

A large, light blue geometric shape, resembling a stylized 'A' or a mountain peak, is positioned in the upper half of the page. It is composed of two triangles meeting at a central point.

Service Delivery
ServiceLink

USER GUIDE

Updated June 12, 2019

UPTAKE

****includes Service Scheduler***

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DISCLAIMER

We update ServiceLink frequently. This user guide will be updated on an ongoing basis and may have slightly outdated content due to the frequency of software updates. Please review the most current version of this guide regularly and with care.

TRADEMARKS

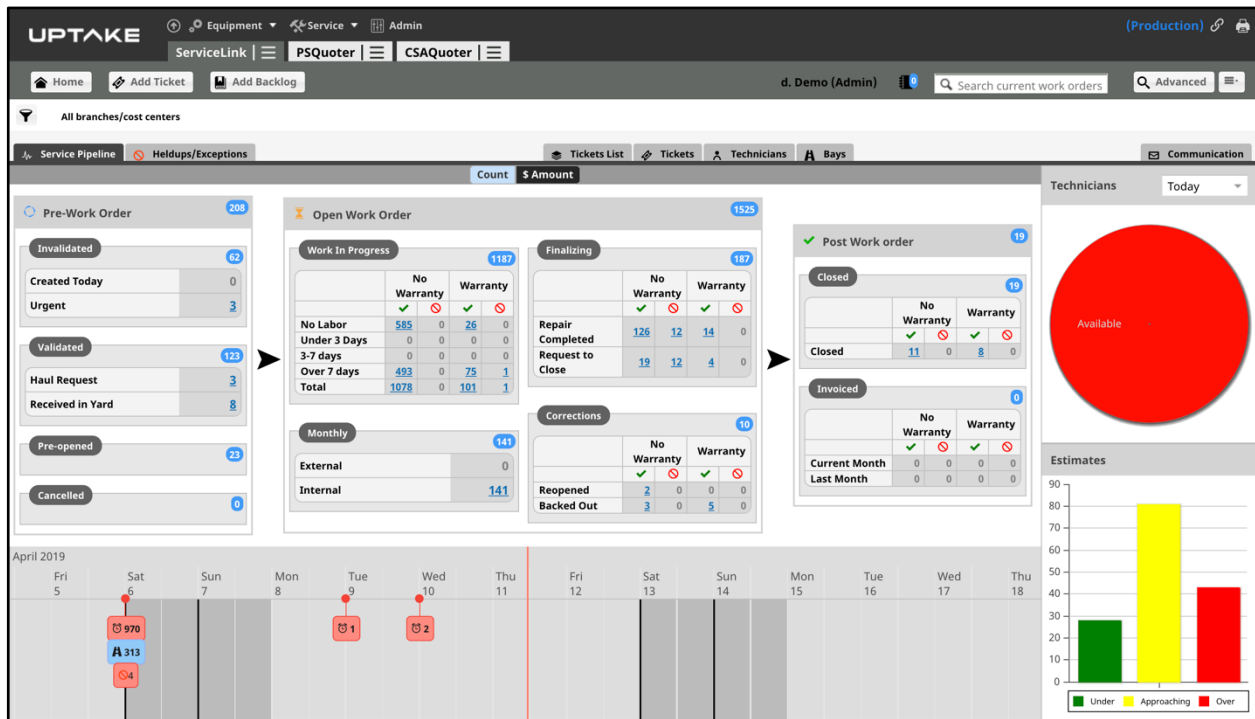
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CUSTOMIZATION

This user guide will show you how to use the ServiceLink application with the assumption that your dealership has made the migration to CloudLink and your ServiceLink application has been set up in a standard configuration. However, it should be noted that depending on your dealership's level of customization, or if your dealership hasn't migrated to CloudLink yet, your screens may look slightly different than those shown here.

INTRODUCTION

Welcome to ServiceLink. To access the application, log in to CloudLink with your Username and Password, then click the **[ENTER]** button under **ServiceLink**. You will be taken to the ServiceLink Home page.



NOTE: The Home page shown here is the Service Pipeline page. However, your Home page may be different depending on your user role.

Navigation



Access the navigation bar at the top of your screen at any time in ServiceLink. At the top left of the navigation are links to other Uptake applications you may have access to.

Click the Menu icon next to ServiceLink to access the different pages within ServiceLink.



Click the Chain-link icon to access your other Uptake applications, as well as your preferences and ServiceLink copyright information.



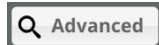
Click the Printer icon to generate a PDF of the current page, which can then be saved or emailed.

Use the three buttons at the left of the navigation bar to access your Home page, add a new ticket, or add a backlog from anywhere in ServiceLink.



Click the Blog icon to access any available blogs.

Use the Search bar next to the Blog icon to search for work orders/tickets. A minimum of three characters are required to begin searching.



Click the Advanced Search icon to refine your searches using more detailed filters.



Click the Recently Viewed icon next to Advanced Search to display the last 15 tickets you have viewed.

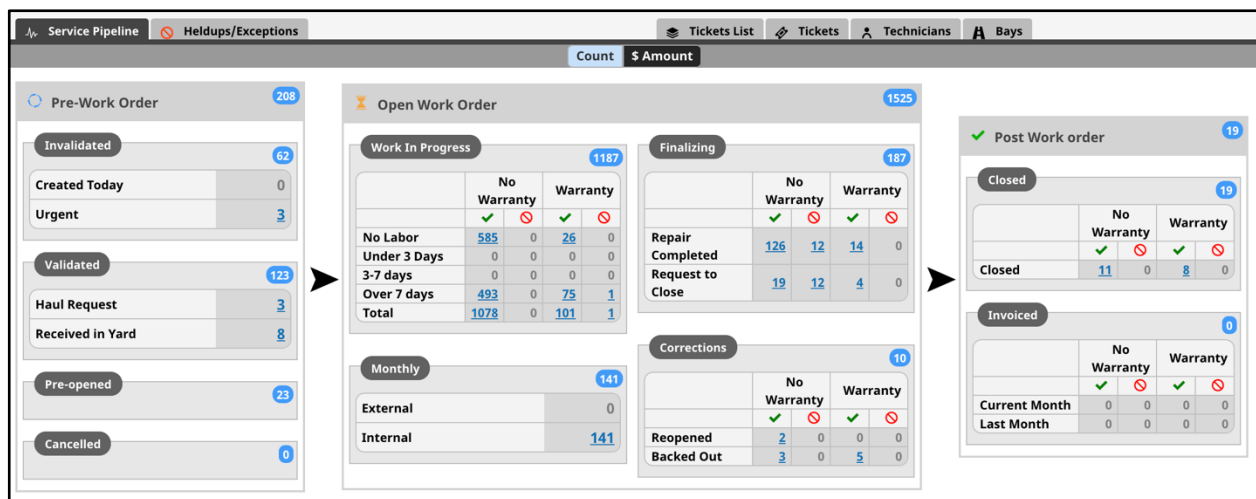


Click the Filter icon to select which Branch/Cost Center information is displayed.

Home

The Home page for ServiceLink is the Service Pipeline page. The Service Pipeline pages gives you visibility into all the work that is currently in progress. Tickets begin on the left side of the Pipeline and move to the right as the repair is completed.

Service Pipeline



The following are statuses in the Service Pipeline.

Pre-Work Order

Invalidated

Tickets that are automatically generated by the dealership ERP and by other Uptake applications. These tickets remain Invalidated until reviewed by the responsible supervisor and changed to Validated.

Validated

Tickets that have been reviewed by the responsible supervisor and changed to Validated. Manually created tickets can be set automatically to Validated.

Pre-Opened

Requests that have been denied and returned in Estimated status.

Cancelled

Tickets that have been Cancelled by the responsible supervisor.

Open Work Order

Work In Progress

Work order tickets that have been created in the ERP and are currently being worked on.

Monthly

Work orders that automatically close, invoice, and reopen each month.

Finalizing

Work orders that have been completed and are waiting to be reviewed by the responsible supervisor.

Corrections

Work orders that have been backed out or reopened.

Post Work Order

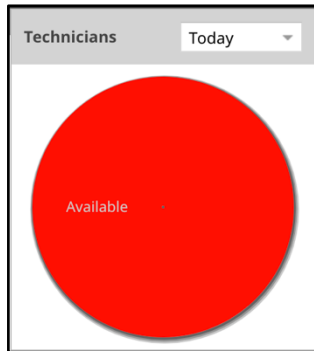
Closed

Work orders that have been completed and closed but not yet invoiced.

Invoiced

Work orders that have been completed and closed and have had invoices sent out.

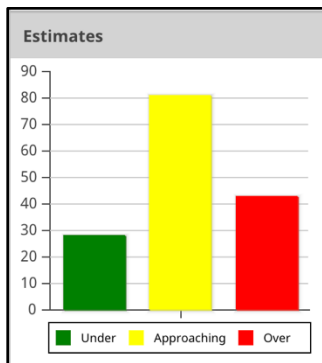
Technicians



The Technicians pie chart represents the state of the technician schedule for the current day. Technicians scheduled to work on a Revenue customer work order will be represented in Green, technicians scheduled to work on an internal work order will be Yellow, technicians not available to be redeployed will be Grey, and technicians not scheduled or available to be redeployed will be Red.

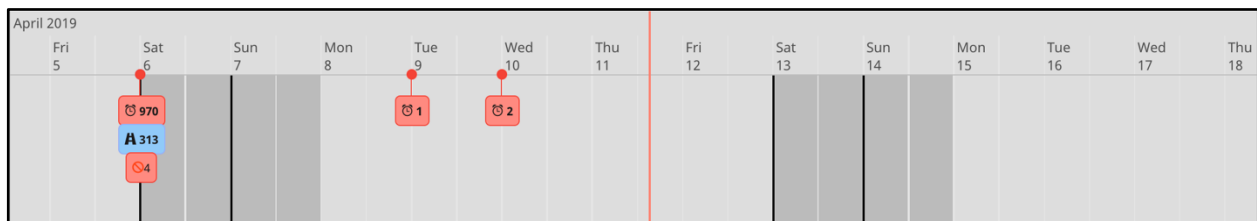
Click the drop-down arrow to display the state of the technician schedule for tomorrow.

Estimates



The Estimates bar chart represents the number of tickets that are below, approaching, and exceeding the financial estimate.

Timeline



The Timeline displays the Promise Dates and Estimated Arrival Dates of tickets. The Promise Dates are represented with the alarm clock icon while the Estimated Arrival Dates display a road icon. As tickets approach the current date, they turn from Green to Yellow, then to Red once they exceed the Promise Date.

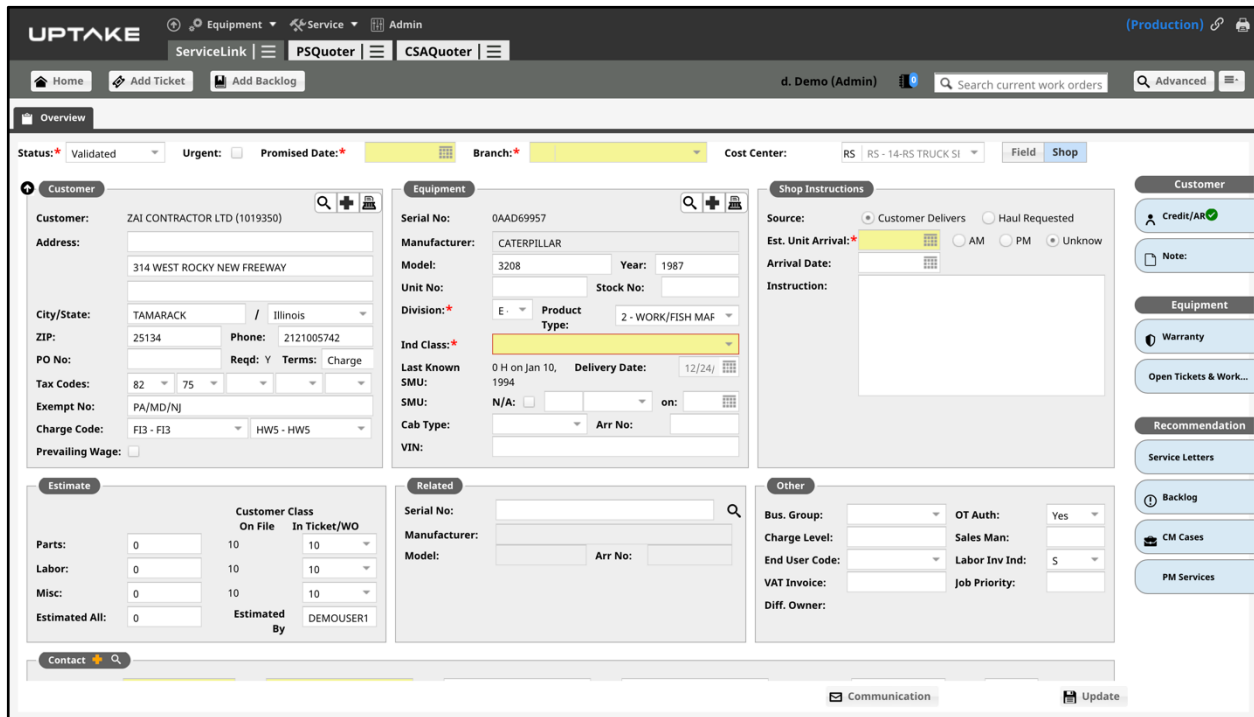
Add Ticket

To manually add a new ticket:

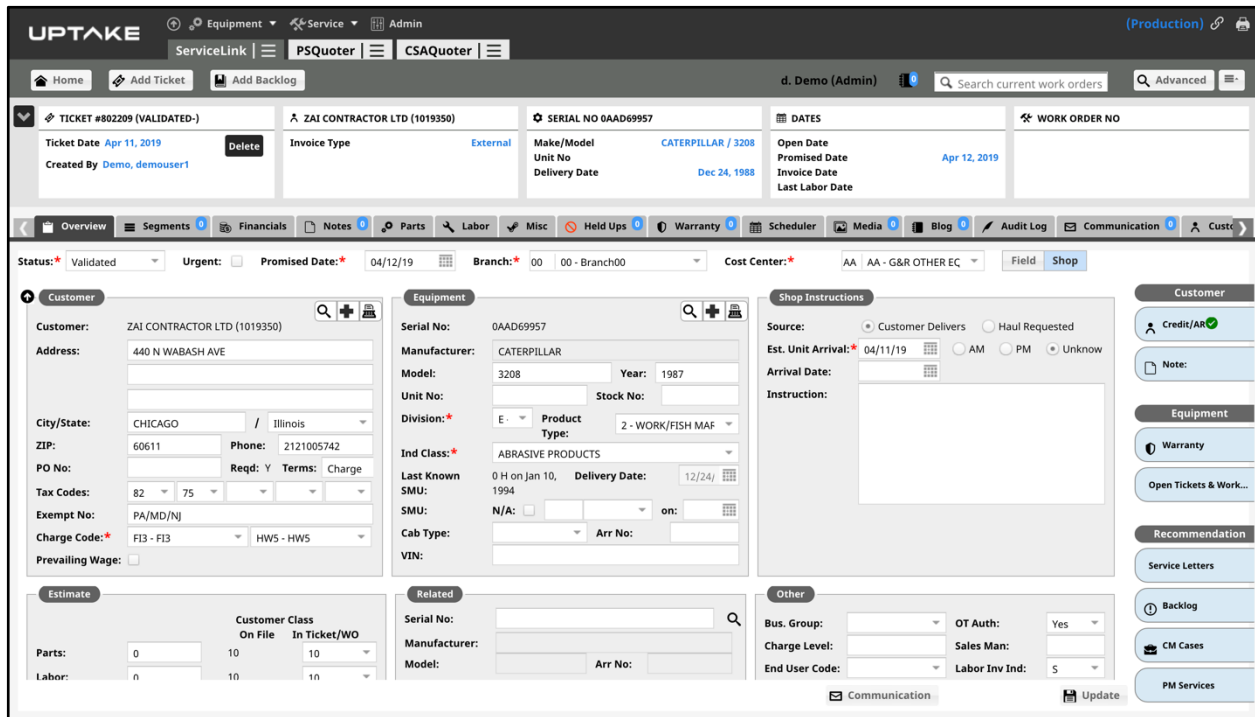
1. Click the **[Add Ticket]** button in the top navigation bar.
2. Use the Search bar to search for a piece of equipment. A minimum of three characters are required to begin searching.

Action	Customer No.	Customer	StoreGrp	Make Code	Manufacturer	Equipment No.	Serial No.	Stock No.	Model	Year
	1019350	ZAI CONTRACTOR LTD 314 West Rocky New Freeway		AA	CATERPILLAR		0AAD69957		3208	1987
	HEAVEN	NFB CONSTRUCTION INC 927 North Rocky Nobel Blvd.		AA	CATERPILLAR		0AAM72225	M2018381	3208	1992
	HEAVEN	NFB CONSTRUCTION INC 927 North Rocky Nobel Blvd.		AA	CATERPILLAR	00329	0AAN69957		3208	1985
	HEAVEN	NFB CONSTRUCTION INC 927 North Rocky Nobel Blvd.		AA	CATERPILLAR	828282	0AAO45572		3208	
	1723525	VVD CONTRACTOR LTD 375 West Green Nobel St.		AA	CATERPILLAR	001-2	0AAR20718		3208	1988
	1756400	YOM EXCAVATING & UNDERGROUND 151 West Nobel Boulevard		AA	CATERPILLAR		0AAY69957	M0780320	924HZ	2010
	HEAVEN	NFB CONSTRUCTION INC 927 North Rocky Nobel Blvd.		AA	CATERPILLAR		0ABD26272	M0103200	3126	1999
	HEAVEN	NFB CONSTRUCTION INC 927 North Rocky Nobel Blvd.		AA	CATERPILLAR		0ABE45572		3208TA	1988
	1501330	LFI CONSTRUCTION INC 716 South White Second Boulevard		AA	CATERPILLAR		0ABF20718	M6641203	320BL	1997
	HEAVEN	NFB CONSTRUCTION INC 927 North Rocky Nobel Blvd.		AA	CATERPILLAR		0ABG93489	M3676067	3208	1997
	HEAVEN	NFB CONSTRUCTION INC 927 North Rocky Nobel Blvd.		AA	CATERPILLAR	111111	0ABP45572		3208	1989
	HEAVEN	NFB CONSTRUCTION INC		AA	CATERPILLAR	2-114	0ABO72225	M6077718	320CLU	2002
Total Records:		3028								

3. Use the tabs at the top of the search screen to filter your results. You can also use the Eye icon at the top right to customize which columns of information are displayed.
4. If both the customer and equipment information is correct, click the Person-and-gear icon to the left to create a ticket with that information. If only the customer information is correct, click the Person icon. If only the equipment information is correct, click the Gear icon.
5. If neither the customer nor equipment information is correct, click the **[Create empty Ticket]** button at the top of the screen to create a blank ticket.



6. Enter all required information into the Ticket Overview fields. Note that any customer or equipment information you deemed correct is automatically filled in.
7. Enter Shop Instructions information if the ticket is for a shop, or click the **[Field]** button at the top of the page to enter Job Site information if the work will take place in the field.
8. Use the tabs at the right of the page to view/add any Customer, Equipment, and Recommendation information to the ticket.
9. Enter Contact information and set the frequency and method of communication.
10. Click the Plus icon in the Symptom section, then enter all required information into the New Symptom form. Click **[Save]** to save the new symptom.
11. Click **[Update]** at the bottom right of the page to create the ticket.



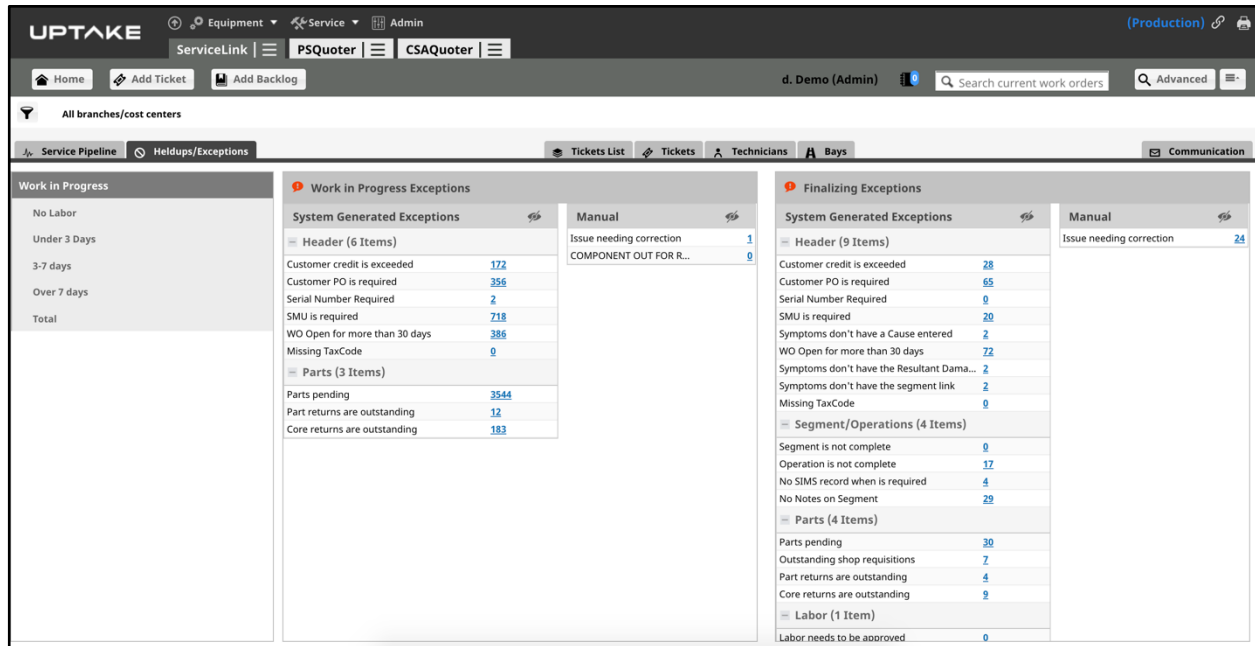
12. Click the Segments tab, then click **[New Segment]**. The New Segment form will display.
13. You can add a new segment from a Template, Work Order, Standard Job, DBS Documents, or Manually.
14. Enter all required fields, then click **[Create]**. Add as many segments as needed.
15. Click the **[Open]** button at the top right of the page to open the work order. Note that all required fields must be entered, segments added, and the status set to Validated before the button will appear.

NOTE: The other tabs in the Work Order page are outlined throughout the rest of this user guide.

MANAGEMENT

Heldups/Exceptions

Click the **Heldups/Exceptions** link under the ServiceLink menu in the top navigation bar, or click the Heldups/Exceptions tab on the Home page. You will be taken to the Heldups/Exceptions overview page.



The Heldups/Exceptions page displays an overview of all current Hold Ups and Exceptions, organized by what stage their respective work order is in. A work order may be held up for a number of different reasons, ranging from outstanding parts documents to waiting on a customer to make a decision regarding the repair.

There are two types of Hold Ups:

- **Manual:** Placed on a work order by a user in order to show that the work order has been delayed for a specific reason, such as having to wait for a goodwill authorization code or a scheduled test of the machine to ensure the repair was completed correctly.
- **System Generated:** A function of the application, such as having an outstanding core return or an SMU reading that is less than the last known reading. In addition, some of the Hold Up reasons are hard stops and others are soft stops. A hard stop is one that will keep the work order from being closed, whereas a soft stop is a notification that a condition exists but will not hinder closing.

Use the tabs at the left of the page to filter the hold ups and exceptions by labor amount. Click on a number to view a detailed list of each work order with that specific hold up or exception.

Click on an individual work order to display its Held Ups tab.

The screenshot displays the 'Held Ups' tab for a work order. The top navigation bar includes 'UPTAKE', 'ServiceLink', and 'Admin'. Below the navigation bar, there are tabs for 'Overview', 'Segments', 'Financials', 'Notes', 'Parts', 'Labor', 'Misc', 'Held Ups', 'Warranty', 'Scheduler', 'Media', 'Blog', 'Audit Log', 'Communication', and 'Customer'. The 'Held Ups' tab is active, showing a table with columns: Reason, Description, Due Date, Entered By, Age, Status, Resolution, Resolved By, and Last updated by. Below the table, there is a 'System Generated' section with a table of closing checklist items, including 'Customer credit is exceeded', 'Customer PO is required', 'Serial Number Required', 'SMU is required', 'Symptoms don't have a Cause entered', 'WO Open for more than 30 days', 'Symptoms don't have the Resultant Damage entered', 'Symptoms don't have the segment link', and 'Missing TaxCode'. Each item has a count of exceptions, a 'Hard Stop' checkbox, and a recommended action.

This tab displays detailed information regarding all hold ups and exceptions for an individual work order, along with recommended actions. Filter the page using the header tabs.

Click the **[Add]** button at the top right of the page to manually add a new hold up. Enter all required information into the form and then click **[Save]**.

NOTE: A work order cannot be closed until all the hard stop hold-up reasons have been resolved.

Templates

Click the **Templates** link under the ServiceLink menu in the top navigation bar. You will be taken to the Templates page.

No	Description	Make	Model	Store	Cost Center	Shop Field	Change	Add Template
02	standard segements			Branch00	G&R BENSALEM MAIN SHOP	Shop	Apr 25, 2017	Create Ticket
03	PREP FOR DEMO	CATERPILLAR		Branch00	G&R NEW EQUIP SHOP	Shop	Apr 25, 2017	Create Ticket
04	PREP FOR RENTAL			Branch00	G&R NEW EQUIP SHOP	Shop	Apr 25, 2017	Create Ticket
05	pdi/PROD LINK	CATERPILLAR		Branch00	G&R NEW EQUIP SHOP	Shop	May 04, 2017	Create Ticket
07	UNERCARRIAGE TURN	CATERPILLAR	D5G	Branch00	G&R BENSALEM MAIN SHOP	Shop	Oct 13, 2017	Create Ticket
09	RENTAL RETURN	CATERPILLAR	ALL	Branch00	G&R NEW EQUIP SHOP	Shop	Apr 17, 2017	Create Ticket
1	MARINE TA1 INSPECTION	CATERPILLAR		Branch15	16-YS MARINE SERVICE RE	Field	Jul 06, 2017	Create Ticket
15	pdi	CATERPILLAR	980	Branch00	G&R NEW EQUIP SHOP	Shop	Aug 11, 2018	Create Ticket
2	MARINE ADV. WTY INSPECTION	CATERPILLAR		Branch15	16-YS MARINE SERVICE RE	Field	Jul 06, 2017	Create Ticket
22	TA1			Branch07	HAMMONTON FIELD SERVICE	Field	Jan 13, 2018	Create Ticket
3	MARINE 1000 HR SERVICE			Branch15	16-YS MARINE SERVICE RE	Field	Jul 06, 2017	Create Ticket
4	MARINE 500 HOUR SERVICE	CATERPILLAR		Branch15	16-YS MARINE SERVICE RE	Field	Jul 06, 2017	Create Ticket
5	MARINE ENGINE SURVEY	CATERPILLAR		Branch15	16-YS MARINE SERVICE RE	Field	Jul 06, 2017	Create Ticket
55	TRUCK WORK ORDER		Peterbuilt	Branch04	G&R W/C F/5	Field	Aug 25, 2017	Create Ticket
6	MARINE BASIC WTY W/O MS36	CATERPILLAR		Branch15	16-YS MARINE SERVICE RE	Field	Jul 06, 2017	Create Ticket
7	MARINE ESC WITH NO DEDUCTIBLE WTY FP66	CATERPILLAR		Branch15	16-YS MARINE SERVICE RE	Field	Jul 06, 2017	Create Ticket
8	MARINE ESC WITH DEDUCTIBLE FP59	CATERPILLAR		Branch15	16-YS MARINE SERVICE RE	Field	Jul 06, 2017	Create Ticket
EM-Billing	Product Link Billing				REP YARD WAREHOUSE	Shop	Mar 02, 2018	Create Ticket
EM-Install	Install Product Link			Branch18	EM SOLUTIONS CENTER	Field	Sep 29, 2017	Create Ticket
EM-Part-00	Order Parts in Bensalem			Branch00	G&R FIELD SVS BENSALEM	Field	Mar 02, 2018	Create Ticket

This page displays a list of all ticket templates that you’ve created. Click on a template number to view the template’s details, edit or delete the template, or add a new segment to the template.

Click the **[Create Ticket]** button to begin creating a new ticket using a template.

To create a new template:

1. Click the **[Add Template]** button at the top right of the page.
2. Enter all required information into the New Template form.
3. Click **[Save]**. You will be taken to the template’s details page where you can edit, delete, or add new segments to your template.

Labor Approval

Click the **Labor Approval** link under the ServiceLink menu in the top navigation bar. You will be taken to the Labor Approval page.

Date	Technician	Ticket No.	WO	Cust.	Model	Seg	Opn	Serial No	Charge Code	S F T	Hrs	DBS Hrs	Overtime	From	To	A/🗑️	
Jan 18, 2019	Sandra Doming...	800275	W1223435	1628...	328DLCR	01-REBEARING & RESEAL...		ORMX00612	CDL	1	1.00	8	--	09:00	10:00	🗑️	
Jan 25, 2019	Sandra Doming...	799431	W5429664	G00...		CS-ALLOW TIME CO HOLL...			CDL	1	8.00	0	--	07:00	15:00	🗑️	
Jan 25, 2019	Aaron Houston	799431	W5429664	G00...		CS-ALLOW TIME CO HOLL...			CDL	1	8.00	0	--	07:00	15:00	🗑️	
Jan 25, 2019	Erik Riley	799431	W5429664	G00...		CS-ALLOW TIME CO HOLL...			CDL	1	8.00	0	--	07:00	15:00	🗑️	
Jan 25, 2019	Tawana Bender	799431	W5429664	G00...		CS-ALLOW TIME CO HOLL...			CDL	1	8.00	0	--	07:00	15:00	🗑️	
Jan 25, 2019	Jim Porter	799431	W5429664	G00...		MS-ALLOW TIME CO HOLL...			CDL	1	5.00	0	--	07:00	12:00	🗑️	
Jan 25, 2019	Jesse Cole	799431	W5429664	G00...		CS-ALLOW TIME CO HOLL...			CDL	2	8.00	0	--	10:00	18:00	🗑️	
Jan 25, 2019	Jim Porter	799431	W5429664	G00...		CS-ALLOW TIME CO HOLL...			CDL	1	3.00	0	--	12:30	15:30	🗑️	
Jan 26, 2019	Sandra Doming...	799431	W5429664	G00...		CS-ALLOW TIME CO HOLL...			CDL	1	8.00	0	--	07:00	15:00	🗑️	
Jan 26, 2019	Aaron Houston	799431	W5429664	G00...		CS-ALLOW TIME CO HOLL...			CDL	1	8.00	0	--	07:00	15:00	🗑️	
Jan 26, 2019	Erik Riley	799431	W5429664	G00...		CS-ALLOW TIME CO HOLL...			CDL	1	8.00	0	--	07:00	15:00	🗑️	
Jan 26, 2019	Tawana Bender	799431	W5429664	G00...		CS-ALLOW TIME CO HOLL...			CDL	1	8.00	0	--	07:00	15:00	🗑️	
Jan 26, 2019	Harold Valenzuela	799431	W5429664	G00...		CS-ALLOW TIME CO HOLL...			CDL	1	8.00	8	--	07:00	15:00	🗑️	
Total: 35											216.58	112.00					

This page displays a detailed list of all labor currently awaiting approval. To filter the list, select your desired filters from the drop-down menus at the top of the page and then click **[Search]**. Click **[Reset]** to remove the filters.

Approving/Rejecting Labor:

- If all submitted labor in the list is correct, check the box in the header row at the top to select all labor in the list. Then click **[Approve]** to approve all labor.
- You can also approve labor individually by checking individual boxes and clicking **[Approve]** for each one.
- To reject labor, check the box next the labor you want to reject and click **[Reject]**. A popup window will appear where you can enter a rejection reason.

Labor Summary

Click the **Labor Summary** link under the ServiceLink menu in the top navigation bar. The Labor Weekly Summary page displays.

Labor Weekly Summary Time Period: Mar 31 to Apr 06 < This Week > 04/06/19

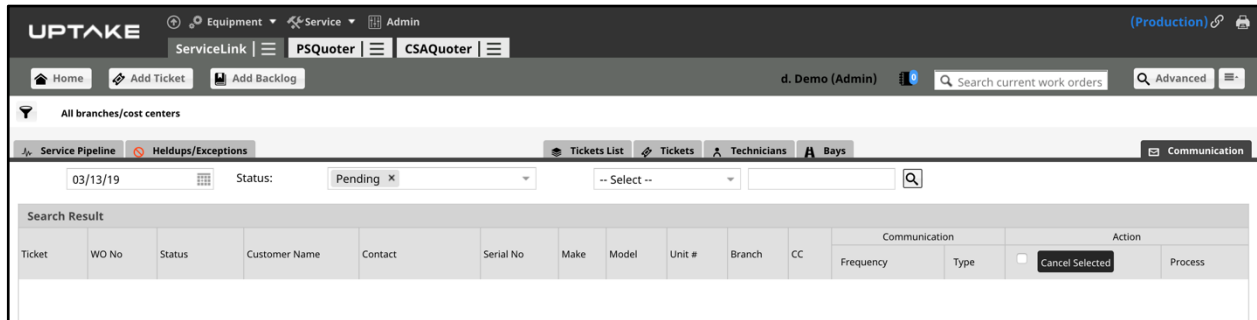
	SL Hrs Worked			DBS WO Hours		Hrs Sched	Sched Eff (%)	Sunday			Monday			Tuesday			Wednesday			Thursday			Friday			Saturday										
	Worked	Hours	VAR	Sched	Eff (%)			Wrk	Appr	VAR	Wrk	Appr	VAR	Wrk	Appr	VAR	Wrk	Appr	VAR	Wrk	Appr	VAR	Wrk	Appr	VAR	Wrk	Appr	VAR								
Aaron Houston	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Abdul Ruiz	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Aileen Rice	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Alberto Kane	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Alex Huerta	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Alicia Tapia	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Alma Hamilton	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Alma Roth	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Alma Zuniga	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Alonzo Ibarra	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Alonzo Pittman	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Alonzo Skinner	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Anitra Turner	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Arnoldo Howard	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Athena Rivers	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Athena Werner	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Betty Mac Donald	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

This page displays information regarding each worker’s scheduled labor hours, the hours they actually worked, their approved work hours, and the variance between their scheduled and worked hours.

Use the left and right arrows or click the calendar icon to display a different week in the table. Click the Gear icon next to the calendar to select which fields should be visible and what order they should be displayed.

Customer Communication

Click the **Customer Communication** link under the ServiceLink menu in the top navigation bar, or click the Communication tab on the Home page. The Communication page displays.



This page displays details regarding customer communications for a selected date. Use the calendar at the top left of the page to change the date. Filter the table by selecting from the drop-down menus at the top of the page and then clicking the Search icon.

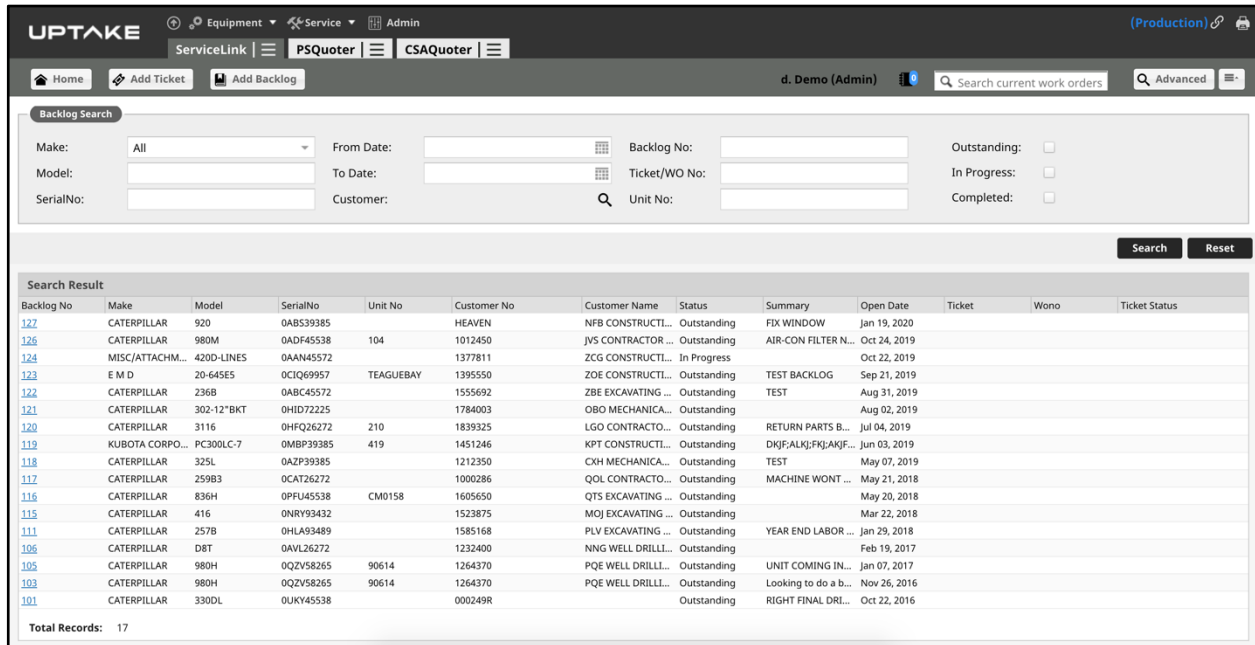
Communications can be cancelled by checking the box next to the communication and clicking the **[Cancel Selected]** button. All communications for a selected date can be cancelled at once by checking the box in the header of the table and clicking the **[Cancel Selected]** button.

Click the **[Process]** button to open the communication processing window, where you can edit the text and details of a communication.

You can also perform the same functions within an individual work order's Communication tab, which will display communications for that specific work order.

Backlog

Click the **Backlog** link under the ServiceLink menu in the top navigation bar. The Backlog page displays.



Search for backlog tickets using the Backlog Search fields at the top of the page. Once your search parameters are entered, click the **[Search]** button. Your results will be displayed in the table below. Click the **[Reset]** button to clear your search.

Click on a Backlog Number to view details regarding that specific backlog ticket.

Add Backlog

To create a new backlog ticket:

1. Click the **[Add Backlog]** button in the top navigation bar.
2. Follow the same steps as you would to create a new ticket. For more information, see the **Add Ticket** section.

SCHEDULER

Tickets

Click the **Tickets** link under the ServiceLink menu in the top navigation bar, or click the Tickets tab on the Home page. The tickets page displays.

This page displays details regarding all tickets scheduled to be worked on over the current week, along with a list of unscheduled tickets to the right. Use the buttons above the schedule to view different weeks or months, or use the drop-down menu to change how many days are displayed at once. You can also filter the schedule by individual technicians.

Click the **[Bays]** or **[Technicians]** buttons at the top left to display the schedules for individual Bays or Technicians.

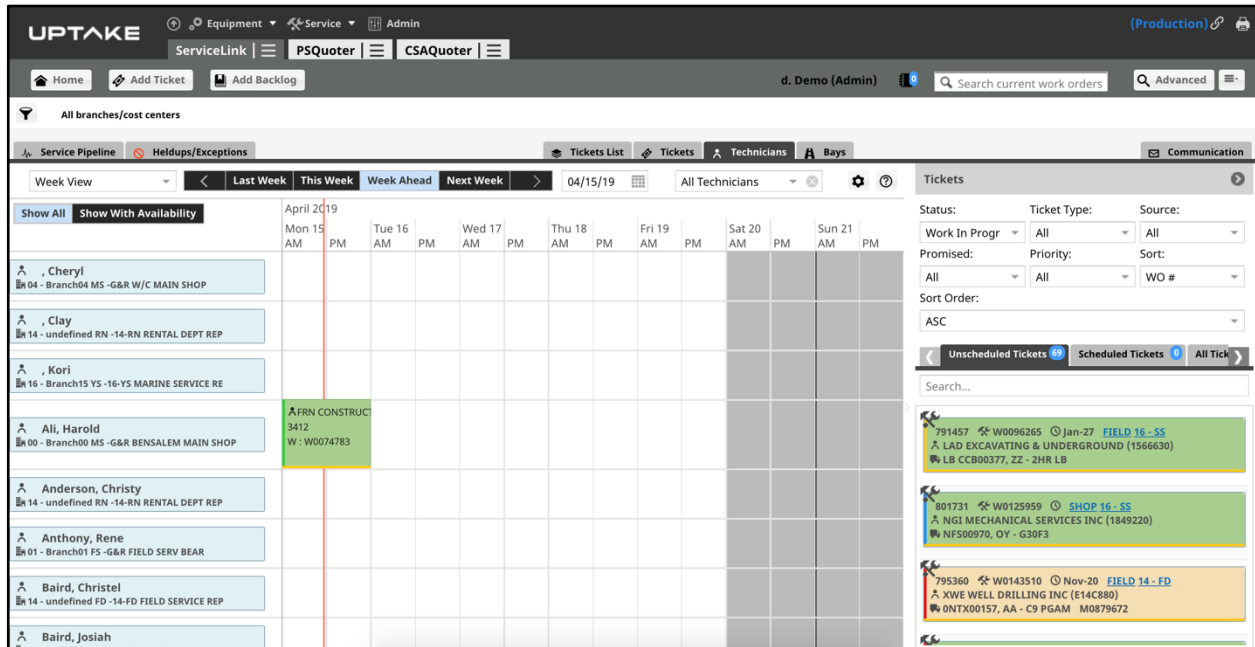
Schedule a Ticket

To schedule a ticket:

1. Drag and drop a ticket from the Unscheduled tickets section into the AM or PM area of the day you want to schedule it. If you're in the Scheduler tab of an individual work order, right click in the schedule and click **[Add Event]**. The Add Event window will display.
2. Select a Technician and a Bay from the drop-down menus.
3. If necessary, edit the Date and Time the ticket will be scheduled. You can also add a Blog entry for the technician if needed.
4. Click **[Save]** to schedule the ticket.

Technicians

Click the **Technicians** link under the ServiceLink menu in the top navigation bar, or click the Technicians tab on the Home page. The Technicians page displays.



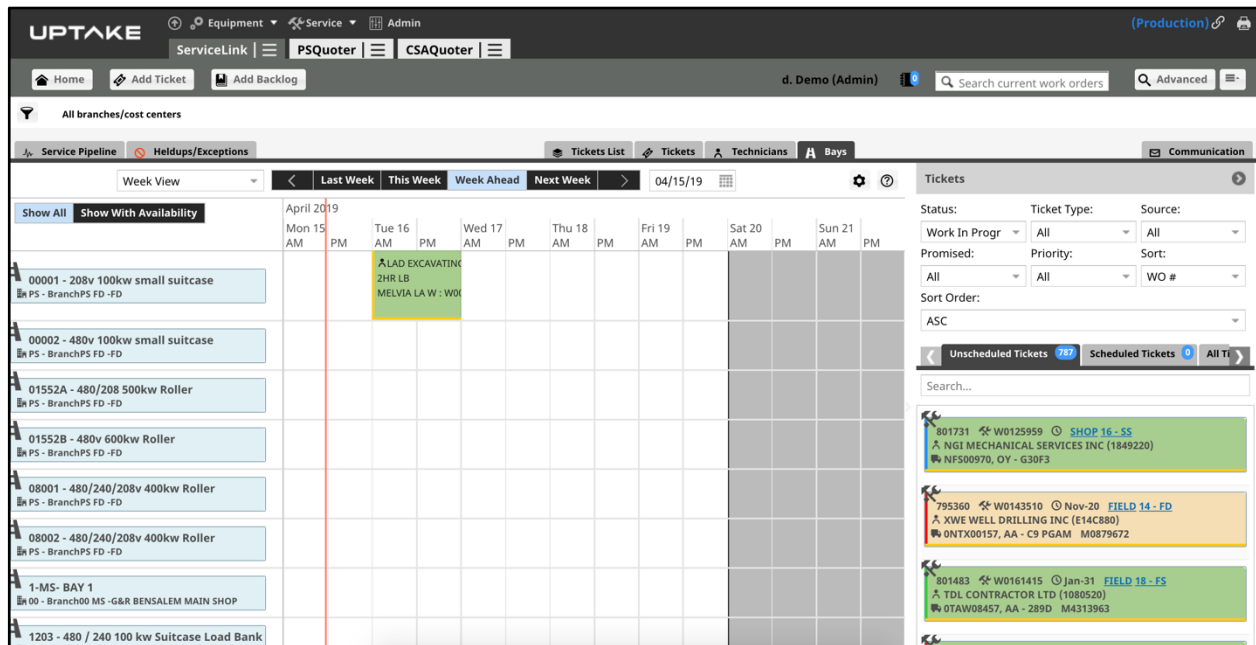
This page displays the same basic information as the Tickets page, but is organized by individual technicians. Use the buttons above the schedule to view different weeks or months, or use the drop-down menu to change how many days are displayed at once.

Click the **[Show All]** button to display all technicians, or click the **[Show With Availability]** button to only show technicians with available time slots.

To schedule a ticket, follow the same procedure described in the Schedule a Ticket section of this guide.

Bays

Click the **Bays** link under the ServiceLink menu in the top navigation bar, or click the Bays tab on the Home page. The Bays page displays.



This page displays the same basic information as the Tickets page, but is organized by individual bays. Use the buttons above the schedule to view different weeks or months, or use the drop-down menu to change how many days are displayed at once.

Click the **[Show All]** button to display all bays, or click the **[Show With Availability]** button to only show bays with available time slots.

To schedule a ticket, follow the same procedure described in the Schedule a Ticket section of this guide.

TECHNICIAN

Dashboard

Click the **Dashboard** link under the ServiceLink menu in the top navigation bar. The Technician Dashboard page displays.

The screenshot shows the Uptake Technician Dashboard for Aaron Houston. At the top, there's a navigation bar with 'ServiceLink', 'PSQuoter', and 'CSAQuoter'. Below that, a summary row shows: Assigned: 0, Not Reviewed: 0, Approved: 0, Rejected: 0, TOTAL: 0. The main area is a calendar for the week of April 14, with columns for Sun through Sat. Below the calendar is a list of work orders:

Work Orders	SUN	MON	TUE	WED	THU	FRI	SAT	Weekly Total
	Apr 14	Apr 15	Apr 16	Apr 17	Apr 18	Apr 19	Apr 20	
Total								0
799431 WS429664 SHOP 00 - FS JIT CONTRACTOR LTD.(G00A800)								0
799432 W4161532 SHOP 00 - FS JUL CONTRACTOR LTD.(G00A810)								0
799433 WS867414 SHOP 00 - OS UFR CONTRACTOR LTD.(G00A820)								0

On the right side, there's a 'Daily Safety Message' titled 'WEARING EAR PROTECTION' dated October 15, 2018, and a 'Today's Labor Entries' section showing 'Labor Entry Rejected Jan 25'.

The Technician Dashboard displays a technician’s scheduled work for the current week. Use the button at the top left of the page to view previous and future week’s schedules. A daily safety message and any labor entries are displayed to the right.

Color-coded tabs at the top center display the number of hours for the current week displayed:

- Assigned – Hours that the supervisor has placed on the technician’s schedule.
- Not Reviewed – Hours submitted for approval but not yet approved.
- Approved – Hours that the supervisor has approved and sent to DBS.
- In Payroll – Hours that have been approved and have been paid to the technician.
- Rejected – Hours that have been sent back to the technician due to an error.
- Total – Total number of hours submitted in the period.

Click the arrow next to a work order to view its segments and operations. A row of icons next to each segment gives you access to the Technician Data Entry form. Hover over an icon to display its name, then click on it to open to the form.

✔ Segment Completed | Segment Not Completed

Work Order #: W5429664 🔍

Model:

Segment: CS - ALLOW TIME CO HOLIDAY UNIT SHOP

Customer: JTT CONTRACTOR LTD (G00A800)

Serial No:

Operation: --

🏠 Overview
🔧 Labor
🔧 Parts
🔧 Misc
📄 Notes
⚡ Symptom
🔧 Bays
♻️ SIMS
📝 Blog 2
📷 Media 1
🛑 Held Ups 0

Customer

Customer: JTT CONTRACTOR LTD (G00A800)

Address:

825 SOUTH GREEN OLD WAY

City/State: BONDVILLE / Illinois

ZIP: Phone:

PO No: Req: 1 Terms:

Prevailing Wage:

Equipment

Serial No:

Manufacturer:

Model: Year: YYYY

Unit No: Stock No:

Division: * G - G Product Type:

Ind Class: *

Last Known SMU: on Delivery Date:

SMU: N/A: 1 hours on: 12/25/11

Cab Type: Arr No:

VIN:

Shop Instructions

Source: Customer Delivers Haul Requested

Est. Unit Arrival: *

Arrival Date:

Instruction:

As work is completed on a ticket a technician can open this window to add/edit work details. Click on a tab to display different work order information and enter or edit work details as needed. Once a segment is completed and all work details have been entered, click the **[Segment Completed]** button.

WARRANTY

Claims Pipeline

Click the **Claims Pipeline** link under the ServiceLink menu in the top navigation bar. The Warranty Claims Pipeline page displays.

The screenshot shows the Uptake ServiceLink interface. At the top, there are navigation menus for 'Equipment', 'Service', and 'Admin'. Below that, there are buttons for 'Home', 'Add Ticket', and 'Add Backlog'. The main content area is divided into two sections: 'WARRANTY SEGMENTS' and 'WARRANTY CLAIMS'. Both sections are organized by 'All branches/cost centers' and are further divided into 'CAT' and 'Allied' categories. The 'WARRANTY SEGMENTS' table shows data for 'from last labor ...' with columns for '0-7 days', '8-14 days', and '15+ days'. The 'WARRANTY CLAIMS' table shows data for 'from claim date ...' with columns for '0-7 days', '8-14 days', and '15+ days'. Both tables include sub-columns for 'OK', 'CORR', and 'HLD'.

WARRANTY SEGMENTS		CAT									Allied								
from last labor ...		0-7 days			8-14 days			15+ days			0-7 days			8-14 days			15+ days		
		OK	CORR	HLD	OK	CORR	HLD	OK	CORR	HLD	OK	CORR	HLD	OK	CORR	HLD	OK	CORR	HLD
WIP		0			0			219			0			0			0		11
Completed		0			0			39			0			0			0		7
Request To Close		0	0	0	0	0	0	9	0	0	0	0	0	0	0	0	0	0	0
Reopened / Backed Out		0	0	0	0	0	0	9	1	0	0	0	0	0	0	0	0	0	0
Closed		0	0	0	0	0	0	9	1	0	0	0	0	0	0	0	0	0	0
Invoiced - No Claim		0	0	0	0	0	0	23147	0	0	0	0	0	0	0	0	0	0	0
Invoiced - Partial Claimed		0	0	0	0	0	0	207821	0	0	0	0	0	0	0	0	0	0	3887
Fully Claimed - Claims in Progress		0			0			0			0			0			0		0
Fully Claimed - Settled Waiting Closure		0			0			1			0			0			0		0
Fully Claimed - and Settled		0			0			0			0			0			0		0

WARRANTY CLAIMS		CAT									Allied								
from claim date ...		0-7 days			8-14 days			15+ days			0-7 days			8-14 days			15+ days		
In Progress - Registered (RGST)		0 (\$0.00)			0 (\$0.00)			27 (\$92,659.04)			0 (\$0.00)			0 (\$0.00)			0 (\$0.00)		0 (\$0.00)
Settled Waiting Closure - Closed (CLSD)		0 (\$0.00)			0 (\$0.00)			1836 (\$4,870,636.14)			0 (\$0.00)			0 (\$0.00)			0 (\$0.00)		0 (\$0.00)
Settled Waiting Closure - Pending (PEND)		0 (\$0.00)			0 (\$0.00)			9 (\$20,337.98)			0 (\$0.00)			0 (\$0.00)			0 (\$0.00)		0 (\$0.00)
Settled Waiting Closure - Supplemental (SUPP)		0 (\$0.00)			0 (\$0.00)			32 (\$258,846.86)			0 (\$0.00)			0 (\$0.00)			0 (\$0.00)		0 (\$0.00)

This page displays two tables of information regarding warranty claims, organized by CAT-specific claims and allied company claims.

The top table displays information regarding Warranty Segments and the stages that they are currently in. Click on a row to display a detailed table of all warranty work orders currently in that specific stage.

The bottom table displays information regarding Warranty Claims and the stages that they are currently in. Click on a row to display a detailed table of all warranty claims currently in that specific stage.

Click on an individual work order to display its Warranty tab, where you can view that specific work order's Warranty Segments and Warranty Claims

EXECUTIVE

KPI

Click the **KPI** link under the ServiceLink menu in the top navigation bar. The Executive KPI page displays.

Item	Trend	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Customer Satisfaction													
First to Last Labor (Days)		7.4	7.4	6.1	6.1	6.1	7.8	8.3	8.2	7.8	9.1	8.1	7.2
Yard to First Labor (Days)		0	0	0	0	0	0	0	0	1.6	-0.6	2.5	-18
Promise Date Gap (Days)		8.2	15.2	-79.4	12.5	13	12.1	16.9	28.1	23.3	9.8	9.3	10.3
Invoice Exceed Quote (Percent)		28.6	47.3	51.6	66.3	56.7	47.4	54	61.7	63	51	38.6	39.4
Arrive (Yard) to complete (Days)		0	0	0	0	0	0	0	0	15.6	19.8	60.1	27.2
Effectiveness													
Transfers (# per WO)		0	0	0	0	0	0	0	0	0	0.2	0.8	0.9
Standard Job Segment Usage (Percent)		24.1	29.9	33.2	35.7	34.8	30.1	25.4	22.4	23.1	22.4	24.1	27.1
Standard Job Variance (Hours)		2.1	1.4	1.3	1.4	1.4	1.8	2.6	3.1	3.2	4	4.5	4.5
Work Orders Opened (#)		33586	28796	25895	25246	24106	24127	24357	25617	27015	27778	26503	1350
Efficiency													
Attended Hours Recovered (Percent)		92.7	91.2	90.9	90.6	92.5	91.5	91.3	90.8	91.4	90.8	91.7	96.1
Service Efficiency (Percent)		3.9	4.8	6.2	6.9	6.3	5.7	4.3	4.1	4	3.8	3.5	2.6
Profitability													
Labor Sold External (Percent)		56.3	58.6	57.1	61.1	62.7	64.8	66.5	66.9	67.1	65.1	65.7	70.2
Labor Sold Internal (Percent)		14.7	12.5	11	11.5	14.9	16.5	16.4	16.1	16.3	15.8	15.2	15.6
Labor Sales (Dollars)		32775511.36	31893621.65	25711084.45	30929607.54	30056384.26	32675292.31	32222515.48	35879214.25	40825858.52	39823238.58	39307742.59	1861171.15
Gross Profit (Percent)		57.1	55.2	34.6	57.6	58.7	59.1	57.5	58.2	59.4	59.2	60.6	63.2
Communication													
Call Cues (#)		0	0	0	0	0	0	0	0	43	106	201	21
Text Cues (#)		0	0	0	0	0	0	0	0	0	0	0	1

This page displays a table of high-level Key Performance Indicator data. Use the filter at the top left of the page to display different branches or cost centers. You can also change the period of time displayed using the drop-down menus to the right, or switch between the Calendar and Fiscal year.

Check the COMPARE box at the far right to add another branch/cost center filter option. Select another branch or cost center to display its data in the table under the previously selected branch or cost center, allowing you to easily compare the two sets of data.

Click on a row in the table to display a graphical representation of that data, along with details regarding the base data for that KPI.

KPI Definitions:

- First to Last Labor (days) – The average number of days between the First Labor and Last Labor on work orders invoiced during the given period.
- Yard to First Labor (days) – The average number of days between the Actual Arrival Date on the ticket and the First Labor on work orders invoiced during the given period.

- Promise Date Gap (days) – The average number of days between the Promise Date on the ticket and the Invoice Date of work orders invoiced during the given period.
- Invoice Exceed Quote (percent) – $(\text{Sum of Total Invoice} - \text{Sum of Total Estimate}) / \text{Sum of Total Invoice}$ for work orders invoiced during the given period.
- Arrive (Yard) to Complete (days) – The average number of days between the Actual Arrival Date on the ticket and the date the ticket moved to Work Complete (the date the last segment was marked complete) for work orders invoiced during the given period.
- Transfers (# per WO) – The average number of transfers per work order for work orders invoiced during the given period.
- Standard Job Usage (percent) – $(\text{the number of segments with a standard job indicator of "2"}) / (\text{total segments invoiced})$ for work orders invoiced during the given period.
- Standard Job Variance (hours) – $(\text{total number of Actual Hours} - \text{Standard Hours}) / \text{Standard Hours}$ for segments with a standard job indicator of "2" on work orders invoiced during the given period.
- Settlement Recovery (percent) – $\text{Total dollars recovered} / \text{Total dollars invoiced on warranty work orders}$ invoiced during the given period.
- Attended Hours Recovered (percent) – $\text{Total hours worked (excludes vacation, jury duty, etc.)} / \text{Total hours invoiced}$ during the given period.
- Service Efficiency (percent) – $\text{Total number of actual hours} / \text{Total number of hours between First Labor and Last Labor}$ on work orders invoiced during the given period.
- WIP Days (percent) – $(\text{Total Labor WIP Dollars}) / (\text{Rolling 12 Month Total Labor Sales} / 365)$.
- Labor Sold External (percent) – $\text{Total Labor Sales to External Customers} / \text{Total Labor Sales}$ for work orders invoiced during the given period.
- Labor Sold Internal (percent) – $\text{Total Labor Sales to Internal Customers} / \text{Total Labor Sales}$ for work orders invoiced during the given period.
- Technician Productivity (percent) – $(\text{Total Hours of Labor Sold}) / (\text{Total Hours of Labor Paid} - \text{Allowed Time})$ for the given period.

- Labor Sales (dollars) – Total Labor Sales on work orders invoiced during the given period.
- Overtime (percent) – Total number of Overtime hours / Total number of Labor Hours on work orders invoiced during the given period.

ADMIN

Management

Click the **Management** link under the ServiceLink menu in the top navigation bar. The Management page displays.

User...	Login Name	Active	Email	Employee #	Approver #	Blog	Store	Cost Center	Approval Group	Charge Code	Shift Code	SVL Shift	Role	Last
Aaro...	Gretchen090	✓	sztz...	5111			00	HC		CDL	1		Lead...	Jun
Abd...	Celeste865	✓	xgrn...	6208			00	AL		FLD	1		Lead...	De
acla...	aclay	✓	acla...										Admin	Ma
adal...	adait	✓	trevi...										Admin	Jun
adist...	adistler	✓	adist...										Admin	
ago...	agomez	✓	ago...										Admin	
ahm...	ahmeds	✓	sami...										Admin	Jul
Ailee...	Chester361	✓	tgdb...										PSSR	De
Aim...	Tracie413	✓	glw...										Exec...	Fet
ajan...	ajanderson	✓	aj.an...										Admin	
Albe...	Dora592	✓	wnc...	6434			14	RS		SVL	1		Tech...	De
Albe...	Brenda079	✓	jkrm...										Exec...	Au
Alex ...	Monte879	✓	mql...										PSSR	De
Alex ...	Melisa521	✓	afvrt...	7844			04	MS		CDL	1		Tech...	De
alice...	alice.hultquist	✓	alice...										Admin	
allar...	alliarj	✓	jay.a...	7551	00-MS		14	RS	00BK,00MR,00MS	SVL	1		Man...	
Alm...	Ethan502	✓	qtux...	5799			00	AL		FLD	1		Lead...	De
Alm...	Victor679	✓	lour...	6225			00	FS		FLD	1		Lead...	De
Alm...	Frances843	✓	dup...	6769			07	FS		FLD	1		Lead...	De
Alon...	Marci186	✓	hfm...	6777			14	FD		FLD	1		Tech...	De
Alon...	Terry042	✓	vnu...	3091			00	FR		CDL	1		Lead...	De
Alon...	Wendy951	✓	lbhj...	6334			17	FD		FLD	1		Tech...	De
ame...	amessaoudi	✓	abd...										Admin	Jan
and...	andy.debruin	✓	and...										Admin	
Anitr...	Milton160	✓	tzhq...	5301			00	FS		FLD	1		Lead...	De
Arm...	Carev641	✓	ore...	8012	ENGINEALL		14	FD	14FD,14RS,16FD...		1		Man...	De

Users with Administrative privileges have the ability to edit or customize certain things within ServiceLink. Click on the tabs at the left of the page to access eight different management areas.

Users

This page displays details regarding each ServiceLink user and their corresponding roles. Click the Edit icon to edit a user’s details and roles, or click the Delete icon to delete the user.

To add a new user:

1. Click the **[Add New User]** button at the top left of the page.

2. Click the **[Search]** button to search for a user by name or email. Note that a user must be set up in EquipmentLink before they will appear.
3. Enter any other user information as needed, then select a Role for the user.
4. Click **[Save User]**.

Symptoms

This page displays a list of all current major symptoms that have been entered into ServiceLink. Check the Enabled box to Enable or Disable a symptom, or delete a symptom by clicking the black X to the right.

To add a new symptom:

1. Click the **[Add]** button at the top right of the page. A blank symptom will be added at the bottom of the list.
2. Enter a name for the symptom. The Enable box will automatically be checked.
3. Click the **[Save]** button at the top right of the page.

Click the number in the Minor Symptoms column to view the minor symptoms associated with a major symptom. Here you can enable/disable or delete minor symptoms in the same way as major symptoms. Add new minor symptoms using the same procedure described above.

Heldup Reasons

This page displays a list of all Heldup Reasons that have been entered into ServiceLink, organized by Work in Progress, Finalizing, and Corrections. Arrange the reasons in the order you want by entering a number in the Order column. Enable or Disable a Heldup reason using the checkbox in the Enable column.

To add a new Heldup Reason:

1. Click the **[Add]** button to the right of the section you want to add a Heldup Reason to.
2. Enter a title for the Heldup Reason. The Enable box will automatically be checked.
3. Click the **[Save]** button at the top right of the page.

Warranty Held Ups

This page displays a list of all Warranty Heldup Reasons that have been entered into ServiceLink. Arrange the reasons in the order you want by entering a number in the Order column. Enable or Disable a Warranty Heldup reason using the checkbox in the Enable column, or delete it by clicking the Delete icon to the right.

To add a new Warranty Heldup Reason:

1. Click the **[Add]** button to the right of the section in which you want to add a Heldup Reason.
2. Enter a title for the Heldup Reason. The Enable box will automatically be checked.
3. Click the **[Save]** button at the top right of the page.

Branches and Cost Centers

This page displays a detailed list of all current branches. Double click on a branch to view/edit the branch's details and scheduler settings. Click the **[Save]** button to save any changes.

To add a new branch:

1. Click the **[New Branch]** button at the top right of the page.
2. Enter all required information about the new branch.
3. Select the branch's scheduler settings.
4. Click **[Save]**. ServiceLink will automatically bring in all the valid cost centers from DBS.

Safety Messages

This page displays all the safety messages that appear on the Technician Dashboard. Click the Edit icon to edit the details of a message, or click the Delete icon to delete it.

To add a new safety message:

1. Click the **[New Message]** button at the top right of the page.
2. Enter the details for your new message, then schedule a date for when it will appear on the dashboard.
3. Click **[Save]**.

Dropbox

This page displays all current dropboxes that have been entered into ServiceLink. Click the Edit icon to edit the details of a dropbox, or click the Delete icon to delete it.

To add a new dropbox:

1. Click the **[Add Dropbox]** button at the top right of the page.
2. Enter a Name, Type, and Address.
3. Click **[Save]**.

Note Template

This page displays all current note templates available in ServiceLink. Click the Edit icon to edit the details of a note template, or click the Delete icon to delete it.

To add a new note template:

1. Click the **[Add Template]** button at the top right of the page.
2. Enter a Template Name, then select a Store and Cost Center.
3. Use the note body area below to construct your template.
4. Click **[Save]**.