# Service Delivery ServiceLink

USER GUIDE Updated June 12, 2019

\*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 This user guide will be updated on an ongoing basis and may have slightly outdated content due to the frequency of software updates.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

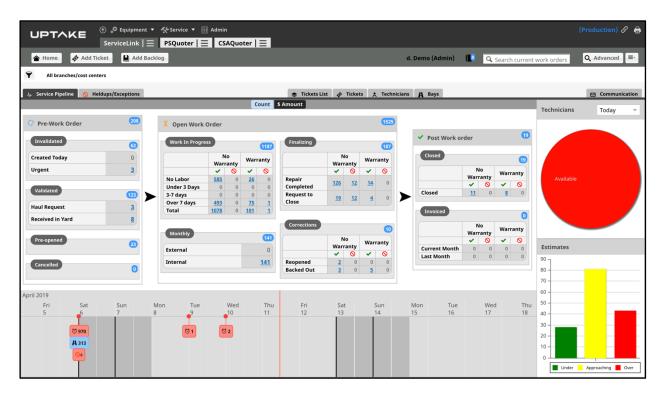
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## **CUSTOMIZATION**

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**

			(Production) 🔗 🔒
😭 Home 🛷 Add	iicket 🔛 Add Backlog	d. Demo (Admin) 🛛 🕕 🔍 Search current work ord	lers Q Advanced =-
All branches/cost ce	iters		

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**

					C	ount	\$ Amount										
O Pre-Work Order	208	Z Open Work	Order								1525						
Invalidated	62	Work In Progre	ss			1187	Finalizing				187		✓ Post Work or	der			(
Created Today	0			lo ranty	Warr	anty			lo ranty	Warı	ranty		Closed				1
Urgent	<u>3</u>		~	0	~	$\otimes$		~	0	~	$\otimes$			N		Warr	antv
		No Labor	<u>585</u>	0	<u>26</u>	0	Repair	126	12	14	0			Warr			
Validated		Under 3 Days	0	0	0	0	Completed	120			0			~	0	~	0
Vandated	123	3-7 days	0	0	0	0	Request to	<u>19</u>	12	4	0	$\blacktriangleright$	Closed	<u>11</u>	0	<u>8</u>	0
Haul Request	3	Over 7 days	<u>493</u>	0	<u>75</u>	1	Close			-		-					
naul Request	2	Total	<u>1078</u>	0	<u>101</u>	1							Invoiced				
Received in Yard	<u>8</u>	Monthly					Corrections				10			N Warr		Warr	_
Pre-opened	23					141			lo	Warı	ranty			~	0	~	0
	•	External				0			ranty				Current Month	0	0	0	0
								~	0	~	0		Last Month	0	0	0	0
Cancelled		Internal				<u>141</u>	Reopened	2	0	0	0						
	0						Backed Out	<u>3</u>	0	5	0						

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

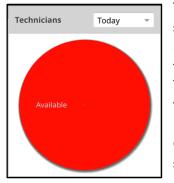
#### Closed

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.

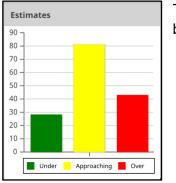
### **Technicians**



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

April 2019													
Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu
5	<b>6</b>	7	8		<b>1</b> 0	11	12	13	14	15	16	17	18
	े 970			ত 1	<b>©</b> 2								
	A 313												
	<u>\</u>												

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.

All Serial	No. Stock No.	Model Customer No. Customer Nam	e Equipment No	<b>D</b> .	Create empty	ficket		Q, 320		$\otimes$
										<b>\$</b> %
Action	Customer No.	Customer	StoreGrp	Make Code	Manufacturer	Equipment No.	Serial No.	Stock No.	Model	Year
1 .0 1.0	1019350	ZAI CONTRACTOR LTD 314 West Rocky New Freeway		AA	CATERPILLAR		0AAD69957		3208	1987
•• <b>1</b> .0	HEAVEN	NFB CONSTRUCTION INC 927 North Rocky Nobel Blvd.		AA	CATERPILLAR		0AAM72225	M2018381	3208	1992
1 % 1%	HEAVEN	NFB CONSTRUCTION INC 927 North Rocky Nobel Blvd.		AA	CATERPILLAR	00329	0AAN69957		3208	1985
1 °0 1°0	HEAVEN	NFB CONSTRUCTION INC 927 North Rocky Nobel Blvd.		AA	CATERPILLAR	828282	0AAO45572		3208	
1 % 1%	1723525	VVD CONTRACTOR LTD 375 West Green Nobel St.		AA	CATERPILLAR	001-2	0AAR20718		3208	1988
1 °0 1°0	1756400	YOM EXCAVATING & UNDERGROUND 151 West Nobel Boulevard		AA	CATERPILLAR		0AAY69957	M0780320	924HZ	2010
1 °0 1°0	HEAVEN	NFB CONSTRUCTION INC 927 North Rocky Nobel Blvd.		AA	CATERPILLAR		0ABD26272	M0103200	3126	1999
1 % 1%	HEAVEN	NFB CONSTRUCTION INC 927 North Rocky Nobel Blvd.		AA	CATERPILLAR		0ABE45572		3208TA	1988
1 °0 1°0	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
0.0 0.0	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.

Home Ø	• Add Ticket	Add Backlog								d. Demo (A	dmin) 👖	<b>Q</b> Search current	work orders	<b>Q</b> Advanced
Ustomer	Urgent ZAI CONTRACTOR		eed Date:*	Equipment -	anch:*	57		(	Cos	Shop Instruct	RS - 14-RS T		Shop	Customer
ddress:	314 WEST ROCKY	NEW FREEWAY		Manufacturer: Model: Unit No:	CATERP 3208	ILLAR	Year: Stock No:	1987	· · · · · ·	Est. Unit Arrival Arrival Date: Instruction:		■ ○ AM ○ PM	Unknow	Note:
ity/State: IP: O No:	TAMARACK 25134		21005742 rms: Charge	Division:* Ind Class:*	E. T	Product Type:	2 - W		H MAF 👻					Equipmen
ax Codes: xempt No: harge Code:	82 v 75 v PA/MD/NJ FI3 - FI3		• •	Last Known SMU: SMU: Cab Type:	0 H on Jan 1994 N/A:	n 10, De	livery Date:		12/24/					Open Tickets & V Recommenda
revailing Wage: Estimate				VIN:						Other				Service Letters
arts: abor: lisc: stimated All:	0 0 0 0	Customer C On File 1 10 10 Estimated By	lass In Ticket/WO 10 * 10 * DEMOUSER1	Serial No: Manufacturer: Model:			Arr No:		Q	Bus. Group: Charge Level: End User Code: VAT Invoice: Diff. Owner:		<ul> <li>OT Auth:</li> <li>Sales Man:</li> <li>Labor Inv Ind:</li> <li>Job Priority:</li> </ul>	Yes 👻 S 🗢	CM Cases PM Services

- 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.

UPTAKE $\odot$ $\circ$ Equipment $\checkmark$ ServiceLink $\equiv$ Mome $\checkmark$ Add Ticket $\blacksquare$ Add Back	PSQuoter   ☰ CSAQuoter   ☰			d. Demo (Admin) 🛛 👔 💽	<b>Q</b> Search current work orders	(Production) &
ICKET #802209 (VALIDATED-)       Ticket Date Apr 11, 2019       Created By Demo, demouser1	A ZAI CONTRACTOR LTD (1019350) Invoice Type Externa	SERIAL NO 0AAD69957     Make/Model CATE     Unit No     Delivery Date	RPILLAR / 3208 Dec 24, 1988	DATES     Open Date     Promised Date     Invoice Date Last Labor Date	Apr 12, 2019	,
Customer: ZAI CONTRACTOR LTD (1019350 Address: 440 N WABASH AVE City/State: CHICAGO / II ZIP: 60611 Phone:	mised Date:* 04/12/19 Branch  Cequipment Serial No: 04/ Manufacturer: C/ Model: 32 Unit No: Division:* E: 2121005742 Ind Class:* AA	the second	Cost Cen		Delivers Haul Requested	Customer Customer Customer Customer Credit/AR Note: Equipment Q Warrany
Tax Codes:         82         75         T           Exempt No:         PA/MD/NJ	S-HWS SMU: 199 SMU: N// Cab Type: VIN: Related er Class Serial No:	4		Other Bus. Group: Charge Level: End User Code:	▼ OT Auth: Yes ▼ Sales Man: ▼ Labor Inv Ind: S ▼	Open Tickets & Work Recommendation Service Letters O Backlog CM Cases PM Services

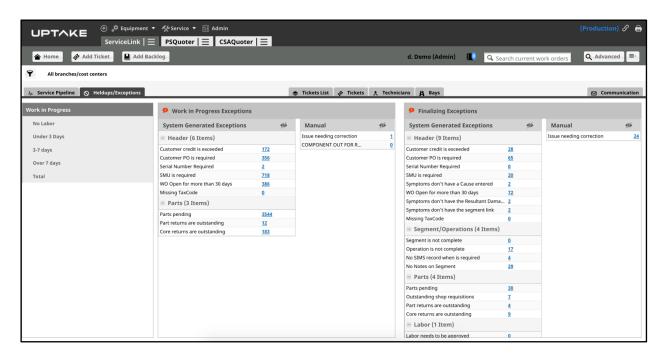
- 12. Click the Segments tab, then click [New Segment]. The New Segment form will display.
- 13. You can add a new segment from a Template, Work Order, Standard Job, DBS Documents, or Manually.
- 14. Enter all required fields, then click **[Create]**. Add as many segments as needed.
- 15. Click the **[Open]** 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.

	<ul> <li>⊕ equipment ▼</li> <li>ServiceLink   =</li> </ul>	PSQuoter		ter   📃										uction) 🔗 🔒
Add 1	icket 🔛 Add Back	log							d. Demo (Admin)		Search cur	rent work orders	Q Ac	ivanced ≡^
✓ ▼ TICKET #760851 (WO	RK IN PROGRESS-)	* NBT WELL D	RILLING INC (126263	30)	SERIAL NO K70	0896			m DATES			* WORK ORDER	NO W1446645	6 (OPEN)
Ticket Date Sep 15, 201 Created By	Delete	Invoice Type		External	Make/Model Unit No Delivery Date		KOHLER / KS	66341255 BLD 102	Open Date Promised Date Invoice Date Last Labor Date		Sep 15, 2017	Print		
🗳 Overview 🔳 Segmer	its 1 👸 Financials	🗅 Notes 💡	Parts 🔧 Labor	🖌 🎸 Misc	🚫 Held Ups 🕘	1 Wa	arranty 🧿	🛗 Schedu	uler 💽 Media 🔍 🔳	Blog 🧿	🖌 Audit Log	Communica	ation 🧿 💡	Customer
Held Ups	0 All 0 Outstanding	0 Resolved												
Reason	Description		Due Date	En	tered By	Age	Status		Resolution		Resolved By	Last u	pdated by:	🕈 Add
No Held Ups														
System Generated	4 All 3 Header 1 Se	gment/Operatio	ns 0 Parts 0 L	abor 0 Misc	0 Warranty									
Closing Checklist Item					#Exceptions		Hard Stop	Action						
Header (9 Items)														
Customer credit is exceeded					1			Call Cre	dit Department and ask for c	override				
Customer PO is required					Q		$\checkmark$	Call cust	tomer and request a purchas	se order #.	Be prepared to s	end a proforma inv	oice via email	or fax if requested
Serial Number Required					<u>0</u>				the technician responsible f hort description of the item		air and ask for the	e serial number. If a	serial number	is not applicable,
SMU is required					1		$\checkmark$		the technician responsible for rview page	or the repa	air and ask for the	SMU. If an SMU is	not applicable,	click the N/A on
Symptoms don't have a Cause e	ntered				Q		$\checkmark$	Contact	the technician and inform th	nem that h	e/she must enter	a Cause prior to clo	ising a work o	rder/ticket
WO Open for more than 30 days					1			Verify th	ne reason for the work order	being ope	n this long. Close	if possible.		
Symptoms don't have the Result	ant Damage entered				Q		$\checkmark$	occurre	the technician and inform th d due to the original failure p enter "N/A"					
Symptoms don't have the segme	ent link				<u>0</u>		$\checkmark$	Each syr	mptom should have a segme	ent link.				
Missing TaxCode					0		1	Please	update tax code.					

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.

UPTA	KE <sup>③</sup> <sup>○</sup> <sup>©</sup> <sup>Equipment</sup> ▼ <sup>≪</sup> Service ▼ <sup>III</sup> Admin ServiceLink   = PSQuoter   = CSA	Quoter   📃						(Production) 🔗 🔒
摿 Home	🛷 Add Ticket 🔛 Add Backlog				d. Demo (Admin) 🛛 👖 🚺	<b>Q</b> Search curre	nt work orders	Q Advanced ≡-
No	Description	Make	Model	Store	Cost Center	Shop Field	Change	Add Template
<u>02</u>	standard segements			Branch00	G&R BENSALEM MAIN SHOP	Shop	Apr 25, 2017	Create Ticket
<u>03</u>	PREP FOR DEMO	CATERPILLAR		Branch00	G&R NEW EQUIP SHOP	Shop	Apr 25, 2017	Create Ticket
<u>04</u>	PREP FOR RENTAL			Branch00	G&R NEW EQUIP SHOP	Shop	Apr 25, 2017	Create Ticket
<u>05</u>	pdi/PROD LINK	CATERPILLAR		Branch00	G&R NEW EQUIP SHOP	Shop	May 04, 2017	Create Ticket
<u>07</u>	UNERCARRIAGE TURN	CATERPILLAR	D5G	Branch00	G&R BENSALEM MAIN SHOP	Shop	Oct 13, 2017	Create Ticket
<u>09</u>	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
<u>15</u>	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
<u>55</u>	TRUCK WORK ORDER		Peterbuilt	Branch04	G&R W/C F/S	Field	Aug 25, 2017	Create Ticket
<u>6</u>	MARINE BASIC WTY W/O MS36	CATERPILLAR		Branch15	16-YS MARINE SERVICE RE	Field	Jul 06, 2017	Create Ticket
Z	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.

UPT/	NKE _	<sub>o</sub> O Equipment		vice 🔻 🔛 Admin uoter   📃 🛛 CSA	Quoter   📃									tion) 🖉 🌾
摿 Home	🛷 Add Ticket	Add 📔	Backlog						d. Demo (	Admin)	0 🔍 Sea	rch current work orders	Q Adv	anced
Store:	ALL		st Center:	ALL 👻	Technician: ALL	v	Work Order:	ALL	¥	Segment:	ALL	<ul> <li>Operation:</li> </ul>	ALL	Ŧ
										A Auto	omatic:	🖑 Manual:	Search	Reset
SVL Labor A	pproval													<b>\$</b> %
Date	Technician	Ticket No.	wo	Cust Model	Seg	Opn	Serial No	Charge Code	S F T	Hrs	Hrs Overtime	From	То	A/ð
an 18, 2019	Sandra Doming	800225	W1223435	1628 328DLCR	01-REBEARING & RESEAL'		0RMX00612	CDL	1	1.00	8	09:00	10:00	ð
an 25, 2019	Sandra Doming	<u>799431</u>	<u>W5429664</u>	G00	CS-ALLOW TIME CO HOLI.			CDL	1	8.00	0	07:00	15:00	ð
an 25, 2019	Aaron Houston	799431	<u>W5429664</u>	G00	CS-ALLOW TIME CO HOLI.			CDL	1	8.00	0	07:00	15:00	ð
an 25, 2019	Erik Riley	<u>799431</u>	<u>W5429664</u>	G00	CS-ALLOW TIME CO HOLI			CDL	1	8.00	0	07:00	15:00	ð
an 25, 2019	Tawana Bender	799431	<u>W5429664</u>	G00	CS-ALLOW TIME CO HOLI			CDL	1	8.00	0	07:00	15:00	ð
an 25, 2019	Jim Porter	<u>799431</u>	W5429664	G00	MS-ALLOW TIME CO HOLI.			CDL	1	5.00	0	07:00	12:00	ð
an 25, 2019	Jesse Cole	<u>799431</u>	<u>W5429664</u>	G00	CS-ALLOW TIME CO HOLI			CDL	2	8.00	0	10:00	18:00	ð
an 25, 2019	Jim Porter	<u>799431</u>	<u>W5429664</u>	G00	CS-ALLOW TIME CO HOLI			CDL	1	3.00	0	12:30	15:30	ð
an 26, 2019	Sandra Doming	<u>799431</u>	<u>W5429664</u>	G00	CS-ALLOW TIME CO HOLI			CDL	1	8.00	0	07:00	15:00	ð
an 26, 2019	Aaron Houston	<u>799431</u>	<u>W5429664</u>	G00	CS-ALLOW TIME CO HOLI			CDL	1	8.00	0	07:00	15:00	ð
an 26, 2019	Erik Riley	<u>799431</u>	<u>W5429664</u>	G00	CS-ALLOW TIME CO HOLI			CDL	1	8.00	0	07:00	15:00	ð
an 26, 2019	Tawana Bender	<u>799431</u>	<u>W5429664</u>	G00	CS-ALLOW TIME CO HOLI			CDL	1	8.00	0	07:00	15:00	ð
an 26, 2019	Harold Valenzuela	799431	<u>W5429664</u>	G00	CS-ALLOW TIME CO HOLI			CDL	1	8.00	8	07:00	15:00	ð
rotal: 35	lim Dortor	700421	WEADOCCA	C00	CO ALLOW TIME CO HOLT			CD1	1	216.58 11	2.00	07-00	12.00	

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.

UPTAKE		quipment eLink   =			Admin	Quote	er   Ξ																	(Prod	uction	) <i>&amp;</i> (
🖀 Home 🛷 Add T	icket	📕 Add Ba	cklog												d. Den	no (Adn	nin)		Q, Sei	arch cui	rrent w	ork ord	ers	Q Ad	lvanced	1 <b>=</b> ·
All branches/cost cent	ters																									
				_								Schedu	ad	Wo	rked	Ann	proved		ariance							
Labor Weekly Summary	Time Pe	eriod: Mar i	31 to Apr 0	6 <	This W	/eek	>	04/06	/19 🎚	\$		Schedu	eu	WO	Keu	Abt	Joved		anance							
	SL Hrs	DBS WO		Hrs	Sched		Sunday		,	Monday		т	uesday		v	Vednesda	y	т	hursday			Friday		S	aturday	
	Worked	Hours	VAR	Sched	Eff (%)	Wrk	Appr	VAR	Wrk	Appr	VAR	Wrk	Appr	VAR	Wrk	Appr	VAR		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	0.0
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.
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.
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	0.0
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	0.0
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	0.0
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.
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	0.0
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	0.0
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	0.0
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	0.0
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	0.0
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.
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.
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.
thena 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.
								-																		

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.

UP	UPTAKE O O Equipment · C Service · Admin (Production) & Admin (Production) & Admin													
🚖 Ho	me 🛷 Ade	d Ticket	Add Backlog							d. Demo	(Admin) 🔟	<b>Q</b> Search	current work orders	Q Advanced ≡-
<b>Y</b> A	ll branches/cost	enters												
	in branches/cost	center 5												
J <sub>i</sub> , Servi	e Pipeline  🚫	Heldups/Except	ions			🛊 Ticket	s List 🏼 🏘	Tickets	🗴 Technician	ns Ale	Bays			🖂 Communication
	03/13/19		Status:	Pending ×	*		Select		~		Q			
Search	Result													
											Communicat	tion	Actic	n
Ticket	WO No	Status	Customer Name	Contact	Serial No	Make	Model	Unit #	Branch	сс	Frequency	Туре	Cancel Selected	Process

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.

UPT	NKE _	。 <sup>O</sup> Equipment		ice 🔻 🔛 Admin Ioter   📃 🛛 CSA	Quoter   =							(Production) 🔗 🧯
摿 Home	🛷 Add Ticket							d. Demo (Ad	min) 順	<b>Q</b> Search curre	nt work orders	Q Advanced ≡-
Backlog Se	arch											
Make:	All		-	From Date:			Backlog No:			Outstanding:		
Model:				To Date:			Ticket/WO No:			In Progress:		
SerialNo:				Customer:		Q	Unit No:			Completed:		
Senaino.				customer.		4	Offic NO.			compicted.		
												Search Reset
												Search Reset
Search Res	ult											
Backlog No	Make	Model	SerialNo	Unit No	Customer No	Custom	er Name Status	Summary	Open Date	Ticket	Wono	Ticket Status
127	CATERPILLAR	920	0ABS3938	5	HEAVEN	NFB CC	NSTRUCTI Outstandir	g FIX WINDOW	Jan 19, 2020			
126	CATERPILLAR	980M	0ADF4553	B 104	1012450	JVS CO	ITRACTOR Outstandir	g AIR-CON FILTER N	Oct 24, 2019			
124	MISC/ATTACHM	420D-LINES	0AAN4557	2	1377811	ZCG CC	NSTRUCTI In Progres	5	Oct 22, 2019			
123	E M D	20-645E5	0CIQ69957	7 TEAGUEBAY	1395550	ZOE CO	NSTRUCTI Outstandir	IG TEST BACKLOG	Sep 21, 2019			
122	CATERPILLAR	236B	0ABC4557	2	1555692	ZBE EX	AVATING Outstandir	IG TEST	Aug 31, 2019			
121	CATERPILLAR	302-12"BKT	0HID7222	5	1784003	OBO M	ECHANICA Outstandir	g	Aug 02, 2019			
120	CATERPILLAR	3116	0HFQ2627	2 210	1839325	LGO CO	NTRACTO Outstandir	Ig RETURN PARTS B	Jul 04, 2019			
119	KUBOTA CORPO	PC300LC-7	0MBP3938	5 419	1451246	KPT CO	NSTRUCTI Outstandir	g DKJF;ALKJ;FKJ;AKJF	Jun 03, 2019			
118	CATERPILLAR	325L	0AZP3938	5	1212350	CXH M	CHANICA Outstandir	Ig TEST	May 07, 2019			
117	CATERPILLAR	259B3	0CAT26272	2	1000286	QOL CO	NTRACTO Outstandir	IG MACHINE WONT	May 21, 2018			
116	CATERPILLAR	836H	0PFU4553	B CM0158	1605650	QTS EX	CAVATING Outstandir	ig	May 20, 2018			
115	CATERPILLAR	416	0NRY9343	2	1523875	MOJ EX	CAVATING Outstandir	g	Mar 22, 2018			
111	CATERPILLAR	257B	0HLA9348	9	1585168	PLV EX	AVATING Outstandir	Ig YEAR END LABOR	Jan 29, 2018			
106	CATERPILLAR	D8T	0AVL26272	2	1232400	NNG W	ELL DRILLI Outstandir	g	Feb 19, 2017			
105	CATERPILLAR	980H	0QZV5826	5 90614	1264370	PQE W	LL DRILLI Outstandir	Ig UNIT COMING IN	Jan 07, 2017			
103	CATERPILLAR	980H	0QZV5826	5 90614	1264370	PQE WI	LL DRILLI Outstandir	g Looking to do a b	Nov 26, 2016			
101	CATERPILLAR	330DL	0UKY4553	В	000249R		Outstandir	g RIGHT FINAL DRI	Oct 22, 2016			
Total Recor	<b>is:</b> 17											

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**

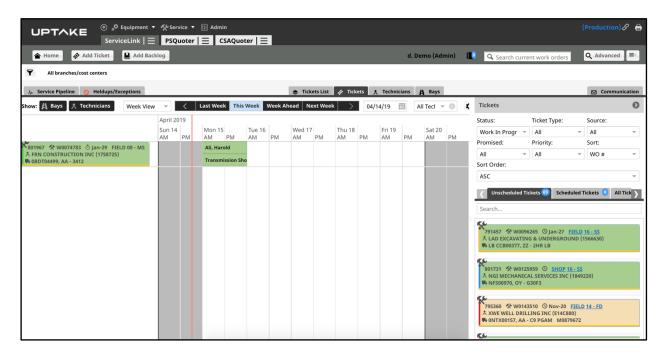
To create a new backlog ticket:

- 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.

				oter   📃										(	Production) 🔗  🖶
👚 Home 🛷 Add Ticket 🔛 Add Bacl	klog										d. De	mo (Adr	nin) i	• Q Search current work orders	Q Advanced ≡-
Y All branches/cost centers															
J <sub>p</sub> Service Pipeline 🚫 Heldups/Exceptions						🔹 Tick	ets List	🧳 Tio	ckets 🖇	។ Technic	ians				Communication
Week View - C Last Wee	ek This Week	Week A	head N	Next Week	>	04/1	5/19		All Tech	hnicians	-	0	• •	Tickets	Ø
Show All Show With Availability	April 2019 Mon 15 AM PM	Tue 16 AM	PM	Wed 17 AM	PM	Thu 18 AM	PM	Fri 19 AM	PM	Sat 20 AM	PM	Sun 21 AM	PM	Status: Ticket Type: Work In Progr V All V	Source:
Å , Cheryl In 04 - Branch04 MS -G&R W/C MAIN SHOP														All  Sort Order:	
* , Clay 調 14 - undefined RN -14-RN RENTAL DEPT REP														ASC	ickets 0 All Tick
* , Kori In 16 - Branch15 YS -16-YS MARINE SERVICE RE														Search	
Ali, Harold	FRN CONSTR 3412 W : W0074783	:UC1												791457 ★ W0096265 ③ Jan-27 FIELD A LAD EXCAVATING & UNDERGROUND (* B LB CCB00377, ZZ - 2HR LB	<u>16 - SS</u> 1566630)
Anderson, Christy														801731 & W0125959 O SHOP 16 - SS * NGI MECHANICAL SERVICES INC (1849)	220)
Anthony, Rene 調01 - Branch01 FS -G&R FIELD SERV BEAR														🖡 NFS00970, OY - G30F3	
* Baird, Christel 調 14 - undefined FD -14-FD FIELD SERVICE REP														795360 ☆ W0143510 ③ Nov-20 FIELD ★ XWE WELL DRILLING INC (E14C880) ♣ 0NTX00157, AA - C9 PGAM M0879672	<u>14 - FD</u>
A Baird, Josiah														<b>C</b> L	

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.

				ter   📃							(Production) හි
📤 Home 🛷 Add Ticket 🔛 Add Bac	klog								d. Der	mo (Admin)	Q Search current work orders
All branches/cost centers											
J <sub>t</sub> , Service Pipeline 🚫 Heldups/Exceptions							_	🕴 🕺 Techn	icians 🛛 🖁		Communicatio
Week View 👻	< ι	.ast Wee	k This Week	Week Ahead	Next We	ek   >	04/15/1	9 🏢		• (?	7 Tickets
Show All Show With Availability	April 20 Mon 15 AM		Tue 16 AM PM	Wed 17 AM P	Thu 1 M AM	8 PM	Fri 19 AM Pl	Sat 20 M AM		Sun 21 AM PM	Status:     Ticket Type:     Source:       Work In Progr     All     All
00001 - 208v 100kw small suitcase Br PS - BranchPS FD -FD			ALAD EXCAVATIN 2HR LB MELVIA LA W : WO								Promised: Priority: Sort: All
00002 - 480v 100kw small suitcase PS - BranchPS FD -FD											ASC
01552A - 480/208 500kw Roller R PS - BranchPS FD -FD											Search
01552B - 480v 600kw Roller FPS - BranchPS FD -FD											801731 ☆ W0125959 ③ <u>SHOP 16 - SS</u> Å NGI MECHANICAL SERVICES INC (1849220) ➡ NFS00970, OY - G30F3
08001 - 480/240/208v 400kw Roller In PS - BranchPS FD -FD											795360 X W0143510 O Nov-20 FIELD 14 - FD X XWE WELL DRILLING INC (E14C880)
08002 - 480/240/208v 400kw Roller R PS - BranchPS FD -FD											DINTX00157, AA - C9 PGAM M0879672
1-MS- BAY 1 In 00 - Branch00 MS -G&R BENSALEM MAIN SHOP											<ul> <li>** 801483</li></ul>
1203 - 480 / 240 100 kw Suitcase Load Bank											к

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.

UPTAKE (* Service Equipment * * Service ServiceLink = PSQuot		uoter   📃							(Production) 🔗 🔒					
👚 Home 🛷 Add Ticket 📓 Add Backlog						d. Demo (Admi	n) 籠 🔍	Search current worl	<pre>corders Q Advanced ■<sup>-</sup></pre>					
Technician Dashboard Aaron Houston 👻 Today	echnician Dashboard Aaron Houston - Todays Work Orders													
Week of Apr 14     Daily Safety Message       C Prev Week     Naxt Week -> how Scheduled:     12:23:07     Assigned:     0     Approved:     0     Rejected:     0     TOTAL:     0       how Today:     -														
				Week of Apr 14					Remember the saying, "You don't know what you've got					
Work Orders > Segments > Operations	SUN Apr 14	MON Apr 15	TUE Apr 16	WED Apr 17	THU Apr 18	FRI Apr 19	SAT Apr 20	Weekly Tota	'til it's gone?" This is really the case with your hearing. Exposure to loud noise and					
Total	Apr 14	Aprilo	Aprilo	Aprili	<b>А</b> рі 16	Арі 19	Αμί 20	0	failure to wear hearing protection can make you lose your hearing before you know it. This loss occurs so					
								0	gradually, you may not realize it's happening. You may not be aware until it's too late. Physiologically, loud noise severely damages the					
7299432 ★ W4161532 SHOP 00 - FS     799432 ★ W4161532 SHOP 00 - FS     ↓ JUL CONTRACTOR LTD. (500A810)     ↓								0	inner ear. The damaging potential of noise depends on the length of exposure and the sound pressure level.					
								0	Today's Labor Entries Labor Entry Rejected Jan 25					
lit	I I		1	I I										

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.

Work Order #: Model: Segment:	•	TIME CO HOI	.IDAY UNIT SH	OP		•	Customer: Serial No: Operation:						
🛆 Overview	🔧 Labor	<b>o</b> Parts	🖋 Misc	🗋 Notes	🗲 Symp	tom <b>A</b>	Bays 🗘	SIMS	📒 Blog 🙎	💽 Medi	ia 👤 🚫 Held	i Ups 🧕	
Customer: Customer: Address:	JTT CONTRACT 825 SOUTH G	•		Seria	ufacturer: el:		s	Year: tock No:	YYYY		Shop Instruct Source: Est. Unit Arriva Arrival Date: Instruction:	<ul> <li>Cust</li> <li>Deliv</li> </ul>	comer Haul vers Requested
City/State: ZIP: 20 No:	BONDVILLE	Phone:	Illinois Terms: Cha	Ind C	ion:* Ilass:*	G-G 💌	Product Type:			•	Instruction:		
Prevailing Wage:				SMU:	: : Гуре:	on N/A: 🗌	1 ho	rry Date: urs 💌	on: 12/25/11				

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.

	Service  Admin PSQuoter  CSA	Ouoter   =				(Production) ${\mathscr O}$
👚 Home 🛷 Add Ticket 🔛 Add Back				d. Demo (Admin) 🛛 🔳	<b>Q</b> Search current work orders	Q Advanced
All branches/cost centers						
WARRANTY SEGMENTS		CAT			Allied	
from last labor	0-7 days	8-14 days	15+ days	0-7 days	8-14 days	15+ days
WIP	0	0	219	0	0	11
Completed	0	0	39	0	0	7
	OK CORR HLD	OK CORR HLD	OK CORR HLD	OK CORR HLD	OK CORR HLD	OK CORR HLD
Request To Close	0 0 0	0 0 0	9 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
losed	0 0 0	0 0 0	9 1 0	0 0 0	0 0 0	0 0 0
nvoiced - No Claim	0 0 0	0 0 0	23147 0 0	0 0 0	0 0 0	1062 0 0
nvoiced - Partial Claimed	0 0 0	0 0 0	207821 0 0	0 0 0	0 0 0	9887 0 0
Fully Claimed - Claims in Progress	0	0	0	0	0	0
Fully Claimed - Settled Waiting Closure	0	0	1	0	0	0
ully Claimed - and Settled	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
n Progress - Registered (RGST)	0 (\$0.00)	0 (\$0.00)	27 (\$92,659.04)	0 (\$0.00)	0 (\$0.00)	0 (\$0.00)
ettled Waiting Closure - Closed (CLSD)	0 (\$0.00)	0 (\$0.00)	1836 (\$4,870,636.14)	0 (\$0.00)	0 (\$0.00)	0 (\$0.00)
ettled Waiting Closure - Pending (PEND)	0 (\$0.00)	0 (\$0.00)	9 (\$20,337.98)	0 (\$0.00)	0 (\$0.00)	0 (\$0.00)
ettled Waiting Closure - Supplemental (SUPP)	0 (\$0.00)	0 (\$0.00)	32 (\$258,846.86)	0 (\$0.00)	0 (\$0.00)	0 (\$0.00)

This page displays two tables of information regarding warranty claims, organized by CATspecific 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.

	Equipment 🔻 🛠 Serv CeLink   🚍 🛛 PSQu		nin CSAQuoter	■								(Product	ion) 🖉  🖶
😭 Home 🛷 Add Ticket	Add Backlog						d.	Demo (Admin	) 💵 🤇	Search currei	nt work orders	Q Adva	nced 🖃
All branches/cost centers							Peri	od: Year	Ŧ			B C	OMPARE
Item	Trend	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Customer Satisfaction													
First to Last Labor (Days)	$\sim \sim \sim$	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)	$\sim$	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
<ul> <li>Effectiveness</li> </ul>													
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
<ul> <li>Efficiency</li> </ul>													
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
<ul> <li>Profitability</li> </ul>													
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)	$\sim$	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 (#)	. 1	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) (Sum of Total Invoice Sum of Total Estimate) / 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) (the number of segments with a standard job indicator of "2") / (total segments invoiced) for work orders invoiced during the given period.
- Standard Job Variance (hours) (total number of Actual Hours Standard Hours) / Standard Hours for segments with a standard job indicator of "2" on work orders invoiced during the given period.
- Settlement Recovery (percent) Total dollars recovered / Total dollars invoiced on warranty work orders invoiced during the given period.
- Attended Hours Recovered (percent) Total hours worked (excludes vacation, jury duty, etc.) / Total hours invoiced during the given period.
- Service Efficiency (percent) Total number of actual hours / Total number of hours between First Labor and Last Labor on work orders invoiced during the given period.
- WIP Days (percent) (Total Labor WIP Dollars) / (Rolling 12 Month Total Labor Sales / 365).
- Labor Sold External (percent) Total Labor Sales to External Customers / Total Labor Sales for work orders invoiced during the given period.
- Labor Sold Internal (percent) Total Labor Sales to Internal Customers / Total Labor Sales for work orders invoiced during the given period.
- Technician Productivity (percent) (Total Hours of Labor Sold) / (Total Hours of Labor Paid – 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.

		Equipment 🔹 松 Sei	(Production) 🔗 🔒										
H	📤 Home 🛷 Add Ticket	Add Backlog						d. Demo (A	dmin) 順	Q Search cur	rent work orde	R Advance	ed ≡^
	Management	User Management											<b>\$</b> %
	L Users	🛉 Add New User										Q Search Users	
	-∕₀- Symptoms	User Login Name	Active	Email Employee #	Approver #	Blog	Store	Cost Center	Approval Group	Charge Code	Shift Code	SVL Shift	Role Las
	Heldup Reasons	Aaro Gretchen090	×	szts 5111			00	HC		CDL	1		Lead Jun
		Abd Celeste865	×	xgrn 6208			00	AL		FLD	1		Lead De
	O Warranty Held Ups	acla aclay	×	acla									Admin Ma
	Branches and Cost Centers	adai adait	×	trevi									Admin Jun
	A	adist adistler	×	adist									Admin
	A Safety Messages	ago agomez	×	ago									Admin
	😳 Dropbox	ahm ahmeds	×	sami									Admin Jul
	Note Template	Ailee Chester361	×	tgdb									PSSR De
		Aim Tracie413	×	gfw									Exec Fet
		ajan ajanderson	×	aj.an									Admin
<		Albe Dora592	×	wnc 6434			14	RS		SVL	1		Tech De
		Albe Brenda079	×	jxrm									Exec Au
		Alex Monte879	×	mqj									PSSR De
		Alex Melisa521	×	afvrt 7844			04	MS		CDL	1		Tech De
		alice alice.hultquist	×	alice									Admin
		allar allarj	×	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
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		ame amessaoudi	×	abd									Admin Jan
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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 with 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].