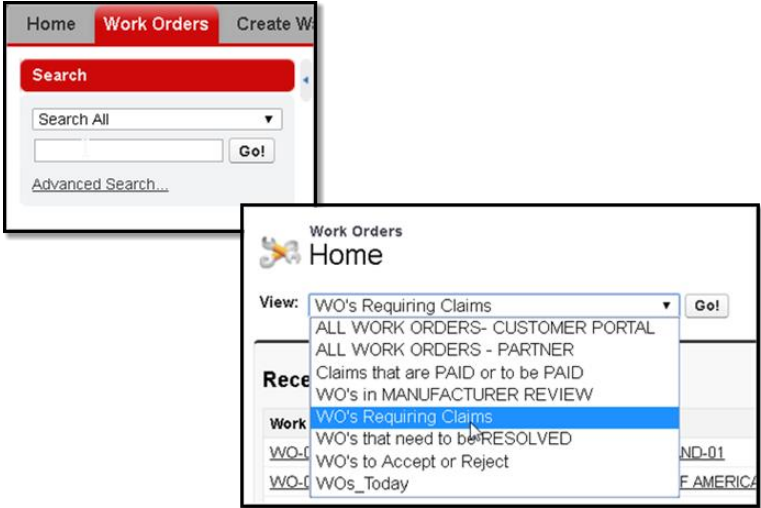
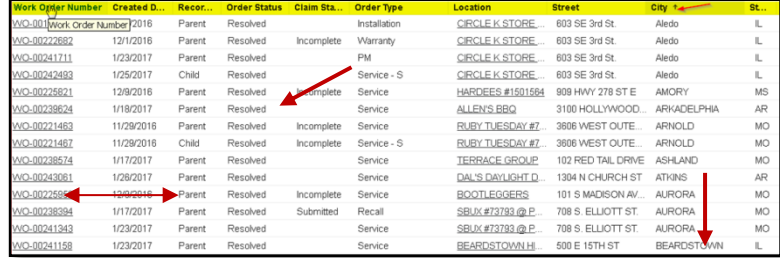
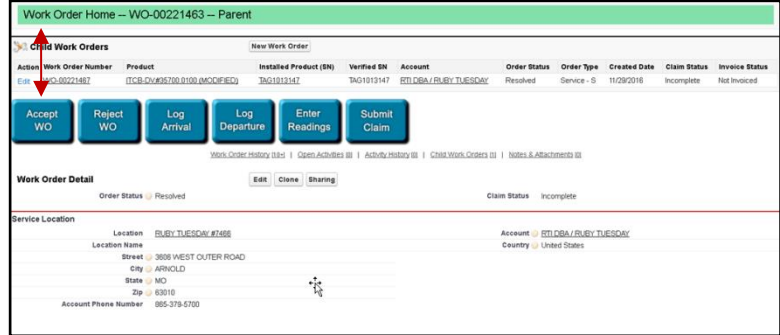


This document provides instructions for **Working with Work Orders and Submitting Claims**.

Steps – Logging in to Bunnserve Plus Portal

To log in to the Bunnserve Plus Portal to work with **Work Orders**, follow these steps:

Steps	Action	Screen Image																																																												
1	<ul style="list-style-type: none"> Enter your user name “email address” Enter your password Click the Log In button 																																																													
2	Click the Work Order tab.	<table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th>Work Order Number</th> <th>Case</th> <th>Account</th> <th>Contract</th> <th>Order Status</th> <th>Order Type</th> <th>Service Team</th> <th>Technician</th> <th>Created Date</th> <th>Owner Alias</th> </tr> </thead> <tbody> <tr> <td>WO-00262160</td> <td>00995655</td> <td>MCDONALDS-CREDIT CARD</td> <td></td> <td>Accepted by SA</td> <td>PM</td> <td></td> <td></td> <td>3/17/2017</td> <td></td> </tr> <tr> <td>WO-00281629</td> <td>01050524</td> <td>SBUX.FS.BW</td> <td></td> <td>Accepted by SA</td> <td>Installation</td> <td></td> <td></td> <td>3/17/2017</td> <td></td> </tr> <tr> <td>WO-00288159</td> <td>01090497</td> <td>MANAGED.SVC.CREDIT CARD</td> <td></td> <td>Resolved</td> <td>Warranty</td> <td>US.EAST</td> <td></td> <td>3/29/2017</td> <td></td> </tr> <tr> <td>WO-00256145</td> <td>00974297</td> <td>FRANKIE.BE.SUPPLY SYSTEMS</td> <td></td> <td>Accepted by SA</td> <td>Installation</td> <td></td> <td></td> <td>3/1/2017</td> <td></td> </tr> <tr> <td>WO-00267890</td> <td>01058857</td> <td>SBUX.FS.BW</td> <td></td> <td>Accepted by SA</td> <td>Installation</td> <td></td> <td></td> <td>3/28/2017</td> <td></td> </tr> </tbody> </table>	Work Order Number	Case	Account	Contract	Order Status	Order Type	Service Team	Technician	Created Date	Owner Alias	WO-00262160	00995655	MCDONALDS-CREDIT CARD		Accepted by SA	PM			3/17/2017		WO-00281629	01050524	SBUX.FS.BW		Accepted by SA	Installation			3/17/2017		WO-00288159	01090497	MANAGED.SVC.CREDIT CARD		Resolved	Warranty	US.EAST		3/29/2017		WO-00256145	00974297	FRANKIE.BE.SUPPLY SYSTEMS		Accepted by SA	Installation			3/1/2017		WO-00267890	01058857	SBUX.FS.BW		Accepted by SA	Installation			3/28/2017	
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Steps	Action	Screen Image
3	<ul style="list-style-type: none"> In the "Search All" box, type in any portion of the work order number and click the Go! button or Select a predefined view from the drop-down menu Click the Go! button 	
4	<p>Once you locate a specific work order that you are looking for:</p> <ul style="list-style-type: none"> Click the work order number to take you to the work order. <p>Note: Manage all work orders through the PARENT work order. If you are closing out a parent and a child work order, close out both of them through the parent work order.</p>	 <ul style="list-style-type: none"> Black arrow indicates current view is sorted by City
5	<ul style="list-style-type: none"> Parent work order will have a green bar across the title All buttons are available to manage work order 	

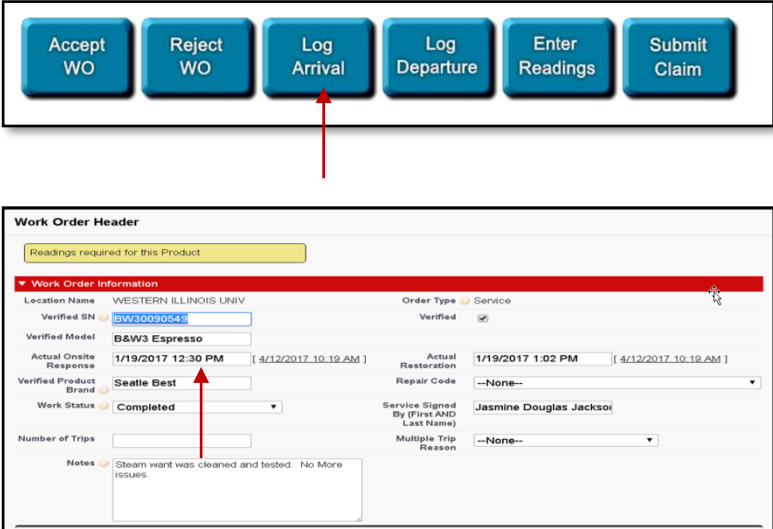
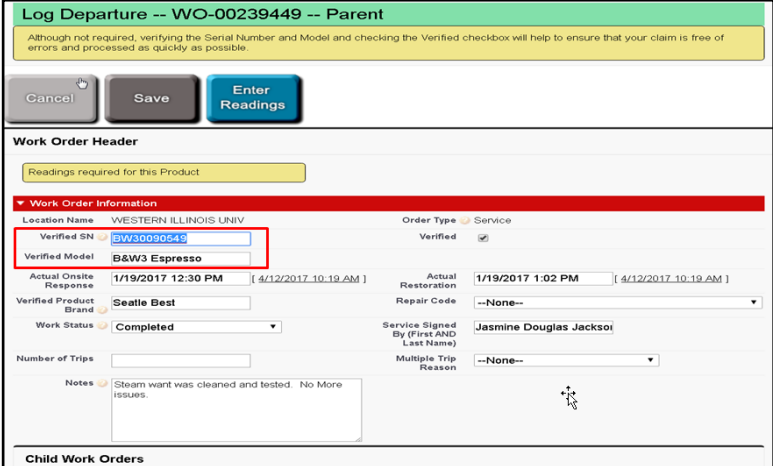

Steps – Accepting and Rejecting Work Orders

To Accept and Reject Work Orders, follow these steps:

Steps	Action	Screen Image
1	To accept a work order, click on the "Accept WO" button. Enter your ETA Date and Time. Click Save .	
2	If you are not able to accept a work order, click on the "Reject WO" button. Choose the appropriate reason from the Tech Declined Reason menu. Click Save .	

Steps – Log Arrival, Log Departure, Enter Readings

To Log Arrival, Log Departure, and Enter Readings, follow these steps:

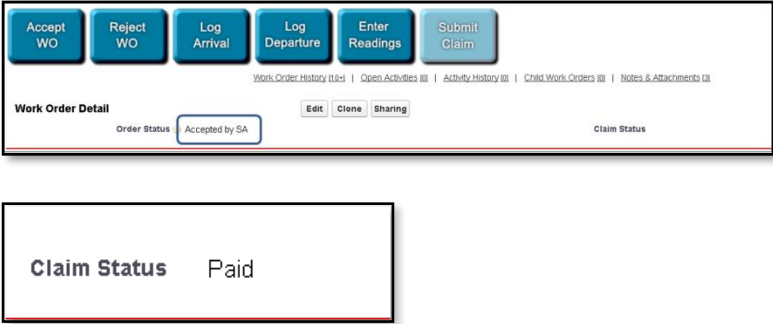
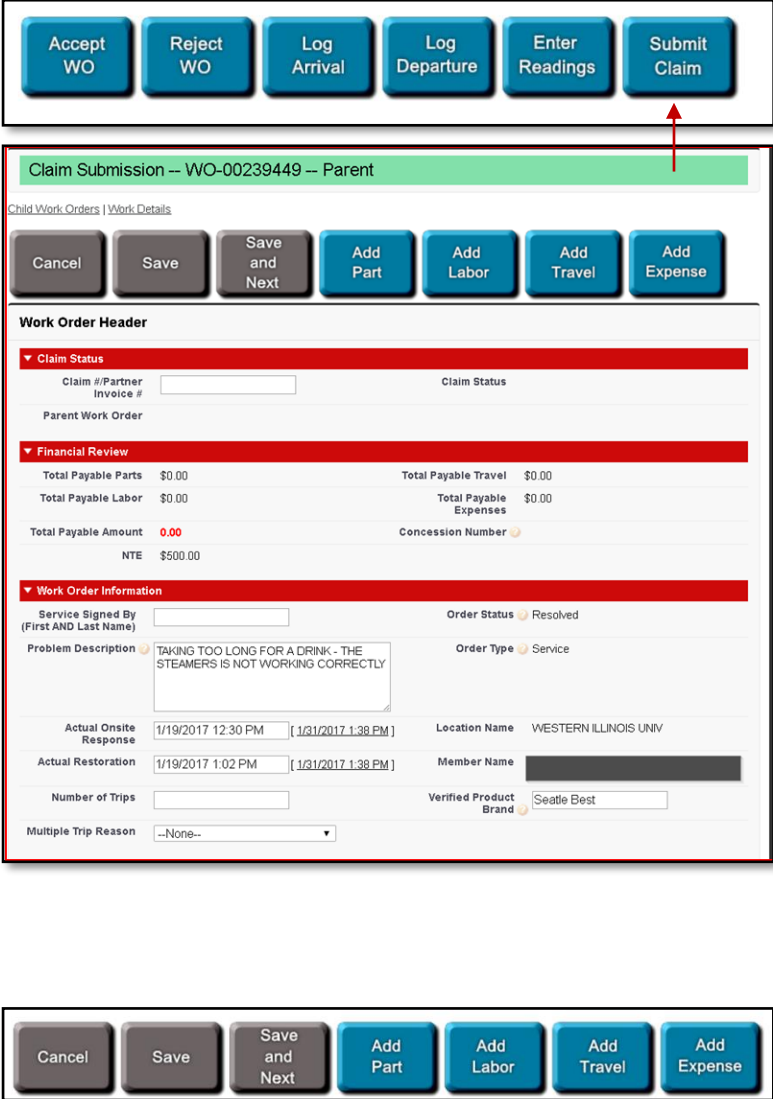
Steps	Action	Screen Image
<p>1</p>	<p>Type in Actual Onsite Response date and time and Actual Restoration date and time.</p> <p>Actual Onsite Response is when you arrived at the site and Actual Restoration is when you finished the work.</p> <p>These times DO NOT have to be in fifteen minute increments as before. If the technician is checking in and out of the work order while onsite, these times will already be here when you go to submit your claim.</p> <p>They will be actual times that were time-stamped throughout the process. These times <u>will not</u> automatically drive the number of labor hours you are being paid for.</p> <p>Click the Save button.</p>	 <p>The first screenshot shows a row of six blue buttons: 'Accept WO', 'Reject WO', 'Log Arrival', 'Log Departure', 'Enter Readings', and 'Submit Claim'. A red arrow points to the 'Log Arrival' button. The second screenshot shows the 'Work Order Header' form. A red arrow points to the 'Actual Onsite Response' field, which contains the value '1/19/2017 12:30 PM'.</p>
<p>2</p>	<p>Complete the Log Departure information:</p> <ul style="list-style-type: none"> • Fill out all fields that pertain to the machine serviced and the work performed • Verify SN & Model on machine repaired, and check the Verified checkbox <p>Note: If you do NOT agree with the data, change it and then click Verified</p> <p>The Actual Onsite Response and Actual Restoration will already be filled in if your tech did this while on site. If not, fill it in now.</p> <p>Enter the Verified Product Brand if applicable to this work order. This will be the name of the product being used in the machine.</p> <p>Select the appropriate Repair Code from the dropdown menu.</p> <p>Select the appropriate Work Status from the dropdown menu.</p>	 <p>The screenshot shows the 'Log Departure -- WO-00239449 -- Parent' form. A red box highlights the 'Verified SN' field (containing 'GW30090649') and the 'Verified Model' field (containing 'B&W3 Espresso'). The 'Verified' checkbox is checked. Other fields include 'Actual Onsite Response' (1/19/2017 12:30 PM), 'Actual Restoration' (1/19/2017 1:02 PM), 'Verified Product Brand' (Seattle Best), and 'Work Status' (Completed).</p>
<p>3</p>	<p>Enter First and Last name of the person that signed for the work.</p> <p>Note: Capture this information each time as it makes things easier when researching work orders for customers when you have a name and not "Manager".</p>	 <p>The screenshot shows the 'Work Order Information' section with a red header. Below it, the 'Service Signed By (First AND Last Name)' field is highlighted with a red box, showing an empty text input field.</p>



Steps	Action	Screen Image
4	<p>Enter Number of Trips</p> <p>Record the number of trips and what the reason was for the multiple trips, (if applicable).</p> <p>Enter "Notes". This is the service work that was performed by the technician.</p> <p>Click Save when done.</p>	
5	<p>After you have Logged Departure and marked the work as completed, the work order will now be in "Resolved" status.</p> <p>You can now move to the next blue button to "Enter Readings" if applicable to the machine that was serviced.</p> <p>Click on the Enter Readings button and enter the Shot Count and any other fields that show.</p>	

Once the **Log Arrival**, **Log Departure** and **Readings** have been entered, you are now ready to submit your claim.

Steps – Entering Claims

To Enter Claims, follow these steps:

Steps	Action	Screen Image
<p>1</p>	<p>To enter a claim the:</p> <ul style="list-style-type: none"> Work Order must be in the “RESOLVED” status <p>If Claim has already been Paid, all the buttons will be inactive and the Claim Status will show Paid</p> <p>Note: If the Submit Claim button is not available, check order status</p>	 <p>The screenshot shows a 'Work Order Detail' interface. At the top, there are six buttons: 'Accept WO', 'Reject WO', 'Log Arrival', 'Log Departure', 'Enter Readings', and 'Submit Claim'. Below these buttons, there are links for 'Work Order History', 'Open Activities', 'Activity History', 'Child Work Orders', and 'Notes & Attachments'. Under the 'Work Order Detail' section, there are 'Edit', 'Clone', and 'Sharing' buttons. The 'Order Status' is 'Accepted by SA' and the 'Claim Status' is 'Paid'.</p>
<p>2</p>	<p>Once the Work Order is Resolved and the readings have been recorded, click the Submit Claim button.</p> <p>Note: This brings you to the Claim Submission page.</p> <p>Gray Buttons</p> <p>Cancel – Used to cancel out without saving and go back to the work order page. This will take you out of the Claim Submission screen.</p> <p>Save – Saves the work that you have done but “stays” on the current page.</p> <p>Save and Next – Saves the work that you have done and takes you to the next page.</p>	 <p>The screenshot shows the 'Claim Submission' page for work order WO-00239449. At the top, there are six buttons: 'Accept WO', 'Reject WO', 'Log Arrival', 'Log Departure', 'Enter Readings', and 'Submit Claim'. Below these buttons, there are links for 'Child Work Orders' and 'Work Details'. Under the 'Claim Submission' section, there are 'Cancel', 'Save', 'Save and Next', 'Add Part', 'Add Labor', 'Add Travel', and 'Add Expense' buttons. The 'Work Order Header' section shows 'Claim Status' as 'Resolved'. The 'Financial Review' section shows 'Total Payable Amount' as '0.00'. The 'Work Order Information' section shows 'Service Signed By', 'Problem Description', 'Actual Onsite Response', 'Actual Restoration', 'Number of Trips', and 'Multiple Trip Reason'.</p> <p>Gray Buttons</p> <p>Cancel – Used to cancel out without saving and go back to the work order page. This will take you out of the Claim Submission screen.</p> <p>Save – Saves the work that you have done but “stays” on the current page.</p> <p>Save and Next – Saves the work that you have done and takes you to the next page.</p>

Steps	Action	Screen Image
	<p>In the case of a parent work order with children, it will take you to the next “child” work order, where you will file the claim for the child the same as you have done for the parent. Once you have entered all of your data for the parent and all of the children work orders, this button will take you to the Final Summary Page prior to submitting your claim to BUNN.</p>	
<p>3</p>	<p>Enter in your claim #</p> <p>This number must be unique for each work order. If you have a parent and a child, they must still be unique. If both machines are on the same claim number in your system, you can make them unique by putting an “a” or “b” after the number or “-1”, “-2”, etc.</p>	
<p>4</p>	<p>Enter Asset Tag Number</p> <p>Enter Asset Tag number, if applicable.</p>	
<p>5</p>	<p>Click “Save”.</p>	

Steps – Adding Work Details

NOTE: The blue buttons are used to add work details to a claim. These include Parts, Labor, Travel and Expenses.

Adding Part Details:

Steps	Action	Screen Image
<p>1</p>	<ul style="list-style-type: none"> Click the Add Part button to enter a Parts detail line. Parts Details will have a blue banner. Enter in a BUNN part number or Part Description. You can also use the magnifying glass to search for a product. Enter in the amount that you want to be paid in the Claim Price Per Unit box. <p>Note: If you are posting 2 sprayheads, enter the price for one sprayhead and it will calculate the amount to pay for the two sprayheads.</p> <ul style="list-style-type: none"> Enter Line Qty used for this part. <p>Note: Typically this field will be 1, but if you used two sprayheads, you would use a Line Qty of 2.</p>	
<p>2</p>	<p>If the part entered requires return to BUNN, the RMA status will indicate that the Part needs to be returned to BUNN.</p> <p>If you are using a part that is consigned to you by BUNN (or sent out to you no-charge for a project):</p> <ul style="list-style-type: none"> Check the Consigned Part box to indicate that you are using the part from your inventory that we are tracking. <p>NOTE - You can only “consume” one consigned part per “Save”. Therefore, if you have multiple part demands on an order, and all of them are consigned, then you will need to hit Save in between adding each part so that the logic can consume one part at a time from your stock.</p> <p>Once you click “Save” the Payable Line Price will calculate the amount that you will be paid for the part shown.</p>	

Steps	Action	Screen Image
3	<p>When adding parts for competitor equipment, (like AMW, Grindmaster, Fetco, or Curtis),</p> <ul style="list-style-type: none"> Click the Add Part button. Click the magnifying glass where you would enter a part number. 	
4	<p>When the window opens, go to the “Filter By” section</p> <ul style="list-style-type: none"> In the first drop down menu, change it to “Manufacture P/N”. In the next drop down menu change it to “Starts With”. Enter the Competitor Part Number. Hit “Go!” 	
5	<p>Click on the Product Name and your part will be added. Enter the “Line Qty” and “Claim Price” Per Unit. Hit “Save”.</p>	

Adding Labor Details:

Steps	Action	Screen Image
1	<p>Click the Add Labor button to load a labor detail line. Labor Details have a yellow banner.</p> <ul style="list-style-type: none"> Select Regular, OT, or Holiday from the Servicer Rates dropdown menu. Enter the number of Labor hours that you want to be paid for. Hit “Save” <p>Note: BSP automatically calculates what to pay based on the Service Rate type that you chose and the number of hours you entered. The payable rate comes from your contracted rate with BUNN.</p>	
2	<p>Vendor Rate Project field</p> <p>If you see a value in RED for Vendor Rate/Project, our records indicate that you have a flat rate agreement with us for this particular work.</p> <p>Enter “1” in the Line Qty field to get paid your flat rate amount for this work order.</p>	

Adding Travel Details:

Steps	Action	Screen Image
1	<p>Click the Add Travel button to load a Travel detail line. Travel details have an orange banner. If you had multiple trips, you should add one Travel demand for each trip.</p> <ul style="list-style-type: none"> • Travel field – Select Hourly or By Zone • Servicer Rates – Select Regular, OT or Holiday rates • Travel Qty – Enter number of hours travel. Use 1 for Zone rates • Hit “Save”. <p>Note - BSP will automatically calculate what to pay based off of the options that you chose and the Travel Qty that you entered. The Payable rate comes from your contracted rate with BUNN for those options.</p>	

Adding Expenses:

Steps	Action	Screen Image
1	<p>Click the Add Expense button to load an Expense detail line. Expense details have a purple banner.</p> <ul style="list-style-type: none"> • Select Expense Type: Airfare, Tolls, Lodging, Tax, Parking, or Shipping • Enter amount (per unit) that you want to be paid in the Claim Price Per Unit field • Enter Quantity in the Line Qty field • Enter any Comments in Comment section • Hit “Save”. 	

Steps	Action	Screen Image
1	<p>When you are done entering in all of the demands, and have verified the total shown in the Financial Review screen section is correct, click the Save and Next button to go to the Child Work Order or to the Final Summary page.</p>	

Steps – Entering Claim on Child Work Order

To Enter a Claim on a Child Work Order, follow these steps:



Steps	Action	Screen Image
<p>1</p> <p>If there is a Child work order, you will be taken to a claim submittal page for the Child.</p> <p>Note - Child work order header changes to ORANGE and the Child WO order number is listed.</p> <ul style="list-style-type: none"> Fill out the Child Claim with a UNIQUE Claim or Invoice #. <p>Reminder - Do not use the same claim number as the Parent WO. If you have them under the same claim number in your system add an “a” or an “-1” to the claim number listed on the Child.</p>		
<p>2</p> <p>When you are done entering all of the demands on this child work order, and you are happy with the total that was shown in the Financial Review Section, click the Save and Next button to go to the next Child Work Order (if there is one) or to the Final Summary page.</p>		

Steps – Reviewing the Financial Summary and Submitting Claim

To review the **Financial Summary** and **Submit Claim**, follow these steps:



Steps	Action	Screen Image
1	<ul style="list-style-type: none"> Review the fields on the Parent and Child work order. If you agree with totals calculated for each claim, Click the I agree to Claim Amounts check box, then click Submit Claim. If you DO NOT agree with the totals that are showing for what we are going to pay for each claim, click the "I contest the claim amounts" check box and type in a reason for why you believe the totals are incorrect. Then hit the "SUBMIT CLAIM" button to submit the claim to BUNN for review. 	
2	<p>Once you have filed your claim through BSP, you can attach your back-up directly to the work order.</p> <ul style="list-style-type: none"> Click Notes & Attachments link Choose Attach File <p>Note - Follow the 3 steps presented to you on the screen to attach the appropriate file directly to the work order.</p>	

This completes the process on **How to Submit a Claim**.

If you need assistance with your Username and Password, contact: **Connie Silva 1-217-585-7886**.

For help or assistance with entering your claim, contact: **Lisa Graham 1-217-585-7074**.

If you need additional training, contact: **Cheryl Formea 1-217-585-7734** or **Chad Formea 1-217-585-7899**.