

BUNNSERVE PLUS

Module 6: Manage Work Orders- SP

Overview

Introduction This module will include information to assist our Service Providers with managing their Work Orders.

Contents

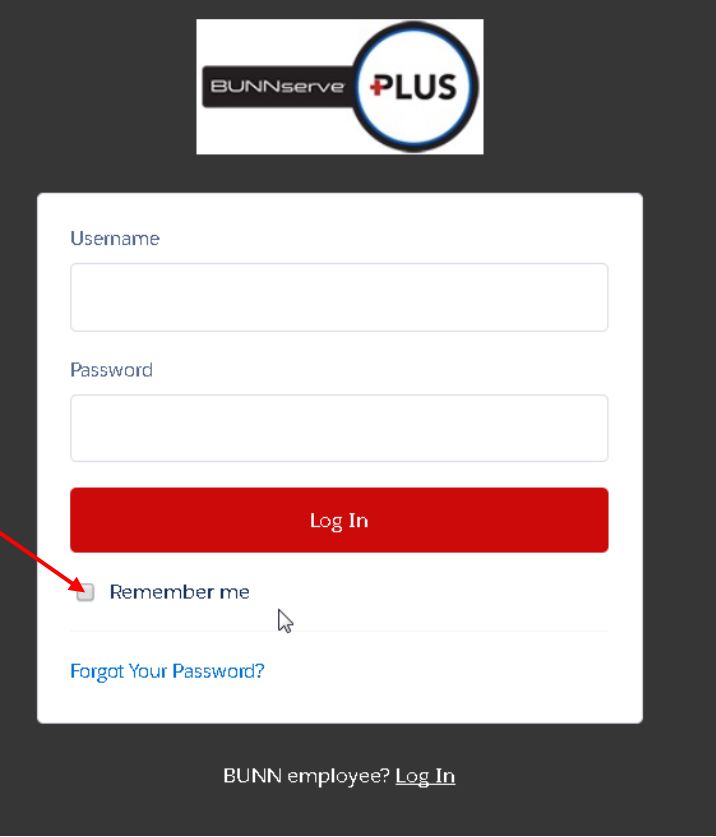
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Logging in to BSP

1. Use a web browser, preferably Google Chrome.
2. Go to <https://bunnportal.force.com/Partners/login>
3. Enter user name
 - Your email address associated with this login
4. Enter Password
5. **Log in**

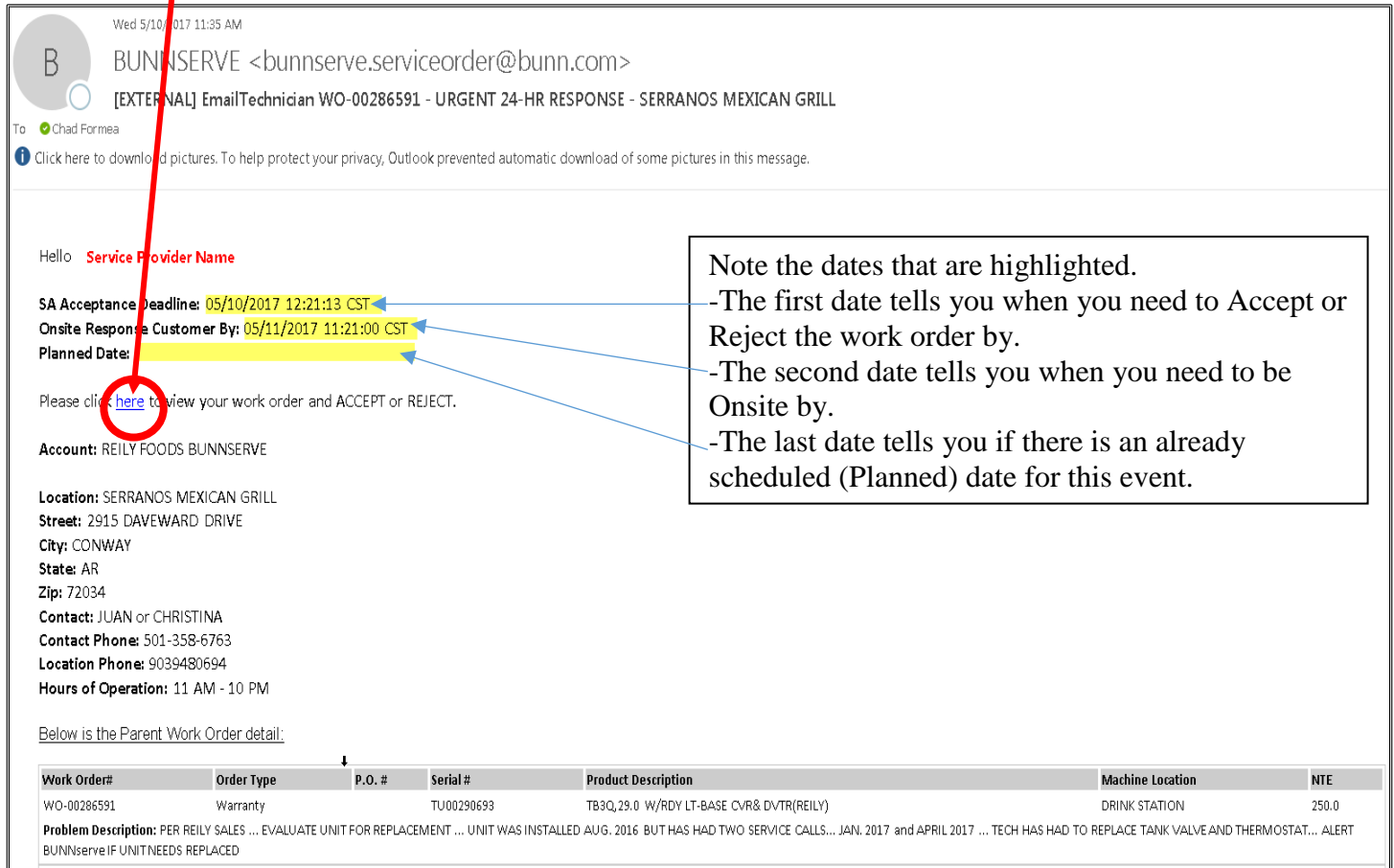
Select this checkbox to have the browser remember your Username for the next time.



The screenshot shows the login interface for BUNNserve PLUS. At the top center is the logo, which consists of the text "BUNNserve" in a black box next to a blue circle containing the word "PLUS". Below the logo is a white rectangular form. Inside the form, there are two input fields: "Username" and "Password". Below these fields is a prominent red button labeled "Log In". Underneath the button is a checkbox labeled "Remember me", which is currently unchecked. A red arrow from the text on the left points to this checkbox. Below the checkbox is a link that says "Forgot Your Password?". At the very bottom of the page, centered, is the text "BUNN employee? [Log In](#)".

Receiving a Work Order (SP)

Your Work Order will be sent via email. This Work Order will contain details related to the work being asked to perform. There will also be a “quick link” that will take you directly to the Work Order.



Wed 5/10/2017 11:35 AM

BUNNSERVE <bunnservice.serviceorder@bunn.com>
[EXTERNAL] EmailTechnician WO-00286591 - URGENT 24-HR RESPONSE - SERRANOS MEXICAN GRILL

To: Chad Fornea

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Hello **Service Provider Name**

SA Acceptance Deadline: 05/10/2017 12:21:13 CST
Onsite Response Customer By: 05/11/2017 11:21:00 CST
Planned Date:

Please click [here](#) to view your work order and ACCEPT or REJECT.

Account: REILY FOODS BUNNSERVE

Location: SERRANOS MEXICAN GRILL
Street: 2915 DAVEWARD DRIVE
City: CONWAY
State: AR
Zip: 72034
Contact: JUAN or CHRISTINA
Contact Phone: 501-358-6763
Location Phone: 9039480694
Hours of Operation: 11 AM - 10 PM

Below is the Parent Work Order detail:

Work Order#	Order Type	P.O. #	Serial #	Product Description	Machine Location	NTE
WO-00286591	Warranty		TU00290693	TB3Q,29.0 W/RDY LT-BASE CVR& DVTR(REILY)	DRINK STATION	250.0

Problem Description: PER REILY SALES ... EVALUATE UNIT FOR REPLACEMENT ... UNIT WAS INSTALLED AUG. 2016 BUT HAS HAD TWO SERVICE CALLS... JAN. 2017 and APRIL 2017 ... TECH HAS HAD TO REPLACE TANK VALVE AND THERMOSTAT... ALERT BUNNServeIF UNITNEEDS REPLACED

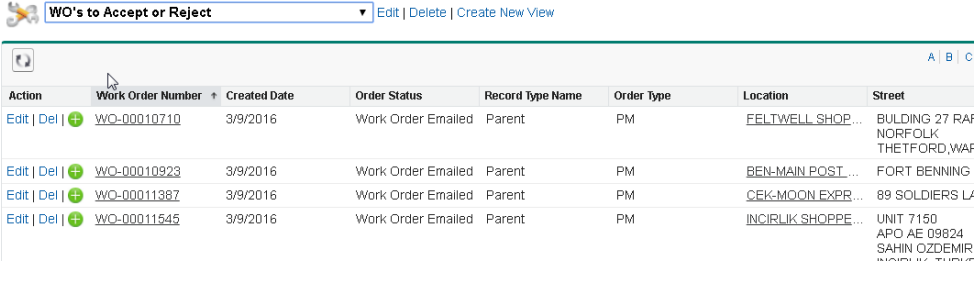

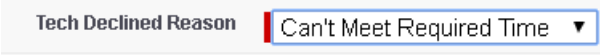
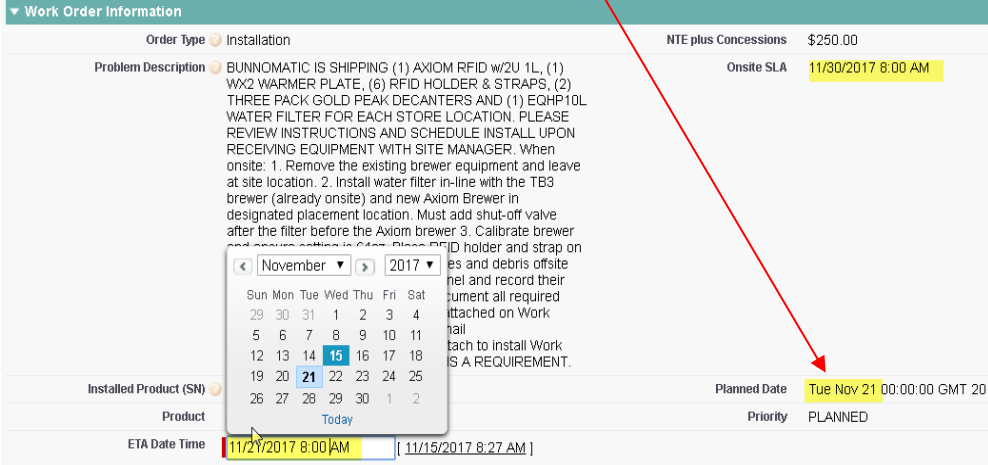
Note the dates that are highlighted.

- The first date tells you when you need to Accept or Reject the work order by.
- The second date tells you when you need to be Onsite by.
- The last date tells you if there is an already scheduled (Planned) date for this event.

Accepting/Rejecting Work Order (SP)


Accepting or Rejecting a Work Order

After the Work Order has been emailed, the Service Provider will be notified via email which will contain a link to the work order. To Accept or Reject the Work Order, follow these steps:


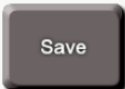
Step	Action																																								
1.	<p>Click the Work Order link in either the email or use the “Work Orders to Accept or Reject” view in the work orders Tab.</p>  <table border="1"> <thead> <tr> <th>Action</th> <th>Work Order Number</th> <th>Created Date</th> <th>Order Status</th> <th>Record Type Name</th> <th>Order Type</th> <th>Location</th> <th>Street</th> </tr> </thead> <tbody> <tr> <td>Edit Del +</td> <td>WO-00010710</td> <td>3/9/2016</td> <td>Work Order Emailed</td> <td>Parent</td> <td>PM</td> <td>FELTWELL SHOP...</td> <td>BUILDING 27 RAF NORFOLK THETFORD, WAF</td> </tr> <tr> <td>Edit Del +</td> <td>WO-00010923</td> <td>3/9/2016</td> <td>Work Order Emailed</td> <td>Parent</td> <td>PM</td> <td>BEN-MAIN POST...</td> <td>FORT BENNING</td> </tr> <tr> <td>Edit Del +</td> <td>WO-00011387</td> <td>3/9/2016</td> <td>Work Order Emailed</td> <td>Parent</td> <td>PM</td> <td>CEK-MOON EXPR...</td> <td>89 SOLDIERS LA</td> </tr> <tr> <td>Edit Del +</td> <td>WO-00011545</td> <td>3/9/2016</td> <td>Work Order Emailed</td> <td>Parent</td> <td>PM</td> <td>INCIRLIK SHOPPE...</td> <td>UNIT 7150 APO AE 09824 SAHIN OZDEMIR</td> </tr> </tbody> </table>	Action	Work Order Number	Created Date	Order Status	Record Type Name	Order Type	Location	Street	Edit Del +	WO-00010710	3/9/2016	Work Order Emailed	Parent	PM	FELTWELL SHOP...	BUILDING 27 RAF NORFOLK THETFORD, WAF	Edit Del +	WO-00010923	3/9/2016	Work Order Emailed	Parent	PM	BEN-MAIN POST...	FORT BENNING	Edit Del +	WO-00011387	3/9/2016	Work Order Emailed	Parent	PM	CEK-MOON EXPR...	89 SOLDIERS LA	Edit Del +	WO-00011545	3/9/2016	Work Order Emailed	Parent	PM	INCIRLIK SHOPPE...	UNIT 7150 APO AE 09824 SAHIN OZDEMIR
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2.	<p>Once the work order is on the screen, Click either the Accept or Reject button.</p> 																																								
3.	<p>If rejecting the Work Order, select the Tech Declined Reason.</p> 																																								
4.	<p>If accepting the Work Order, update the ETA Date Time field with your Estimated Time of Arrival and click the Save button. NOTE: All Children Work Order(s) are accepted at the same time as the Parent. The Onsite SLA is the deadline to be onsite based on the “priority” (4-hour, 24-hour, Planned). If there is a Planned Date, that is the date that the work is to be scheduled. These dates will also be in the email to you.</p>  <p>Work Order Information</p> <p>Order Type: Installation NTE plus Concessions: \$250.00</p> <p>Problem Description: BUNNOMATIC IS SHIPPING (1) AXIOM RFID w/2U 1L, (1) WX2 WARMER PLATE, (6) RFID HOLDER & STRAPS, (2) THREE PACK GOLD PEAK DECANTERS AND (1) EQHP10L WATER FILTER FOR EACH STORE LOCATION. PLEASE REVIEW INSTRUCTIONS AND SCHEDULE INSTALL UPON RECEIVING EQUIPMENT WITH SITE MANAGER. When onsite: 1. Remove the existing brewer equipment and leave at site location. 2. Install water filter in-line with the TB3 brewer (already onsite) and new Axiom Brewer in designated placement location. Must add shut-off valve after the filter before the Axiom brewer 3. Calibrate brewer and receive activation code. Place RFID holder and strap on es and debris offsite and record their location. Attach all required documentation on Work Order. Attach to install Work Order. THIS IS A REQUIREMENT.</p> <p>Installed Product (SN): Product: Today</p> <p>ETA Date Time: 11/21/2017 8:00 AM [11/15/2017 8:27 AM]</p> <p>Onsite SLA: 11/30/2017 8:00 AM</p> <p>Planned Date: Tue Nov 21 00:00:00 GMT 2017</p> <p>Priority: PLANNED</p>																																								

Managing the Work order after it is Accepted

Start Travel- Indicating that you are on the Way







Button/Field	Step	Action
	1.	From the Work Order Detail screen click the Start Travel button. This will change the status of the work order to “Tech En Route”.

Check In – Indicating that you have arrived

Button/Field	Step	Action
	1.	From the Work Order Detail screen click the Check In button.
	2.	This will record the current date and time as your Actual Onsite Response. Just click the Save button. This data is now saved so that you do not need to re-enter this data at the time of claim submission.

NOTE: If you have a Child Work Order, you will be automatically checked in to that work order at the same time.

Check Out- Indicating that you are done

Button/Field	Step	Action
	1.	From the Work Order Detail screen click the Check Out button. Note: if you do not see the Check Out button, then you have not Checked In. Complete the Check in step first, and if required, change the date and time to the actual time that you got onsite.
	2.	Record the serial number exactly as it appears on the machine. If we captured a serial number at the time of dispatch, it will be displayed here. Please make changes to it if it is not correct.
	3.	This is a text field that allows you to report the model of the machine that was repaired. Again, if what you see there is not correct, please make changes to it.
	4.	Check this box once you verify that the model and serial number in the fields above are correct.
	5.	Choose the appropriate Repair Code from the dropdown list.
	6.	Choose the appropriate Work Status from the list. If the work is done and there are no return trips required, please choose Completed. This is what will change the Work Order status to Resolved and allow for claim submission. If the work is not completed, refer to the section below – “ Awaiting Return Trip ”

Multiple Trip Reason	7.	If you required multiple trips to complete this work order, please indicate the reason for the multiple trips.
Notes	8.	This is the field to record in detail what was done to repair the machine. This is a text field that can hold a lot of data, so please be complete. ***Note: The first 250 characters of what is entered here is what will show up in the invoice to the customer.
Asset Tag	9.	If the machine has an asset tag, enter that number here. If the customer requires us to capture this number, you will not be able to complete the check-out process without entering the asset number, so please be vigilant for that.
Service Signed By (First AND Last Name)	10.	Please record the first and last name of the person onsite that approved and/or signed off of that the machine was repaired.
Further Action or Follow-up with the Customer is required by BUNN for complete resolution	11.	This field is required. It allows you to mark the work order for further follow-up in order to get this customer's issue <u>completely resolved</u> . A Few examples of when you should choose "Yes" are when you are recommending machine replacement, a part is required to send directly to the location, or the customer wants BUNN to contact them for some reason.

NOTE: If you have a Child Work Order you will hit the Save and Next button to enter the pertinent data for each child work order.


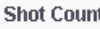


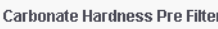






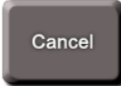
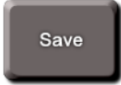

Out-Of-Box Quality Questions for Installations

If the work order is an installation work order, the Quality Section will appear on the check-out screen. These questions are being asked so assist BUNN in striving towards 100% out-of-box quality.

Button/Field	Step	Action
Any quality issues at time of install?	1.	This is a Yes or No question. If you choose Yes, you will fill in the appropriate details using the following fields.
Cosmetic issues?	2.	Select this checkbox if the machine has any cosmetic blemishes or dents.
Missing parts or accessories?	3.	Select this checkbox if the machine was missing parts like a funnel, sprayhead, manuals, etc.
Service Manual Insufficient?	4.	Select this checkbox if the service or installation manual was not sufficient to assist with your installation of the machine.
Warranty Issues?	5.	Select this checkbox if there were warranty issues with the machine such as a bad valve, switch, or board, etc.
Equip shipped by BUNN or already onsite?	6.	Select this dropdown to indicate whether this machine was shipped by BUNN to your location or if it was already onsite when you arrived to do the installation.
Further Explanation	7.	Please use this field to provide more detail related to the out-of-box quality issue.

Enter Required Readings (shot counts, software, etc)

If the machine on this work order requires certain readings to be recorded, this section will appear as part of the Check-Out process as well.

Button/Field	Step	Action
	1.	Record the serial number of the machine for which the readings are for.
	2.	Record the current shot count on the machine.
	3.	Record the number of Cleaning Cycles that have been canceled by the location.
	4.	Record Total Water hardness in grains.
	5.	Record the Carbonate Hardness reading (Pre-Filter) in ppm.
	6.	Record the Chlorine reading (Pre-Filter) in ppm.
	7.	Record the PH of the water (Pre-Filter) as a whole number.
	8.	Record the Total Dissolved Solids (Pre-Filter) in ppm.
	9.	Record the Brix reading.
	10.	Select the software version for this machine from the dropdown list. If the software version is not listed, choose “other version” and make note of it in the NOTES field on the check-out screen.
	11.	Select the appropriate water filter being used from the dropdown list. If the filter is not there, choose other and make note of it in the NOTES field on the check-out screen.
		Using this button will cancel out of the Check-Out page and you will lose any unsaved data up until that point.
		Using this button will Save your changes that have been made on this page and it will keep you on this page to continue working.
		Using this button will Save your changes that have been made on this page and it will take you to the next page to finalize the check out paperwork. It will then give you an option to send the Field Service Report (FSR) to the customer.

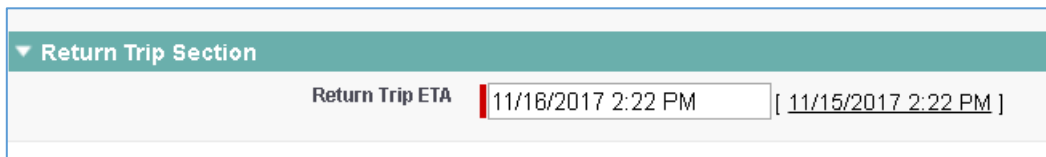
Signature Capture on Mobile Devices

After logging all of the information on the Check-Out Process and posting your demands, you have the ability on a mobile device (iPad, iPhone, Android device, etc) to capture the **customer signature** and the **Technician Signature** directly on the work order. After the signatures are in place, click **“Capture Signature”** under each signature window to save the signature as an attachment on the work order. These signatures will automatically print on the FSR report if they are captured and saved. See pg 12 for an example of the report.



Awaiting Return Trip – Unable to Resolve WO


If you are unable to repair the machine on the first trip, you will choose a “work status” at check-out that indicates that a second trip is required (example: Location Issue, Waiting for Parts, etc). When you hit **Save and Next**, it will take you to a WO Checkout Summary page where you will need to select an ETA for your return trip.



This new ETA will be recorded on the work order. When you hit **Save and Next** again, you will be returned to the work order and the work order status will show **“Awaiting Return Trip”**. If you need to adjust that ETA date and time for the return trip, just click the **Accept** button and change the **ETA Date Time** field to the new ETA.

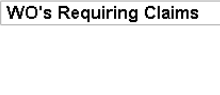
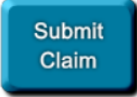







Emailing the Field Service Report

Once you have finished filling out the required fields for the check-out process, you will be taken to a Check Out summary (confirmation) page where you have the option to email the completed field service report to the customer. These two fields will be available to help you do that:

Email FSR to Customer	1.	Check this box to send the Field Service Report (FSR) to the customer. This will happen upon hitting the Save and Next button.
FSR Delivery Email	2.	Enter in the email address where the customer would like to have the FSR sent.
	3.	Hit Save and Next and the FSR will be sent automatically to the email address that is listed in the FSR Delivery Email field.

Manage/Submit Claim (SP)

To submit a claim, follow these steps:

Button/Field	Step	Action
	1.	Search for and open the completed (Resolved) Work Order. You can also use the work order view called “WO’s Requiring Claims”
	2.	Once you have opened the appropriate work order, Click the Submit Claim button. If you do not see the Submit Claim button, it is because the work order has not been resolved. Please complete the Check-Out process first.
Claim #/Partner Invoice #	3.	Enter your Claim or Invoice Number.
	5.	The aqua colored section is for posting parts to the work order. Please post all parts that you used to compete the job. This includes parts that were sent to you by BUNN (i.e. PM kits, filters, etc).
	6.	Type in the BUNN product number and/or do a search using the  icon.
	7.	Type in the amount that you expect to be paid for the part.
	8.	Enter in the qty used of this part number.
	9.	The yellow colored section is for posting labor to the work order.
	10.	Enter in the number of labor hours required to complete this job. If you have a Flat Rate with BUNN for this work, you should enter a qty of “1”. Labor hours should be entered in ¼ hour increments (1.0, 1.25, 1.5, 1.75, etc)

Servicer Rates	11.	Choose “Regular”, “OT”, or “Holiday” from the dropdown list to indicate what type of labor is being charged.
Add Travel	12.	The orange colored section is for posting travel demands to the work order
Travel Zone	13.	Choose the appropriate category for the travel demand (hourly, zone, mileage, etc). Note that ZPM is chosen for “PM travel”.
Servicer Rates	14.	Choose “Regular”, “OT”, or “Holiday” from the dropdown list to indicate what type of travel is being charged.
Qty	15.	Enter in the appropriate quantity. If you are charging for a zone, the quantity should be “1”. If you are charging for hourly travel, it should be your travel hours in ¼ hour increments.
Add Expense	16.	The purple colored section is for posting expenses to the work order if they apply. These would be things like tolls, shipping changes, taxes, etc.
Expense Type	17.	Choose the expense type from the dropdown list.
Comment	18.	This is a text field to give us more details about the expense and why it is being billed. This is not required if the expense type is self-explanatory.
Claim Price Per Unit	19.	Type in the amount that you expect to be paid for the expense.
Qty	20.	Enter in the appropriate quantity.
Cancel		Using this button will cancel out of the submit claim page and you will lose any unsaved data up until that point.
Save		Using this button will Save your changes that have been made on this page and it will keep you on this page to continue working.
Save and Next		Using this button will Save your changes that have been made on this page and it will take you to the next page to finalize your claim submission.

Claim Submission on Child Work Orders

Upon selecting the Save and Next button on the parent, you will be taken to the claim submission page for each child work order. You will enter all the required data as you did on the parent work order, and then continue to hit Save & Next to enter in your claim data for each child work order. Once all of the work orders have been done, you will come to a final “Claim Summary” page which will summarize all of the claim amounts that have been entered. (See below example)

▼ Parent Work Order			
Total Payable Parts	\$0.00	Total Payable Travel	\$75.00
Total Payable Labor	\$45.00	Total Payable Expenses	\$0.00
Total Payable Amount	120.00	Claim #/Partner Invoice #	1917
NTE	\$250.00	Concession Number	
Child Work Orders			
▼ WO-00121176			
Total Payable Parts	\$0.00	Total Payable Travel	\$0.00
Total Payable Labor	\$45.00	Total Payable Expenses	\$0.00
Total Payable Amount	45.00	Claim #/Partner Invoice #	1917-2

If the amounts that you see on the summary page are what you expect to see, then check the “**I agree to claim amounts**”. If the amounts are not coming out correct, and you want to contest the claim amounts, check the “**I contest the claim amounts**” checkbox and give a reason in the “**Contested Claim Reason**” checkbox. After you have selected one of the checkboxes, click the **submit claim** button to move the claim to “**Submitted**” status and send it to BUNN for approval.



Adding Attachments to the Work Order

The *Notes and Attachments* section is where documents can be attached to the Work Order.

To add an Attachment to the Work Order such as a document or a picture, follow these steps:

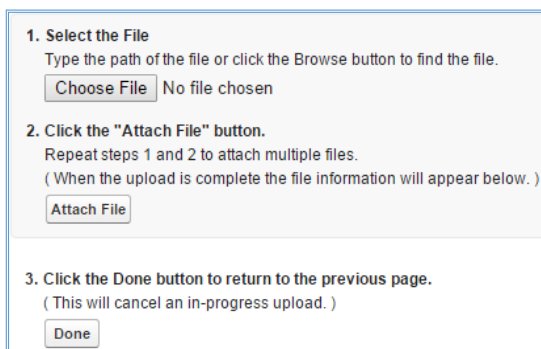
1. Select the Notes & Attachments at the top of the Work Order page.

[Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Child Work Orders \[1\]](#) | [Notes & Attachments \[2\]](#) | [Counter Details \[0\]](#)

2. This will take you to this section:



3. Select the “Attach File” button and follow the steps displayed on screen.



Example of a Field Service Report (FSR)

[Follow](#)

[Back to Work Order](#)

WORK ORDER -- WO-00300543 -- Parent

[Help for this Page](#) 

Account Information

Account KROGER SOUTHWEST DIVISION Account SAP External ID 500433-SP-01-US01

Service Location

Location SBUX #72765 @ KROGER 746
 Street 11701 S SAM HOUSTON PKWY E
 City HOUSTON
 State TX
 Zip 77089
 Site Phone 281-484-7754
 Hours of Operation 6:00AM - 8:00PM Dispatch Region Central
 Customer UCN

Location Contact Information

Location Contact Name KATHRYN LARSEN Location Contact Phone 281-484-7754 Location Contact Email


Machine Serviced

Product MASTRENA, BASE UNIT(208V/30AMP) Serial Number 40-075062
 Product Number 40500.0104 Shot Count 317,431

Machine Problem Description

Problem Description ONE SIDE IS CLOGGED AND NOT WORKING, SHOTS ARE ERRATIC, UNABLE TO CLEAR CLOG, EXCESSIVE WATER IN THE GROUNDS TRAY



Repair Information

Work Performed REPLACED CUFF SEAL. CLEANED FIXED PISTON. CALIBRATED SHOTS.
 Repair Code REPLACED MECHANICAL PART
 Signed By Cynthia Mixon 

Work Details

Line Type	Line Qty	Travel Qty	Part
Parts	1.0000	0.0000	<u>CUFF, FIX PISTON V2</u>
Labor	1.2500	0.0000	
Travel	0.0000	1.0000	
Labor	1.0000	0.0000	MASTRENA, BASE UNIT(208V/30AMP)

Customer/FSE Signature

 Date Signed: 11/16/2017 10:16 AM Captured By: Bill Mills
 Date Signed: 11/16/2017 10:16 AM Captured By: Bill Mills