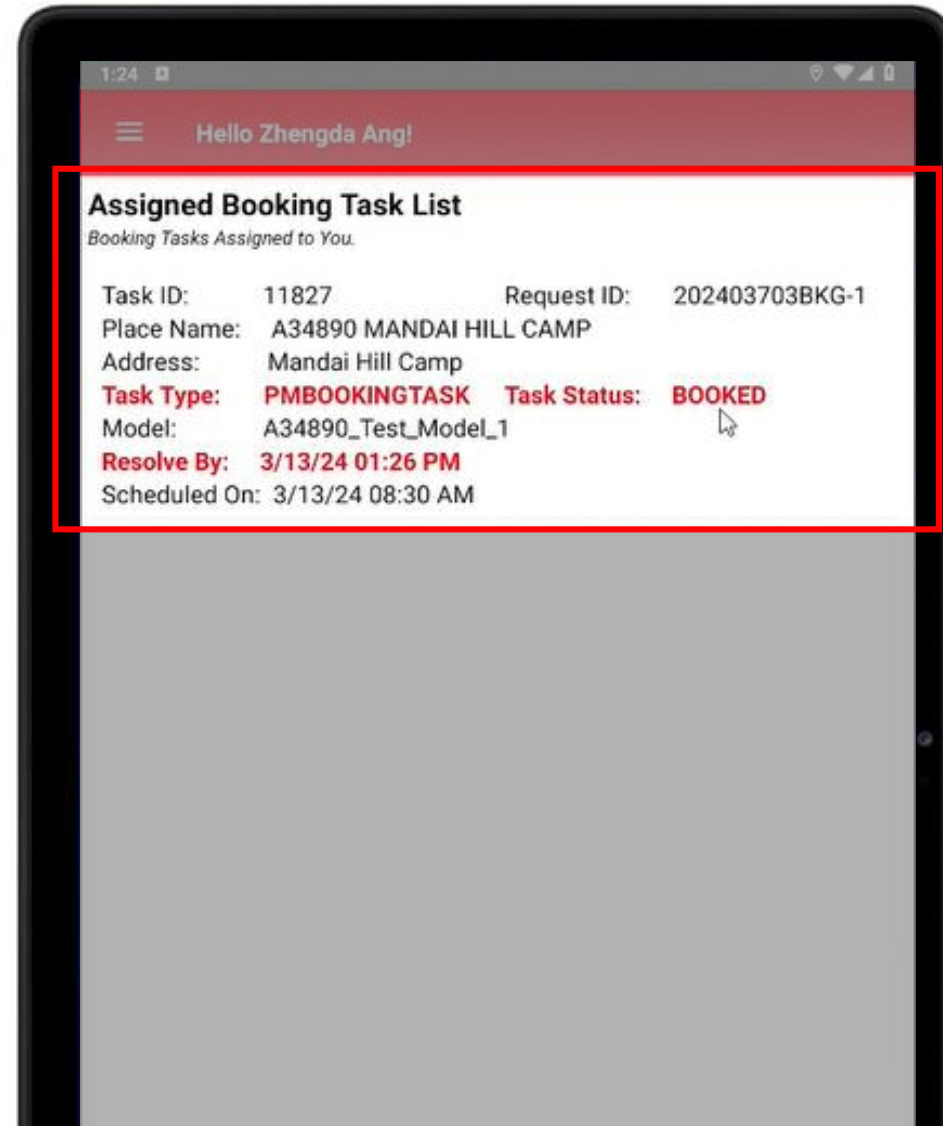
Step 1: Go to Appointment Booking Assigned Task

Select **Appointment Booking Assigned Task** to view a list of assigned job requests.



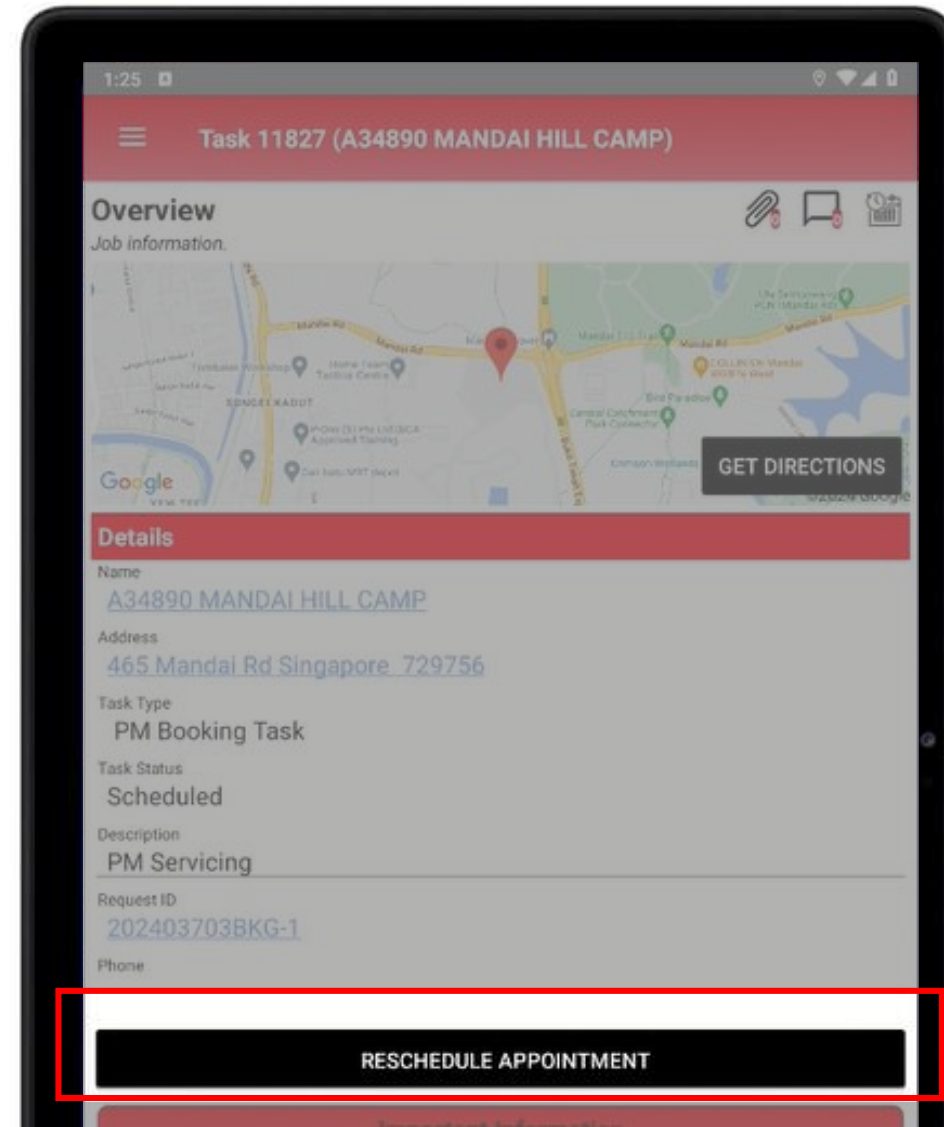
Step 2: Select and view a Job Task

Select an assigned task from a list of job requests.



Step 3: Select Reschedule Appointment

Select **Reschedule Appointment** under Details Section to change appointment date and time.

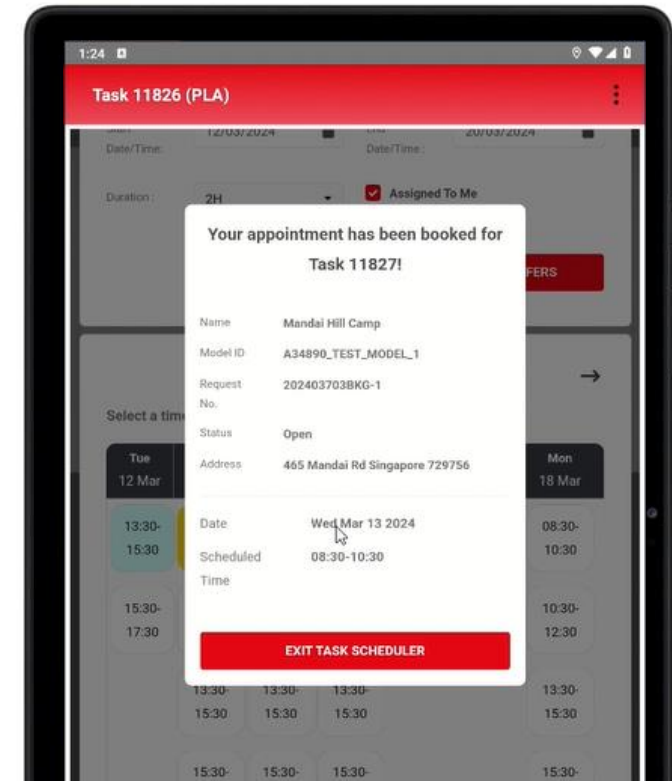
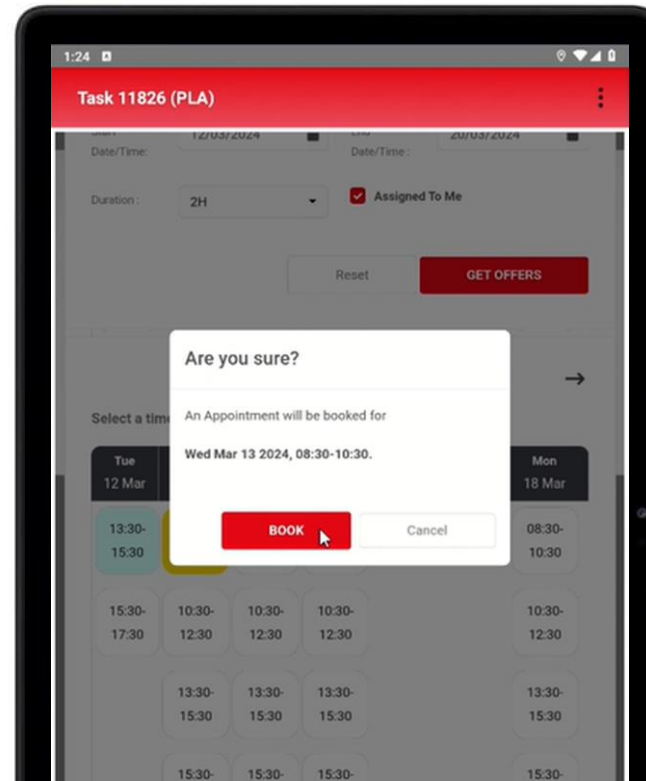
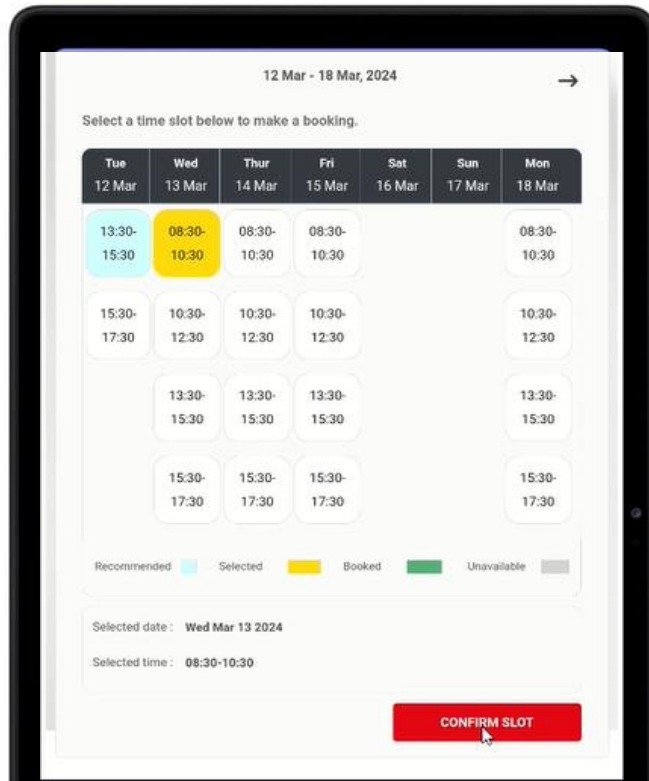


Step 4: Change Appointment Date and Time

1 Select a new Date and Time and **Confirm Slot**.

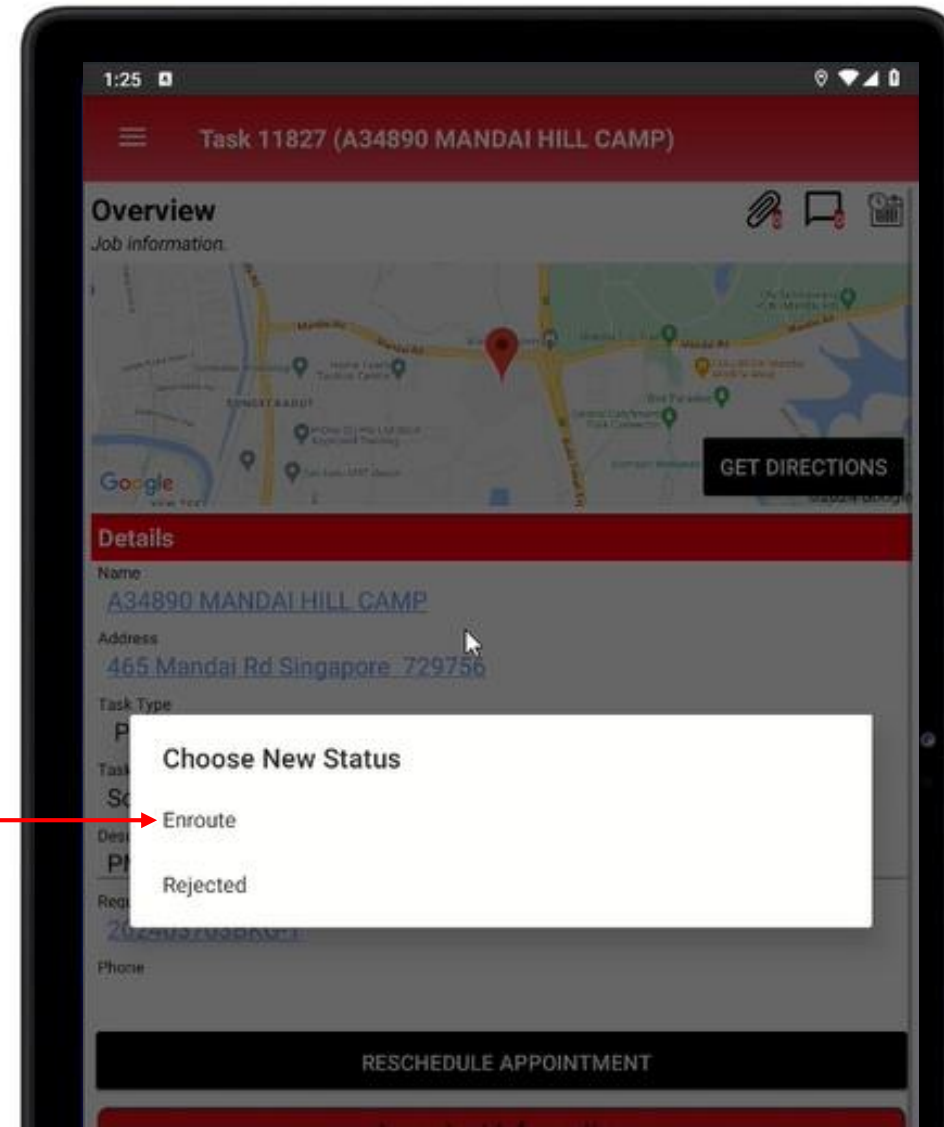
2 Confirm to **Book** the slot

3 Appointment booking has been confirmed.



No Rescheduling after Job Enroute

Please note that once you have changed your status to **Enroute**, you will not be able to reschedule your appointment with the customer.

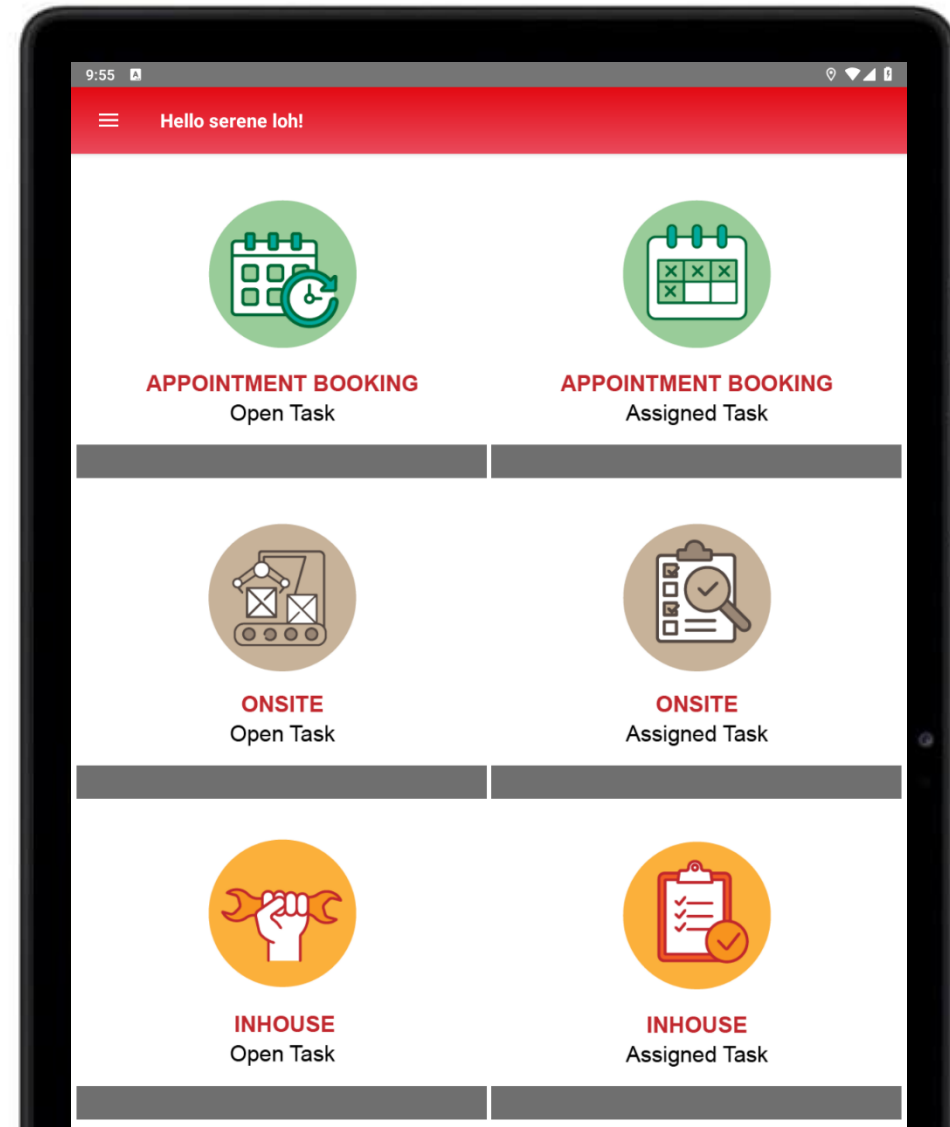


Unable to view Appointment
For Appointment Schedule

UNABLE TO VIEW APPOINTMENT

Unable to view Appointment or Task

SDS2.0 app prevents booking conflict between two or more users accessing the same task page, thus if the first user accesses the task, the task will not be shown in the job list. Once the user is done with the page, the task will reappear in the job list.



Complete Job Task

Proceed to work on the Job Task

Engineer can continue to work on the job task with or without booking an appointment.
Refer to **User guides for Managers & Engineers** for different types of workflow.

1 Inhouse Repair Request

2 Onsite Service Request

- Repair and Return
- Advanced Replace
- Engineer Swap

Thank you