

# Services

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# 1 Services

This screen is specific to Services.

You can create new services, edit them or delete them if you are a full admin user.

The screen only displays the data for your default site.

The screen allows you to filter the data by:

- Load ID.
- Job ID.
- Service ID.
- Service Type.
- Job Status.
- Job Group.
- Reg Number.
- VIN Number.
- SIM number.
- Customer Code.

Once you enter the filter information and click **Search**, the screen displays all matching service items in a results table below:

Q Find New

Load ID	Job ID	Service ID	Service Type	Job Status
Job code	Job Group	Reg Number	VIN Number	SIM Number
				Customer Code

Clear Q Search Create Excel Spreadsheet

Current Services Records Per Page: 10

Load	Job Id	Service ID	Service Type	Job Group	Job Code	REG	VIN	SIM	Status	Customer Code
GENL13	12345678DU	SID-L13504011-1	D	OTHER	GENL11501	Something	SN-5055232488800001		Cancelled	MAN_TRSPT
GENL13	12345678DU	SID-L13504011-2	I	OTHER	GENL11501	Something	SN-5055232488800002		Cancelled	MAN_TRSPT
GENL13	12345678DU	SID-L13504011-3	Service	OTHER	GENL11501	Something	SN-5055232488800003		Cancelled	MAN_TRSPT
GAPL03	GAPL03501	SID-GAPL02501-1	D	GAP	ZGPS3PL00000002717	Something	SN-5055232488800001		Pending	02717
GENL09	GENL09011	BX65EUV	Service	OTHER	GENL09-S01	BX65EUV			Complete	Cust001
GENL09	GENL09011	CK155BK	Service	OTHER	GENL09-S01	CK155BK			Cancelled	Cust001
GENL09	GENL09011	WC51935976	Service	OTHER	GENL09-S01	WC51935976			Cancelled	Cust001
GENL09	GENL09011	WC51935981	Service	OTHER	GENL09-S01	WC51935981			Cancelled	Cust001
GENL09	GENL09011	WV63XPY	Service	OTHER	GENL09-S01	WV63XPY			Cancelled	Cust001
GENL09	GENL09012	BX65EUV	Service	OTHER	GENL09-S02	BX65EUV			Complete	Cust002

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## Services/Service Items

Alternatively, if you click 'Create Excel Spreadsheet', the screen will export the service data to a Microsoft Excel spreadsheet. The functionality differs per the browser you have used to access the Admin system, but the likely result is the spreadsheet file will be offered for download.

Depending on the status of the line, the screen will colour the lines:

- Pending - No colour.
- Complete - Green.
- Cancelled - Red.

The screen will display a single line per Service Job and Item found.

You can sort each column by clicking on the column header - if you click again this will reverse the sort sequence.

If you click the *Details* button against each line, the screen will display the details of the specific Service or Service Item by calling the [Service Details](#) screen.

If the job is complete, you can view the Service Report by clicking the **Report** button against each Service Job line in the table at this status. From there you can email or print the service report.



## 1.1 New Service Items

The screen allows you to create a new Service and Service Item, by pressing the provided "New" button at the top of the screen.

*New Service/Service Item Pop-up*

You can enter the following details:

- Specific Service or Service-item related information, depending on configuration, such as:
  - ◆ *Reg Number.*
  - ◆ *Serial Number.*
  - ◆ *SIM Number.*
  - ◆ *Mileage.*
- *Job Group.*
- *Job Code* - the main unique job reference.
- *Load ID* - A drop-down list of available loads to which this service job can be assigned.
- *Planned Date and Time* - the planned arrival date and time.
- *Job Instruction* - Instructions for the driver/engineer.
- *Customer* - the customer code through a drop-down list, identifying the address from the customer.
- *Service ID* - the ID for the item being serviced or the service itself, depending on the operation.
- *Service Type* - selected from a drop-down list.

You can assign or de-assign the job from a load here, by changing the Load ID against the Job. 💡 **Note:** Only service jobs with a customer with (at least) a post code can be assigned, and only to Loads that are not in progress.

## 1.2 Editing Services/Service Items

You can edit Services and Service Items by clicking the **Select** button against the line. The screen will display the Edit pop-up screen, showing all the details against the service selected.



The screenshot shows a 'Details' window with several tabs: 'Details', 'Info UDF', 'Diagnosis UDF', 'Prewrite UDF', and 'Postwork UDF'. The 'Details' tab is active, displaying the following information:

- Job Id : GENL09011
- Reg Number : BX63EUV
- Serial No : [Empty]
- SIM Number : [Empty]
- Mileage : 0
- Job Group : OTHER
- Job Code : GENL09-501
- Load ID : GENL09
- Planned Date and Time : 22/03/2016 12:45
- Job Instruction : Ring 15 mins before arrival
- Customer : Customer Jones
- Service ID : BX63EUV
- Service Type : Service

*Edit Service/Service Item Pop-up*

The details the screen shows and allows to be edited here are the same as the New pop-up.

The screen may show multiple tabs for many purposes. These allow data to be viewed, edited or added, for example:

The screenshot shows the 'Info UDF' tab selected in the 'Details' window. The 'Info' section contains the following fields:

- Wash Code : Code 1
- Order No : [Empty]
- Driver Name : [Empty]
- Trailer No : [Empty]
- Department : Dept 1

*Info UDF Tab*

The screenshot shows the 'Postwork UDF' tab selected in the 'Details' window. The 'Feedback' section contains the following fields:

- Quality of Service : 1 - Very Satisfied
- Are you likely to use this service again?: Yes

*Postwork UDF Tab*

- **Info UDF** - User-defined Forms information, entered by the user when starting a service or service item.
- **Diagnosis UDF** - User-defined Forms information, entered by the user when completing a service or service item.
- **Prewrite UDF** - User-defined Forms information, entered by the user before starting a service or service item.
- **Postwork UDF** - User-defined Forms information, entered by the user after completing a service or service item.
- **Photos** - When a service is completed, the driver may have taken images if the service or service item is cancelled, or as part of the many UDF points. If so, this tab allows viewing of all the photos in a gallery. If you click the link to the photo from the other tabs, this **Photos** tab will open and show the related images. Any comments that may have been entered by the driver will be displayed for each image, along with a description of at what stage the image was taken.

