User Guide for Manager Portal

Inhouse Repair Request

5th June 2023

Release 2.1 v1.0

AGENDA

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1. Inhouse Repair Request

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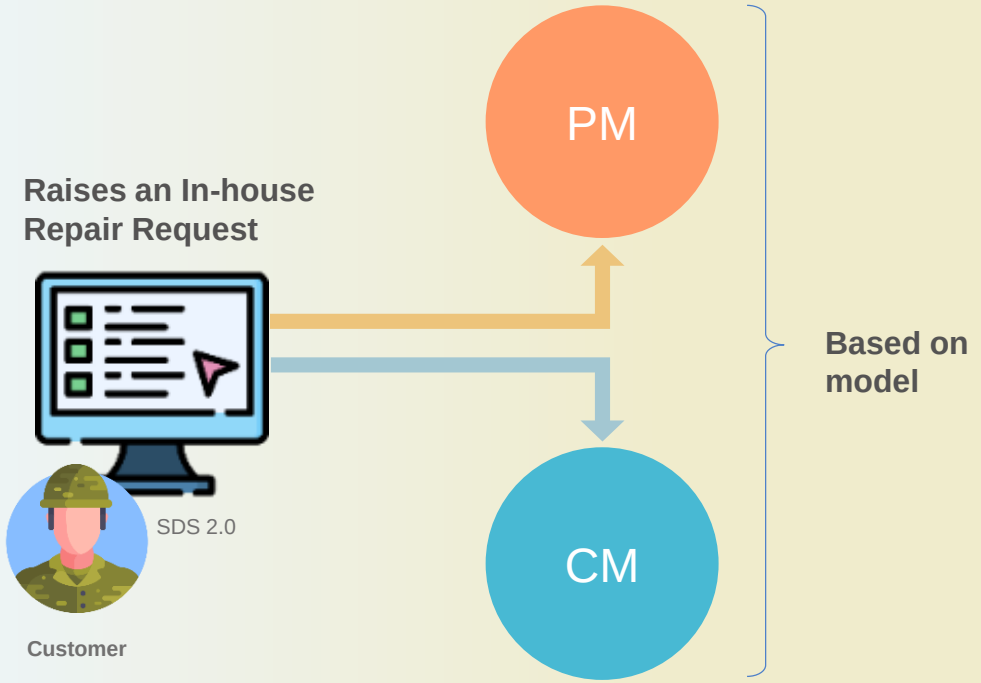
Inhouse Repair Request

Type of Inhouse Repair Request



Repair & Return

Customer returns an unusable product for the engineer to repair it before shipping it back.

Advanced Replace

Engineering team delivers a usable product to the customer before collecting the unusable one. After collecting the unusable product, depot engineer can repair it and put it in usable stock or dispose it.

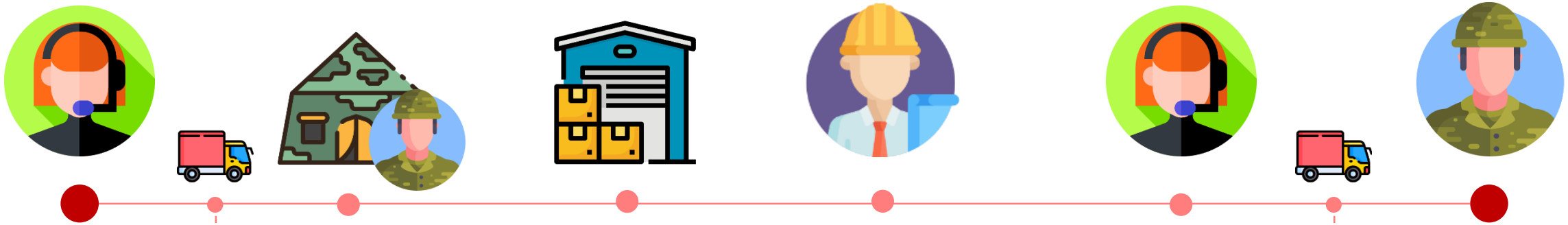
Engineer Swap

During onsite inspection and maintenance, engineer discovers that Product is faulty and replaces it with a usable Product. Then he will send the unusable one to depot for inhouse repair.

Inhouse Repair Request

Repair and Return

Repair and Return is when customer returns an unusable product for the engineer to repair it before shipping it back.



SR Team approves repair request from customer

Milk-run Driver to collect Unusable Product from customer

Product Collection at **Customer's Site**

Milk-run Driver drop-off Unusable Product at **Depot**

Engineer repairs Unusable Product

SR Team prepares document to ship Repaired Product

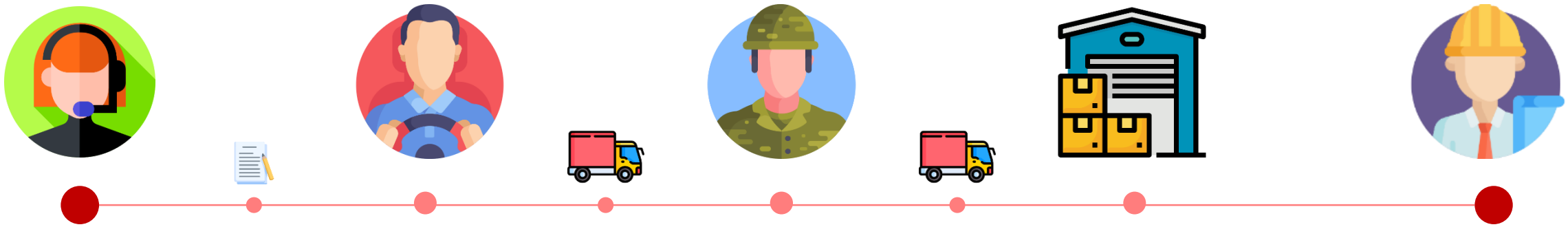
Milk-run Driver delivers Repaired Product to customer

Customer confirms Product Delivery and signs off

Inhouse Repair Request

Advanced Replace

Advanced Replace is when the engineering team delivers a usable product to the customer before collecting the unusable one. After collecting the unusable product, the depot engineer can repair it and put it in the usable stock or dispose of it.



SR Team prepares document to ship usable product and collect unusable one

Milk-run Driver delivers usable product and collects unusable one from customer

Customer collects usable product and returns unusable one to milk-run driver

Milk-run Driver drop-off unusable product at **Depot**

Engineer repairs unusable product and store in usable stock

Inhouse Repair Request

Engineer Swap

Engineer Swap is where during onsite inspection and maintenance, engineer discovers that Product is faulty and replaces it with a usable Product. Then he will send the unusable one to depot for inhouse repair.

Engineer identifies Unusable Product at Customer's site

Collects Faulty Product and replaces it with Usable one

Customer signs off for the replacement

Engineer send to Depot for **Inhouse repair** or send to **OEM for repair**

Engineer returns repaired Product to **Depot**

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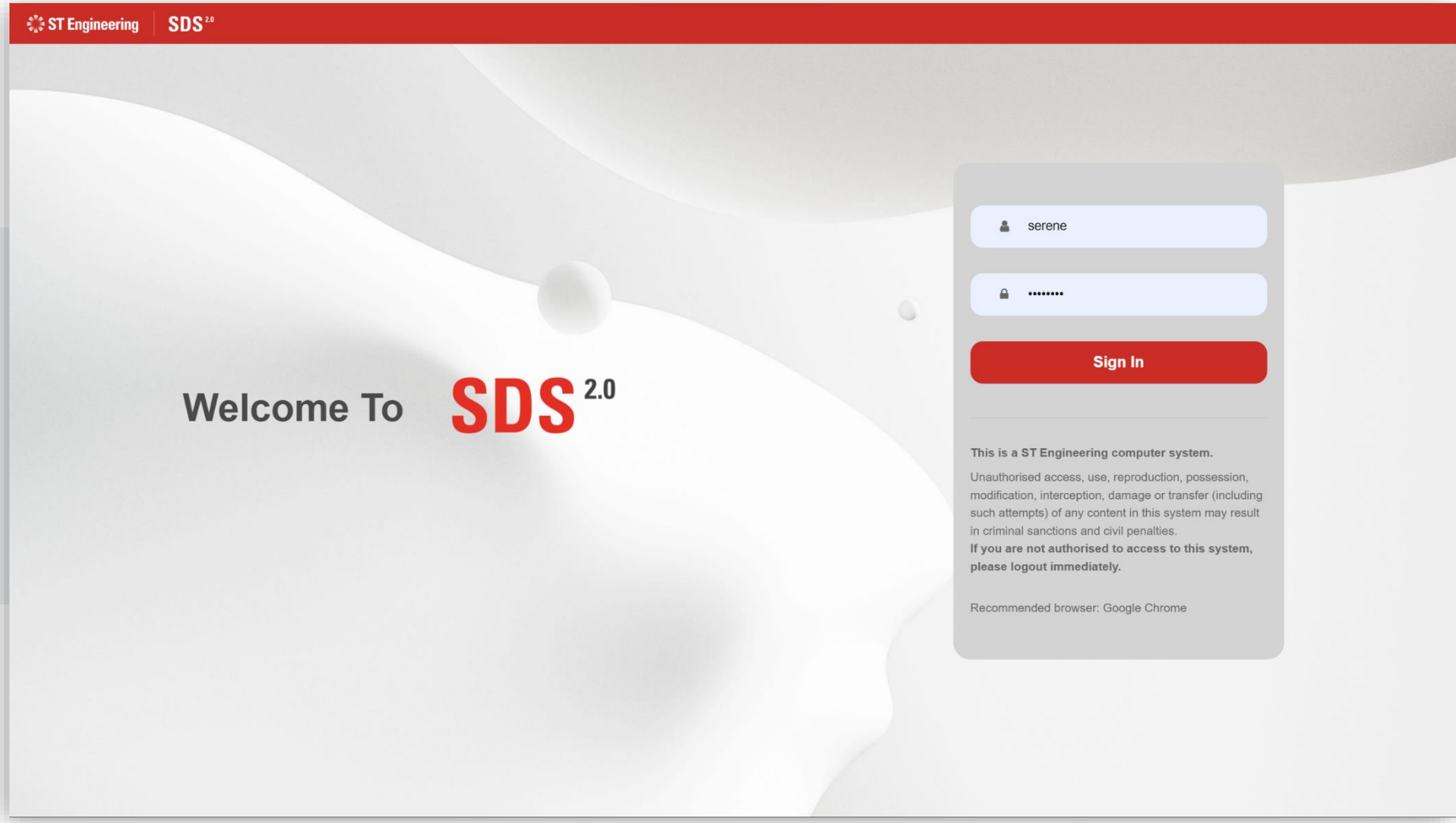
Manager Web Portal

Login

Use your login credentials to access:

https://sds.stengg.com

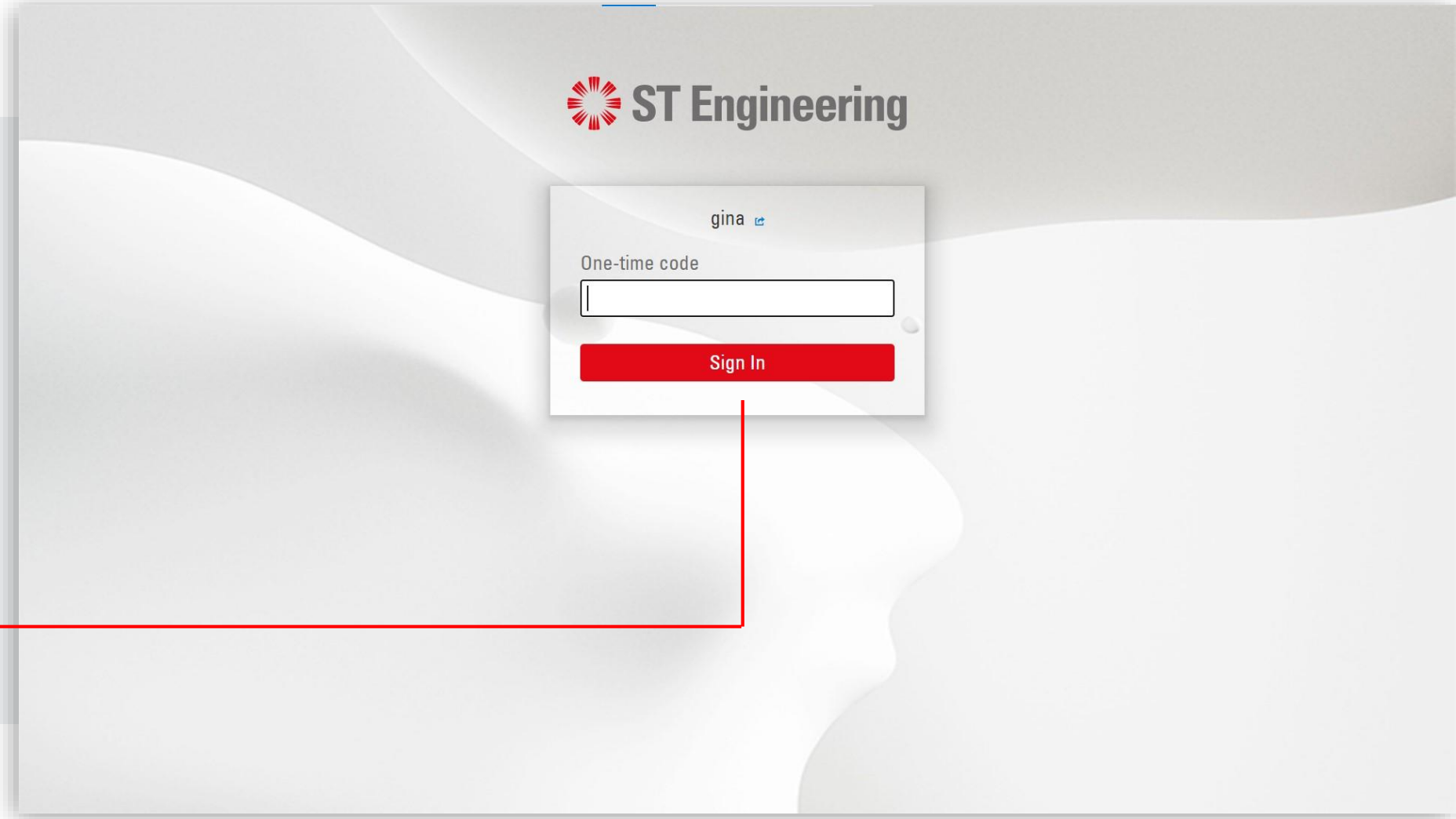


Manager Web Portal

One-Time Code

Retrieve One-Time Code from your Authenticator App (Google Authenticator or MS Authenticator)

Enter 2FA code and tap **[Sign In]**.



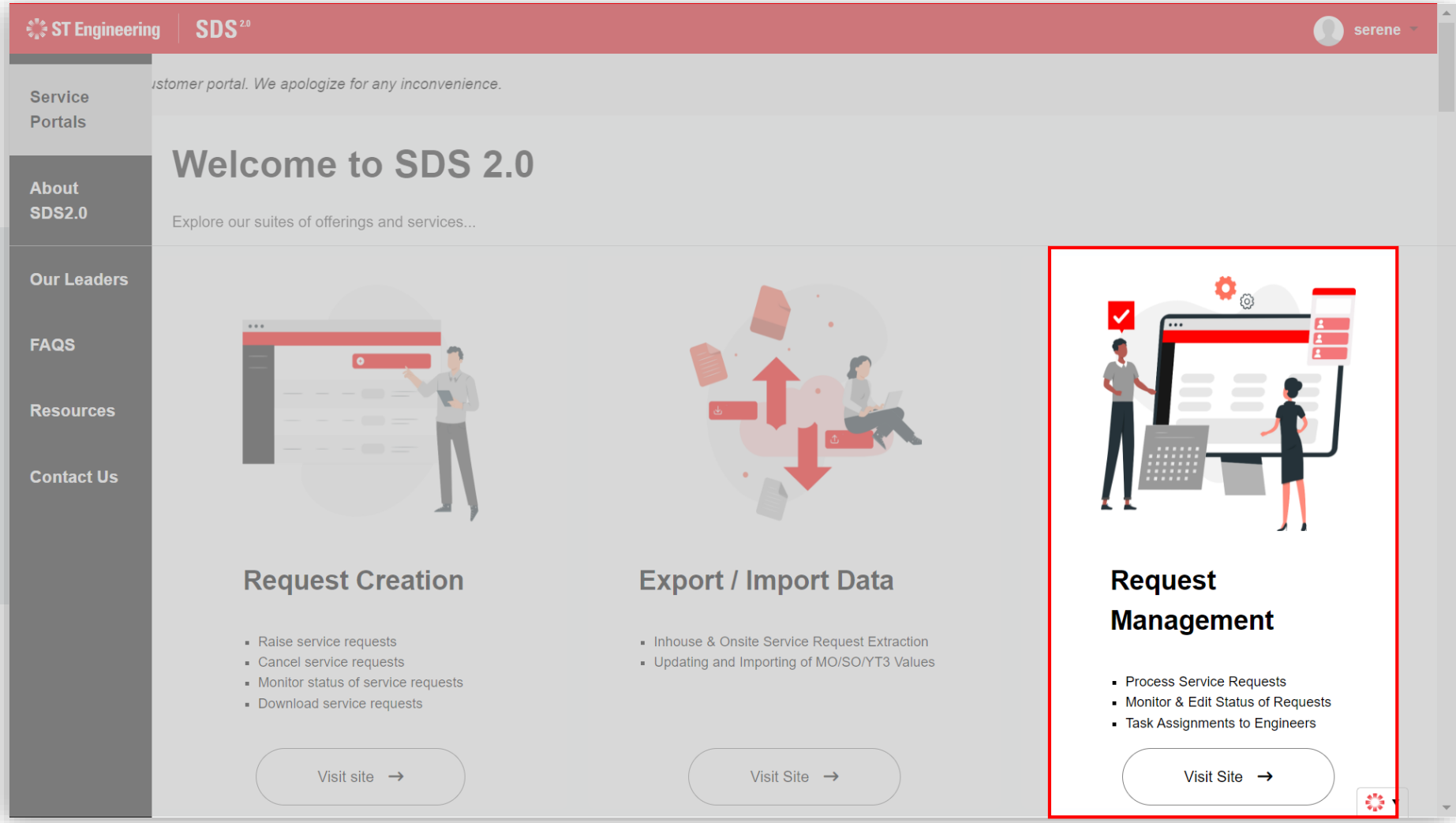
Manager Web Portal

View Site

Access the link to

Request Management

from Service Portal page.



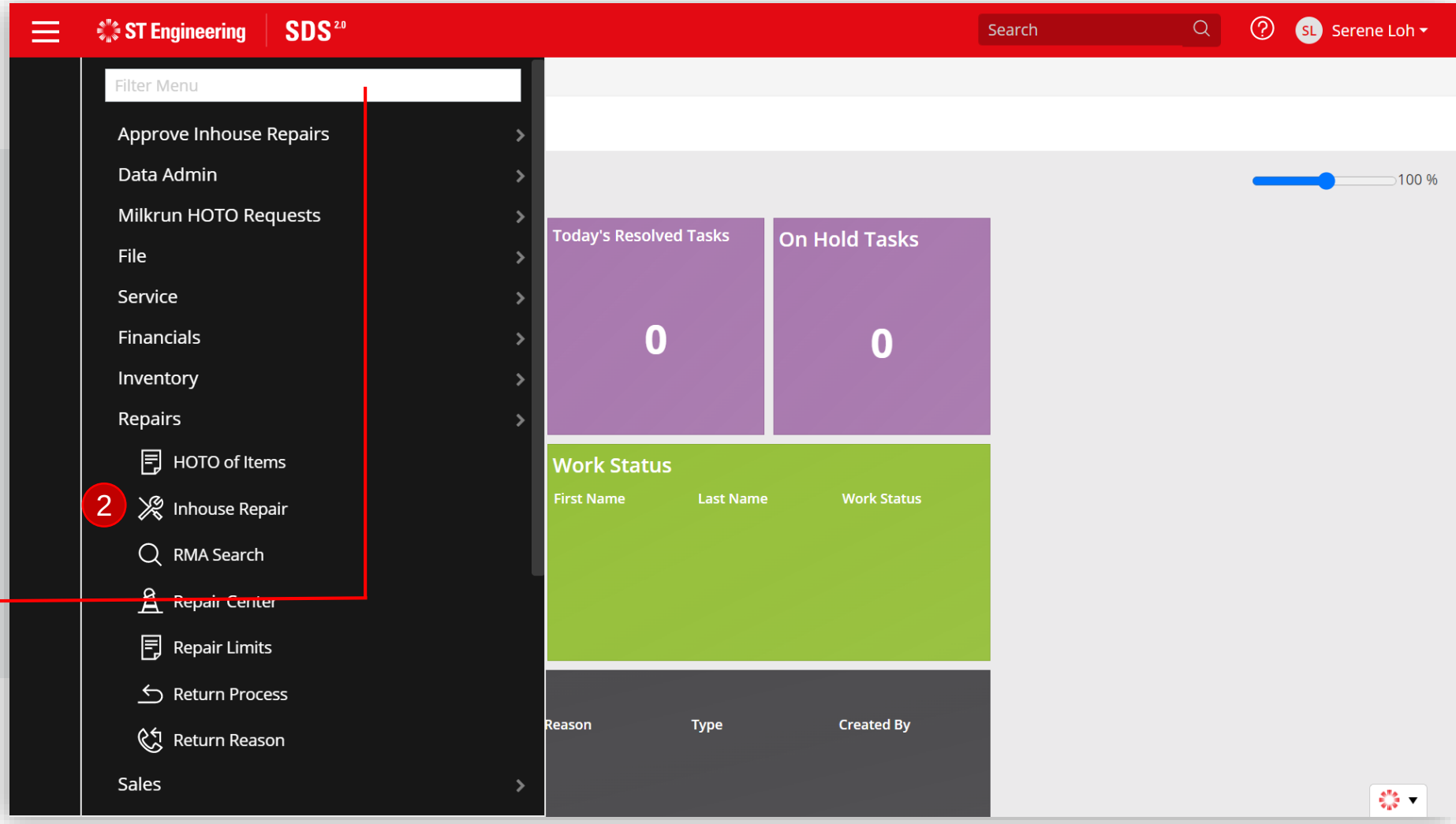
View Inhouse Repairs

Manager Web Portal

View Inhouse Repairs

1 At Lobby page, tap **menu bar** to view menu

2 Go to **Repairs > Inhouse Repair** or type “Inhouse Repair” in menu search bar

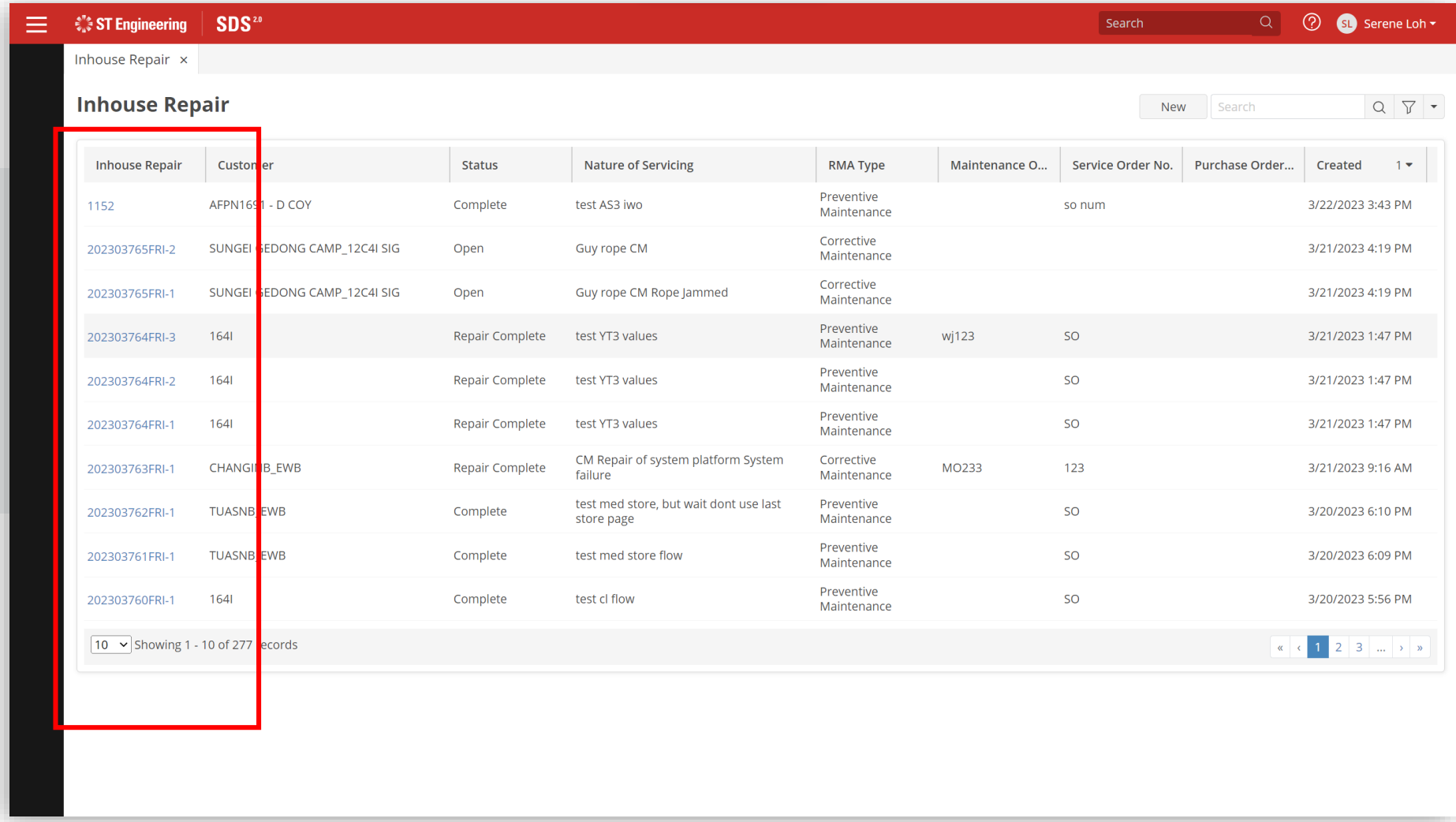


Manager Web Portal

Select an RMA ID

Select an **Inhouse Repair link** to view a repair request pending to process.

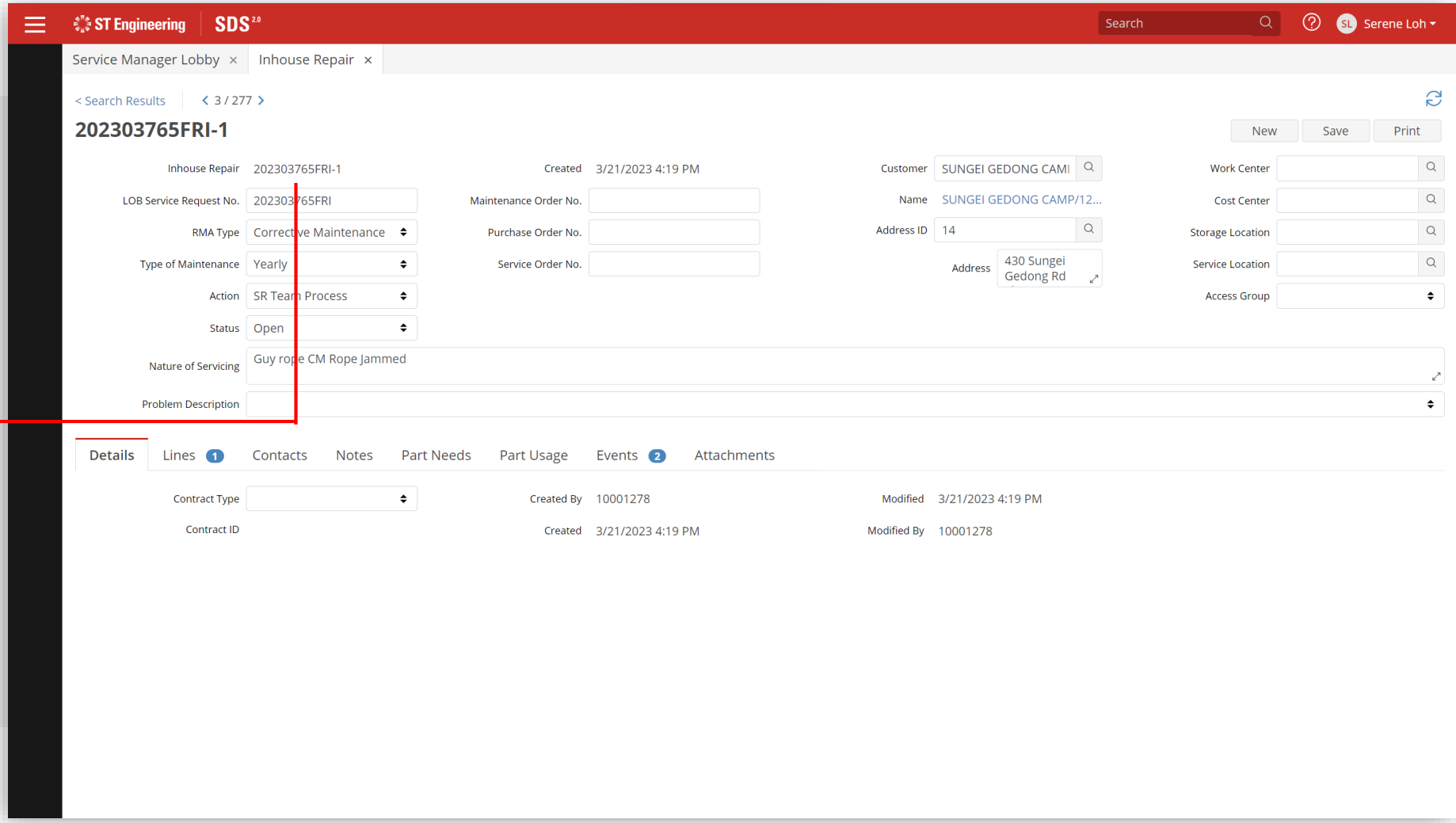
Note: If the list is not showing, tap the 🔍 icon.



Manager Web Portal

View an Inhouse Repair Request

When customer submits an inhouse repair request, it generates a request page tagged by **Inhouse Repair ID**. Information is auto-filled from customer's repair request entry.

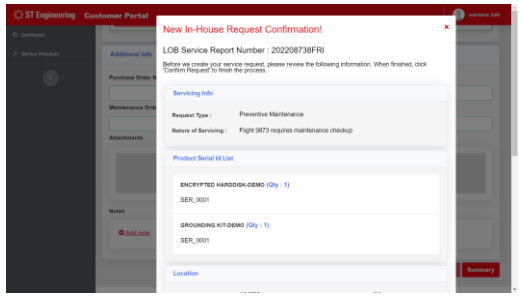


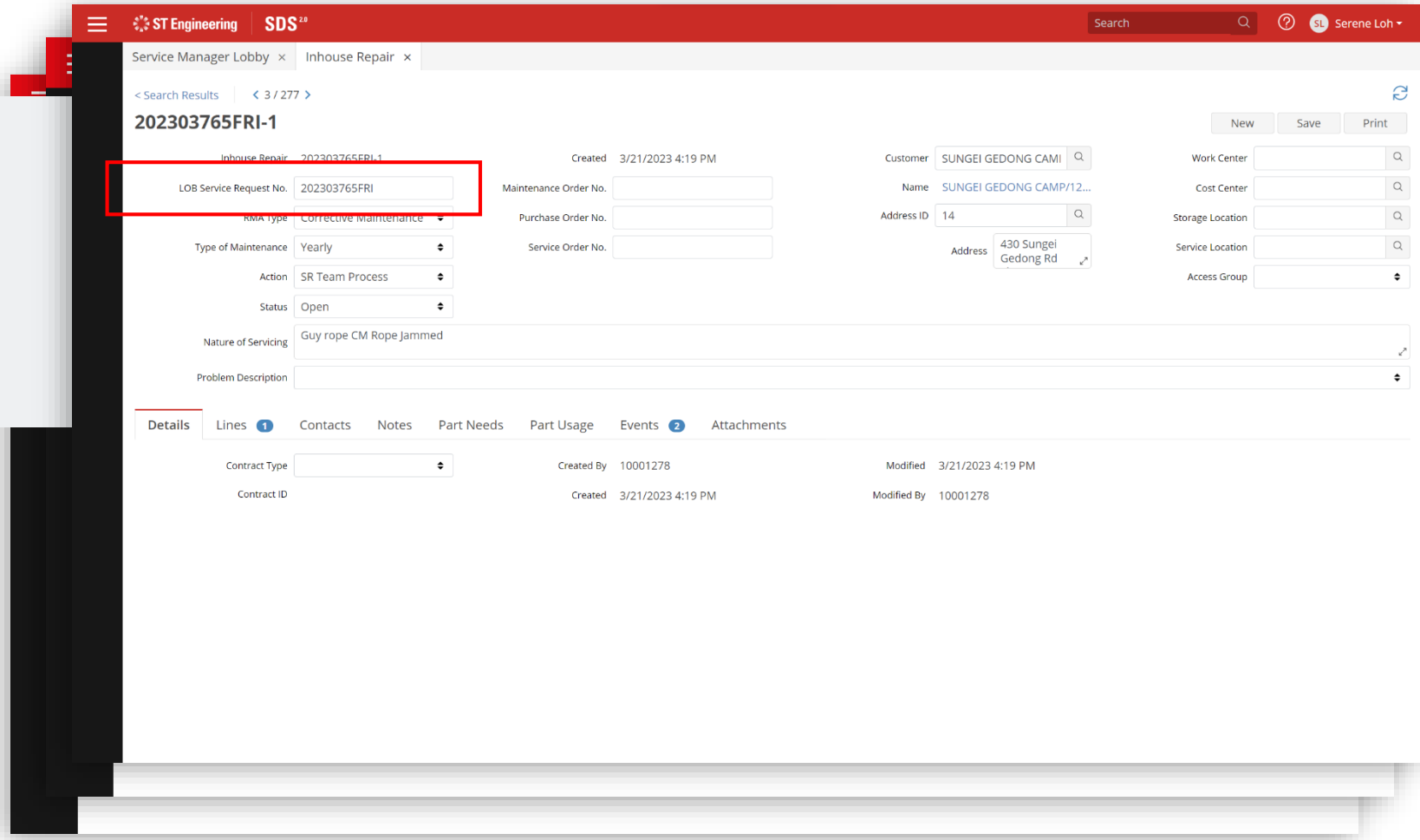
Manager Web Portal

LOB Service Request ID

LOB Service Request ID is linked to all the products requested by the customer on a single request form.

Customer portal (One request form)





Multiple inhouse repair requests

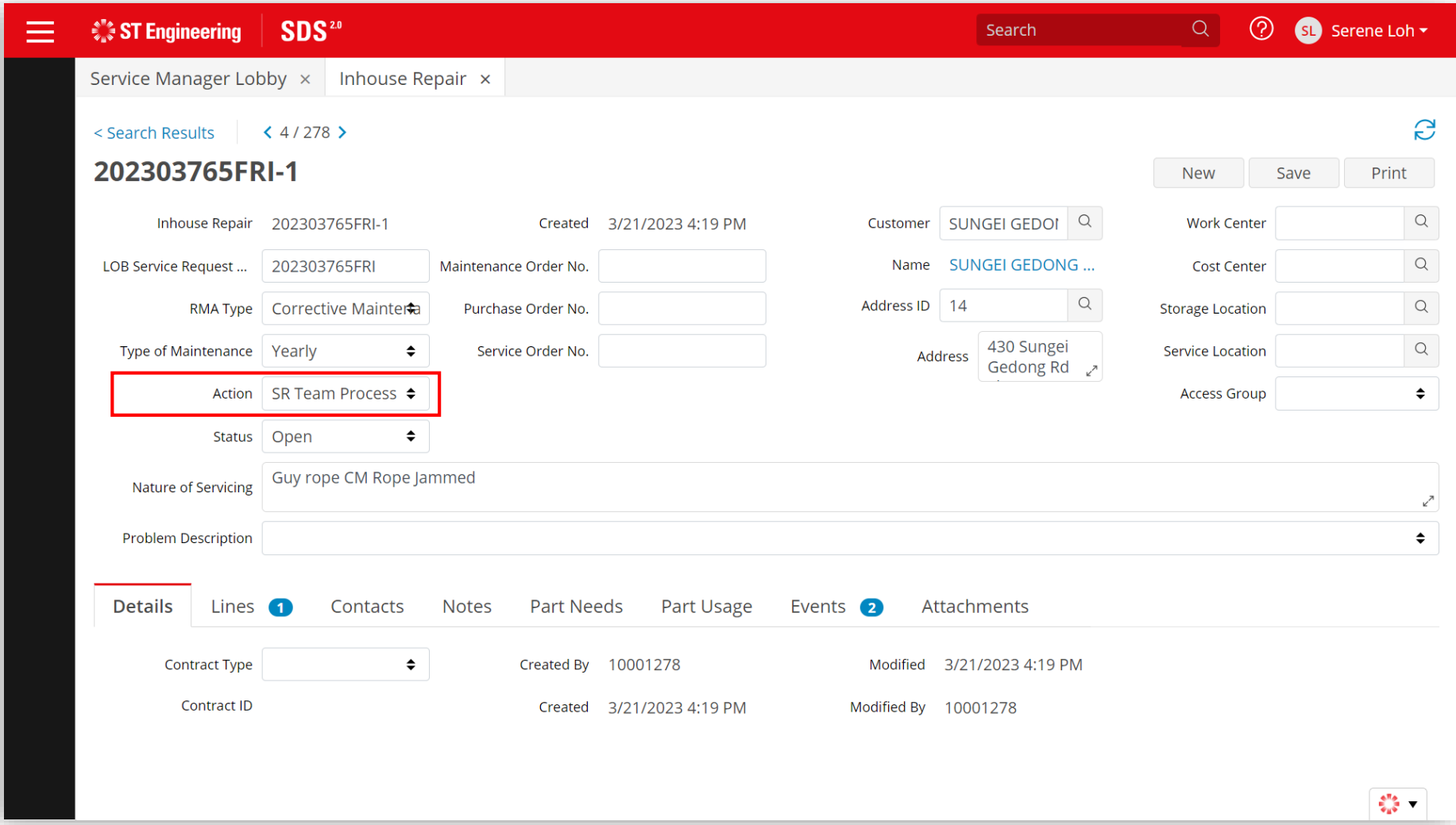
Approval on Inhouse Repair Request

Approval on Inhouse Repair Request

New Inhouse Repair Request

When there is a new depot repair request, default action status is **[SR Team Process]**.

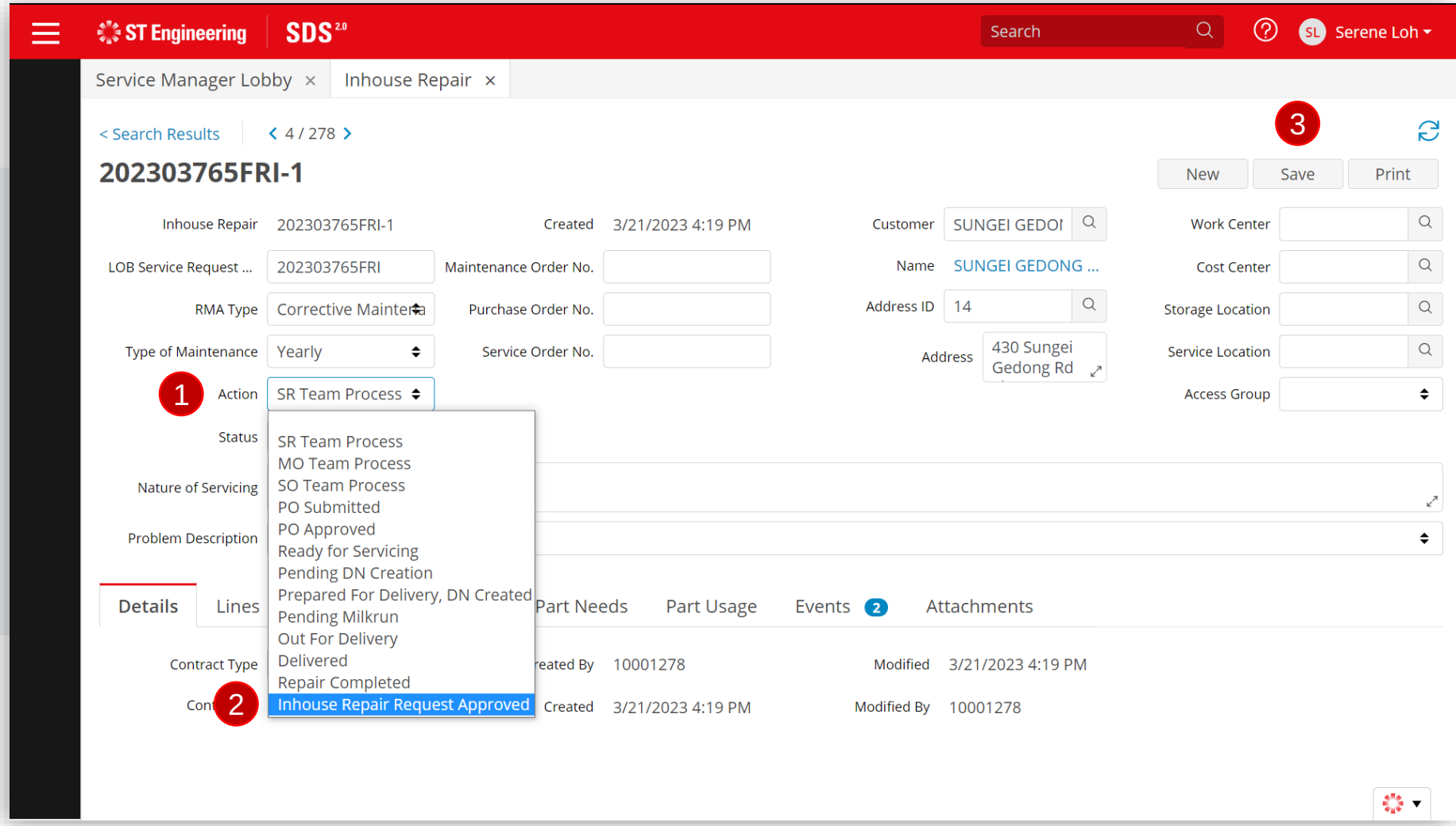
The team will vet through the details and choose to proceed or reject request.



Approval on Inhouse Repair Request

Approve Inhouse Repair Request

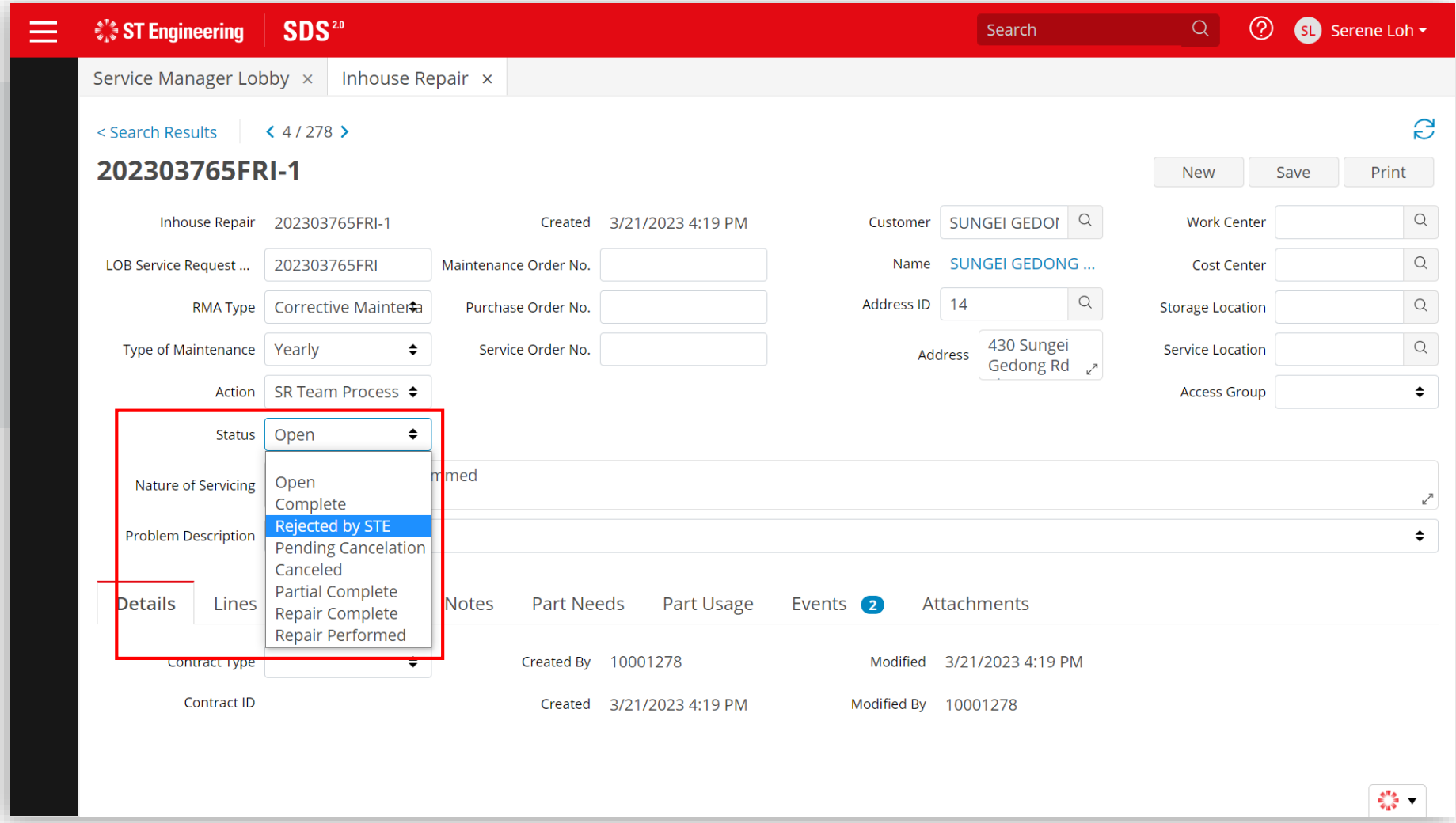
1. Action Status has different sets of processes.
2. Select **[Inhouse Repair Request Approved]** and
3. **[Save]**



Reject Inhouse Repair Request

If the request is wrong or incomplete, select **[Rejected by STE]** under Status and **[Save]**.

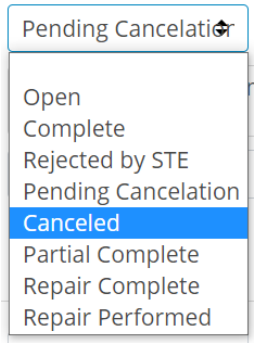
SR Team should inform customer about the rejected request and raise a new repair request.



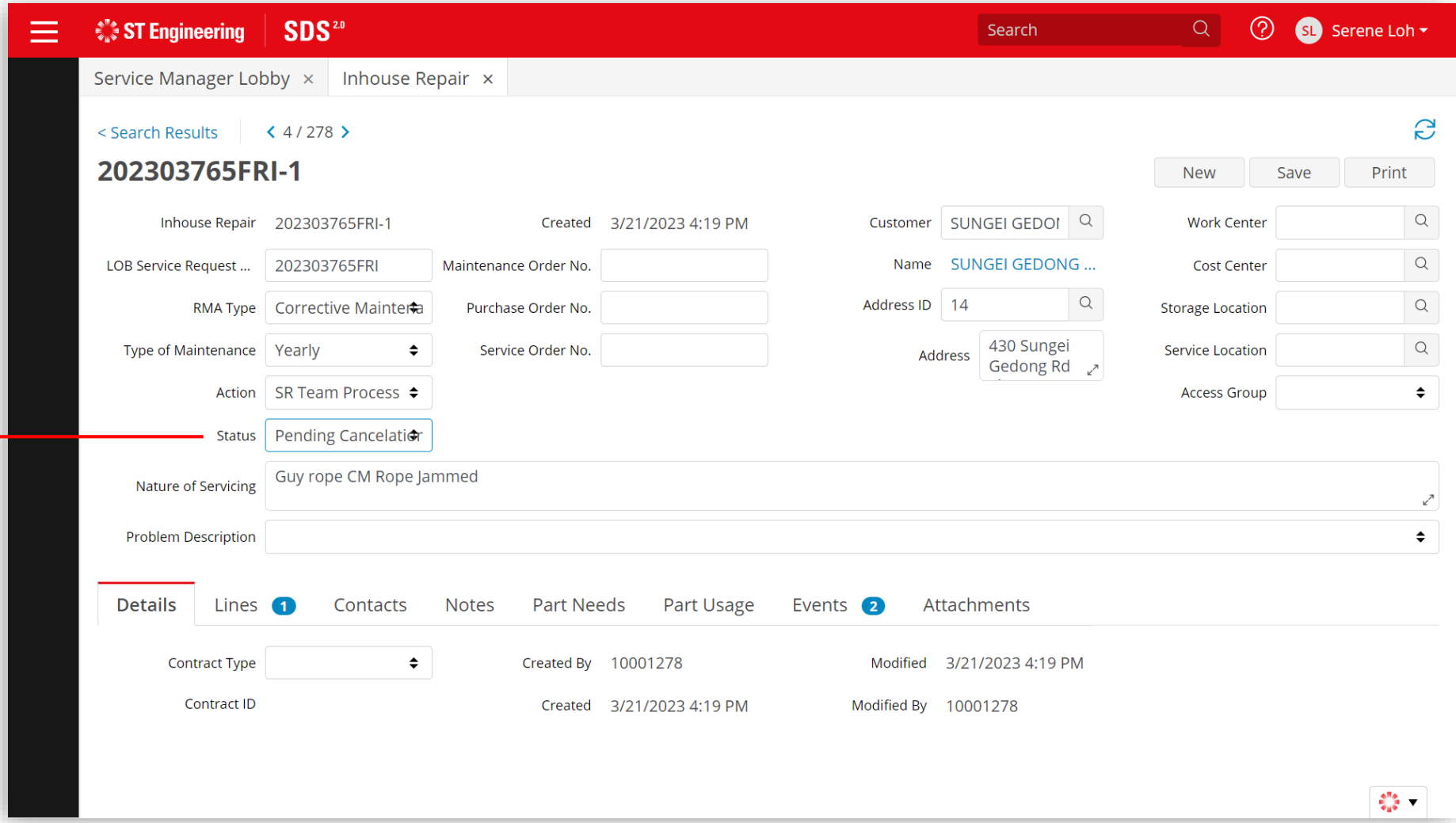
Approval on Inhouse Repair Request

Pending Cancelation and Canceled Request

When customer submits a cancelation request, status will show **[Pending Cancelation]**.



Select **[Canceled]** to confirm cancelation and tap **[Save]**.



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Process Flow

For Repair and Return

Approval on Inhouse Repair Request

Milk-run HOTO Task to collect Unusable Product

Assign Inhouse Repair Task to Engineer

Preparation Shipment

Milk-run HOTO Task to Deliver Repaired Product

Process Flow

For Advanced Replace

Approval on Inhouse Repair Request

Preparation Shipment

Milk-run HOTO Task to collect Unusable Product

Milk-run HOTO Task to Deliver Repaired Product

Assign Inhouse Repair Task to Engineer

Process Flow

For Engineer Swap

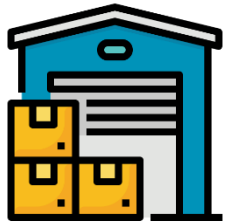
Engineer completes Onsite Service Request task and creates **Inhouse Repair task**

SR Team to update Service Order no.

Repair by Depot

Depot Self-Assign Inhouse Repair Task

Repair by OEM



Send Faulty Equipment to OEM

Assign Inhouse Repair Task To Engineer

Assign Inhouse Repair Task to Engineer

Inhouse Repair Task Process

Do take note that the workflow or steps in managing inhouse repair tasks **may vary in different organizations**.

SR Team updates Inhouse Repair Service Order no.

Depot Engineer picks up repair task from SR Team

Depot Engineer proceeds with **Inhouse Repair**

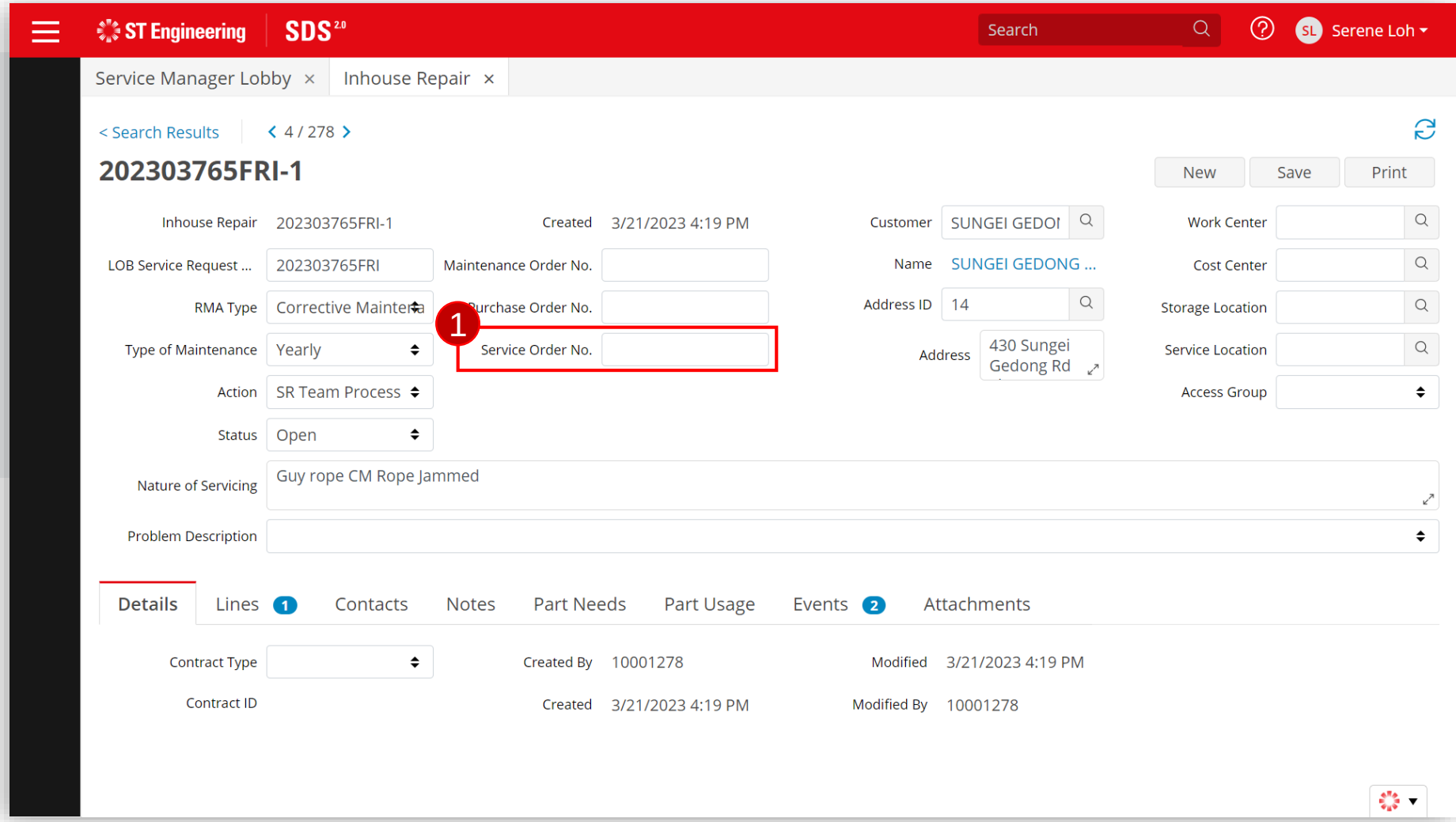
Depot Engineer completes Inhouse repair and signs off

Assign Inhouse Repair Task to Engineer

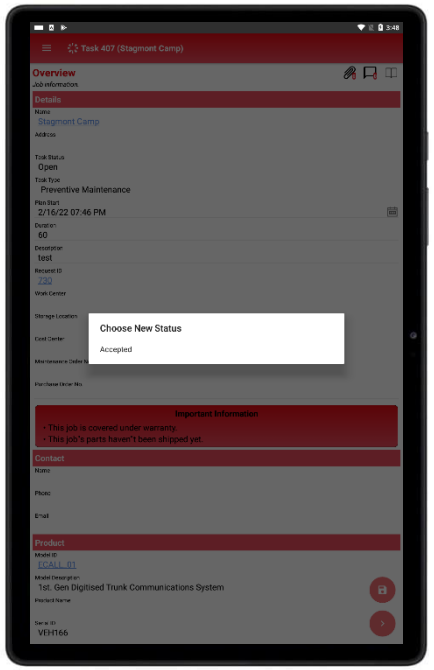
Pre-requisite to Inhouse Repair Task Assignment

1 SR Team needs to update a **Service Order No.** before Inhouse Repair task can be assigned.

ℹ You can mass update MO, SO and PO for a list of requests via **SM Portal**.



Depot Engineer pickups Task or SR Team assigns Task



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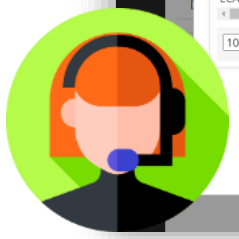
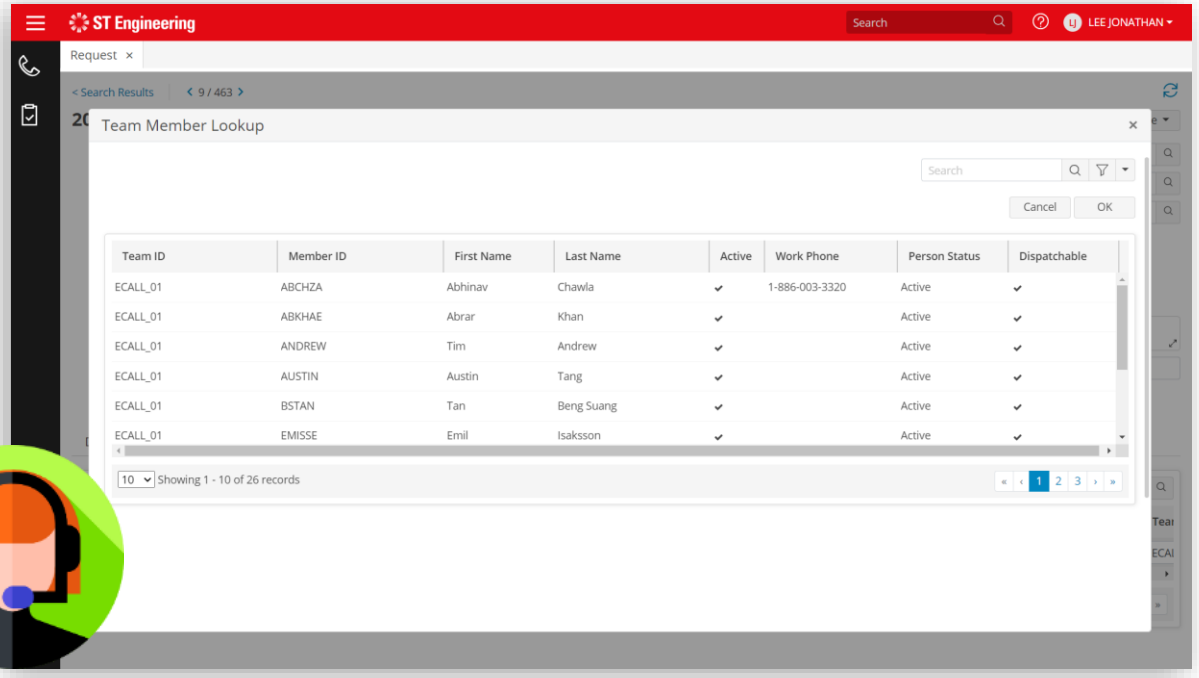




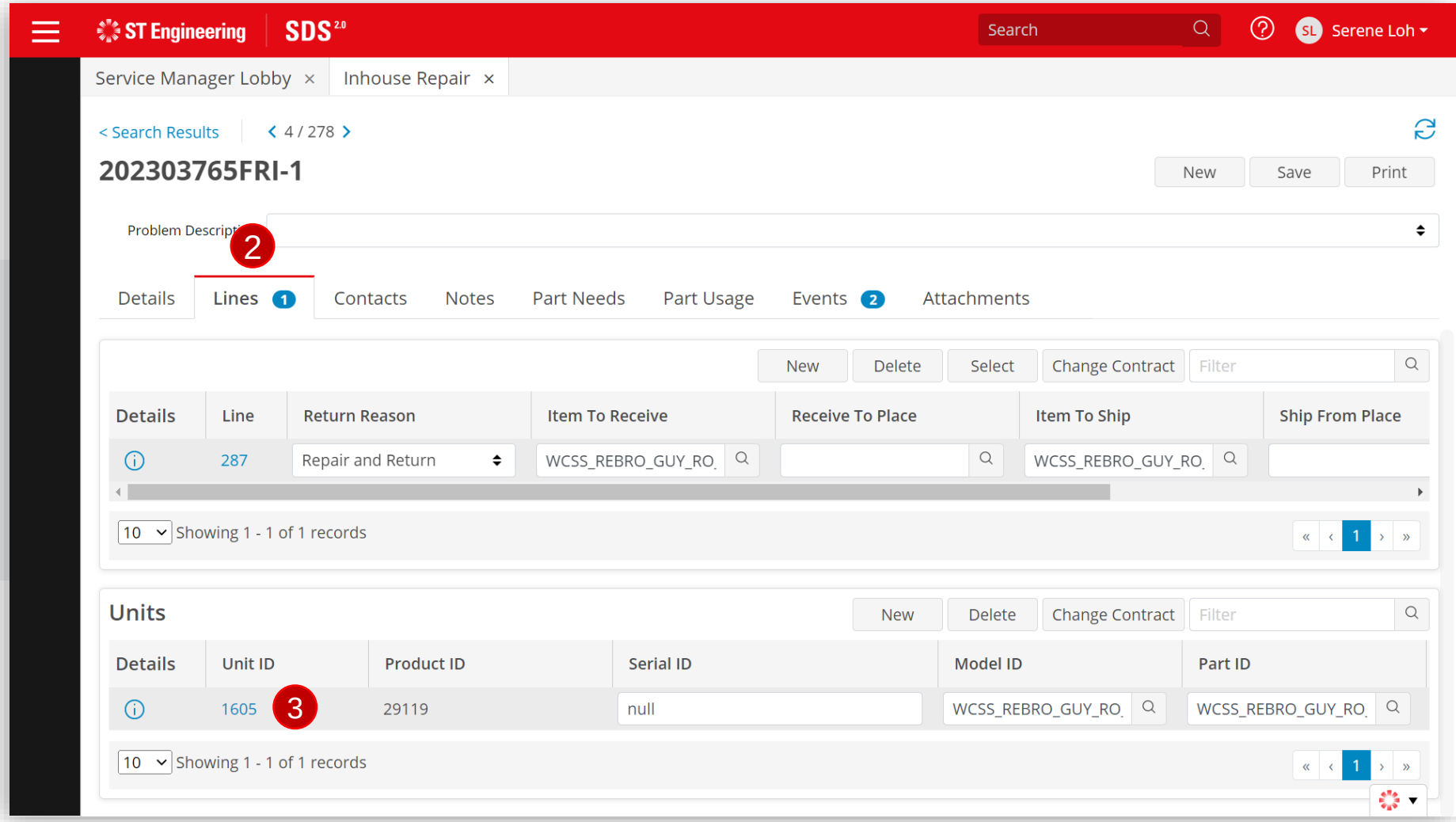
Depot engineer can pick up the unassigned RMA task via mobile app.

SR Team assigns task to depot engineer.

Assigning Inhouse Repair Task to Depot Engineer

2 Go to **[Lines]** Tab.

3 Select the link under **Unit ID** at **[Units]** section.

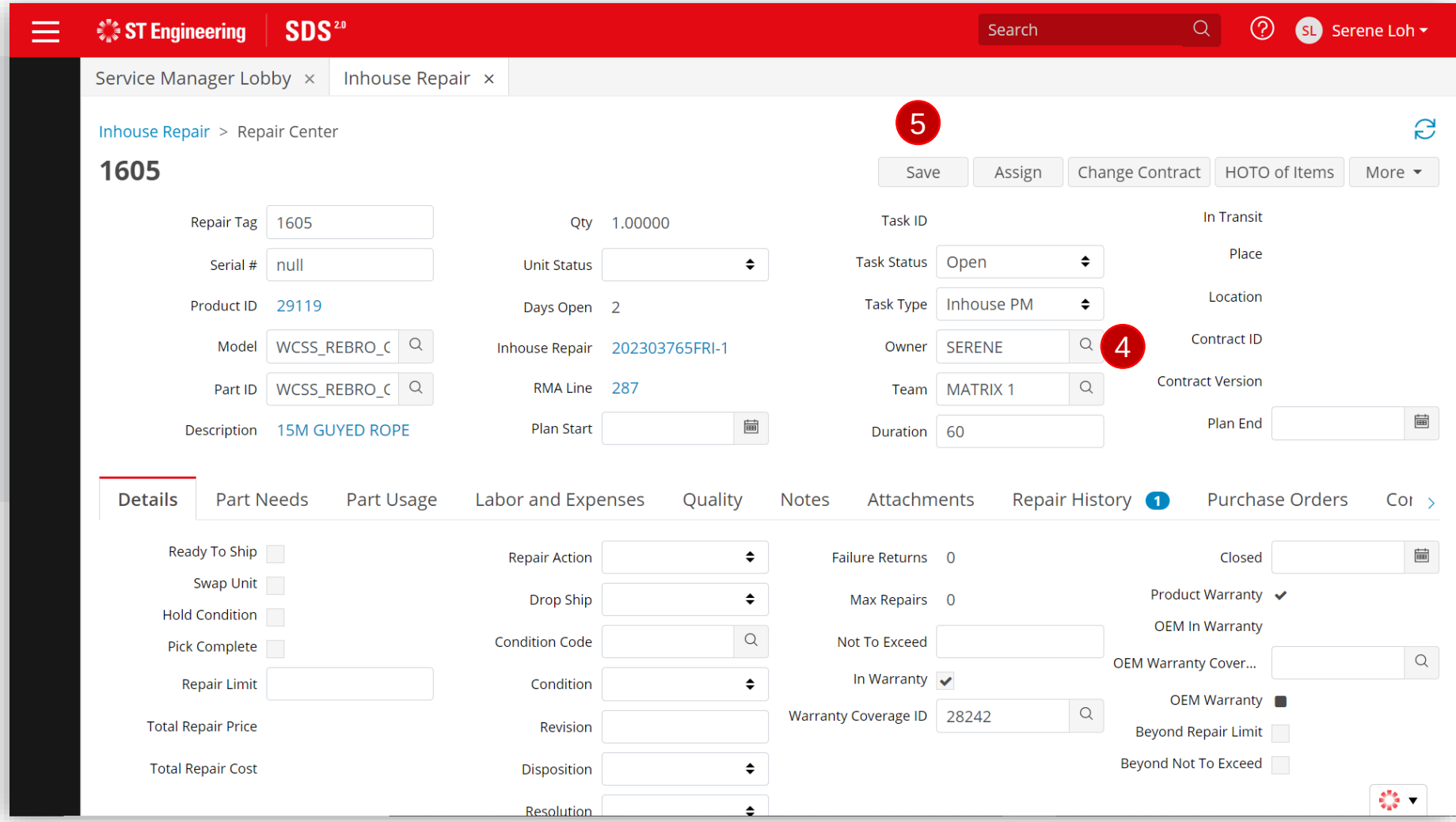


Assign Owner as Depot Engineer

4 Search engineer's name from Team Members Lookup list under **[Owner]**

5 Tap **[Save]** to update changes.

Engineer will be notified on the task.



Completion of Inhouse Repair Task

Send Faulty Equipment to OEM

Faulty Equipment to be repaired by OEM

In the scenario where faulty equipment is to be repaired by OEM, user will send the faulty equipment for repair.

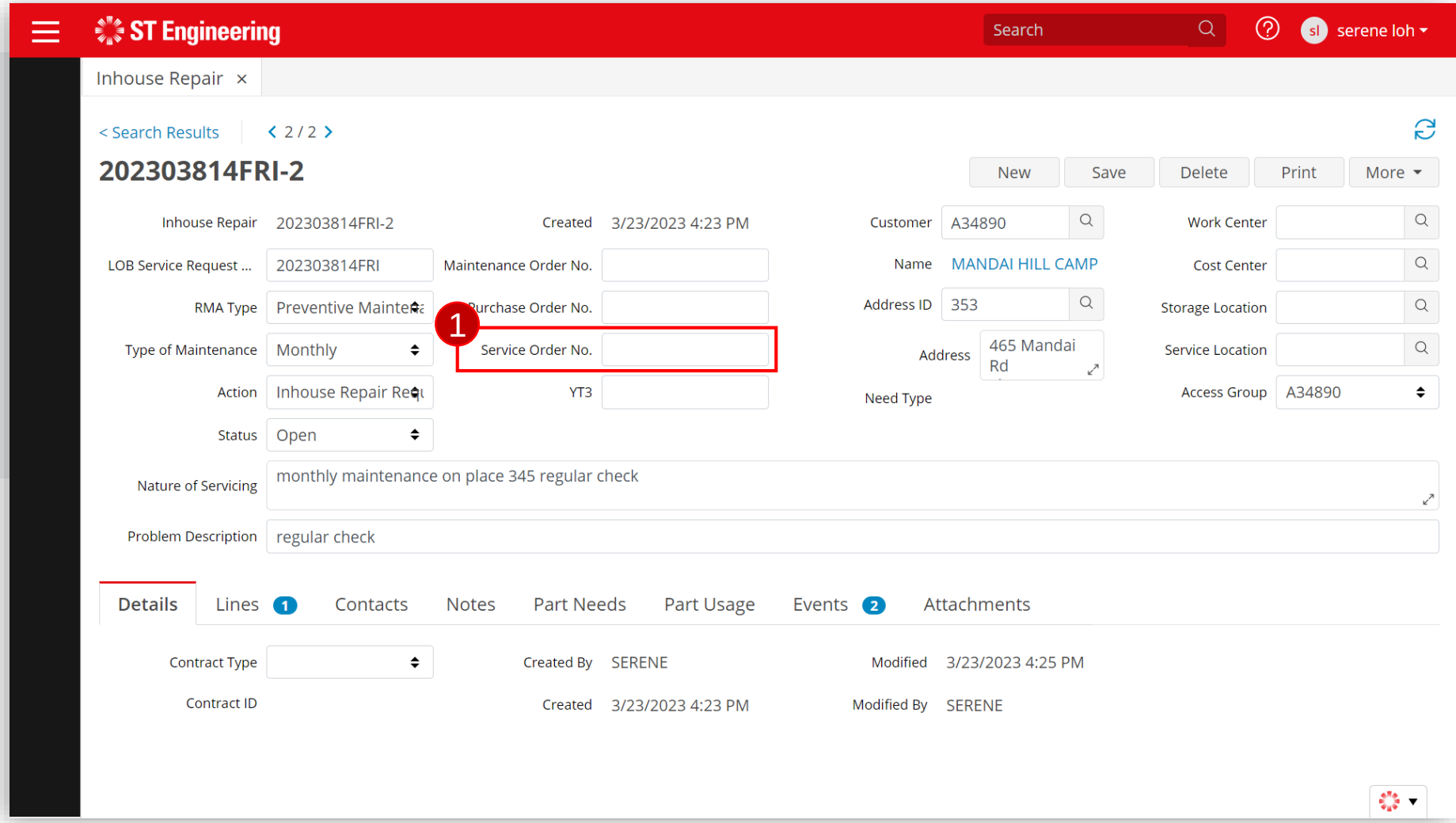
Team Lead updates Inhouse Repair Service Order no.

Send to **OEM** for repair

Send Faulty Equipment to OEM

Pre-requisite to Inhouse Repair Task Assignment

1 SR Team needs to update a **Service Order No.** before Inhouse Repair task can be assigned.

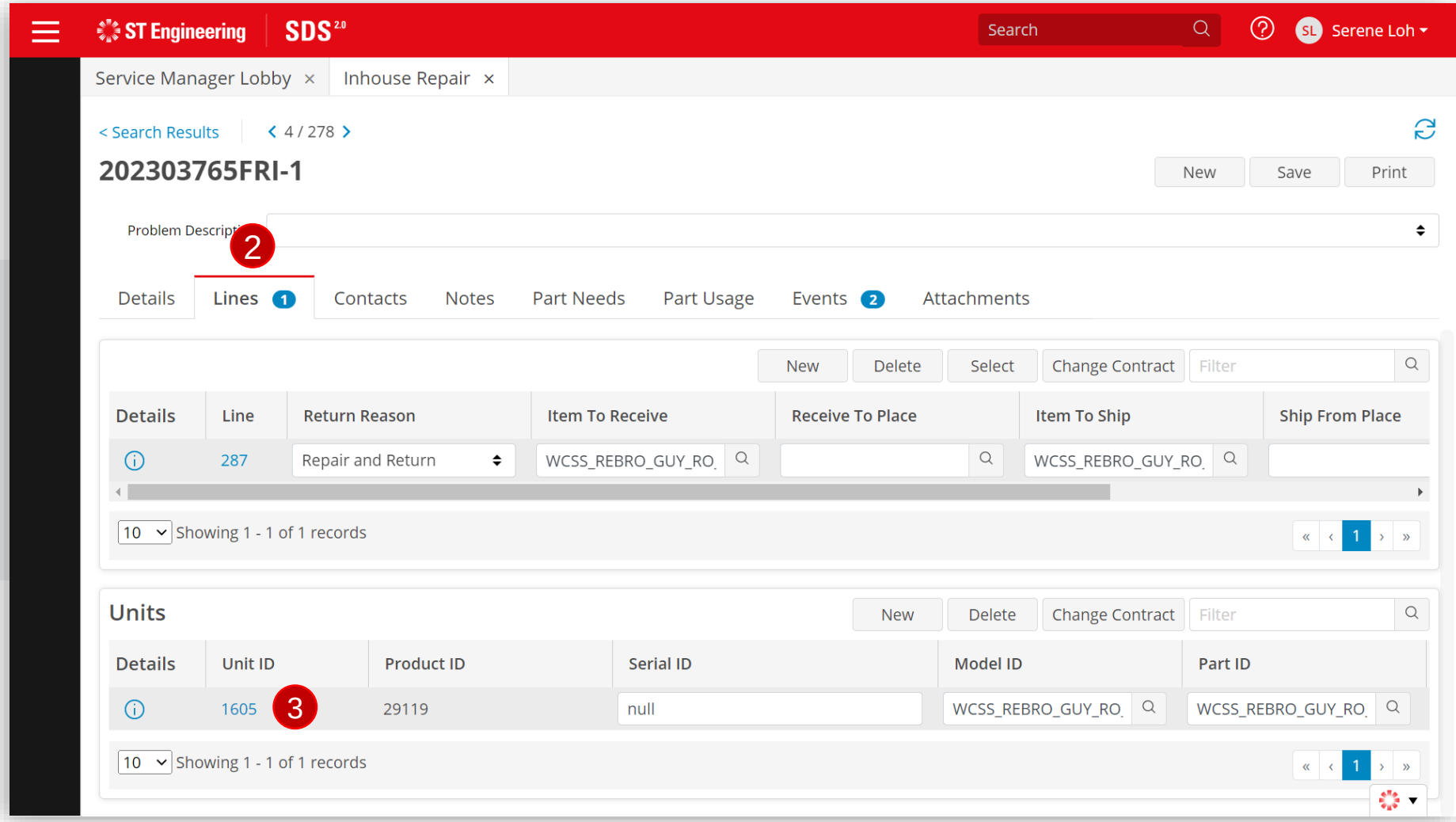


ℹ You can mass update MO, SO and PO for a list of requests via **SM Portal**.

Send Faulty Equipment to OEM

2 Go to **[Lines]** Tab.

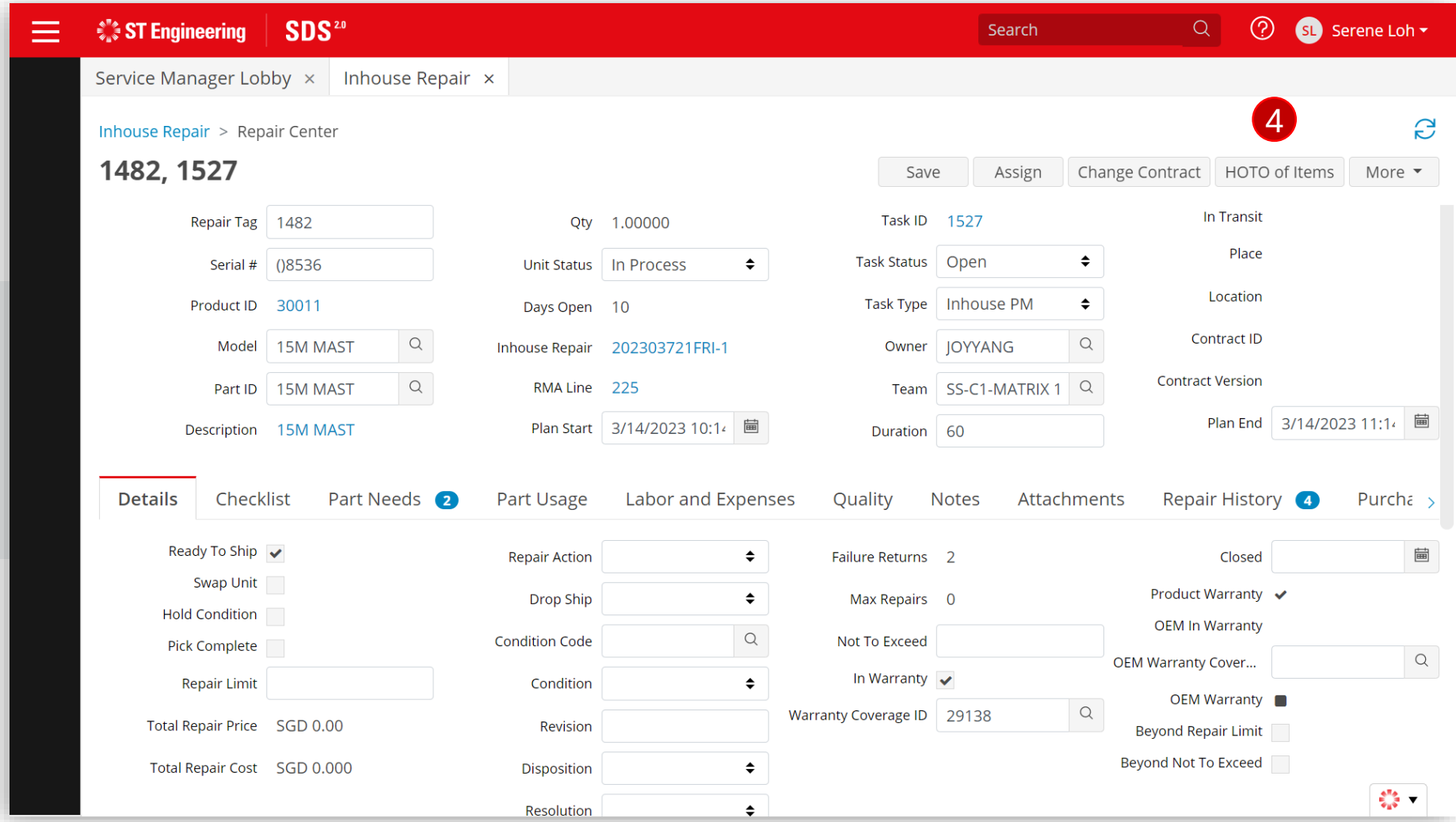
3 Select the link under **Unit ID** at **[Units]** section.



Send Faulty Equipment to OEM

HOTO of Items

4 Go to **[HOTO of Items]** button

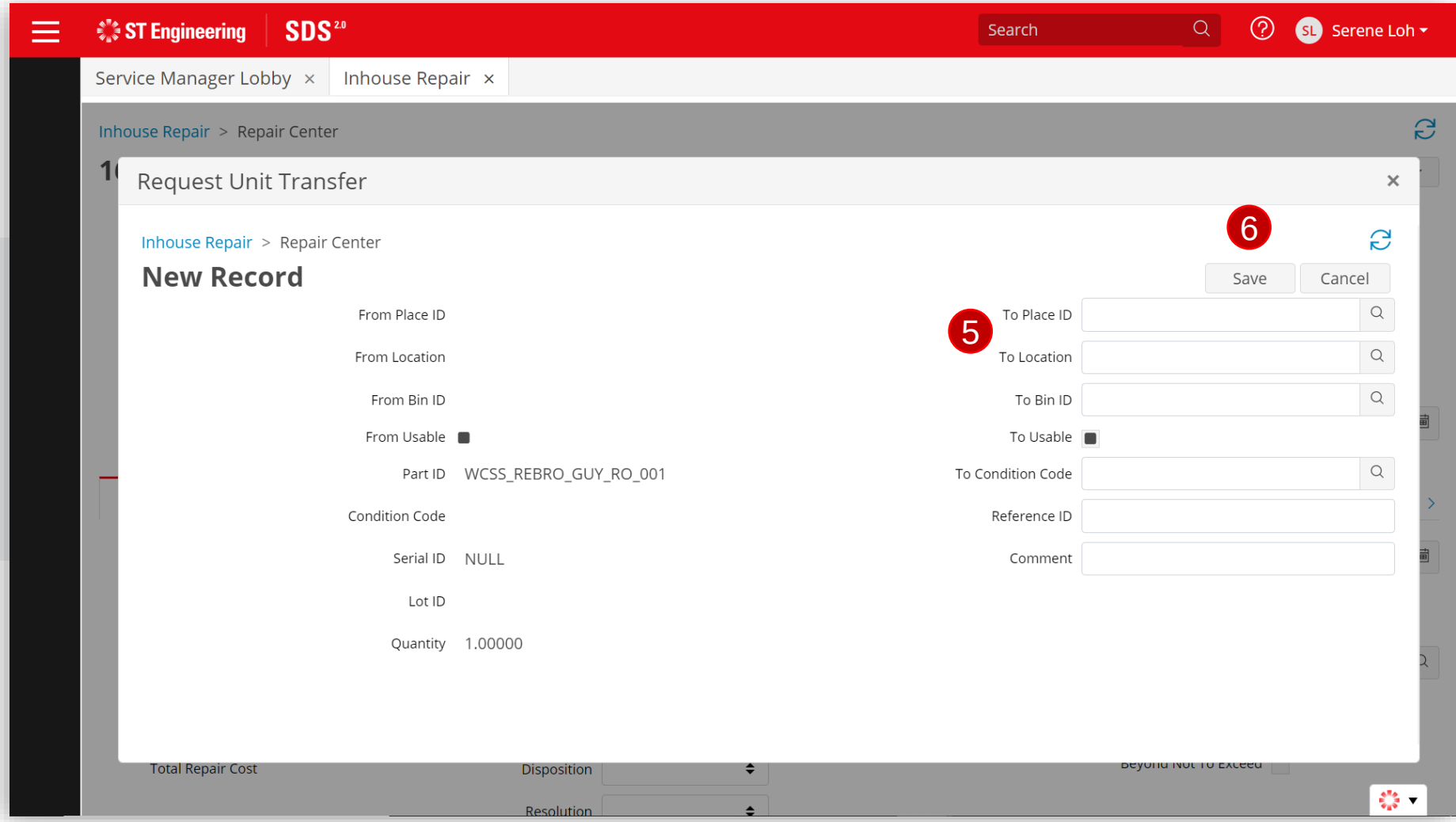


Send Faulty Equipment to OEM

New Record

5 Input **[To Place ID]** and **[To Location]** fields

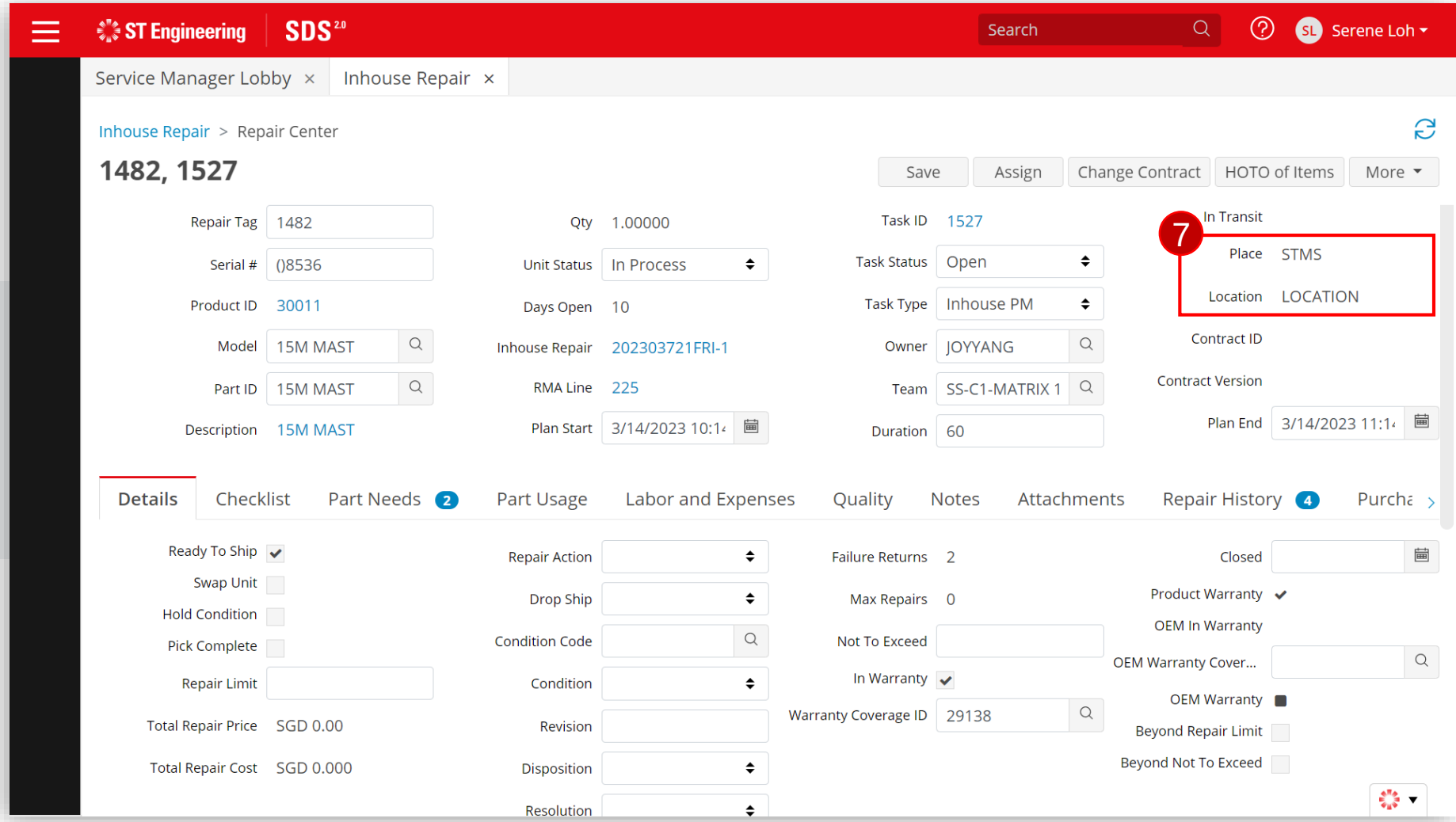
6 and **[Save]**



Send Faulty Equipment to OEM

HOTO to OEM

7 Place and Location are updated to OEM's



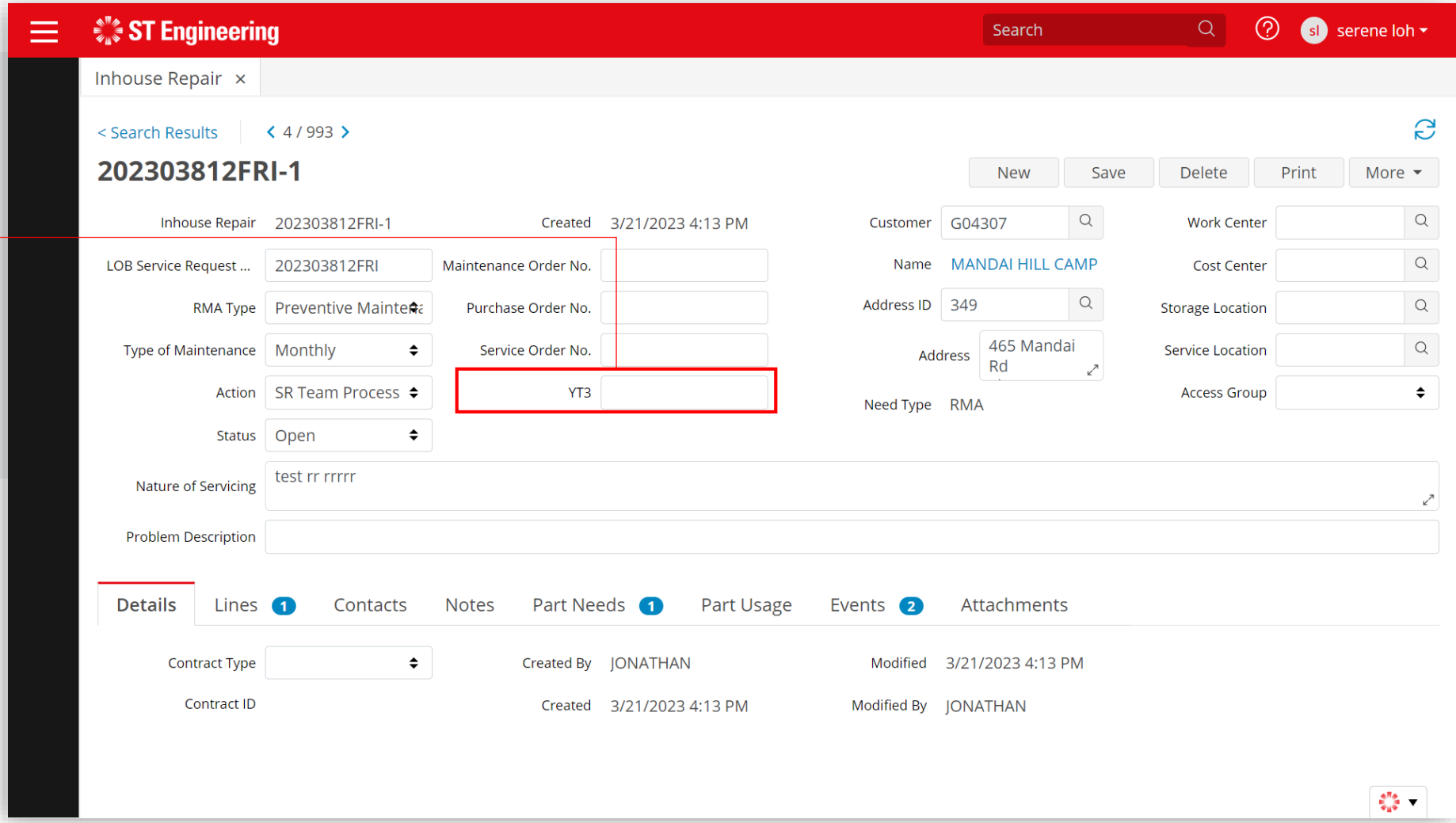
Preparation Shipment

Preparation Shipment

Pre-requisite to Shipment Preparation

SR Team needs to update **YT3 No.** to create a delivery note and prepare for delivery.

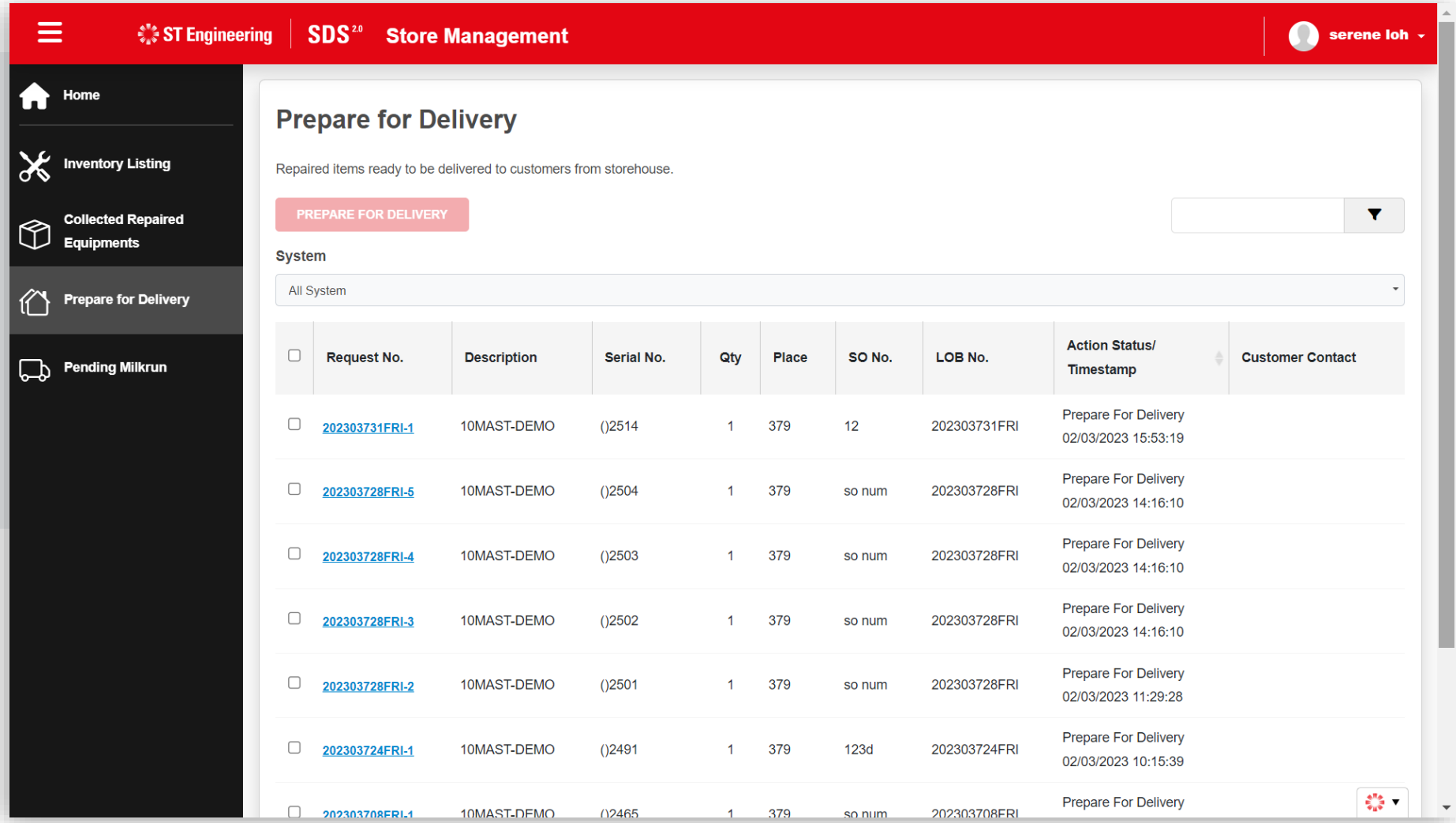
ℹ You can mass update YT3 for a list of requests via **SM Portal**.



Preparation Shipment

Prepare for Delivery by Store Management

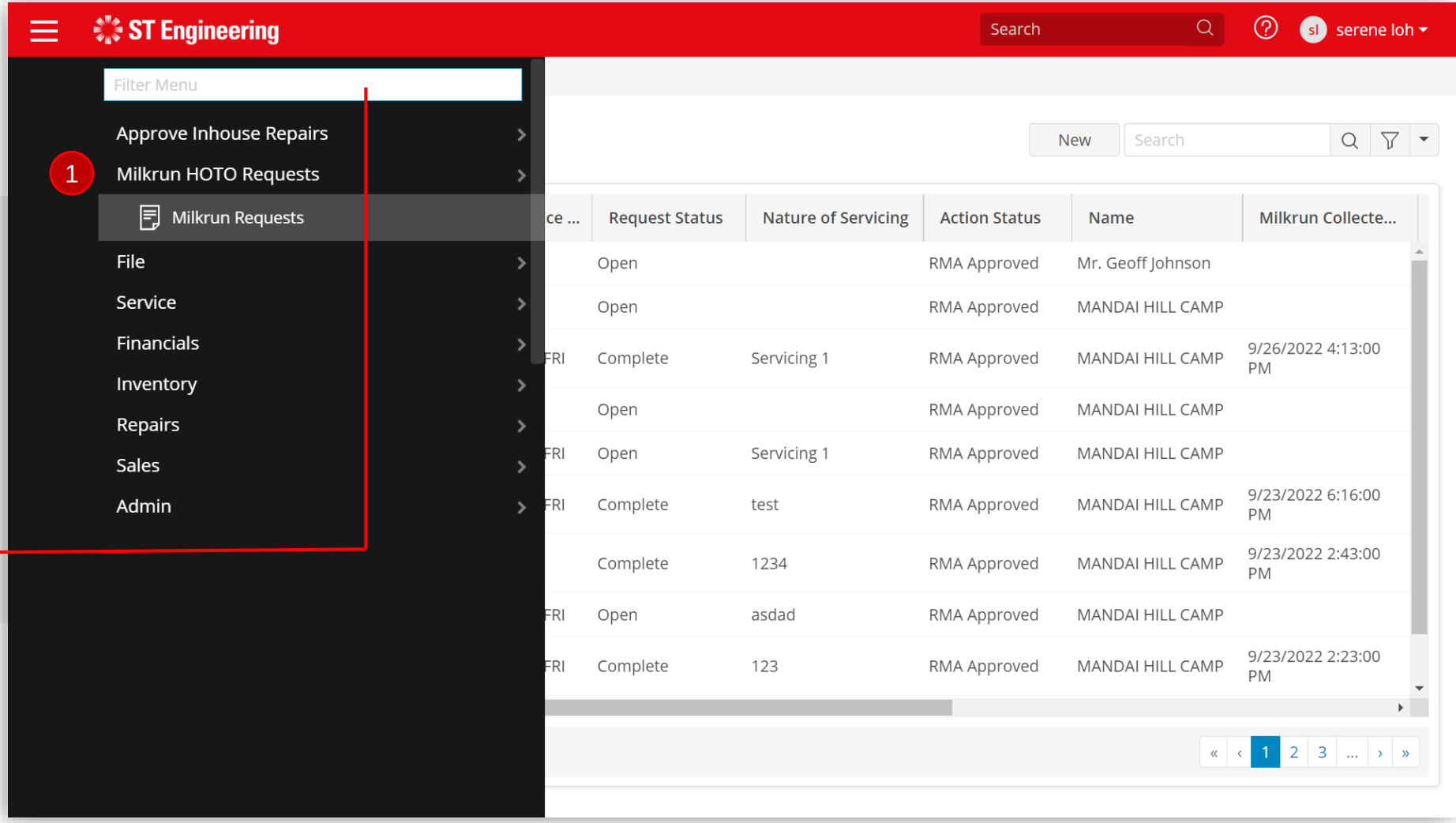
Once Delivery Note has been created, the Store Team will check a list of equipment to prepare to send for delivery using the **Store Portal**



Milk-run HOTO Task to Collect Unusable Product

Milk-run Requests

1 Go to **Milkrun HOTO Requests > Milkrun Requests** or type “Milkrun Requests” in the menu search bar.

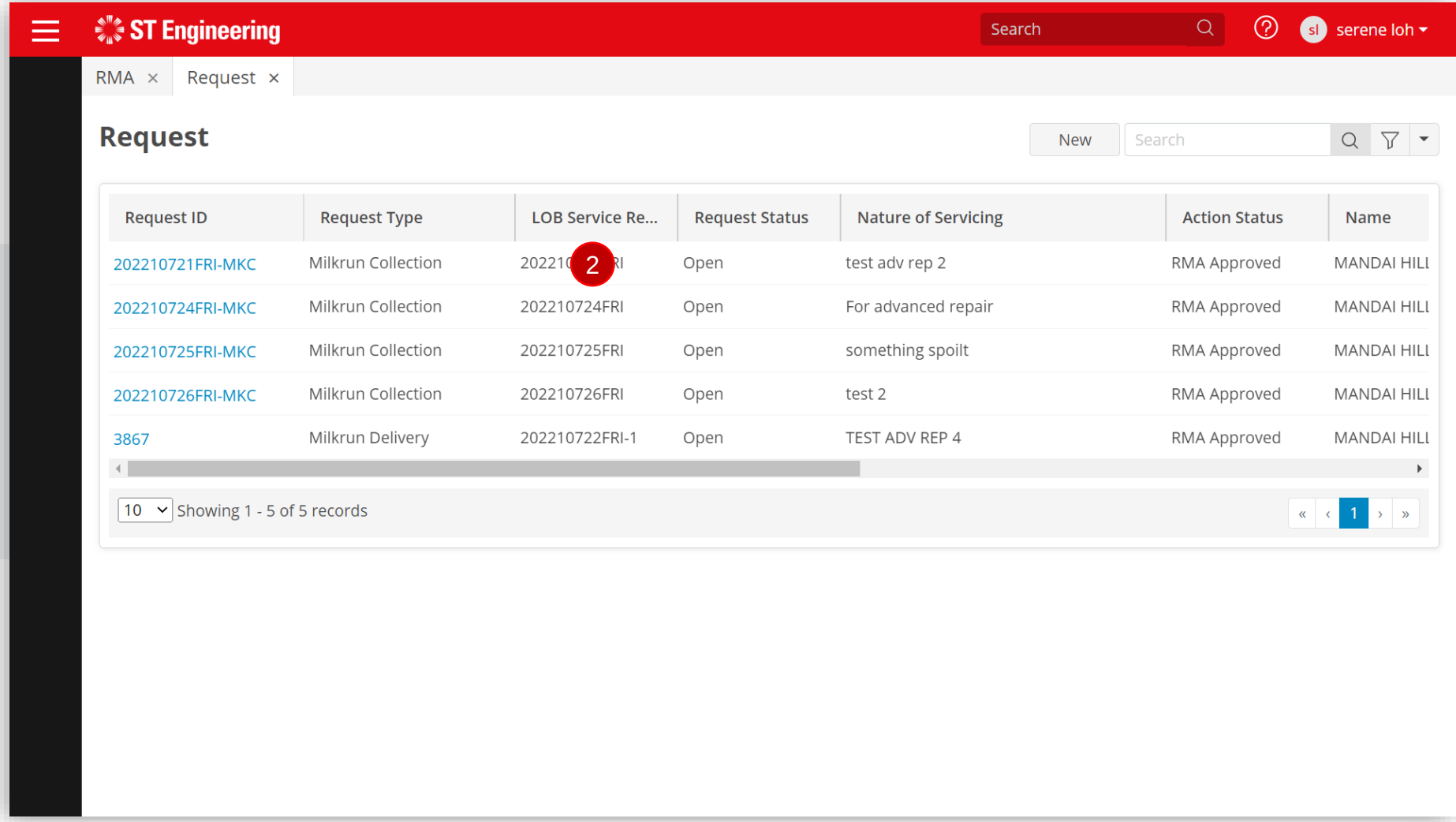


Milk-run HOTO Task to Collect Unusable Product

Milk-run Collection Request

2 Search Milk-run Collection request by **[LOB Service Request ID]**

Refer to this slide to find the LOB SR. ID no.

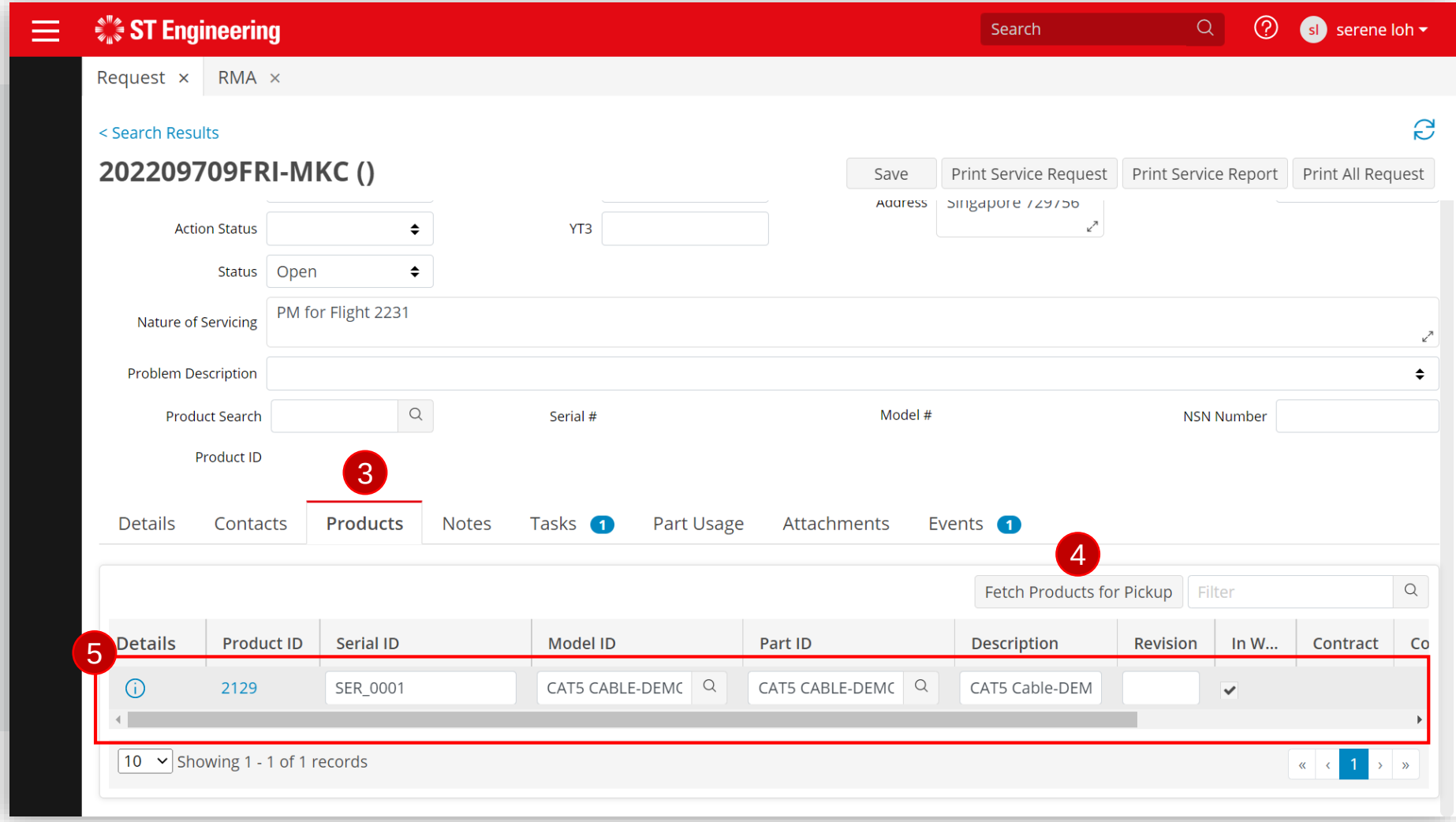


Fetch Products for Pickup

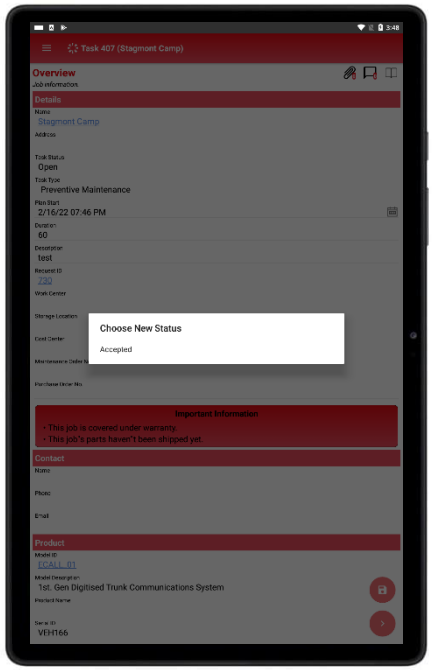
3 On the service request page, open **[Products Tab].**

4 Tap **[Fetch Products for Pickup].**

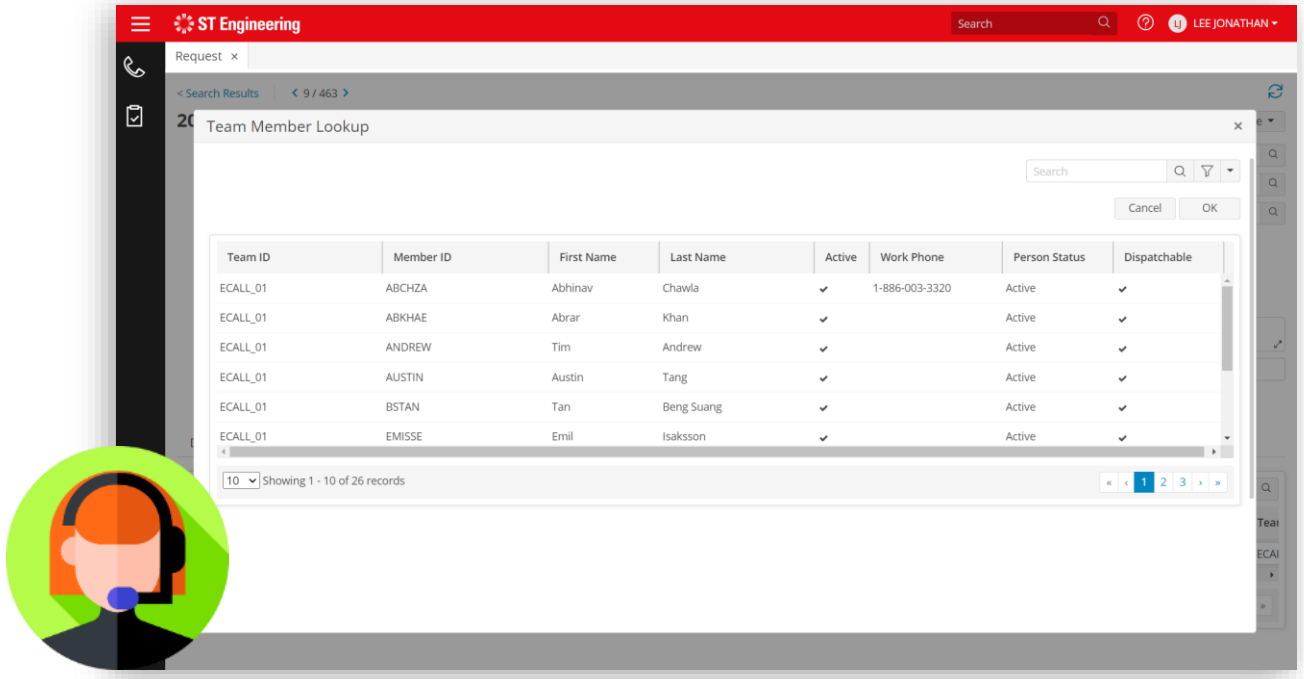
5 It will retrieve and filled the product listing with details.



Milk-run pickup Task or SR Team Assigns Task



OR



Milk-run driver can pick up the unassigned task via mobile app.

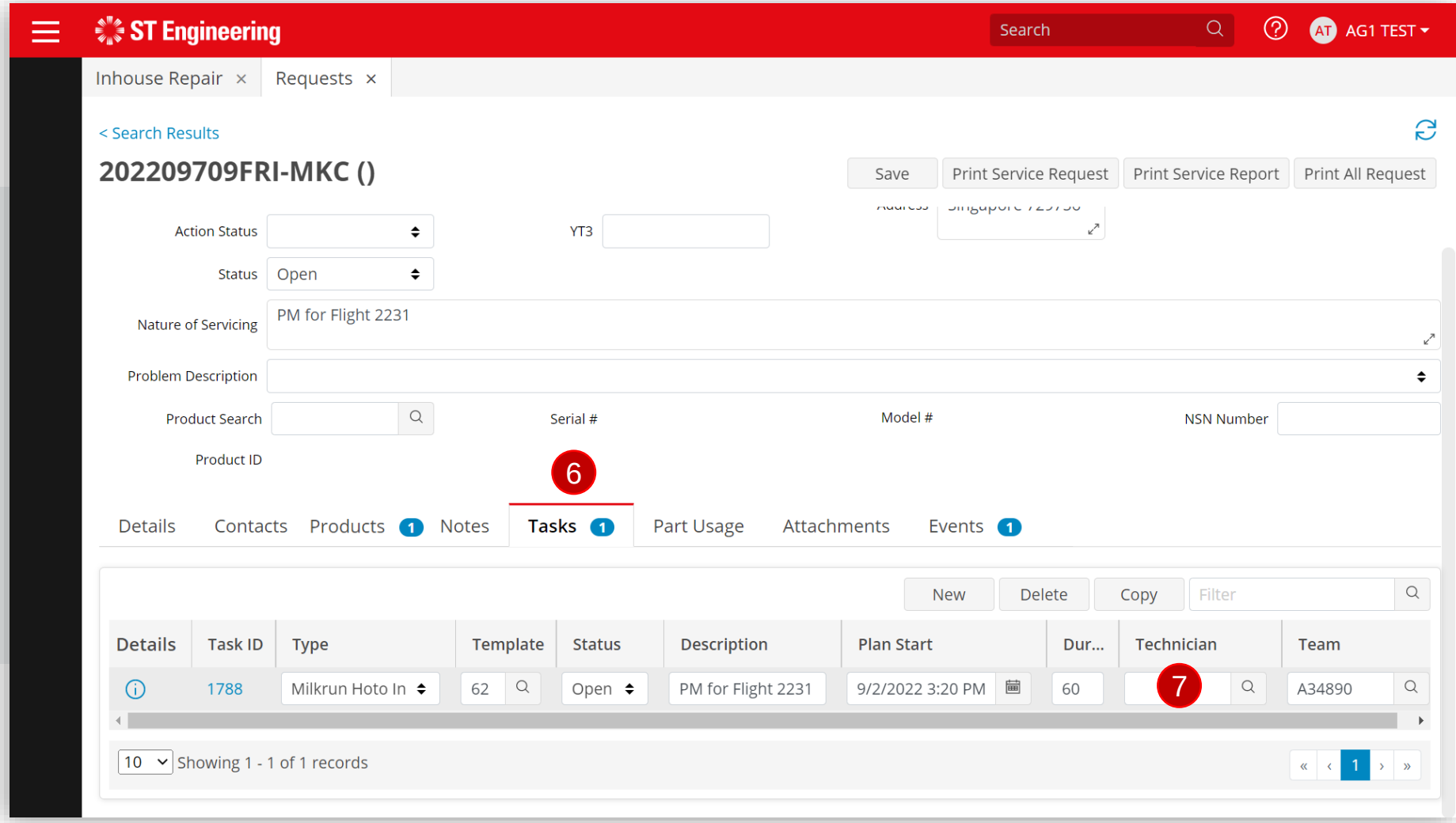
SR Team assigns task to Milk-run driver.

Assign HOTO Task to Milk-run Driver

6 Go to **[Tasks Tab]**.

First task is auto-created.

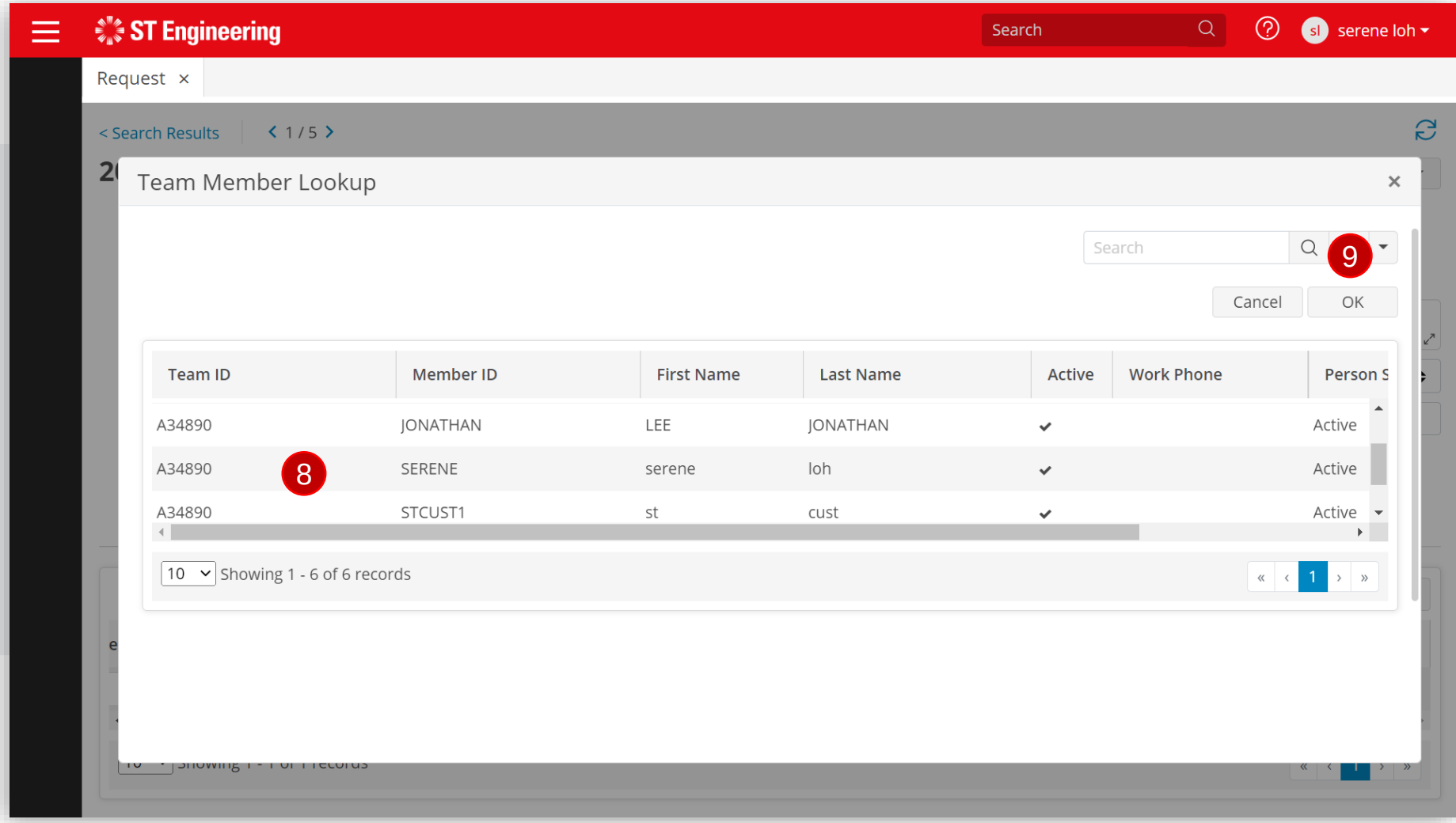
7 Tap 🔍 next to the textbox under Technician column.



Select Milk-run Driver

8 Select Milk-run driver from Team Member Lookup list.

9 Tap **[OK]** to confirm selection or double-tap the name to confirm.



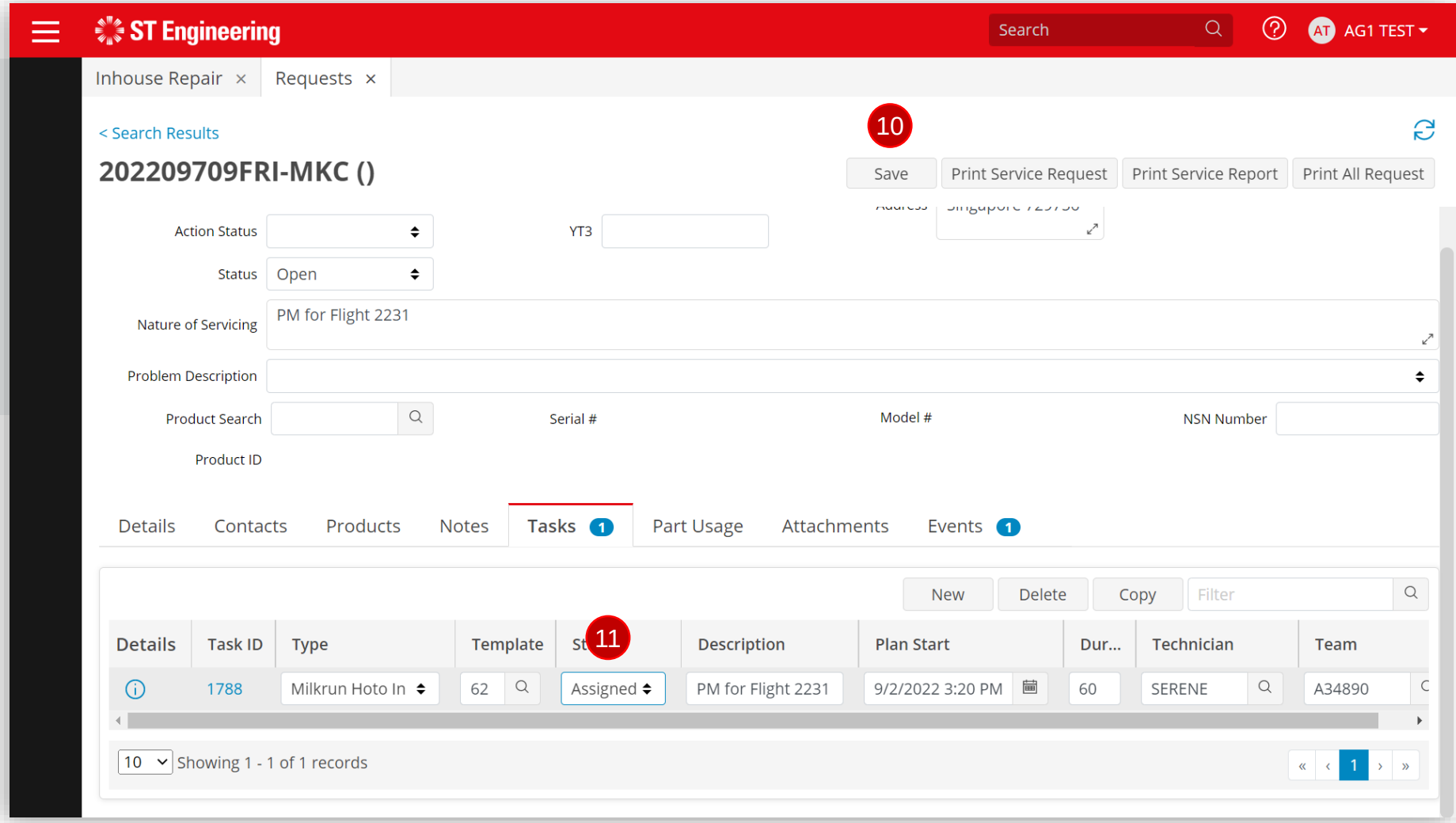
Milk-run HOTO Task to Collect Unusable Product

Save to update changes

10 Once assigned, **[Save]** to update changes.

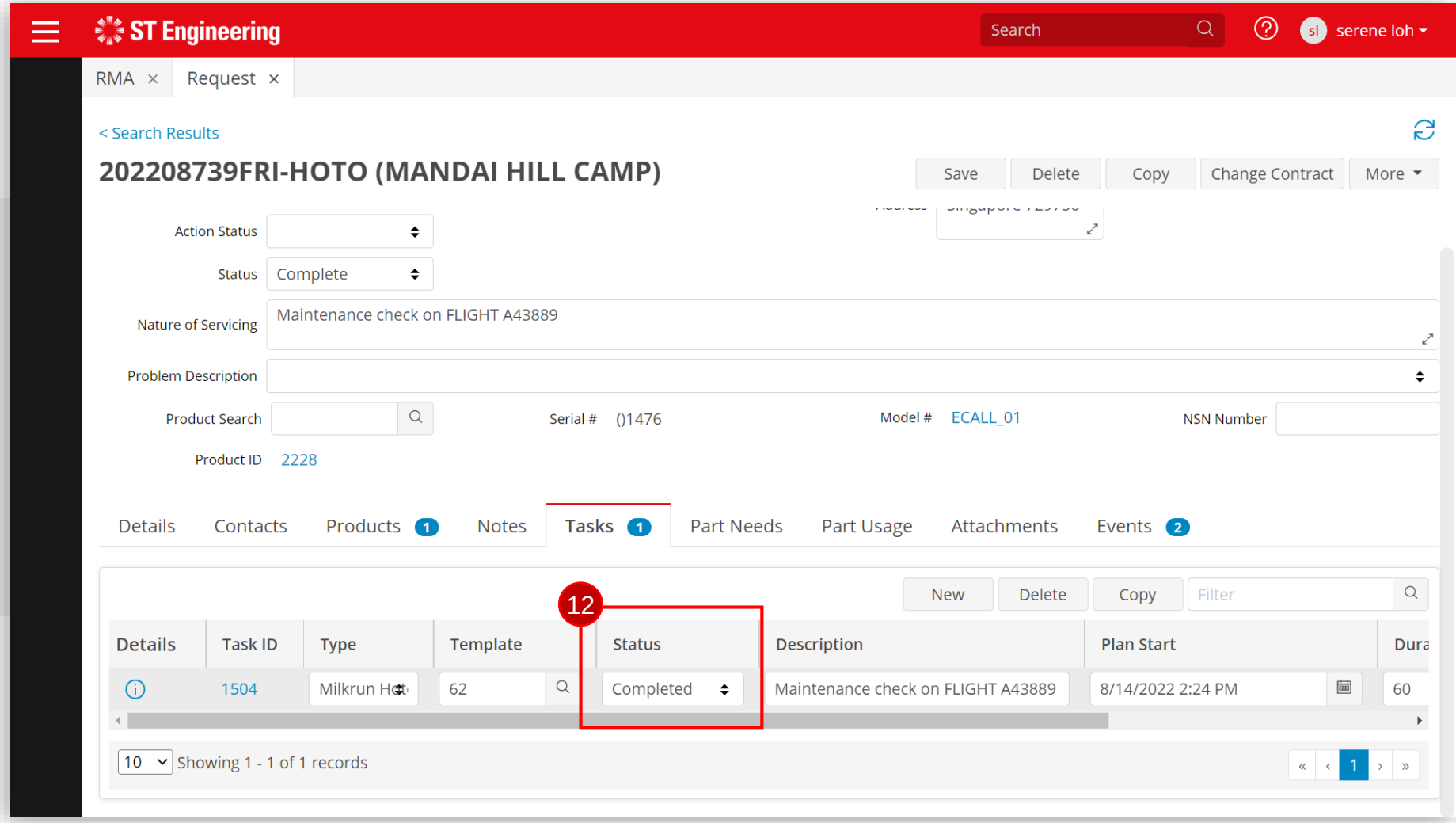
11 Task Status auto-updates to **[Assigned]**.

Milk-run driver will be notified on the task.



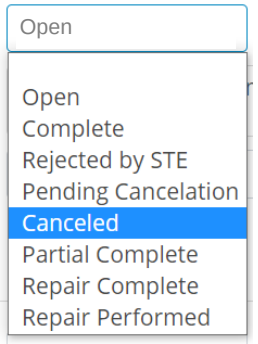
Task Completed for Milk-run HOTO

12 Once Milk-run driver has completed the task, task status will update to **[Completed]**.

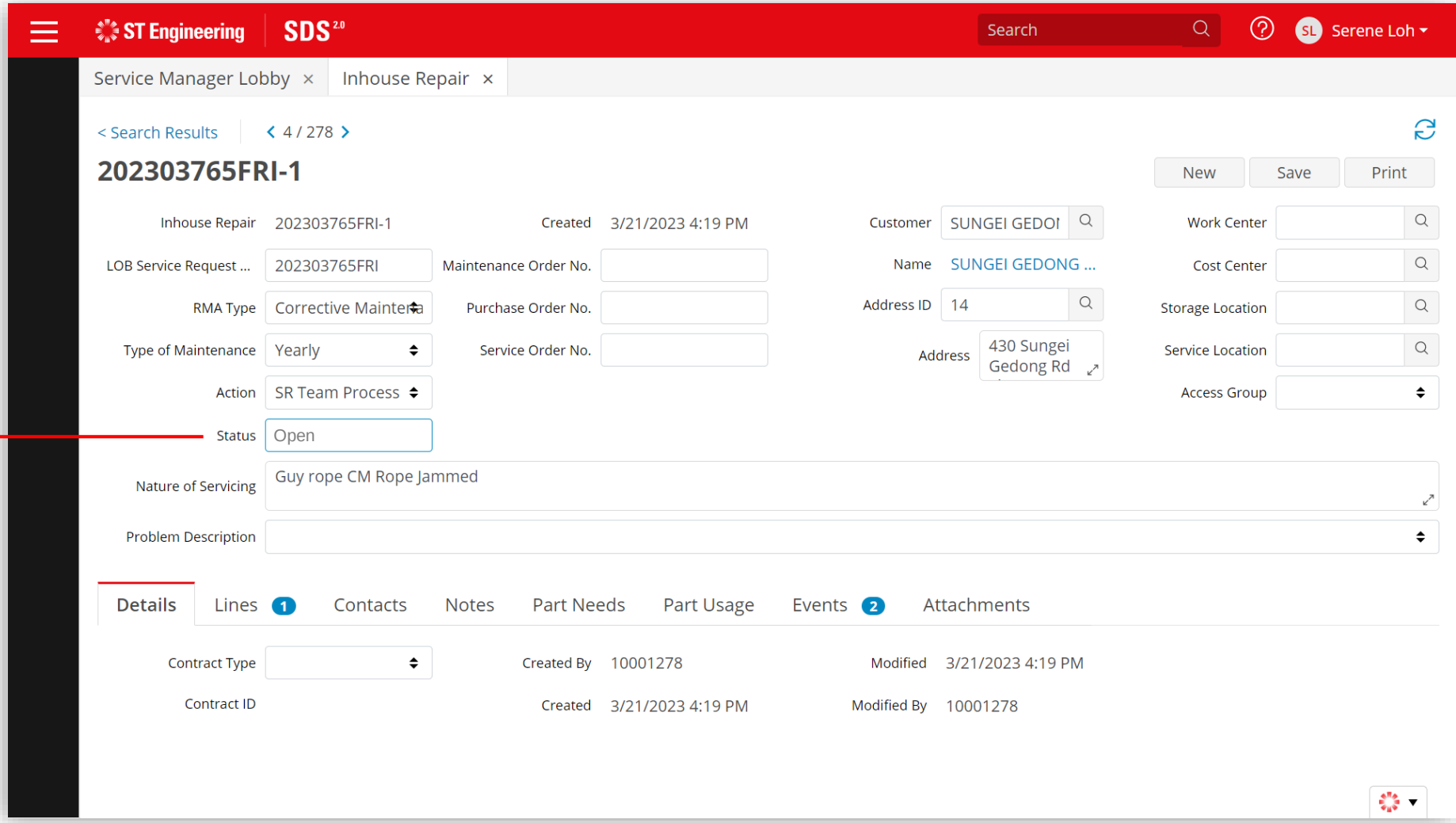


Canceled Uncollected Items

For uncollected item(s) from Milk-run collection, customer can cancel the original inhouse repair request.



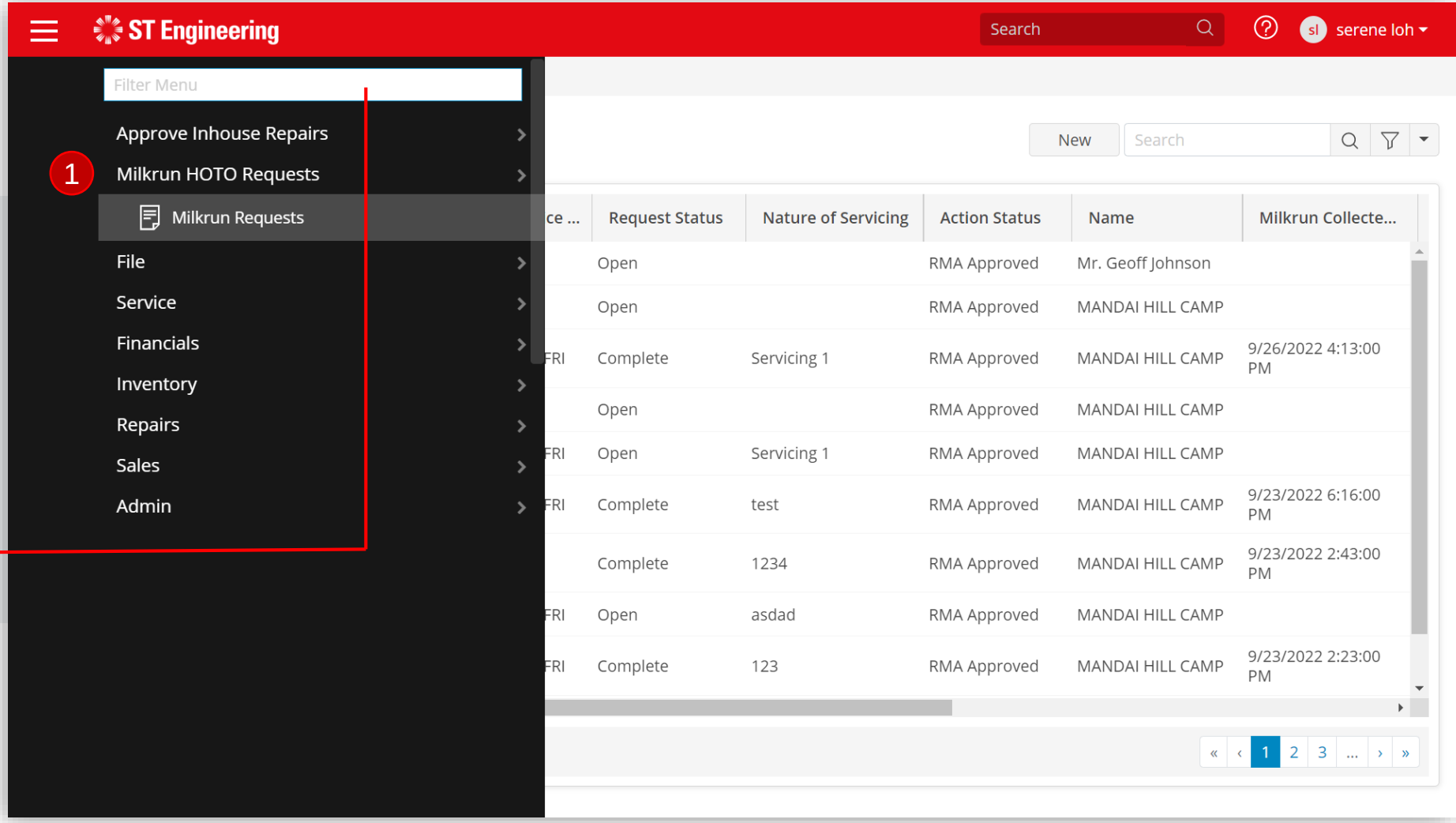
Select **[Canceled]** to cancel request and tap **[Save]**.



Milk-run HOTO Task to Deliver Repaired Product

Go to Milk-run Requests

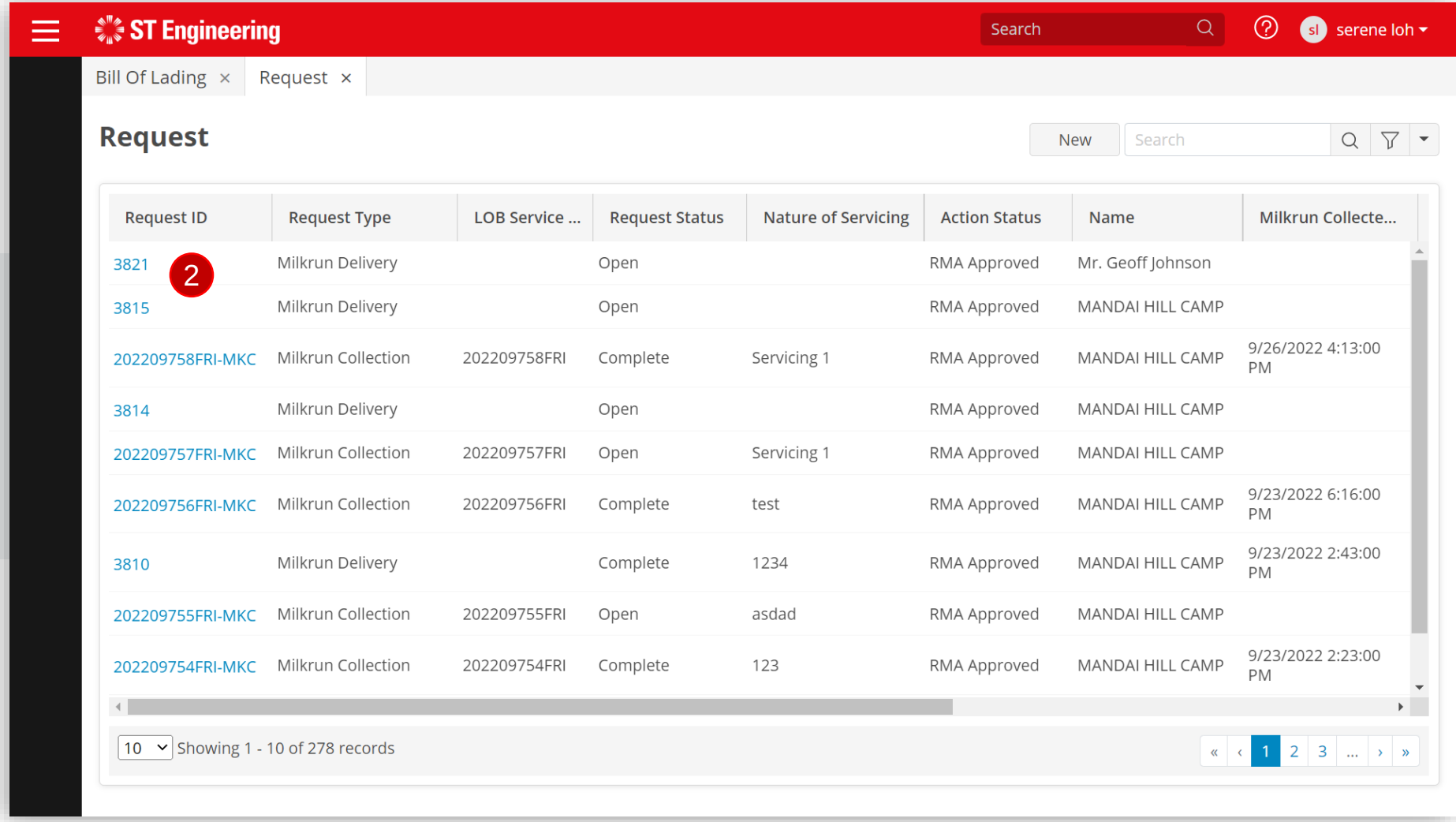
1 Go to **Milkrun HOTO Requests > Milkrun Requests** or type “Milkrun Requests” in the menu search bar.



Search Milk-run Delivery Request

2 Search and go to the Milk-run delivery request by **[Request ID]**

Refer to this slide to find the Request ID no.

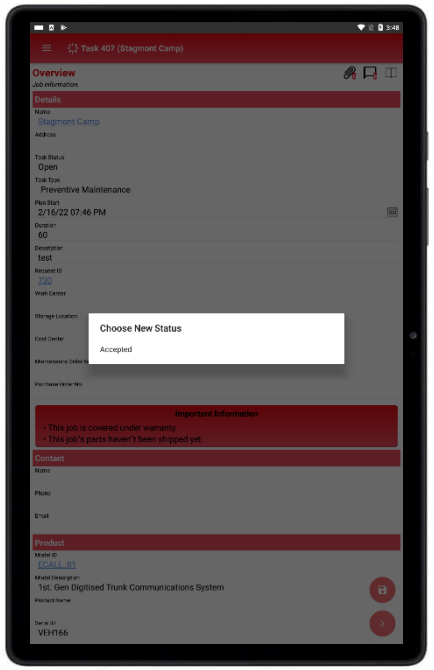


Request ID	Request Type	LOB Service ...	Request Status	Nature of Servicing	Action Status	Name	Milkrun Collecte...
3821	Milkrun Delivery		Open		RMA Approved	Mr. Geoff Johnson	
3815	Milkrun Delivery		Open		RMA Approved	MANDAI HILL CAMP	
202209758FRI-MKC	Milkrun Collection	202209758FRI	Complete	Servicing 1	RMA Approved	MANDAI HILL CAMP	9/26/2022 4:13:00 PM
3814	Milkrun Delivery		Open		RMA Approved	MANDAI HILL CAMP	
202209757FRI-MKC	Milkrun Collection	202209757FRI	Open	Servicing 1	RMA Approved	MANDAI HILL CAMP	
202209756FRI-MKC	Milkrun Collection	202209756FRI	Complete	test	RMA Approved	MANDAI HILL CAMP	9/23/2022 6:16:00 PM
3810	Milkrun Delivery		Complete	1234	RMA Approved	MANDAI HILL CAMP	9/23/2022 2:43:00 PM
202209755FRI-MKC	Milkrun Collection	202209755FRI	Open	asdad	RMA Approved	MANDAI HILL CAMP	
202209754FRI-MKC	Milkrun Collection	202209754FRI	Complete	123	RMA Approved	MANDAI HILL CAMP	9/23/2022 2:23:00 PM

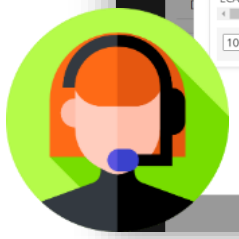
10 Showing 1 - 10 of 278 records

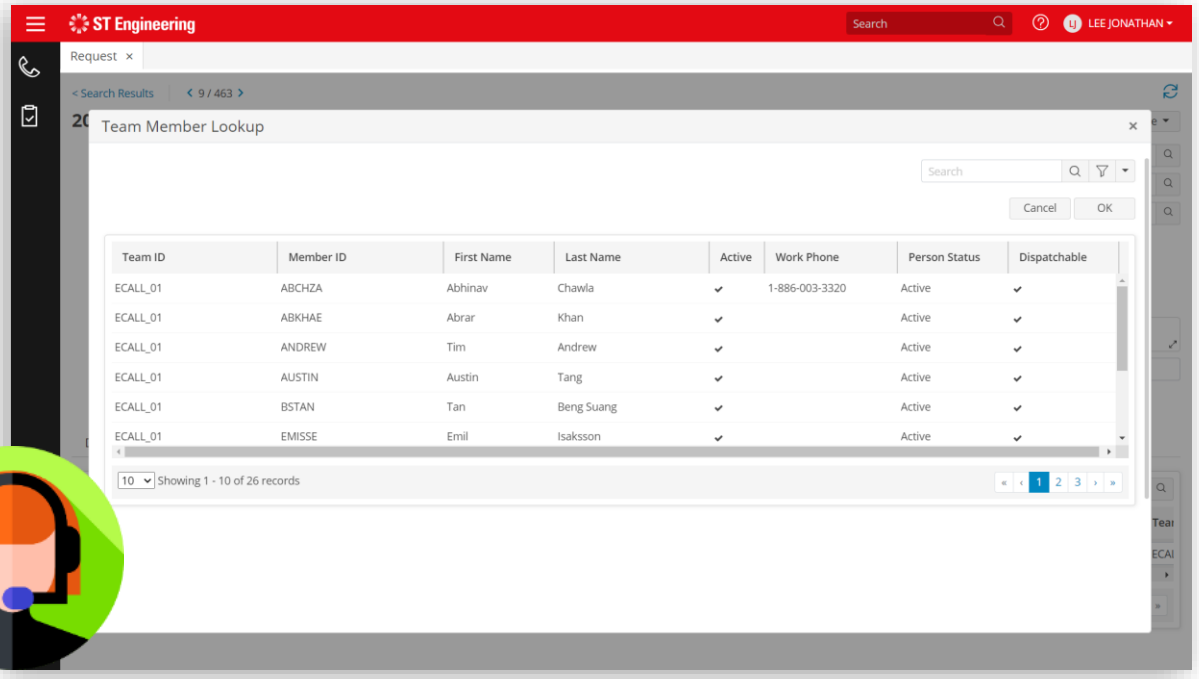
« ‹ 1 2 3 ... › »

Milk-run Driver pickups Task or SR Team assigns Task



OR





Milk-run driver can pick up the unassigned delivery task via mobile app.

SR Team assigns task to Milk-run driver.

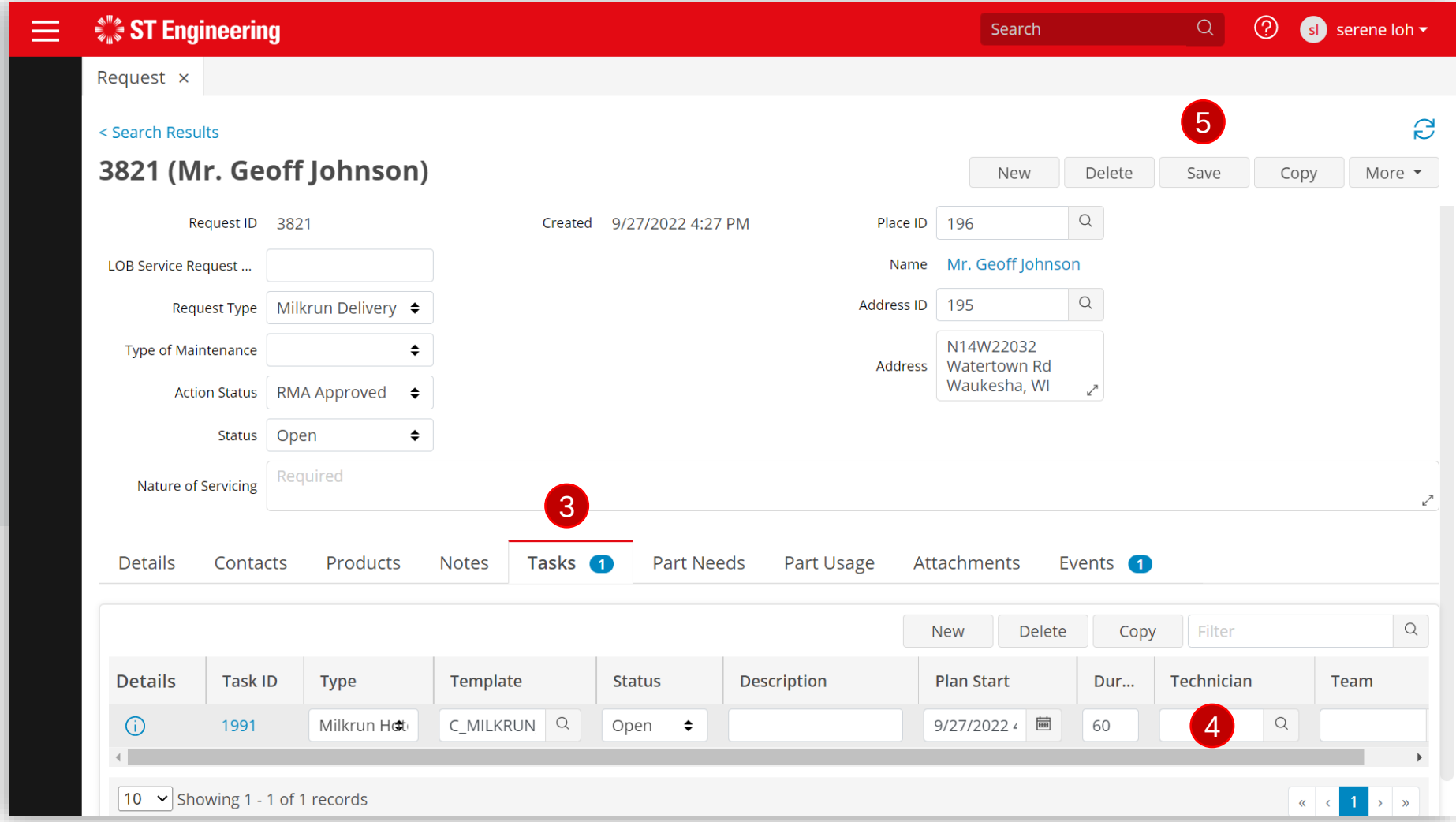
Assign Milk-run Delivery Task

3 Go to **[Tasks]**

4 Select a Milk-run driver from **[Technician]** to assign task.

5 Tap **[Save]**.

Milk-run driver will be notified on the task.



ST Engineering

Thank You