SDS
2.0

Smart Digital Systems
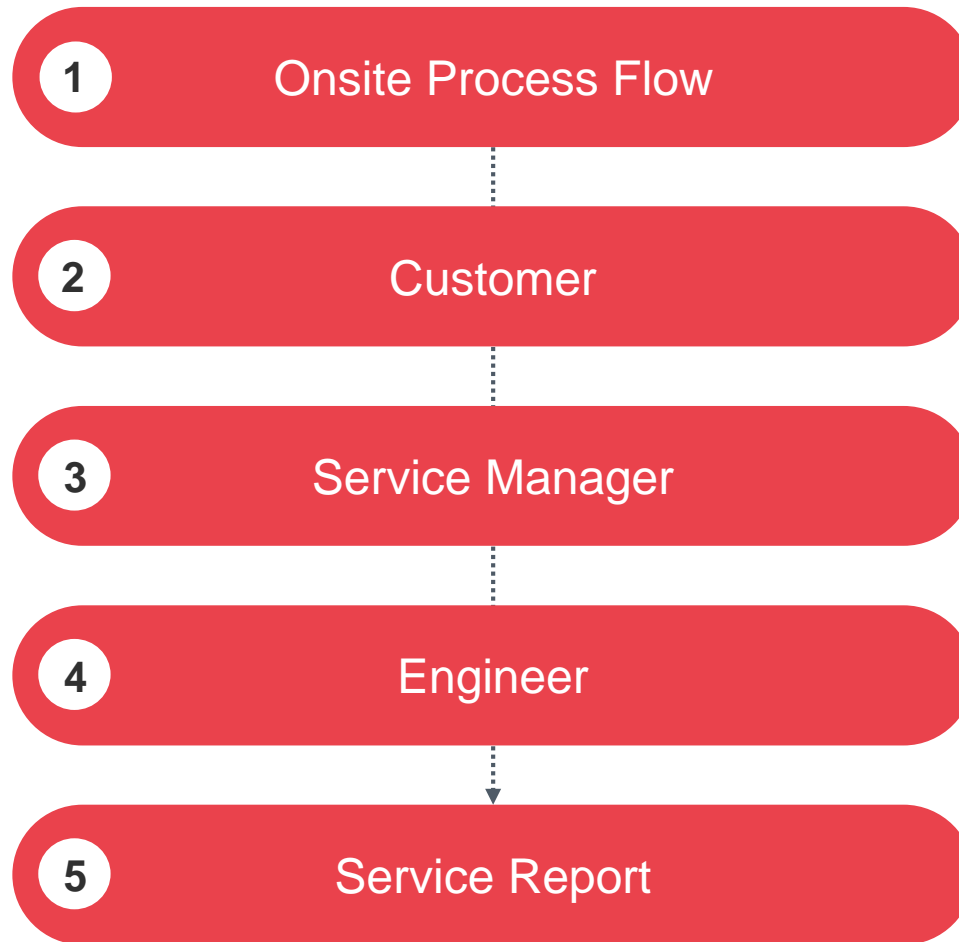
User Guide for Managers & Engineers | Managing Onsite Service Requests

ST Engineering

ST Engineering

Agenda

1	Onsite Process Flow

2	Customer

3	Service Manager

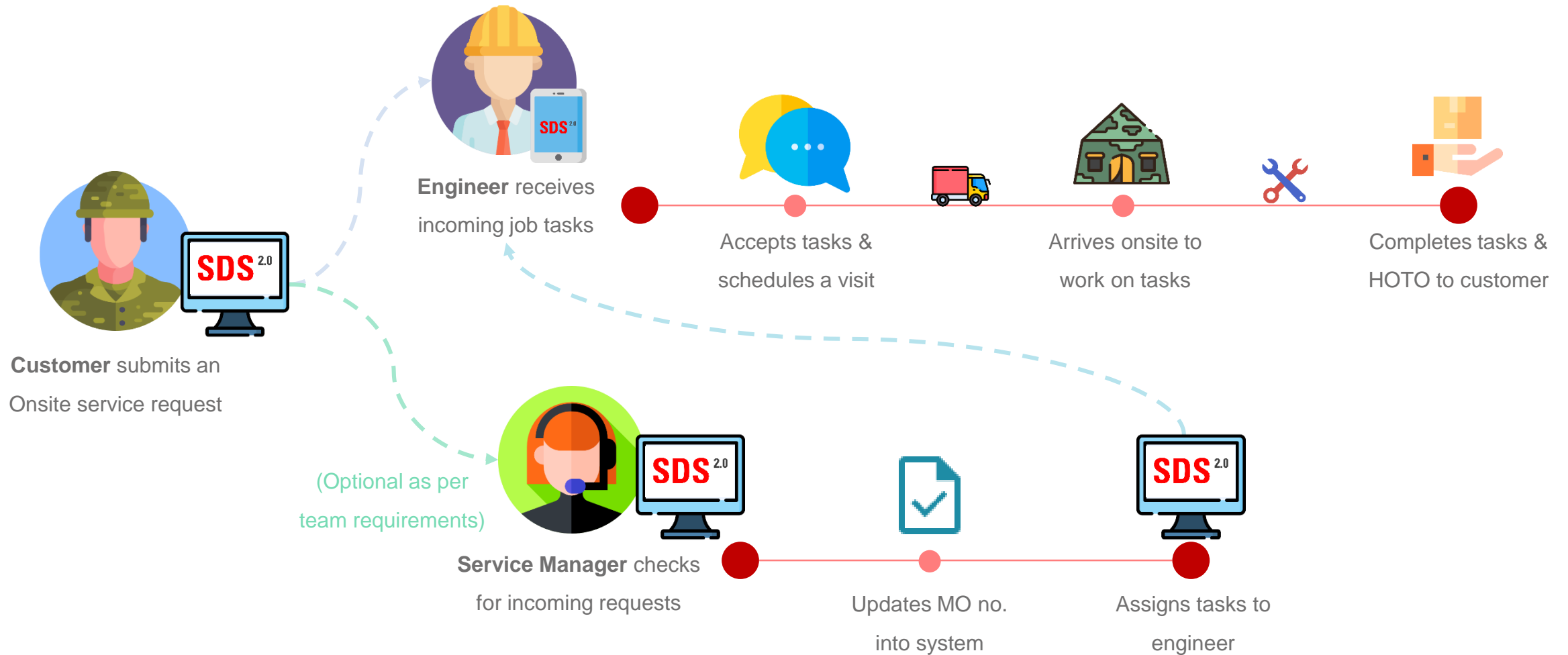| 4	Engineer

5	Service Report

Onsite Process Flow

- Overview

- Processing an Onsite Service Request

ST Engineering
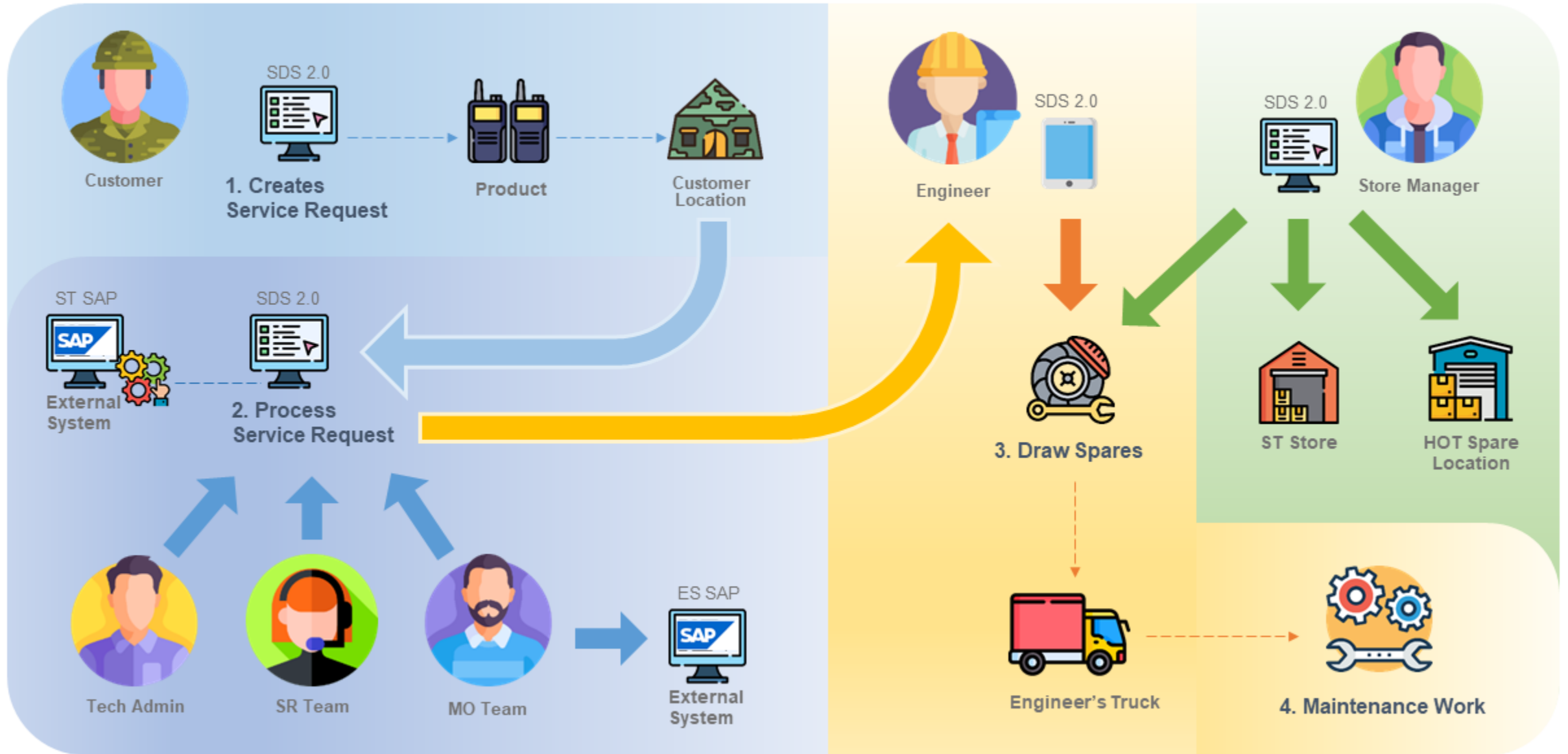
Processing an Onsite Service Request

Customer submits an Onsite service request

Engineer receives incoming job tasks

Accepts tasks & schedules a visit

Arrives onsite to work on tasks

Completes tasks & HOTO to customer

(Optional as per team requirements)

Service Manager checks for incoming requests

Updates MO no. into system

Assigns tasks to engineer

Customer

- Process Overview
- Request Creation
- Create Onsite Service Request
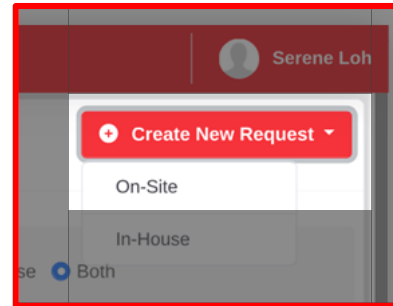- LOB Service Request Number

ST Engineering

Process Overview

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(Optional as per team requirements)

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Assigns tasks to engineer

Request Creation

Customers can create service requests at the Service Portal, **Request Creation**
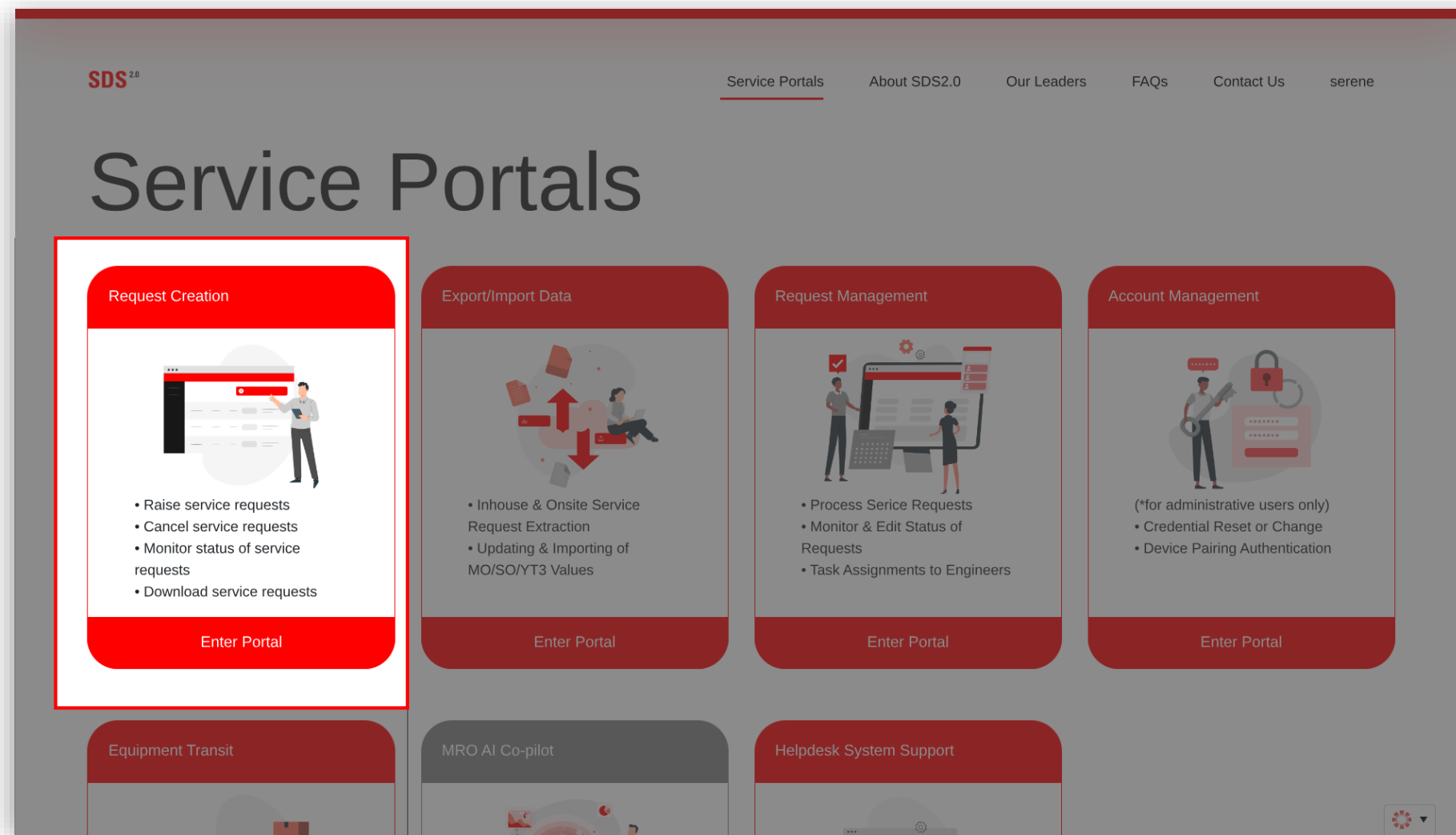
Create Onsite Service Request

1 At the Service Request page, the customer can trigger the dropdown button **Create New Request** and selects **On-Site.**

2 Customer will then fill-in the necessary details in the service request page for submission.
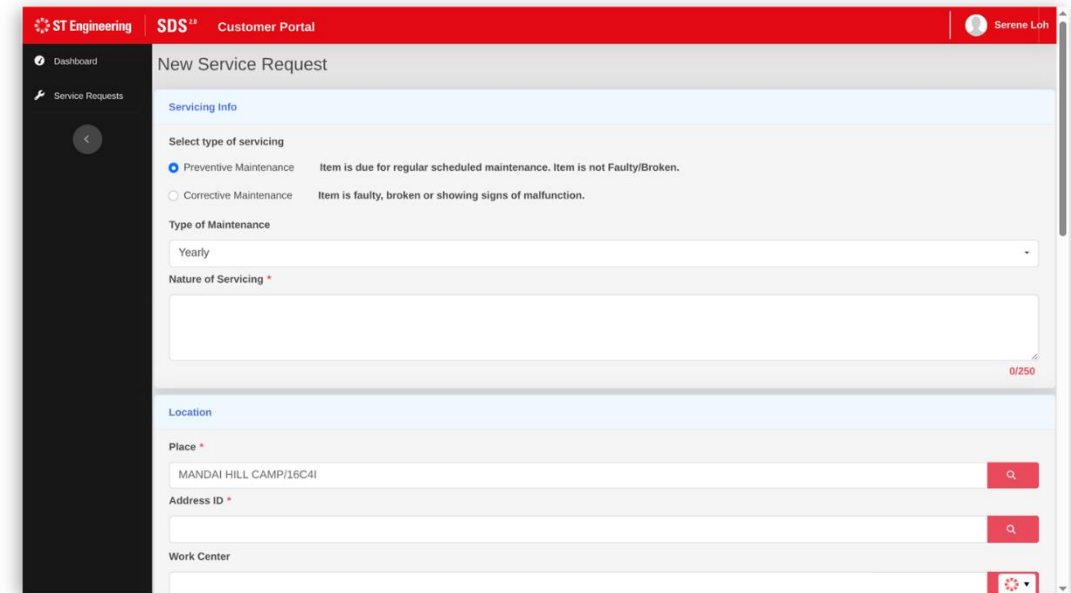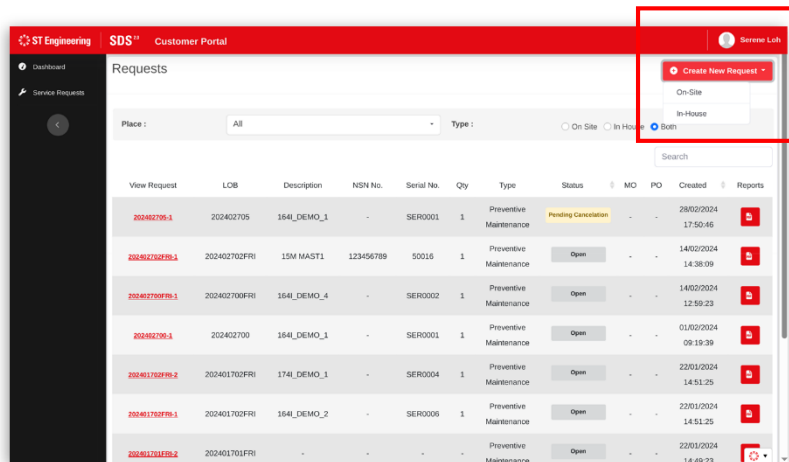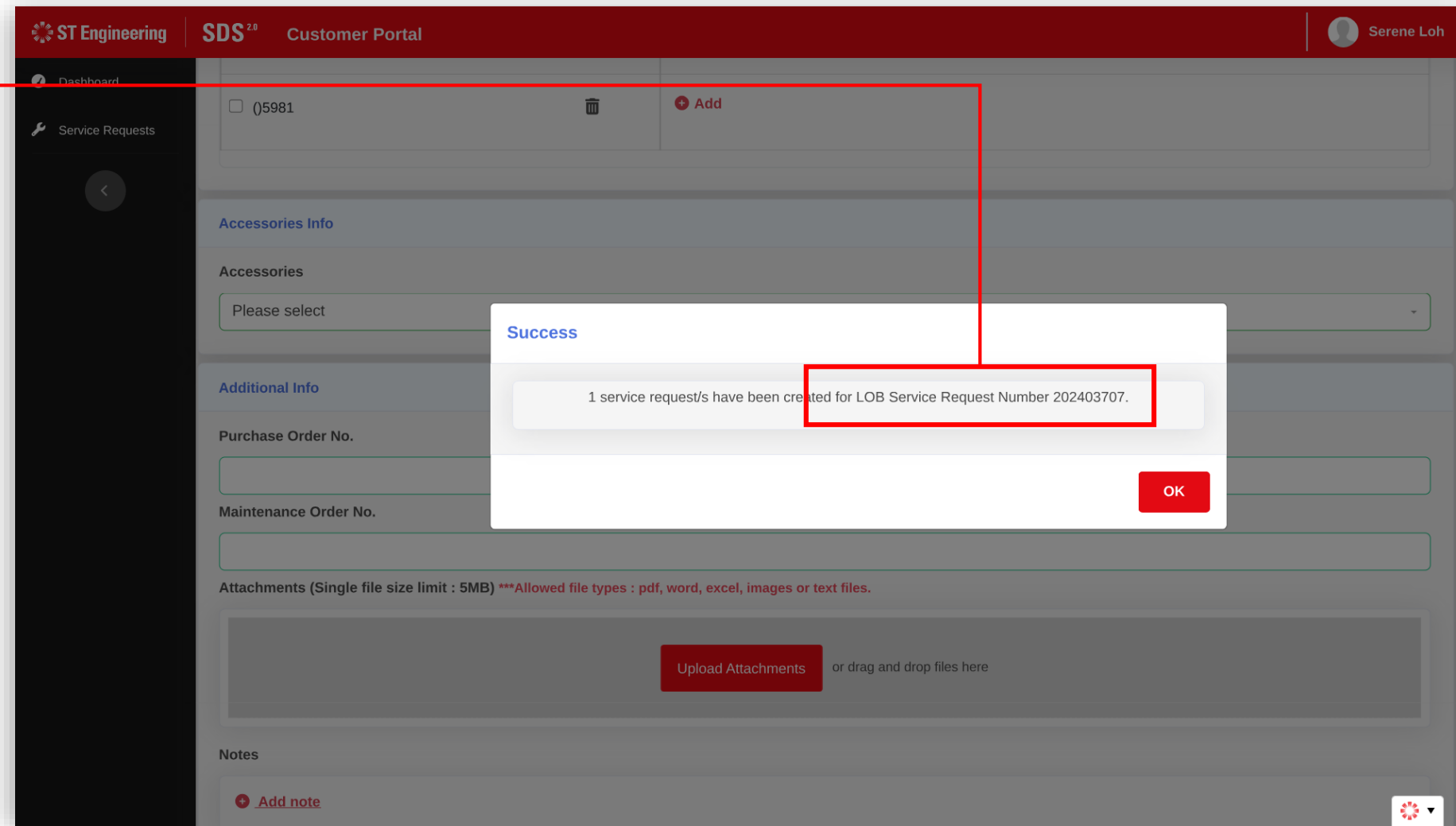
For further details on request creation, please refer to

User Guide for Customers – How to raise a Request

LOB Service Request Number

LOB Service Request Number is automatically generated and assigned to a list of service request/s created for the customer.

It is used to track the customer's request.

Service Manager

- Process Overview
- Request Management
- Managing an Onsite Service Request
- Change Request Status

- Update PO Number
- Update Multiple Requests with PO Numbers at SM Portal
- Assign Tasks

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Process Overview

Engineer receives incoming job tasks

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Accepts tasks & schedules a visit

Arrives onsite to work on tasks

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(Optional as per team requirements)

Service Manager checks for incoming requests

Updates MO no. into system

Assigns tasks to engineer
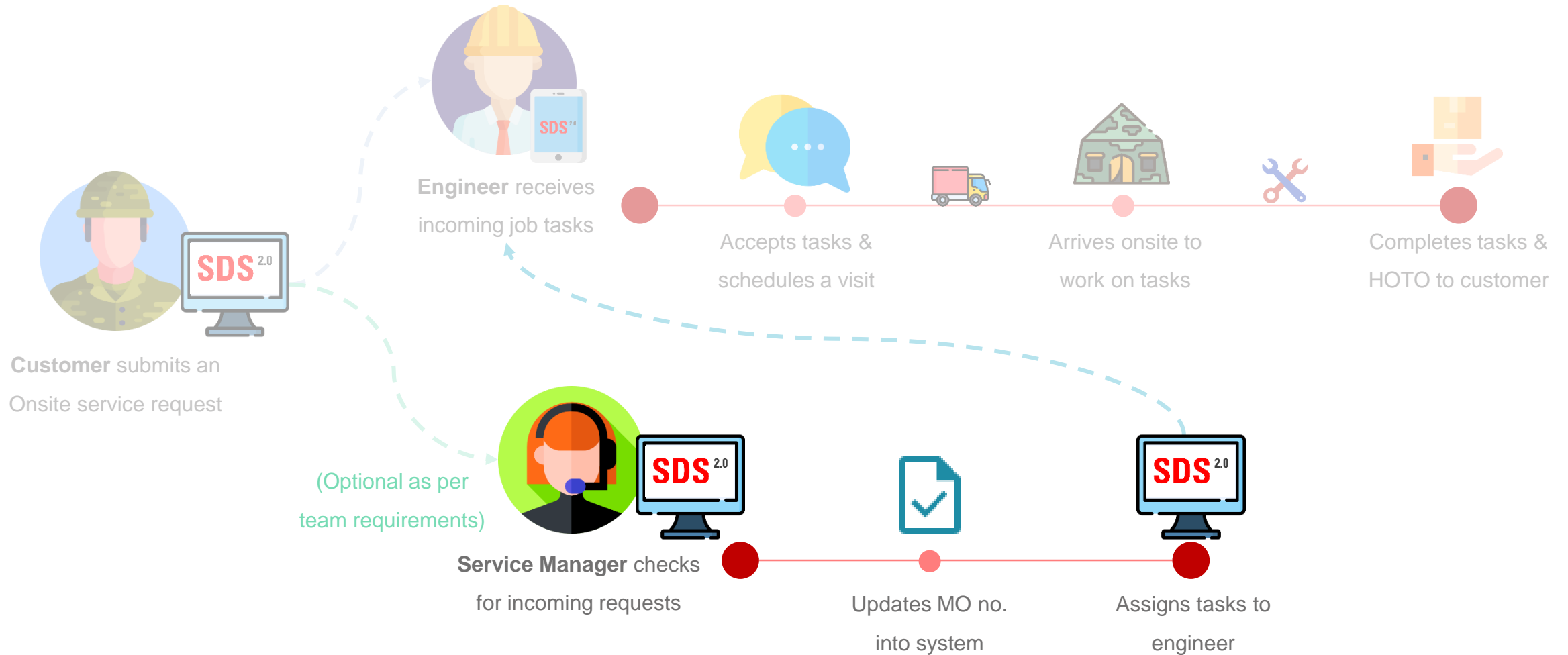
Request Management

Service managers can manage service requests at the Service Portal, **Request Management**
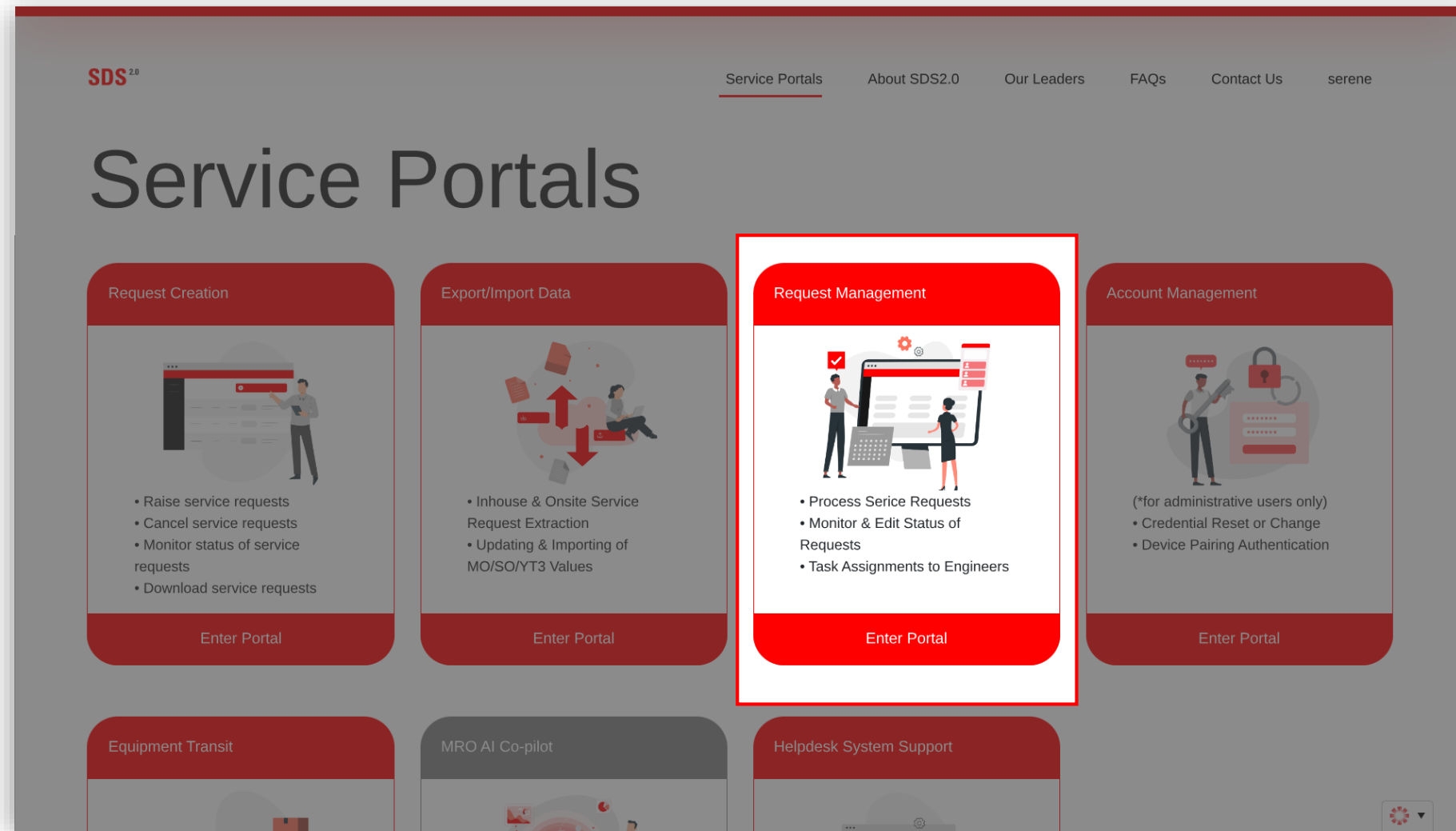
Managing an Onsite Service Request (1)

1 Service manager can go to **Onsite Repair Request** page via **Menu > Service > Requests**
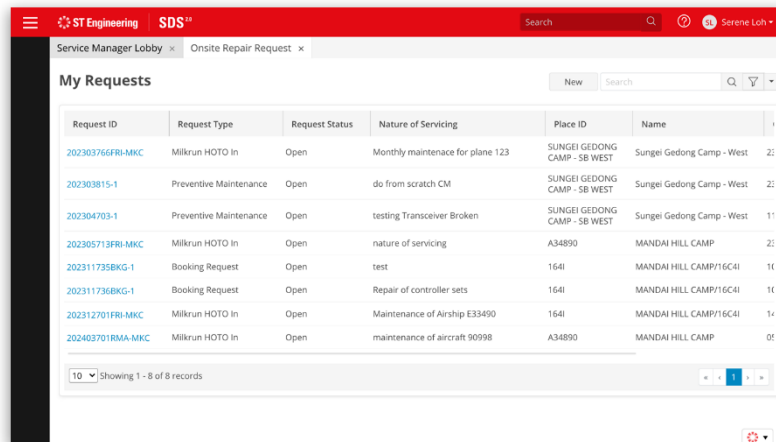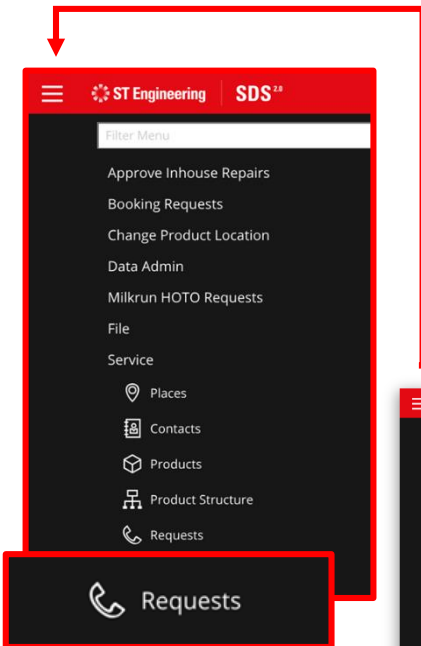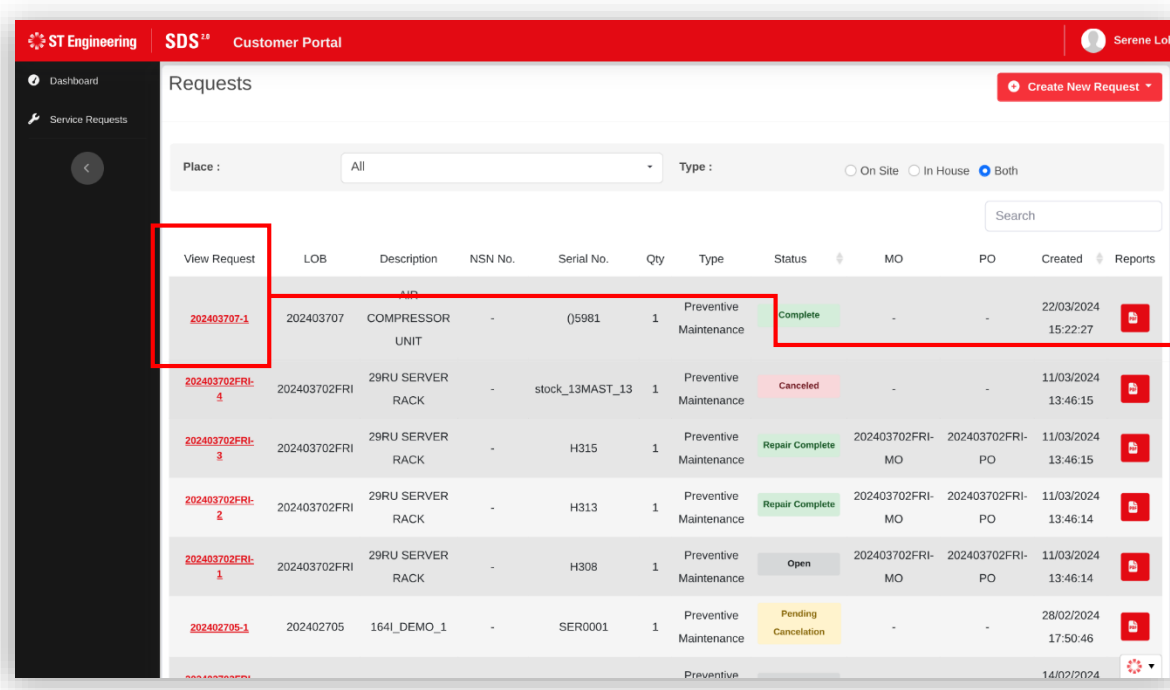
2 Service manager can search for the **request ID** by its **LOB Service Request Number.**
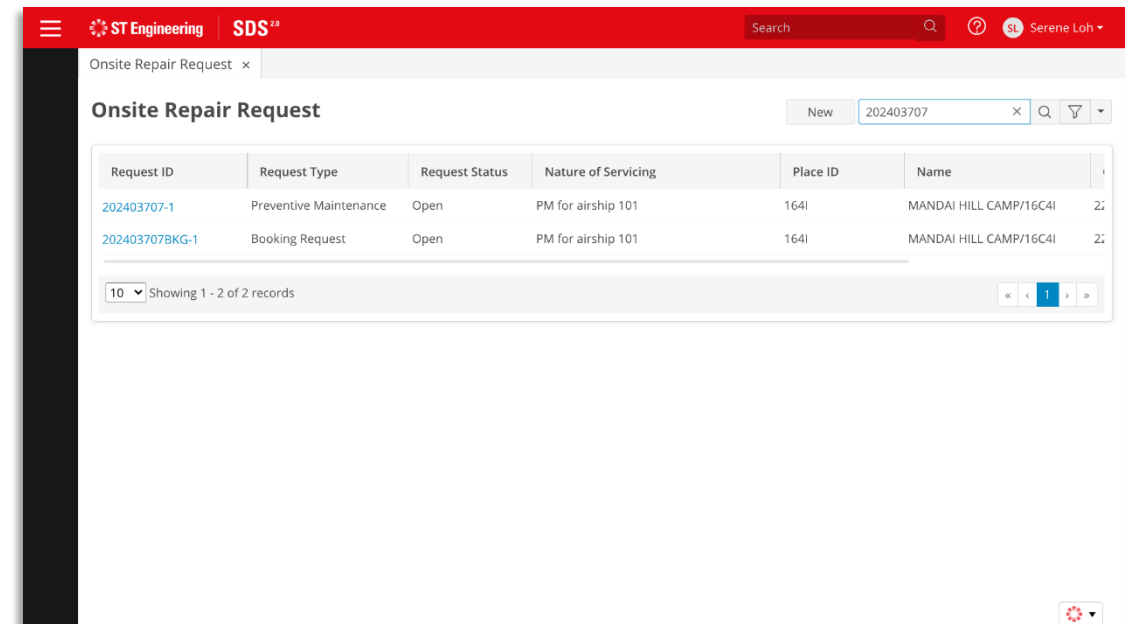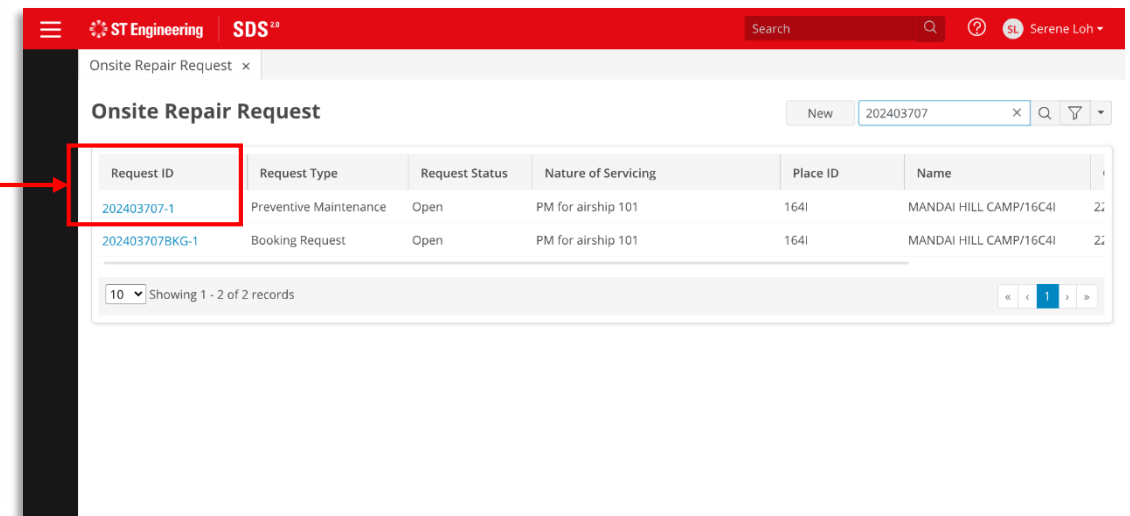
For further details on request management, please refer to

User Guide for Manager Portal

Managing an Onsite Service Request (2)

3 For new creations, service managers should select the request ID generated from the customer portal when viewing/ editing request page.

Booking Request *is for the engineer to make an appointment with the customer using the engineer app.*

Change Request Status

1 Service managers can change the request status by selecting the relevant status from the **Status** dropdown list.

2 Then tap the **Save** button to update changes.
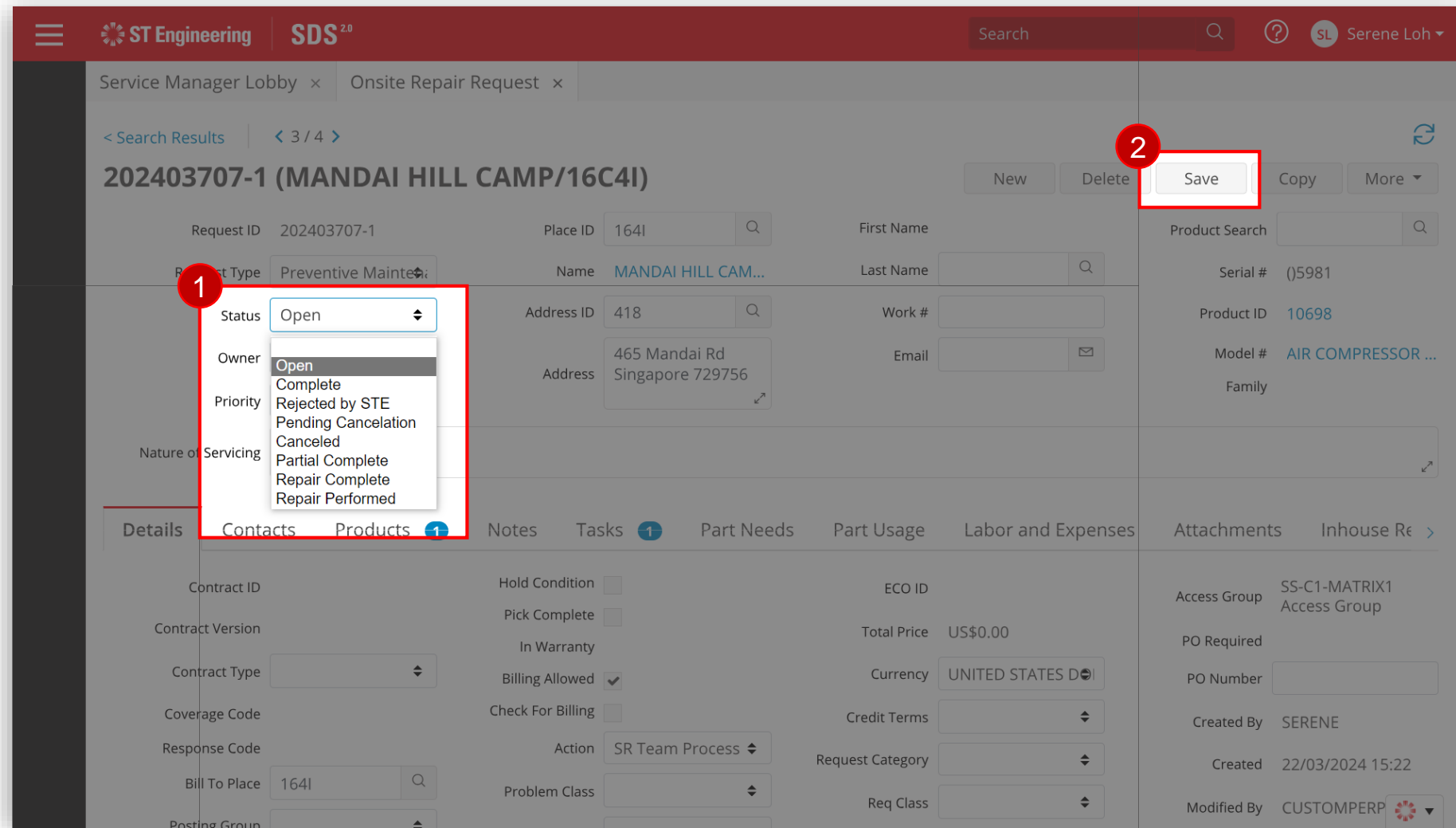
Update PO Number

Depending on Team requirements, service manager may need to update PO Number before engineers can proceed with their tasks.

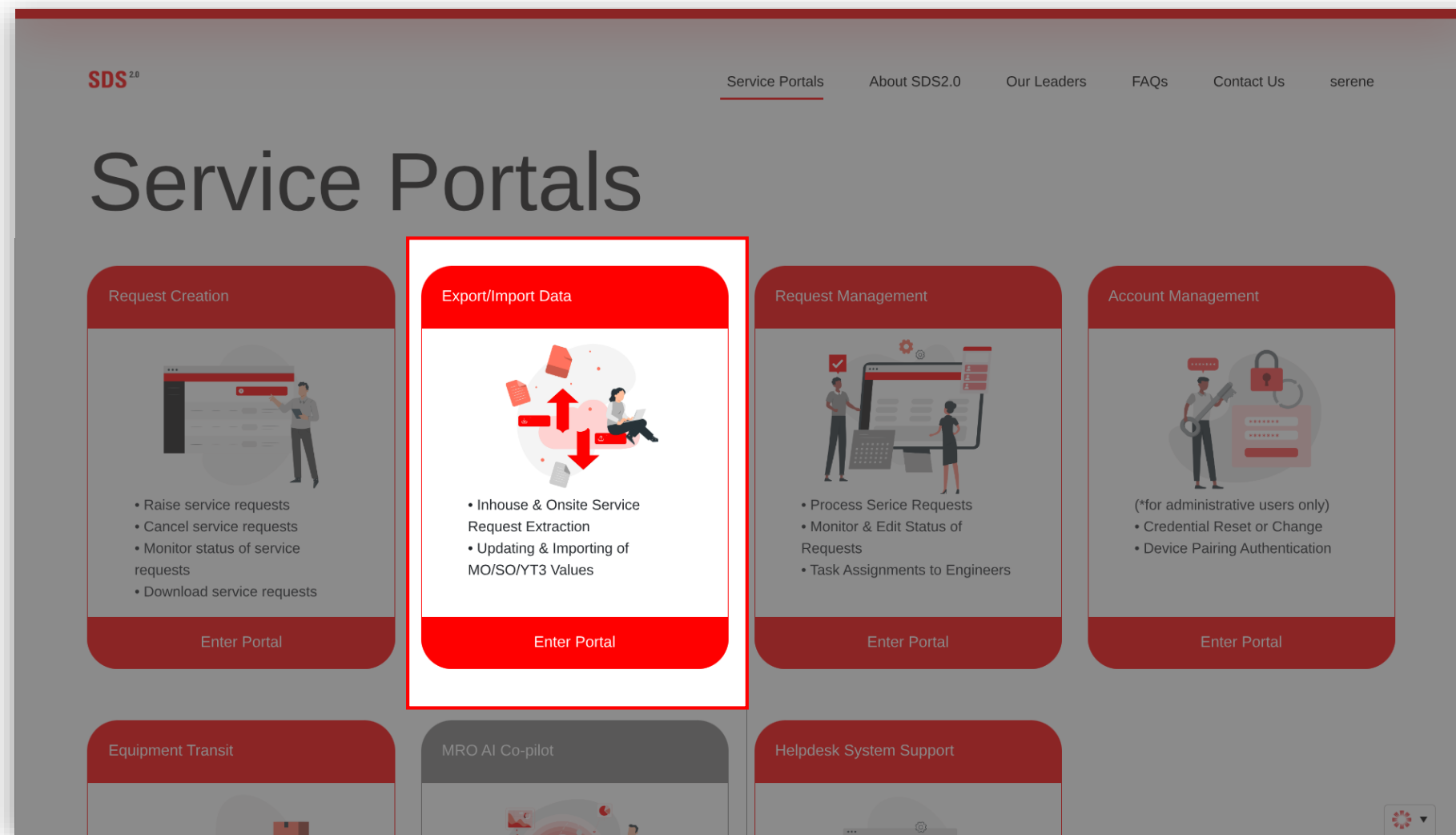**1** Under **Details** Tab, enter the **2** **PO number** in the textbox and tap **3** **Save** to update.

Update Multiple Requests with PO Numbers at SM Portal

Alternatively, service manager can update the PO Numbers for multiple requests at the Service Portal, **Export/Import Data.**
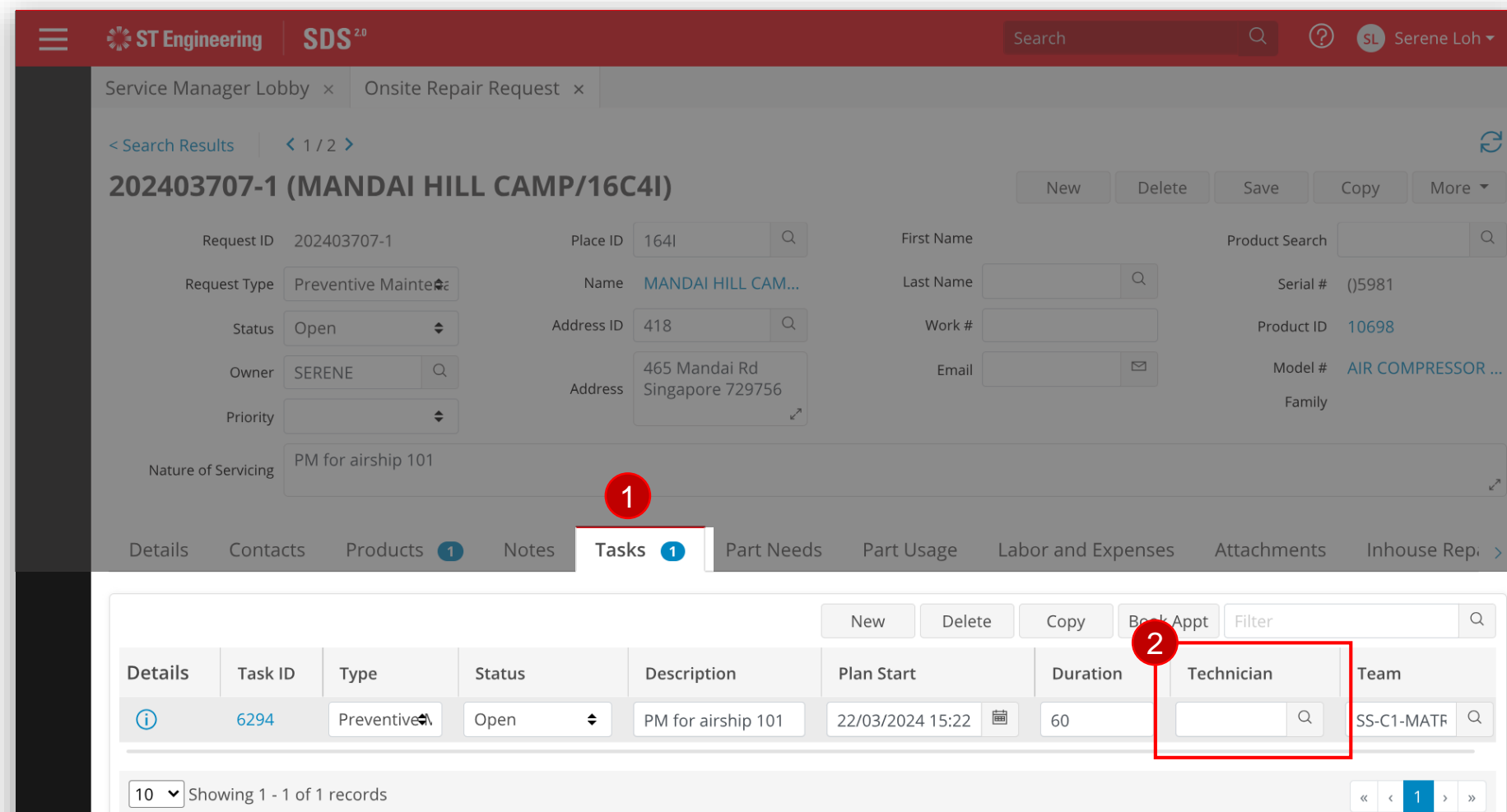
For further details on how to export/ import data, please refer to **User Guide for SM Portal**

Assign Tasks (1)

Service manager can manually assign Tasks to engineers under the ❶ **Tasks** Tab.

Tap search under the ❷ **Technician** category and it will open a list of engineers for selection.

Assign Tasks (2)

Select the dedicated engineer from the ❸ **Team list** to work on the task and tap ❹ **OK**.

Assign Tasks (3)

⑤ Next, change the Status from **Open** to **Assigned**

⑥ Once assigned, tap **Save** to update.

Engineer

- Process Overview
- Onsite Open Task
- Accepting Onsite Open Task
- Onsite Assigned Task

- Scheduling Onsite Service Request
- Enroute Onsite Service Request
- Processing Onsite Service Request
- Servicing Onsite Service Request

ST Engineering

Process Overview

Engineer receives incoming job tasks

Accepts tasks & schedules a visit

Arrives onsite to work on tasks

Completes tasks & HOTO to customer

Customer submits an Onsite service request

(Optional as per team requirements)

Service Manager checks for incoming requests

Updates MO no. into system
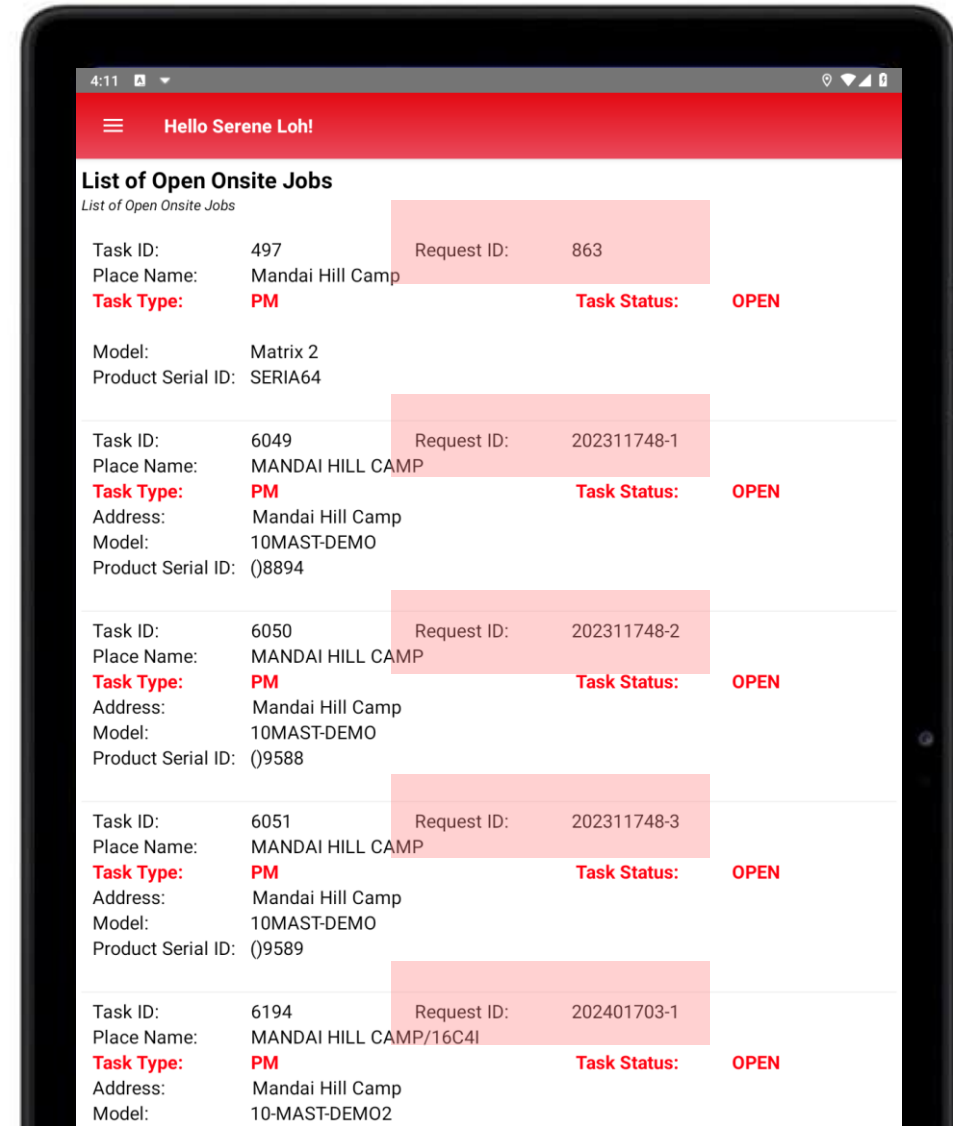
Assigns tasks to engineer

Onsite Open Task

When customer submits a new onsite service request, it will create an onsite open task.

Engineer can go to **Onsite Open Task** section to accept a new task.
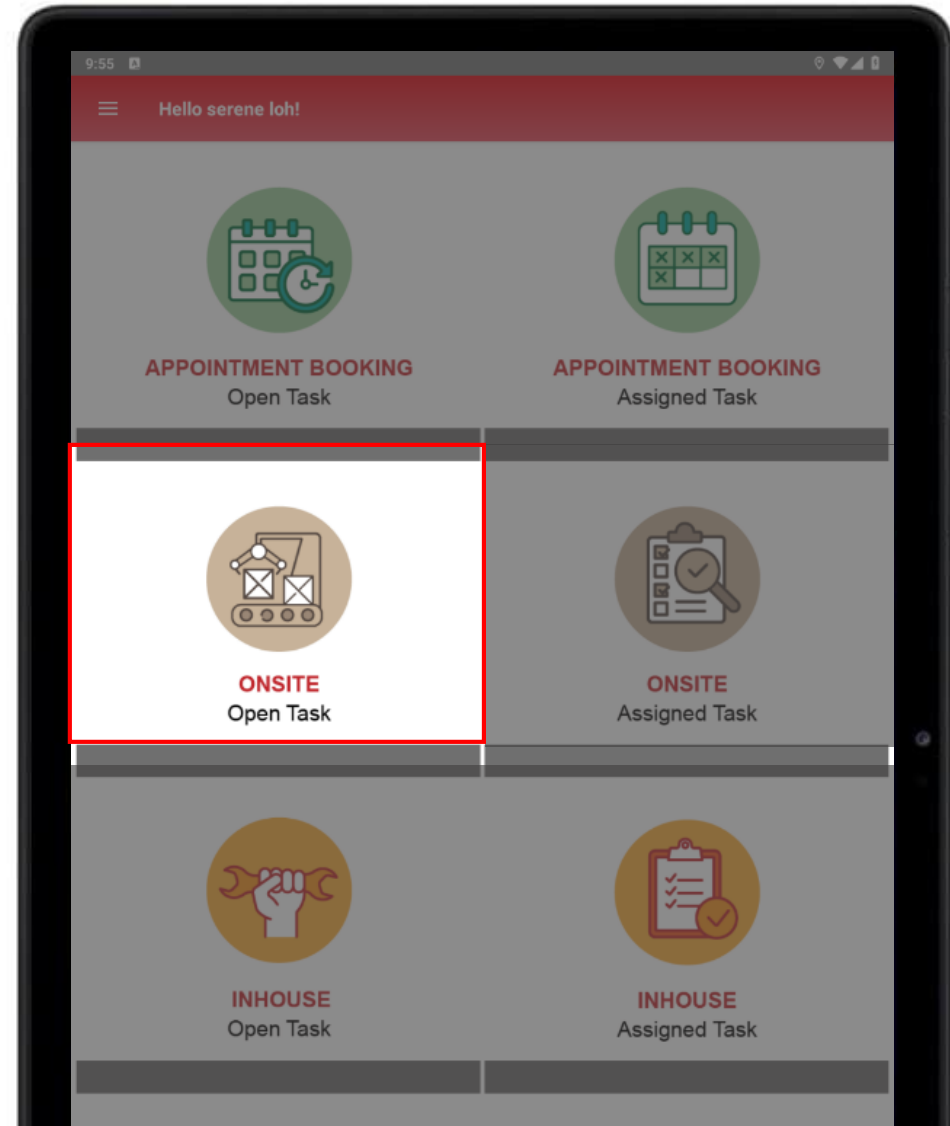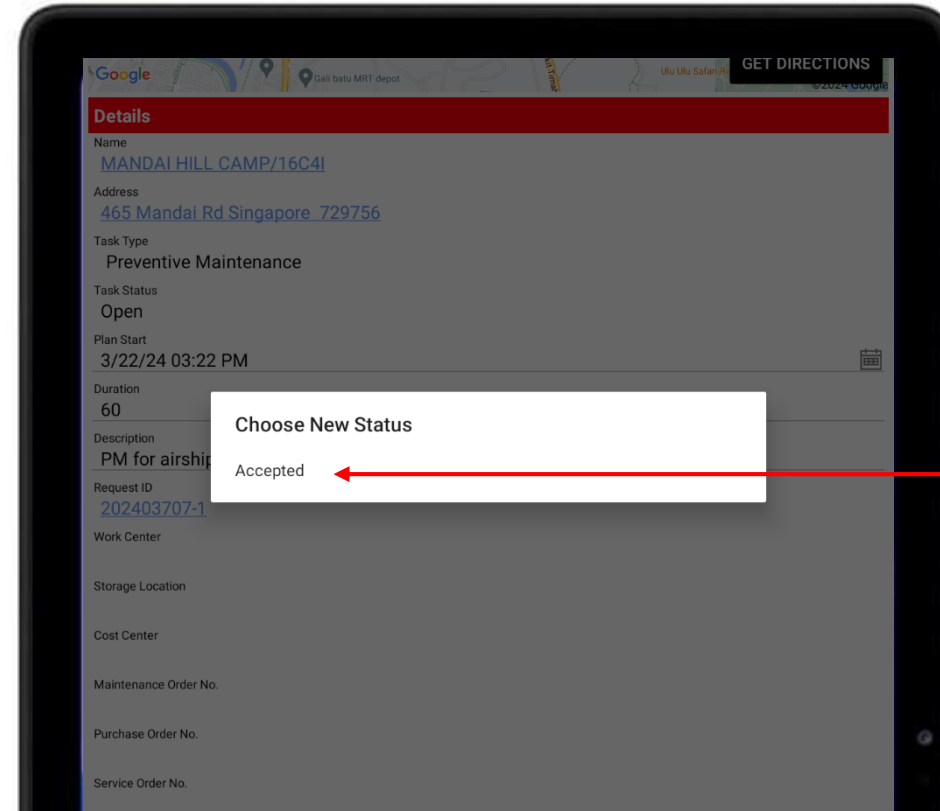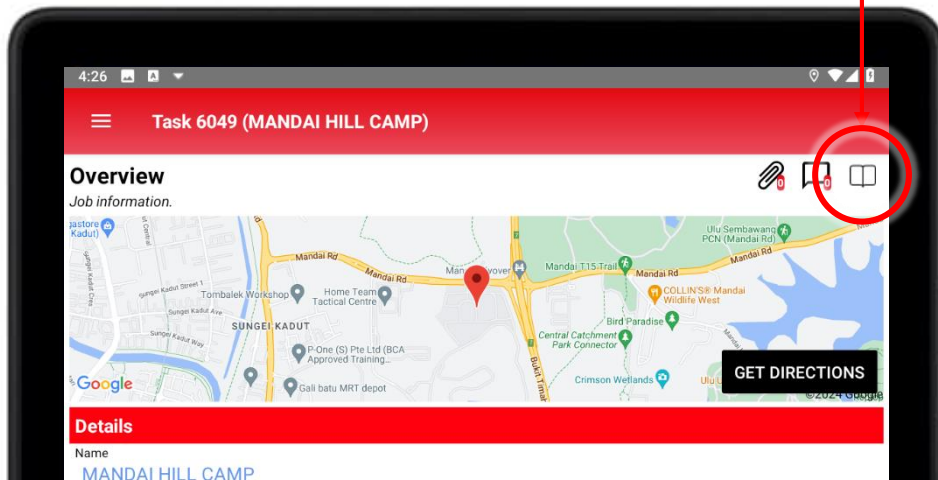
Accepting Onsite Open Task (1)

In **Onsite Open Task**, it will display a list of open onsite jobs. Look for the **request ID** to work on and tap on the subject to view the task.
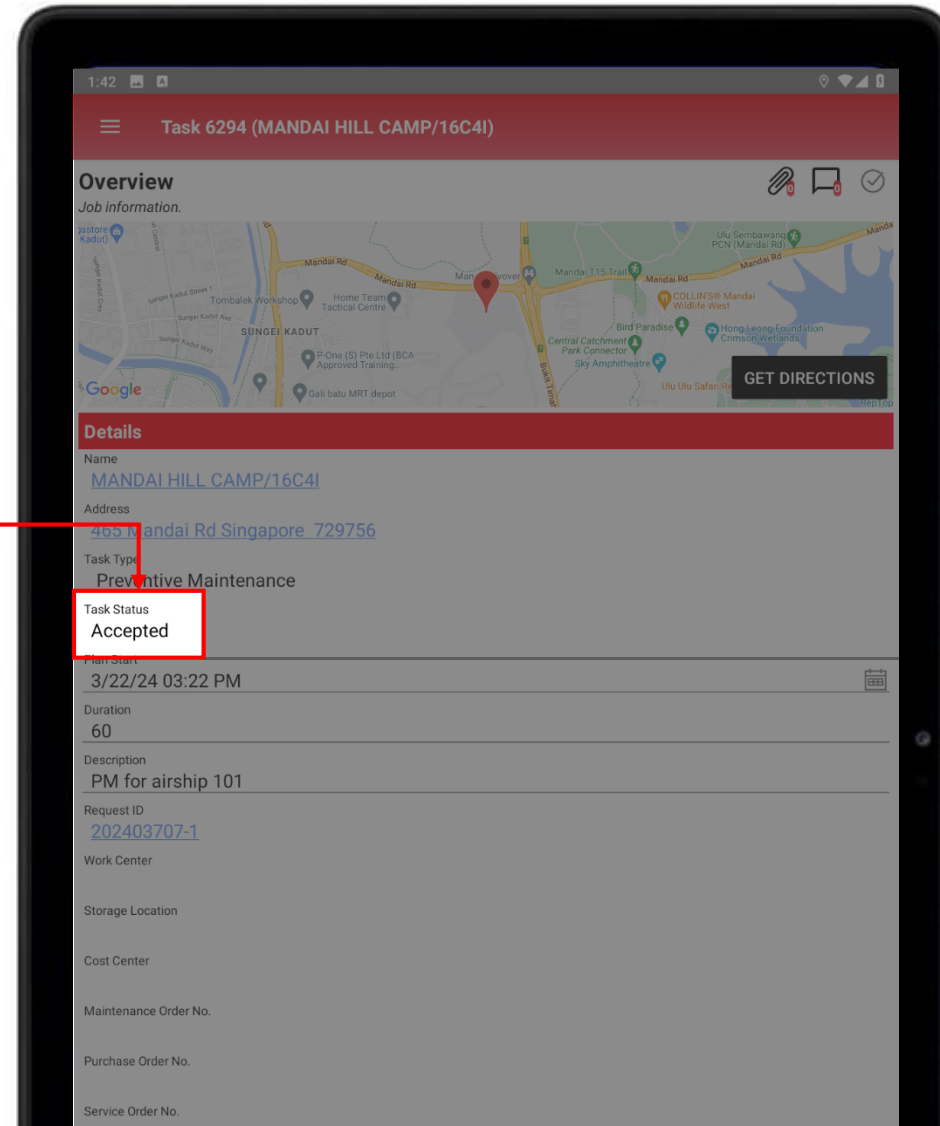
Accepting Onsite Open Task (2)

2 Tap **Accepted** to assign job to self.

1 Select the **Book** icon 📖

to open the accept window.

Accepting Onsite Open Task (3)

Task Status will change from **Open** to **Accepted**. It

can be viewed and edited by assigned engineer.

Onsite Assigned Task

Service manager can **assign tasks** to an engineer, or engineer **accepts an open task**.

Assigned tasks are saved in **Onsite Assigned Task** section. Engineer can view all the tasks assigned to him/her.
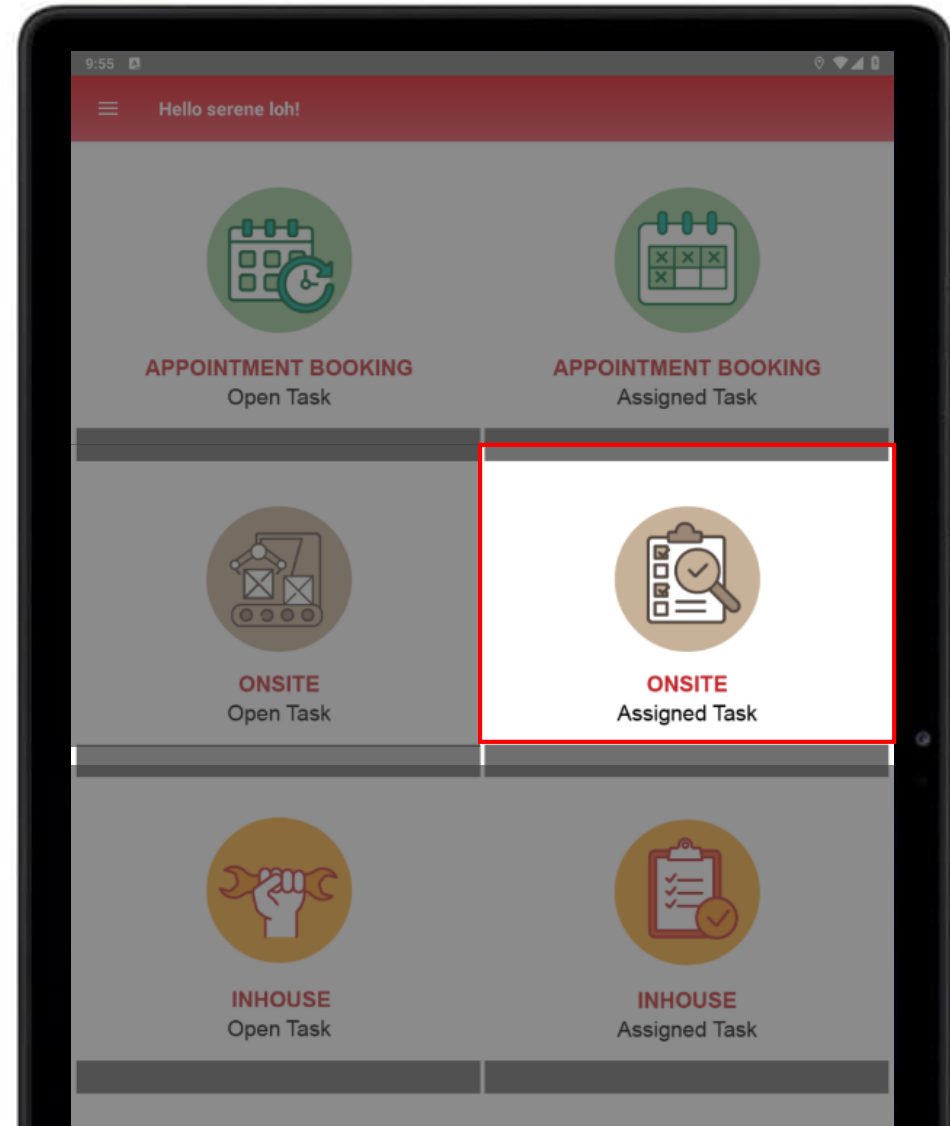
Scheduling Onsite Service Request (1)

In **Onsite Assigned Task**, it will display a list of assigned onsite jobs. Look for the **request ID** to work on and tap on the subject to view the task.
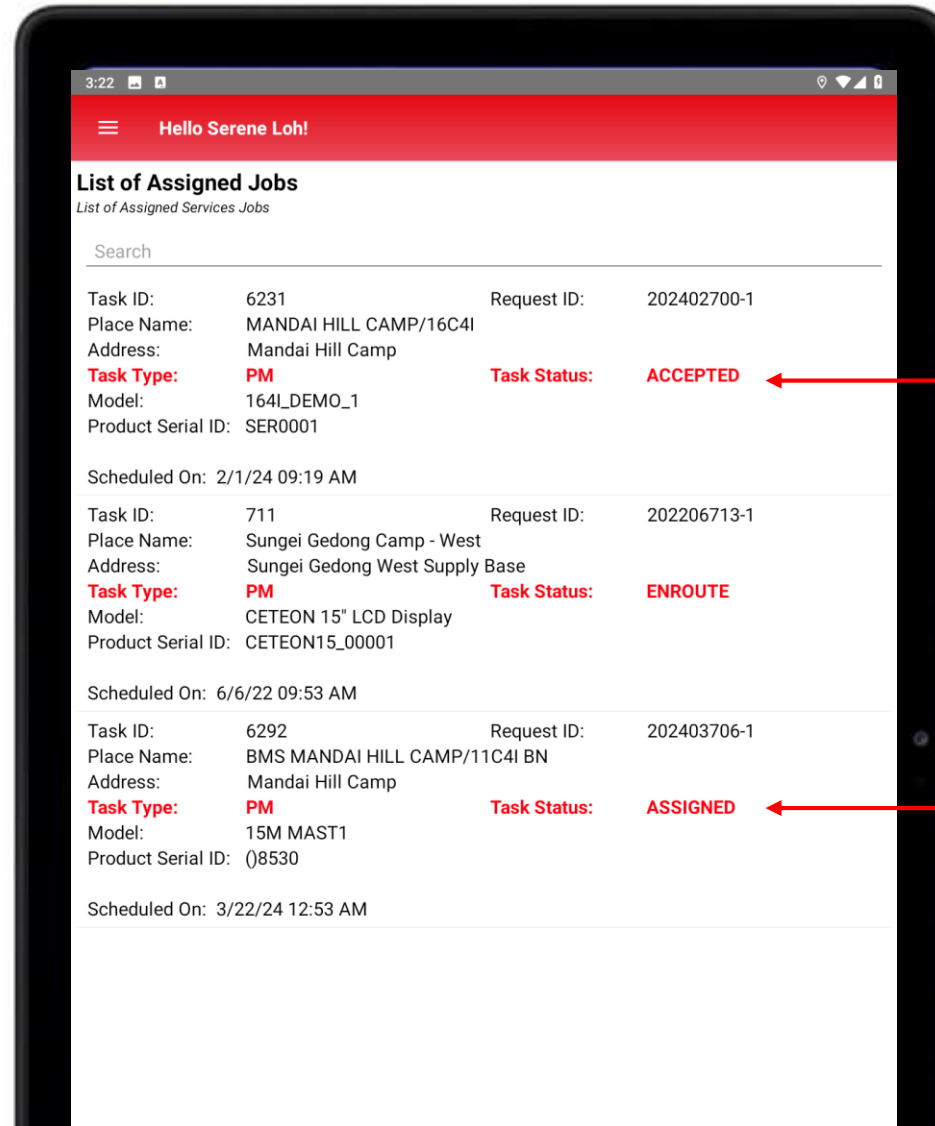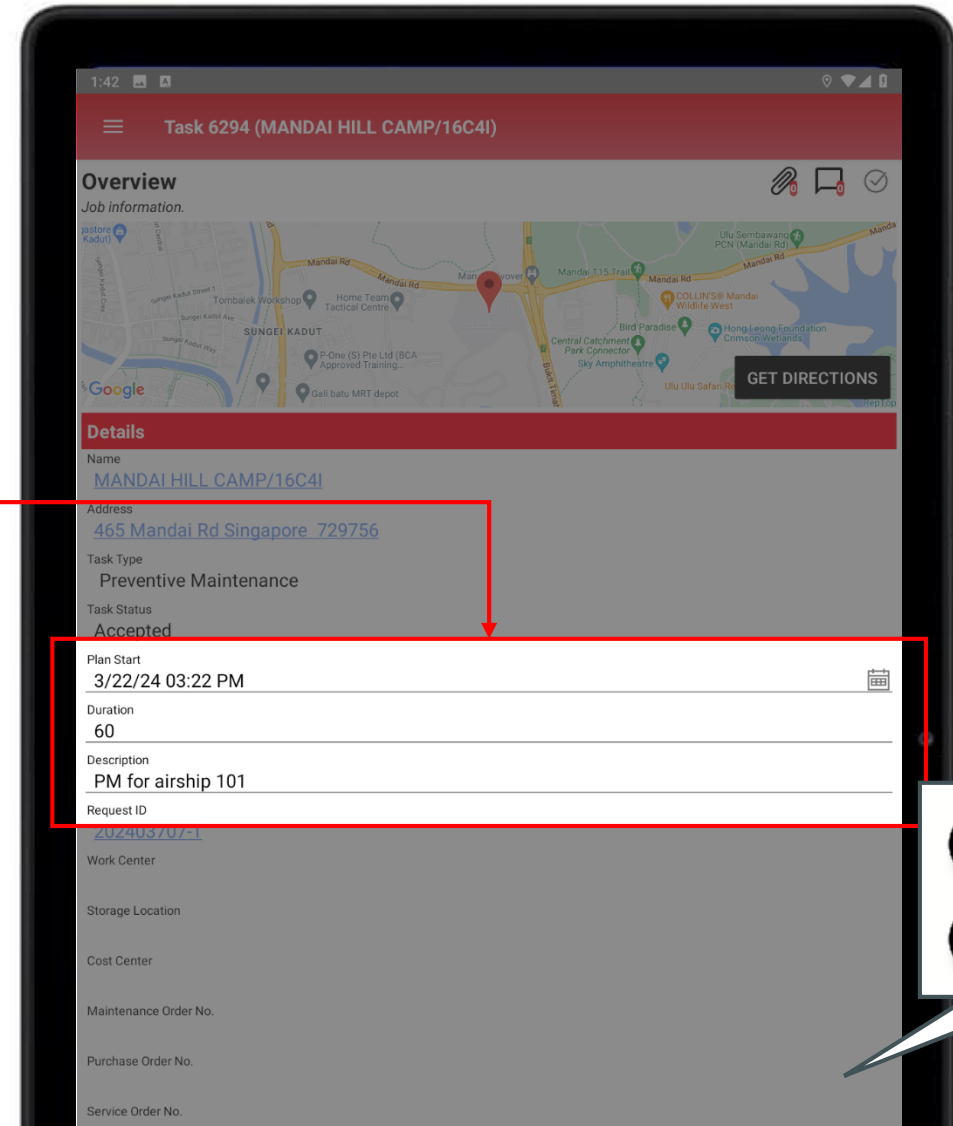
Task which has been **accepted** by the engineer.

Task **assigned** by service manager/ team lead where engineer can choose to accept or reject the task.

Scheduling Onsite Service Request (2)

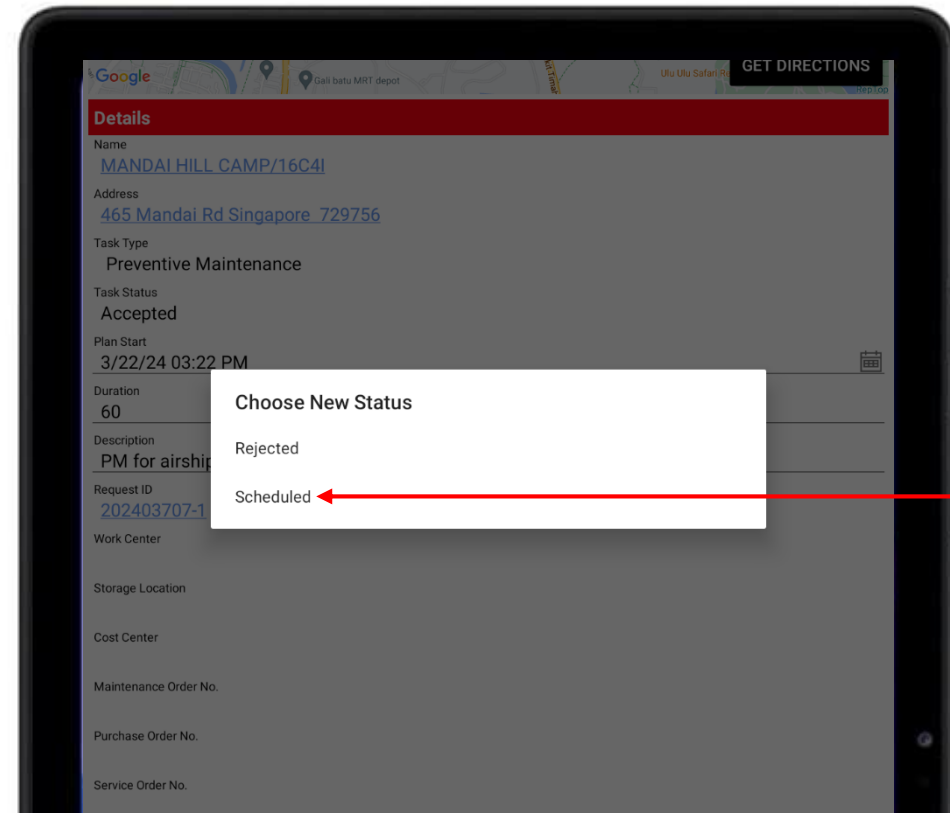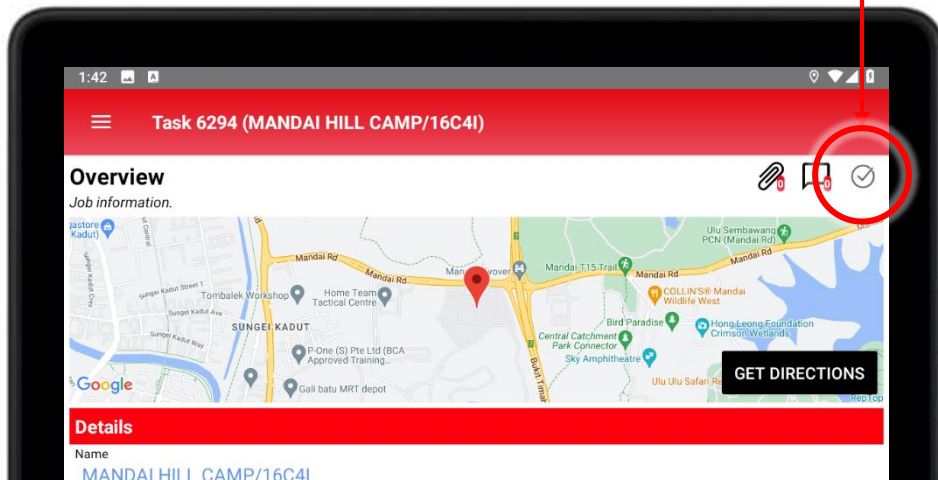Check if there is any change to the **Plan Start** Date/Time, **Duration** and the **Description**.

Engineer can modify the text fields accordingly and tap **Save** 💾 to update.
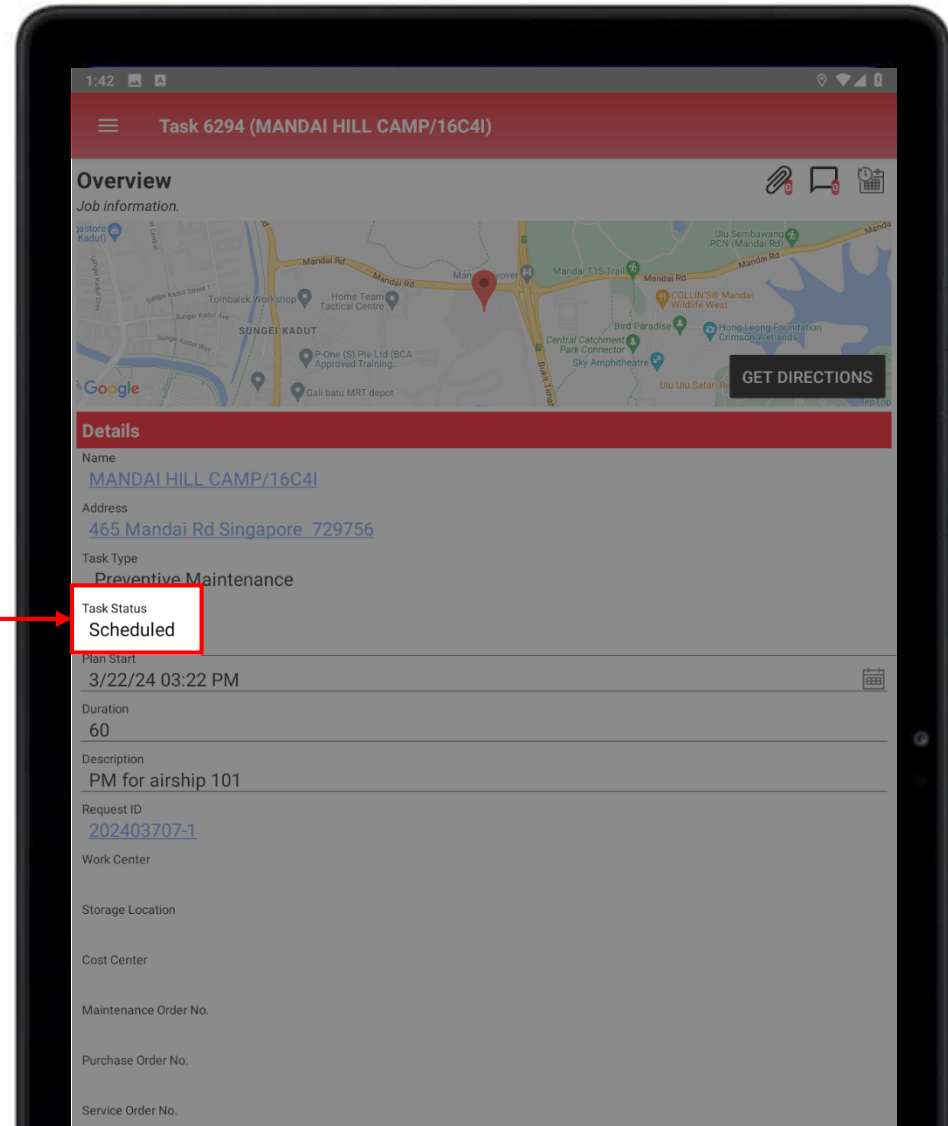
Scheduling Onsite Service Request (3)

1 Select the **Schedule** icon ⊘

to open the schedule window.

2 Tap **Scheduled** to confirm schedule.
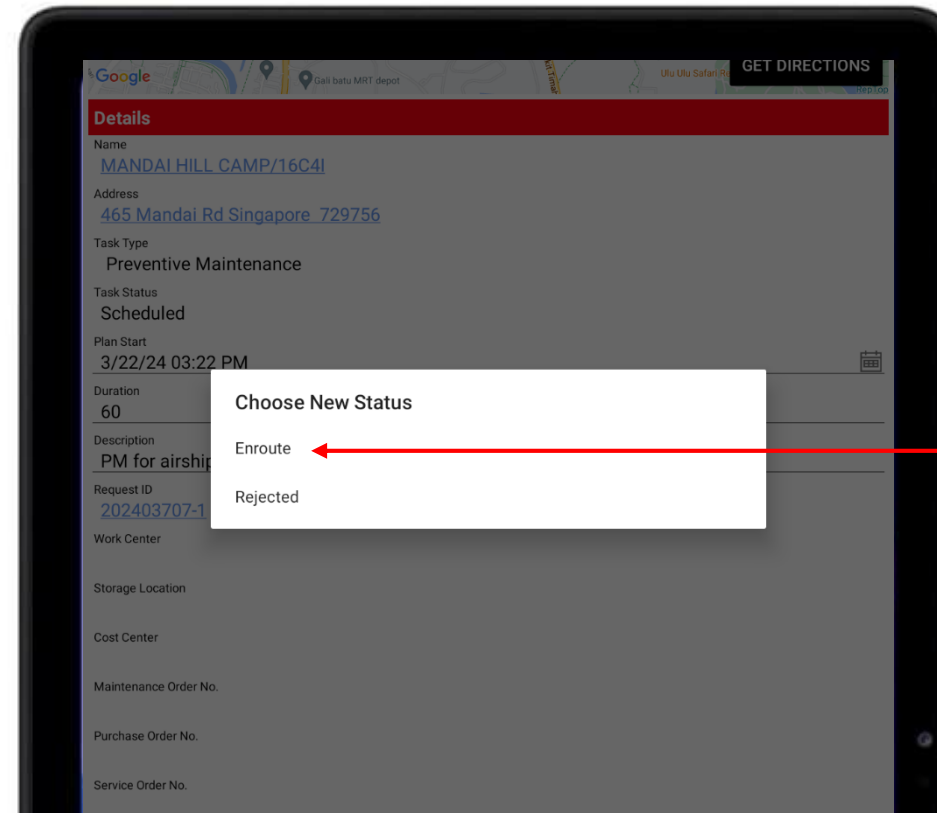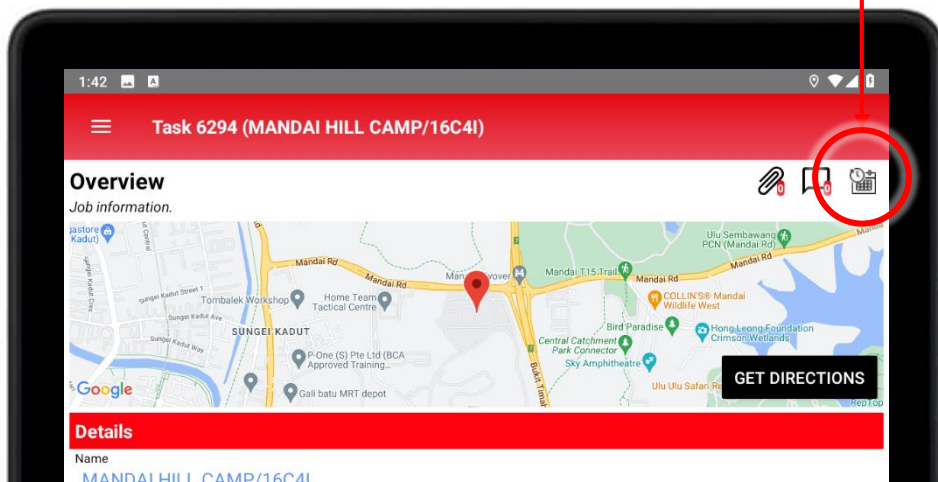
Scheduling Onsite Service Request (4)

Task Status will change from

Accepted to **Scheduled**.

Enroute Onsite Service Request (1)

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2 Tap **Enroute** to change task status.

1 When engineer prepares to go to customer's location, he can change status to **Enroute**

Enroute Onsite Service Request (2)

Task Status will change from

Scheduled to **Enroute.**
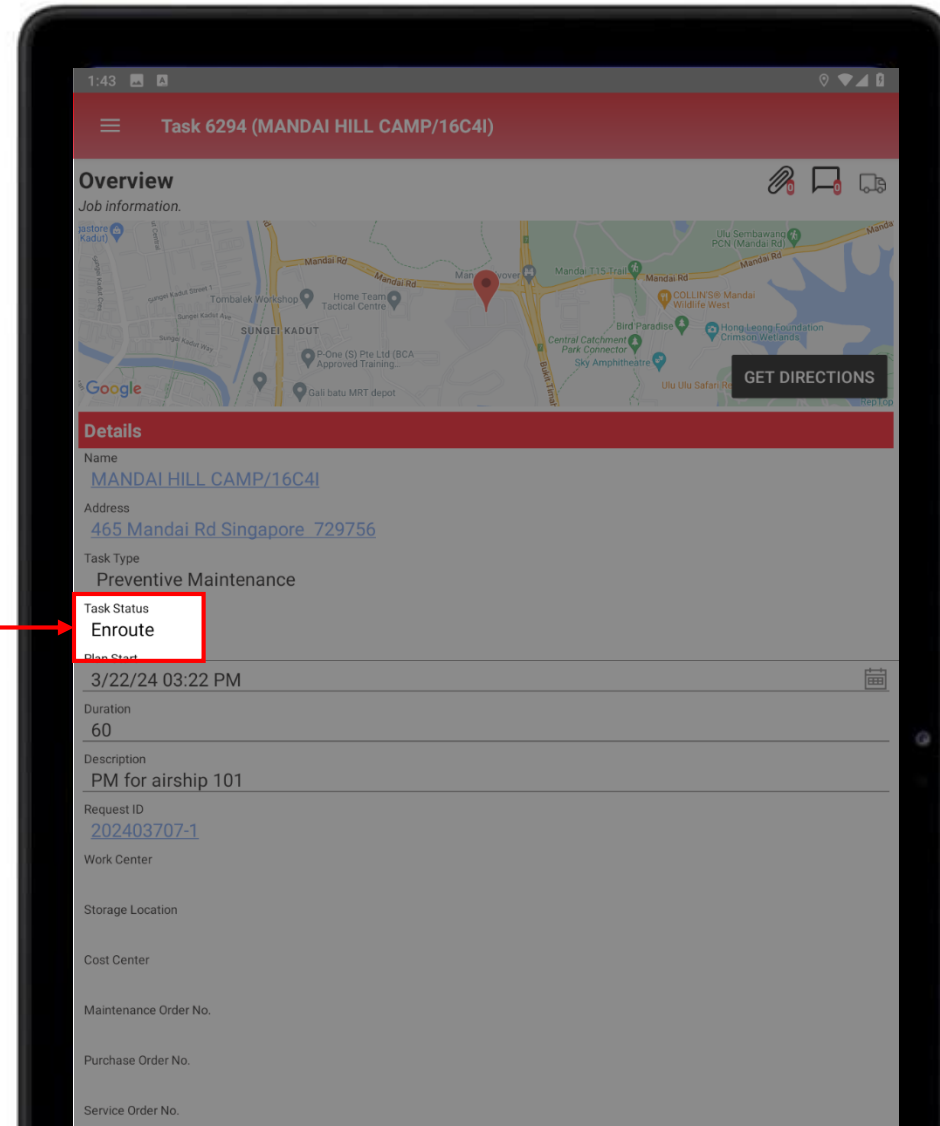
Processing Onsite Service Request (1)

1 When engineer proceeds with the servicing, he can change status to **In Process** 🚚

2 Tap **In Process** to change task status.
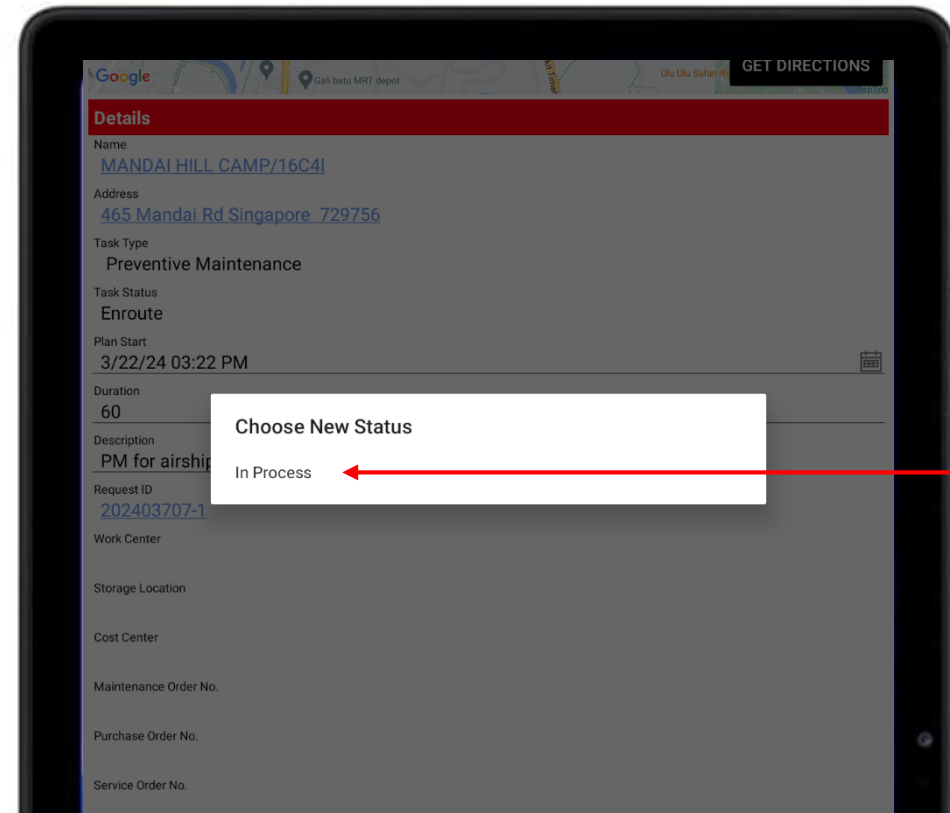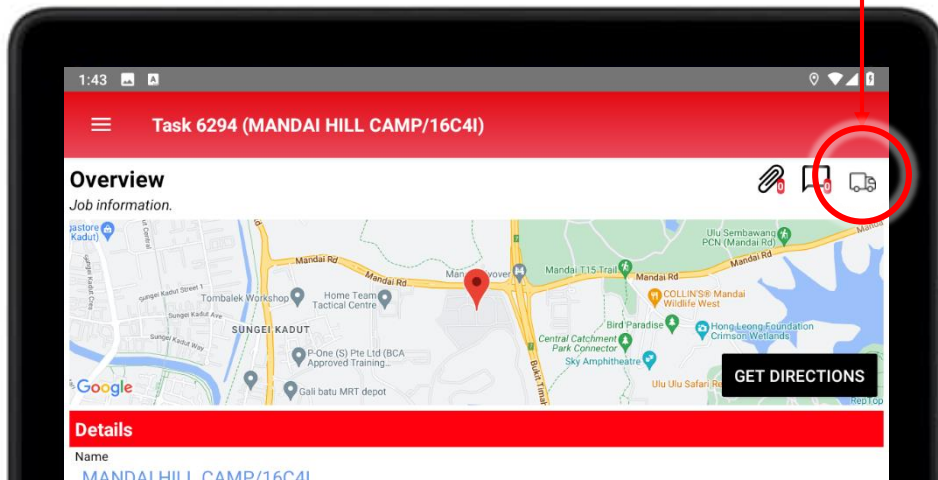
Processing Onsite Service Request (2)

Task Status will change from

Enroute to **In Process.**

Proceed **Next** ❯ to continue with the job task.
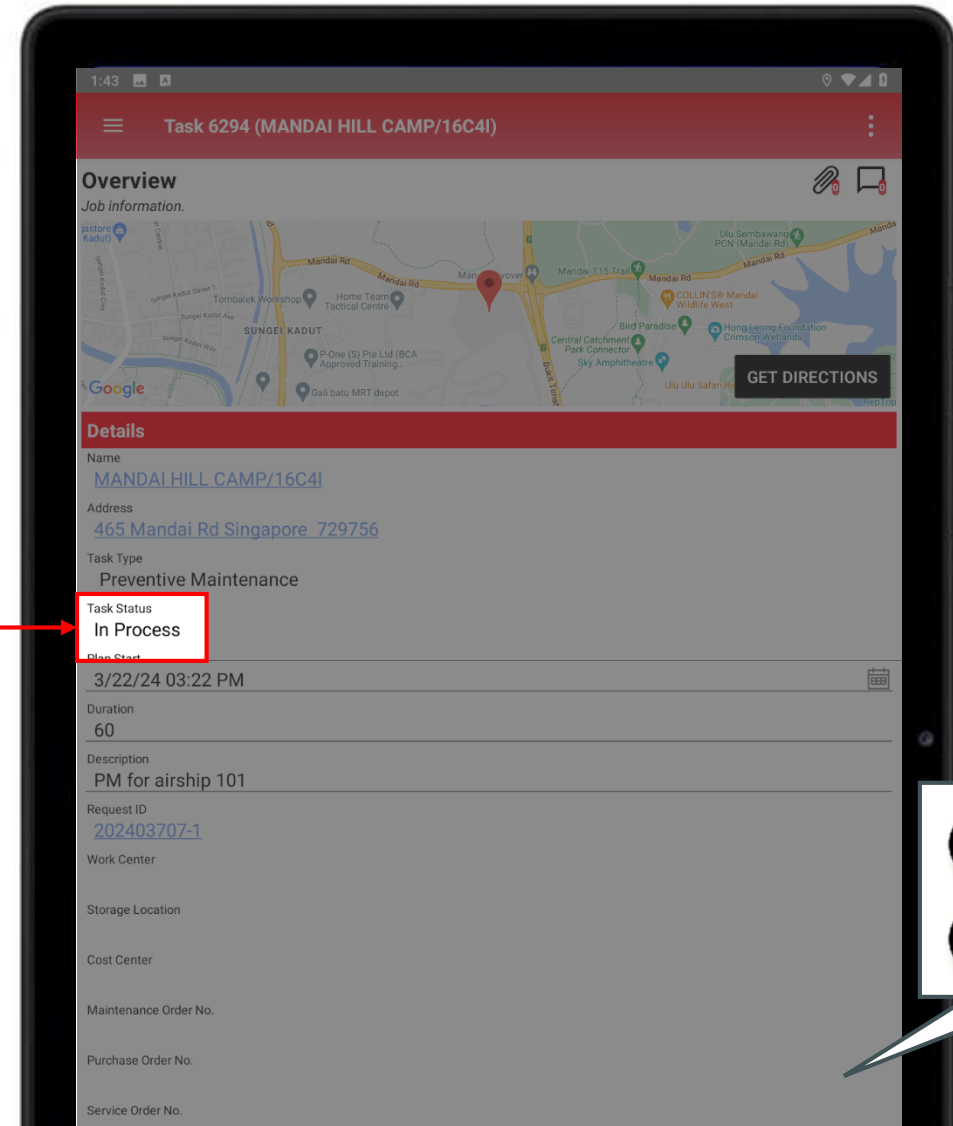
Save

Next

Servicing Onsite Service Request (1)

Parts Used (Optional) allows engineer to input parts

that are used when doing servicing for the customer.

Proceed **Next** ❯ to continue with the job task.
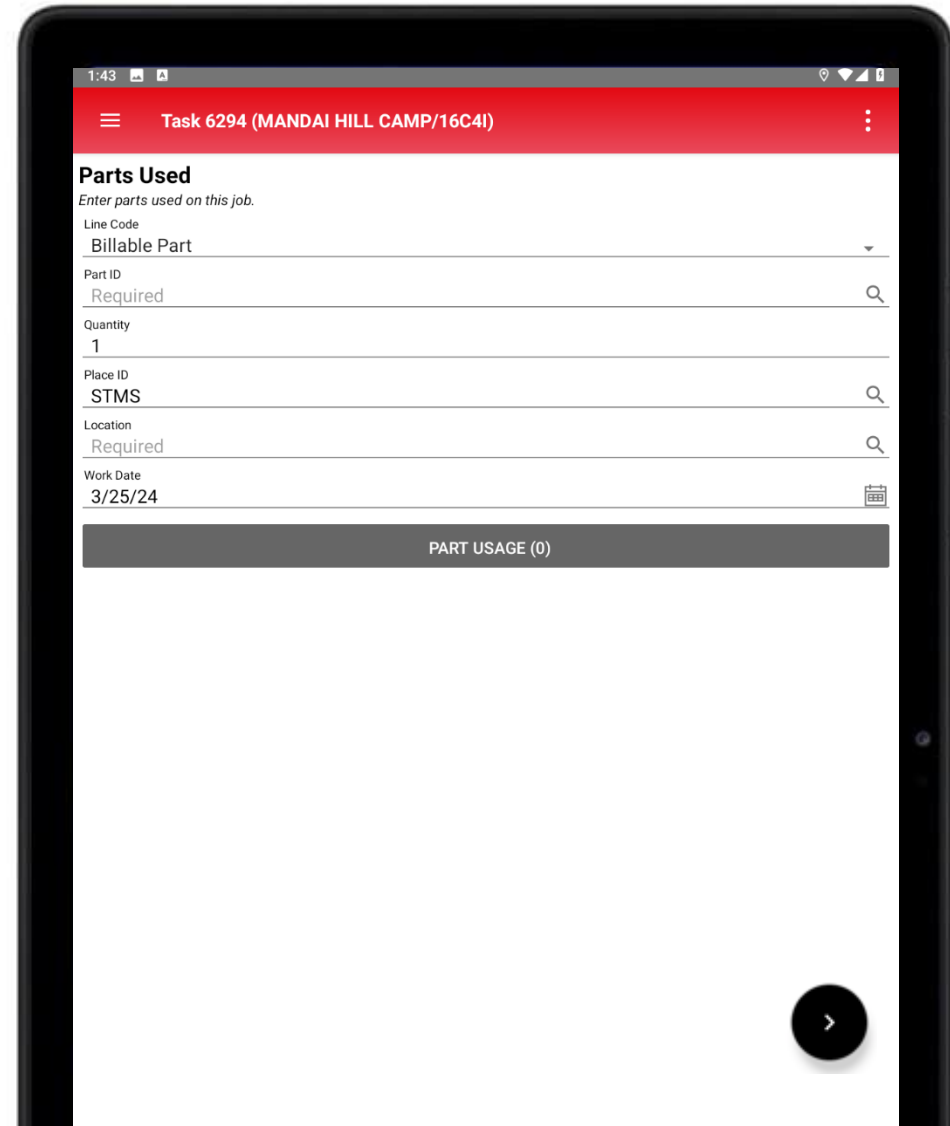
Servicing Onsite Service Request (2)

Remove Product (Optional) is when the product cannot be repaired on the spot and need to be removed from customer site and brought back to depot for servicing.

Proceed **Next** ⊙ to continue with the job task.
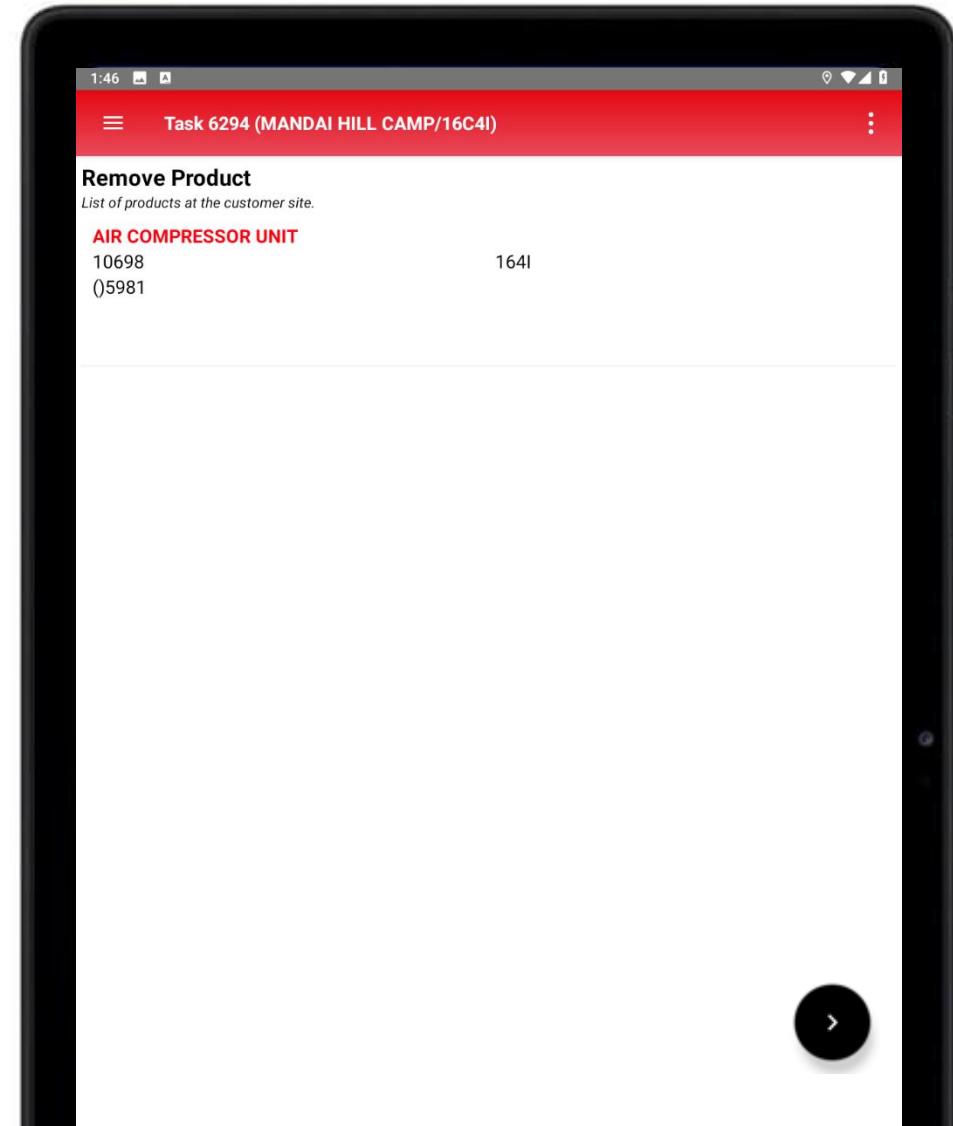
Servicing Onsite Service Request (3)

Customer Review is after customer has checked that the maintenance is completed and proceeds to sign off the task.
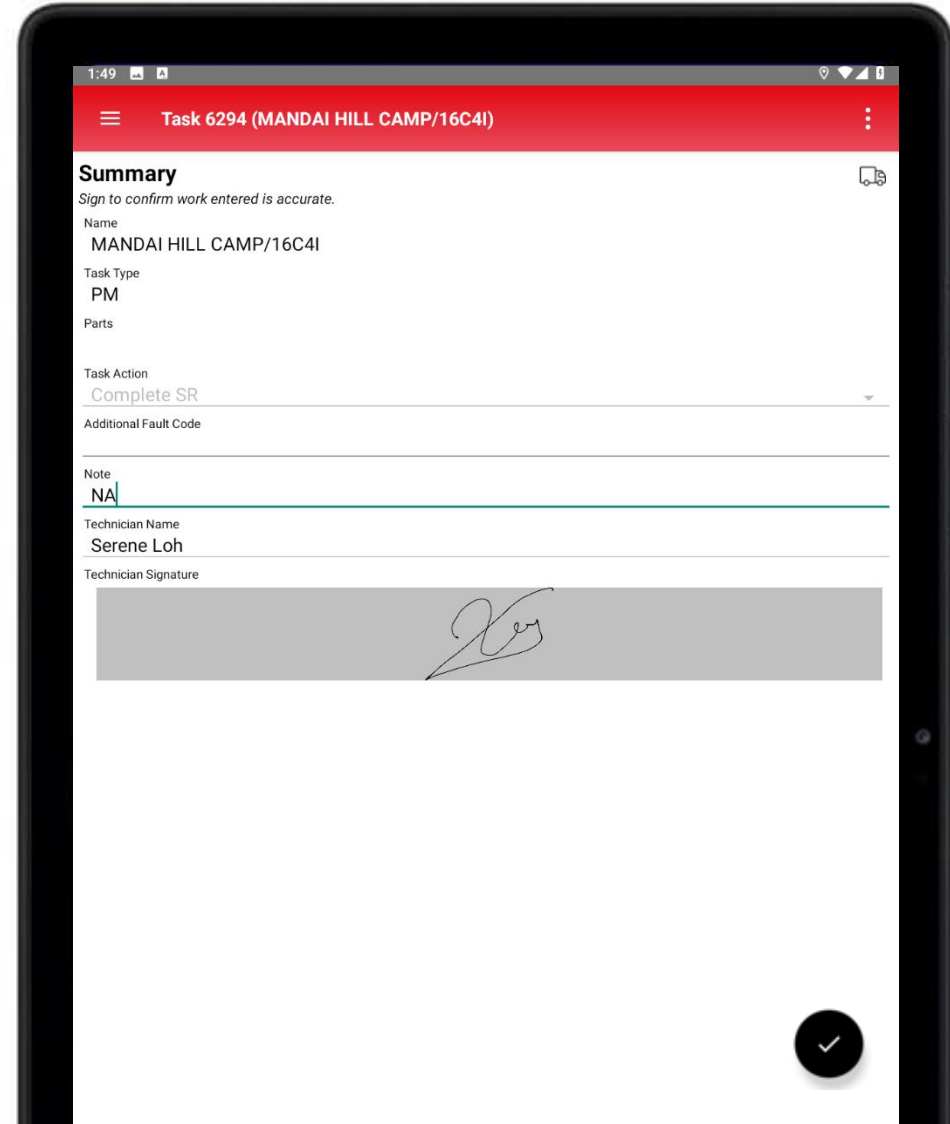
Once customer has filled in the required text fields and signed off, tap **Save** 💾 to update.
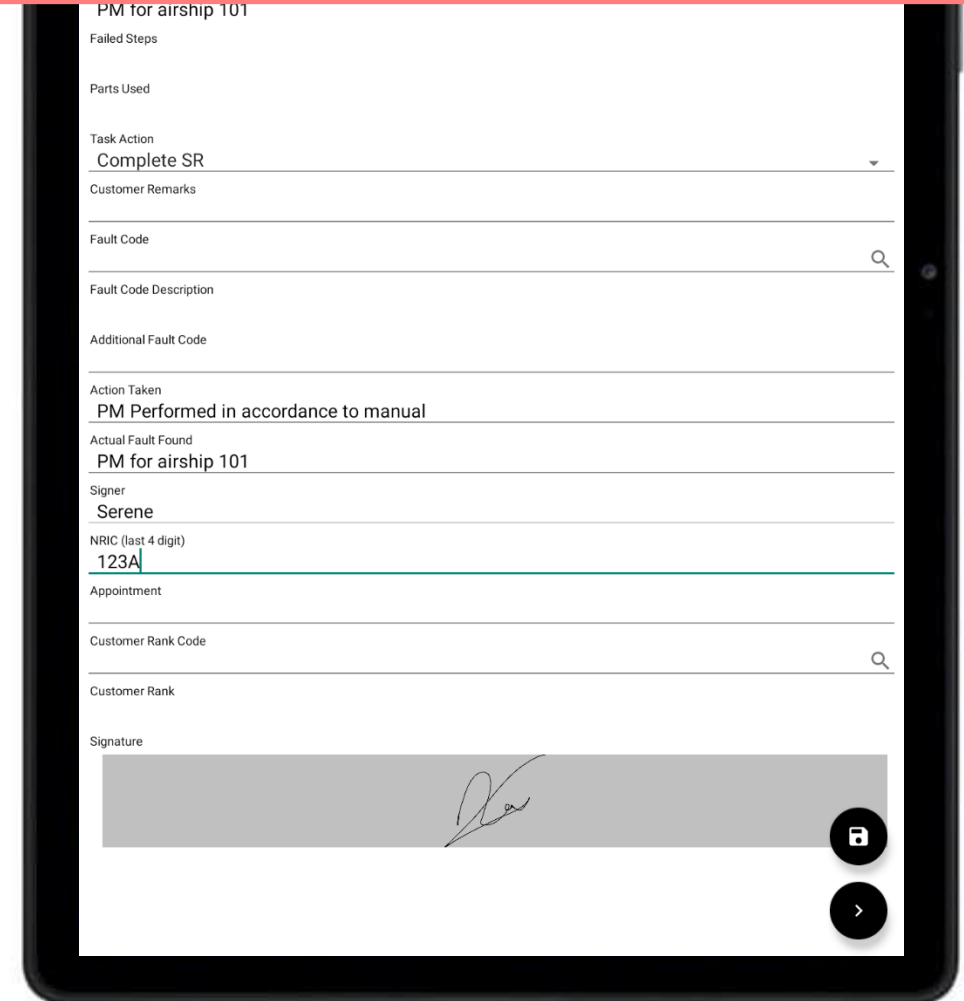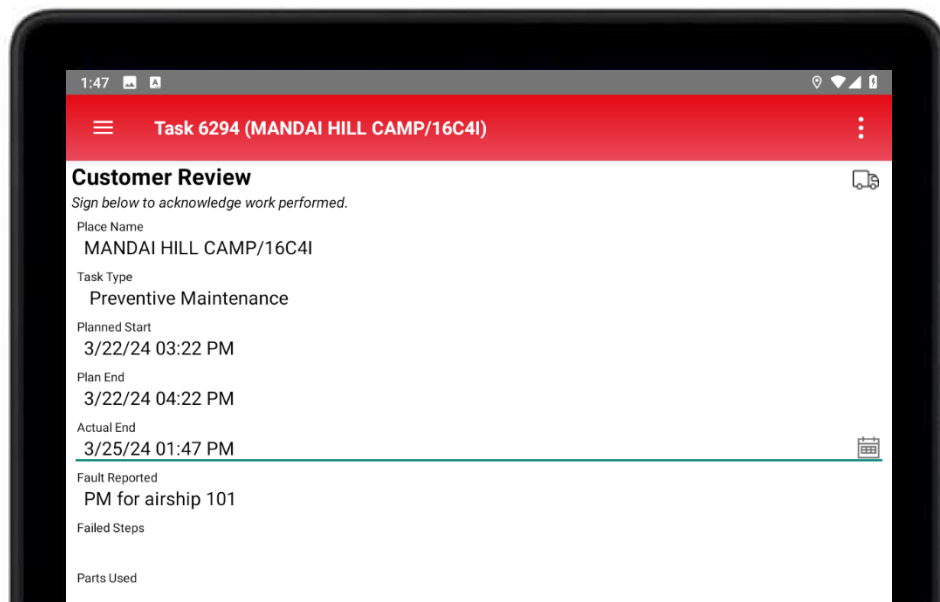
Servicing Onsite Service Request (4)

Summary is after customer has signed off the task and engineer does a check on the maintenance and work details are entered correctly.

After the engineer filled in the required text fields and signed off, tap **Confirm** ✓ to complete the task.

Servicing Onsite Service Request (5)

It will prompt for a final confirmation if the engineer wants to complete the job.

Tap **YES** to confirm.
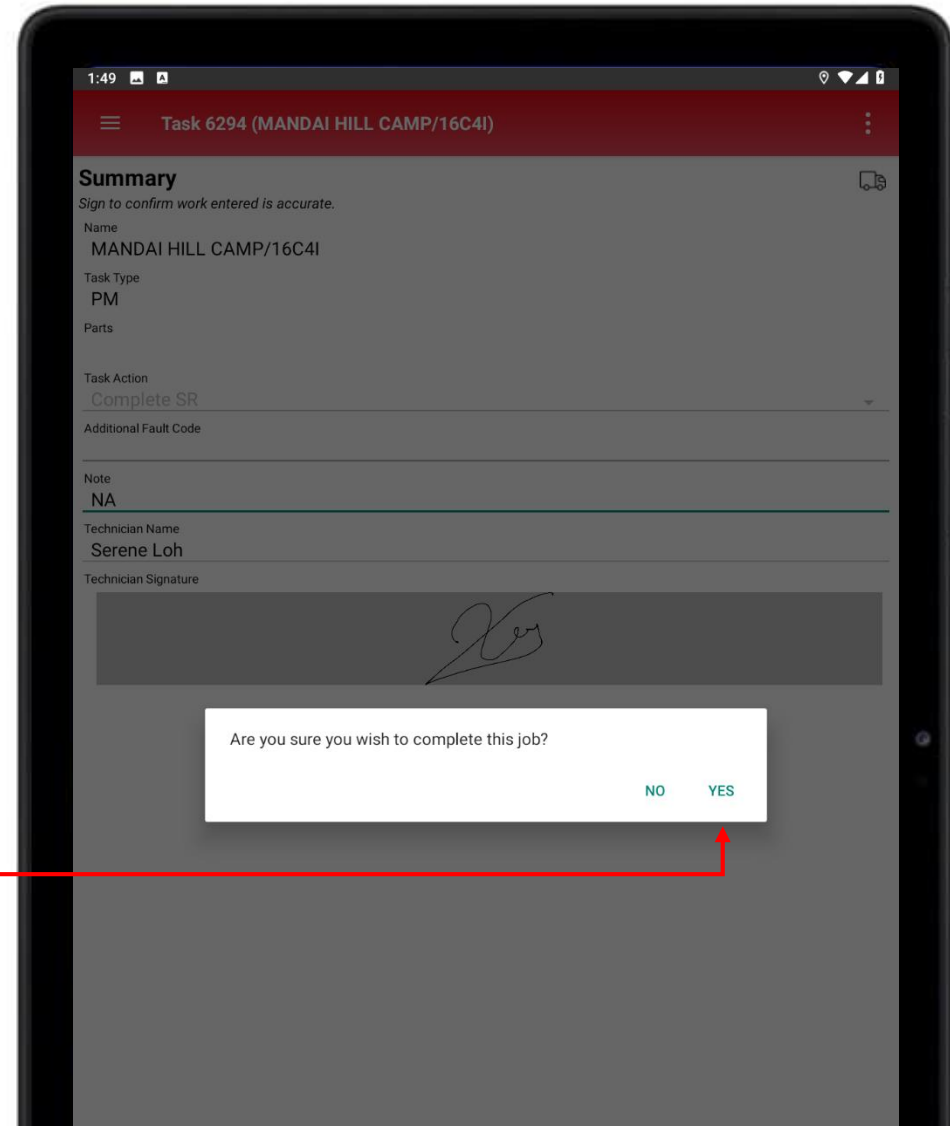
Service Report

- Customer Portal
- Download Service Report
- View Service Report

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Customer Portal

After task completed, customer can select **PDF** under **Reports** to download the report.

Download Service Report

It will open a Reports panel for customer to choose the available reports for downloading.

Tap **Download**.

View Service Report

Customer will be able to view the details on the service report in PDF format.

Thank You

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