



# BUNNserve Plus

*Field Service Lightning Mobile App Edition*

*Service Provider*



LAST MODIFIED: MAR. 2022



# Table of Contents

Summary/Flow .....	3	- Check Out .....	16-17
Logging in for the first time .....	4-5	- Field Service Report .....	18
Schedule .....	7	- Concession Submittal .....	19-20
Managing a Work Order .....	9-20	- Virtual Tech .....	21
- Start Travel .....	9	Error Handling .....	23
- Undo Travel .....	10	Frequently Asked Questions .....	25
- Check In .....	11-12		
- Add Part WOLI .....	13		
- Add Expense WOLI .....	14		
- Add Files .....	15		

# Summary

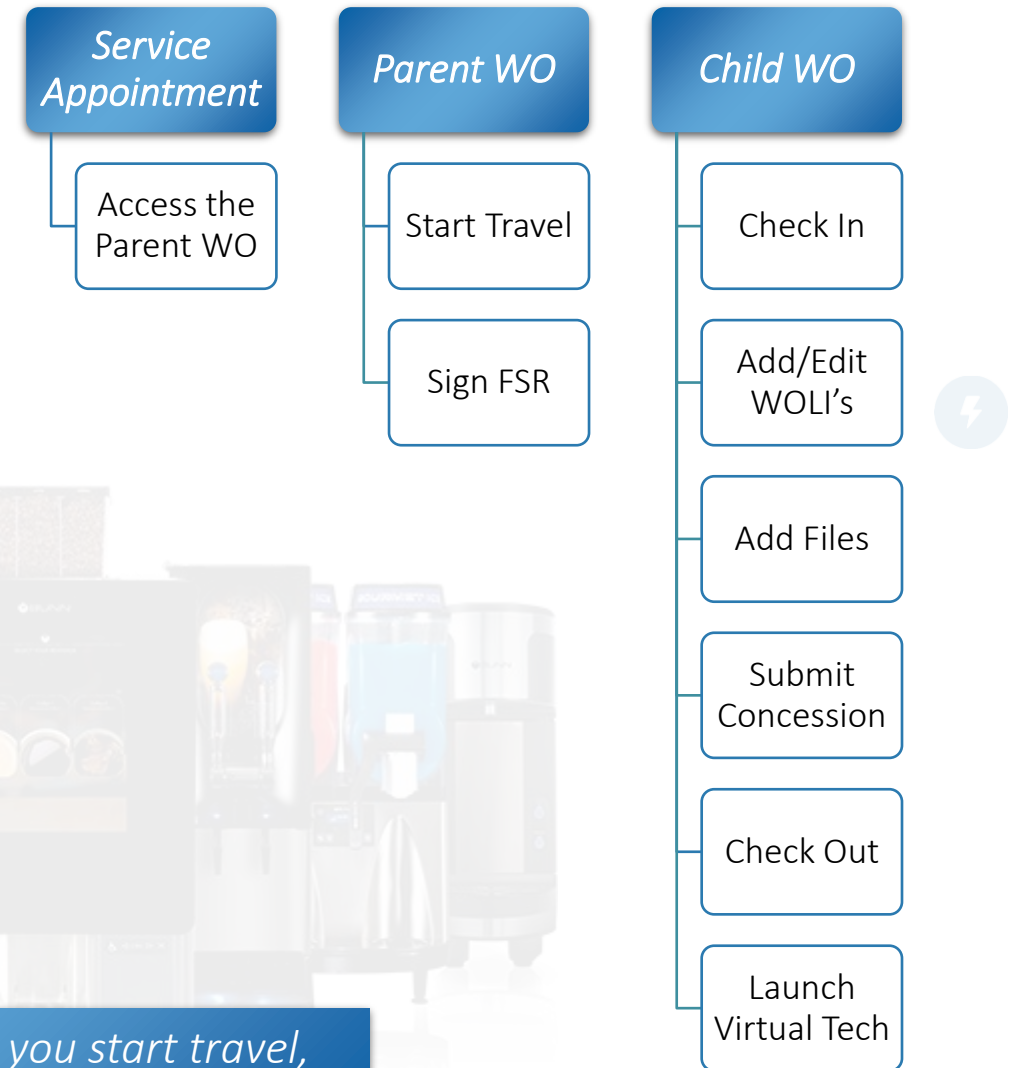
Your home office will dispatch you a specific Service Appointment (SA) that you will use to access your BUNN Work Order.

The Parent WO is simply a container for Children WO's.

- A single service request will be one Parent WO and one or more Children.

Nearly all activity is completed directly from the child work order, except for starting travel and completing the Field Service Report (FSR).

*Note: Completing a Field Service Report with a customer signature is required.*

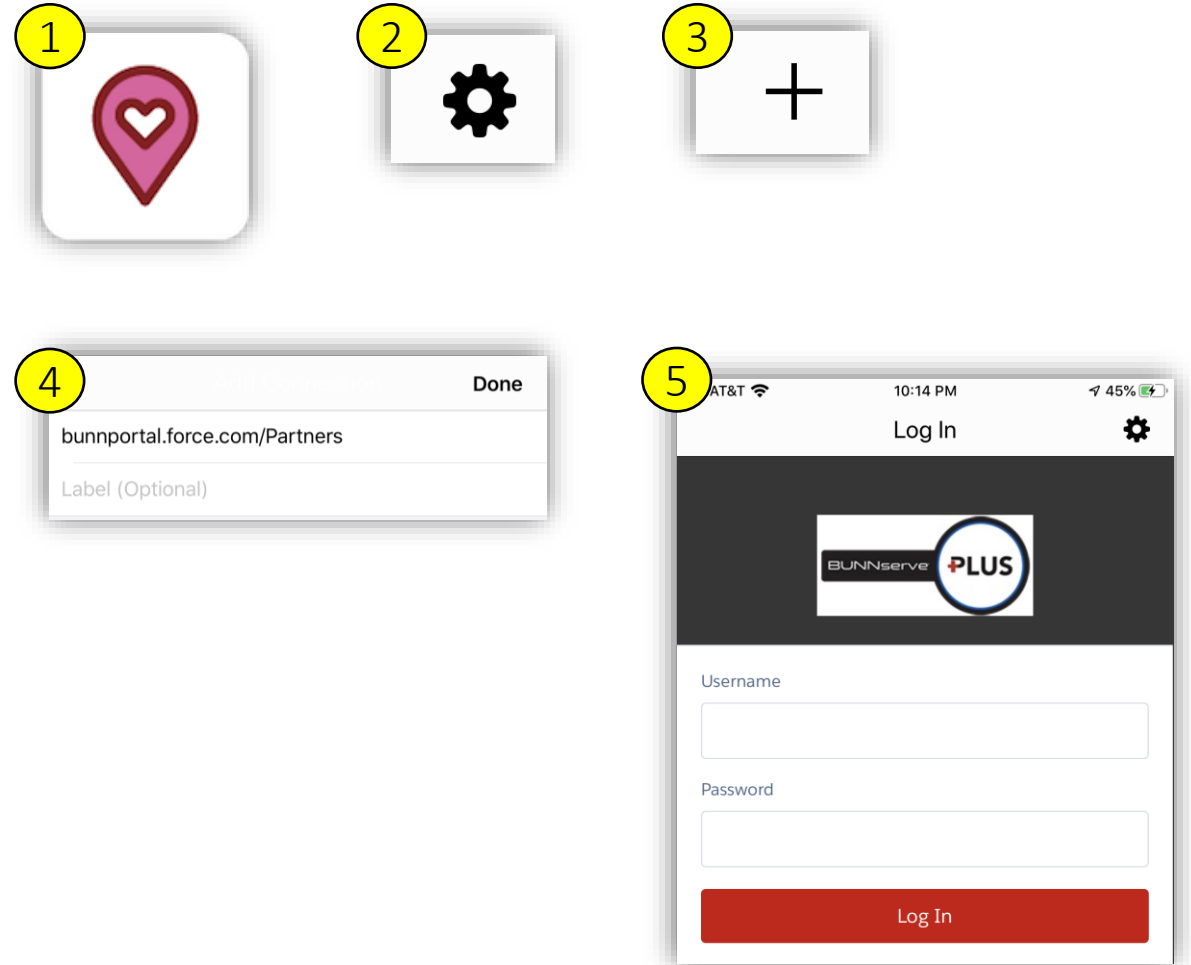


*Use the Field Service mobile app to alert us when you start travel, arrive and when you have finished the work.*

# First Login

1. Locate and install the Salesforce Field Service mobile app from your app store and tap the app icon to open it.
2. From the Log In screen, tap the gear icon in the top right.
3. Tap the + icon in the top right.
4. In the top field, enter `bunnportal.force.com/Partners` and then tap Done in the top right.  
*This field is case sensitive, so be sure to use the capital P on Partners.*
5. Enter your username (home office) and password, click Log In.

*Continued on next page....*



# First Login - *Continued*

6. If prompted for a Validation Code, please contact your office as it will be in the inbox associated with the login they provided.
7. Click Allow.
8. If prompted, pick a 4-digit passcode. This passcode will be used to open the app should you not opt to enable the optional touch or face ID features.
9. If prompted, you may Enable Touch ID to allow quick access without passcode. Some newer devices may replace the touch ID option with Face Id. These options are individual preferences and can be enabled or skipped.

6

Verify Your Identity

You're trying to Log In to Salesforce. To make sure your Salesforce account is secure, we have to verify your identity.

Enter the verification code we emailed to ja\*\*\*\*\*@\*\*nn.com.

Verification Code

Verify

☒ Don't ask again  
Resend Code

7

Allow Access?

Salesforce Field Service for iOS is asking to:

- Access your basic information
- Provide access to your data via the Web
- Access and manage your data
- Perform requests on your behalf at any time

Do you want to allow access for bill.mills@bunn.com.fslqa? (Not you?)

Deny Allow

8


Create Passcode

For increased security, please create a passcode that you will use to access Salesforce when the session has timed out due to inactivity.

○ ○ ○ ○

9

Touch ID



Set up Touch ID

You can now unlock FieldServiceApp using Touch ID for extra security and convenience.

Not Now Enable

# Field Service Mobile App Navigation

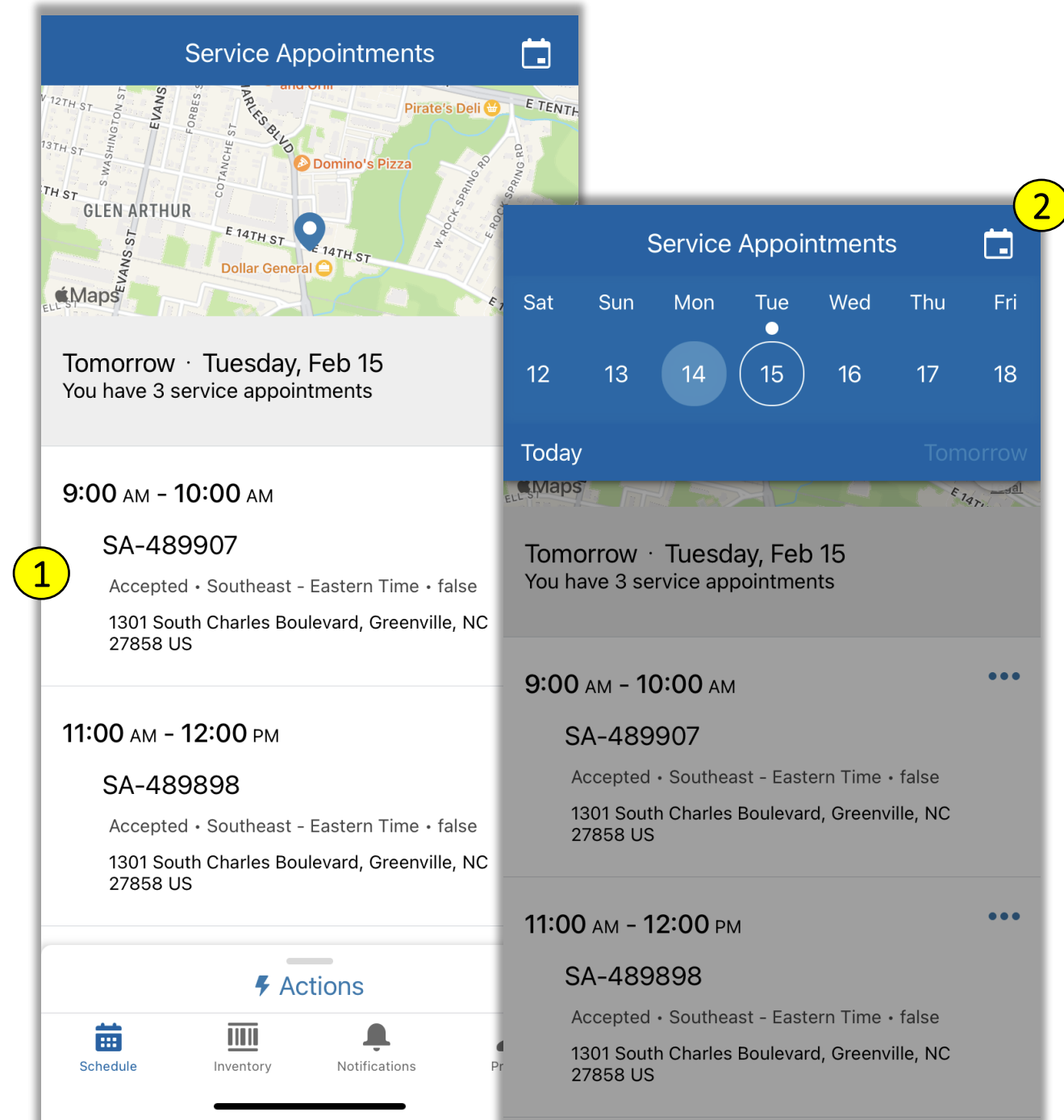


# Schedule

After launching the app, you land on the Schedule by default.

Each appointment lists a start and end time at the top. The start time is the ETA your office entered when accepting the work. Additionally, you'll see the service appointment number (SA#), the status of the work, the time zone and the site address.

1. Tap an appointment to open the work order.
2. Tap the calendar icon in the top right to move forward or backward by up to 45 days in either direction.

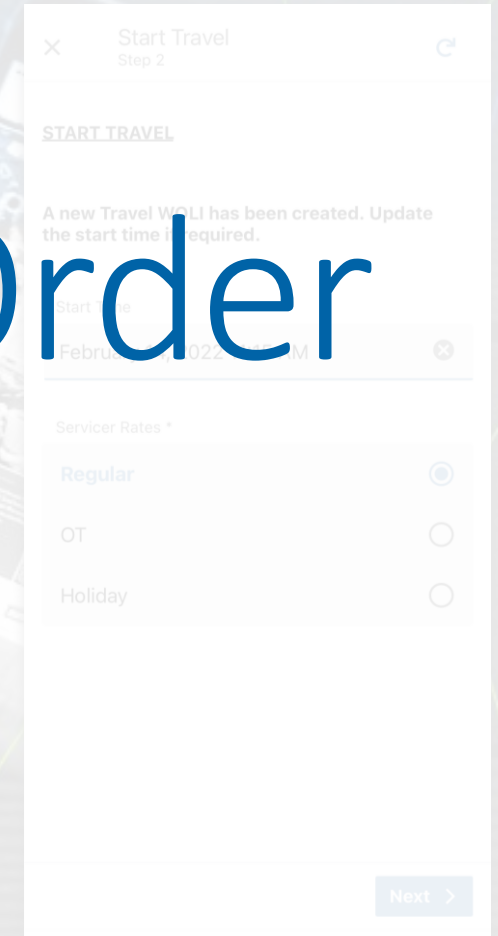
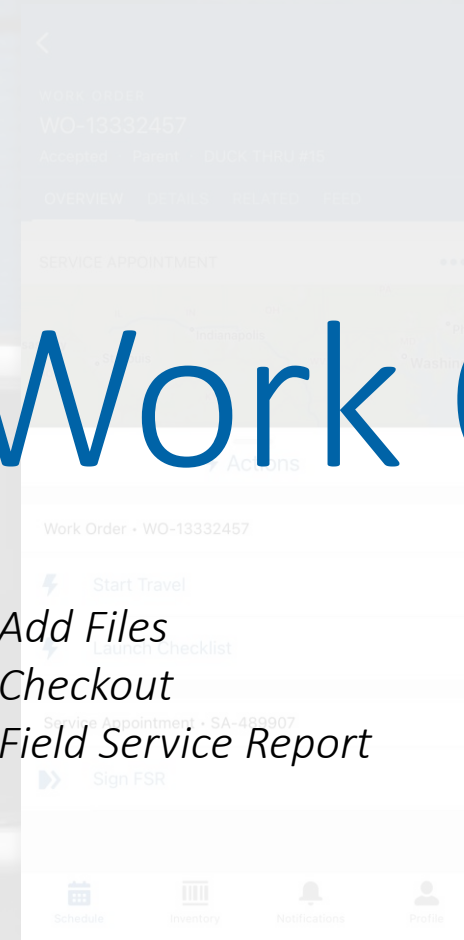
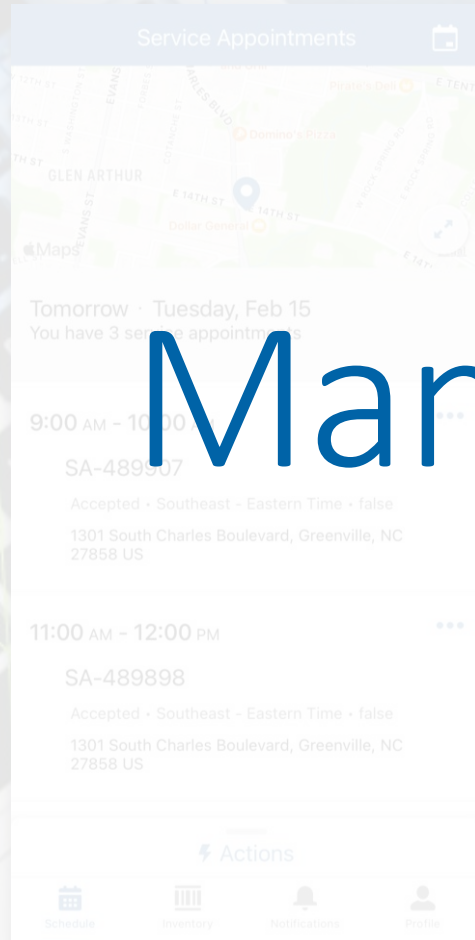




# Managing a Work Order

- *Start Travel*
- *Check In*
- *Add WOLI – Parts*
- *Add WOLI – Expenses*

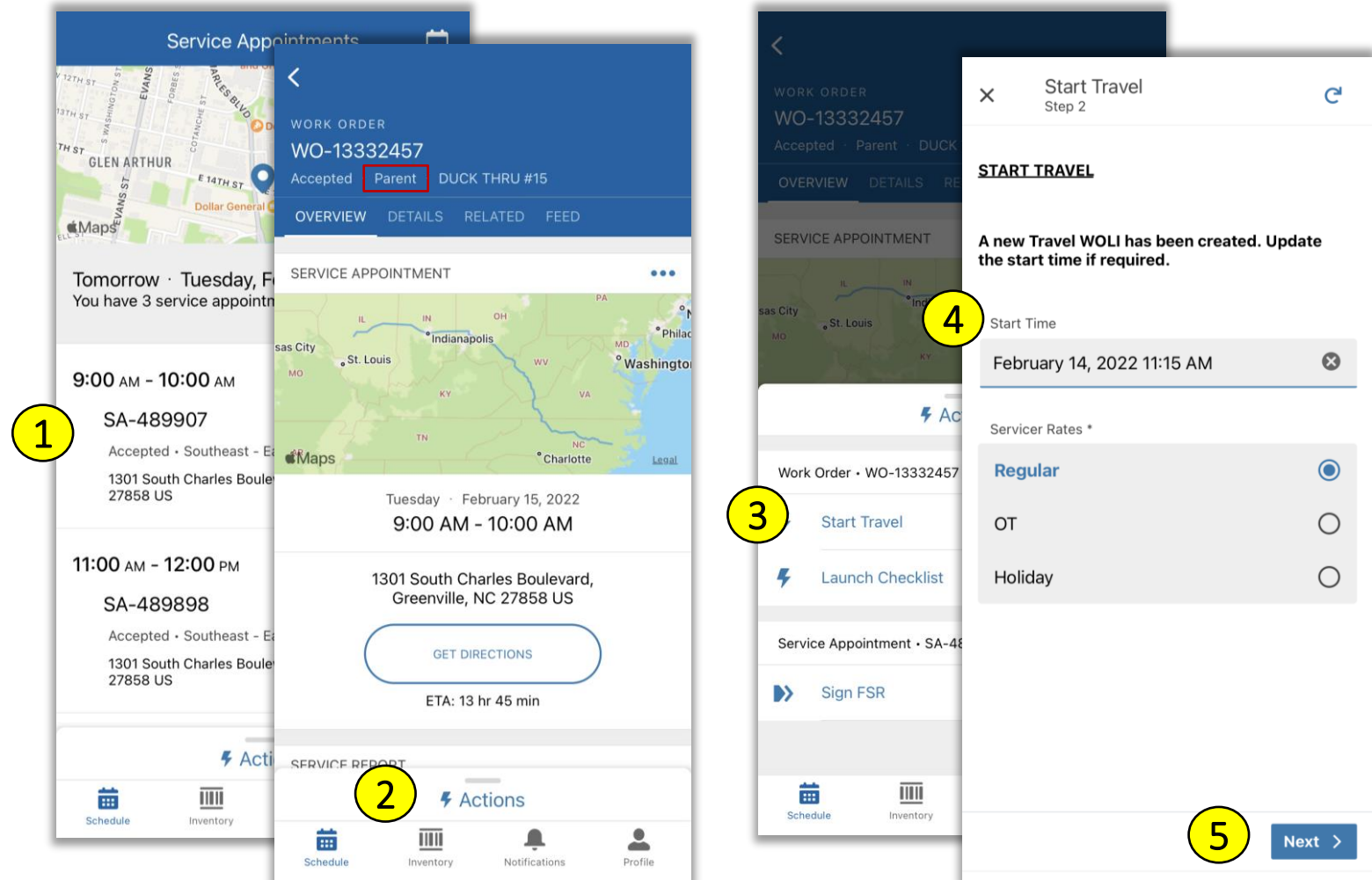
- *Add Files*
- *Checkout*
- *Field Service Report*





# Start Travel

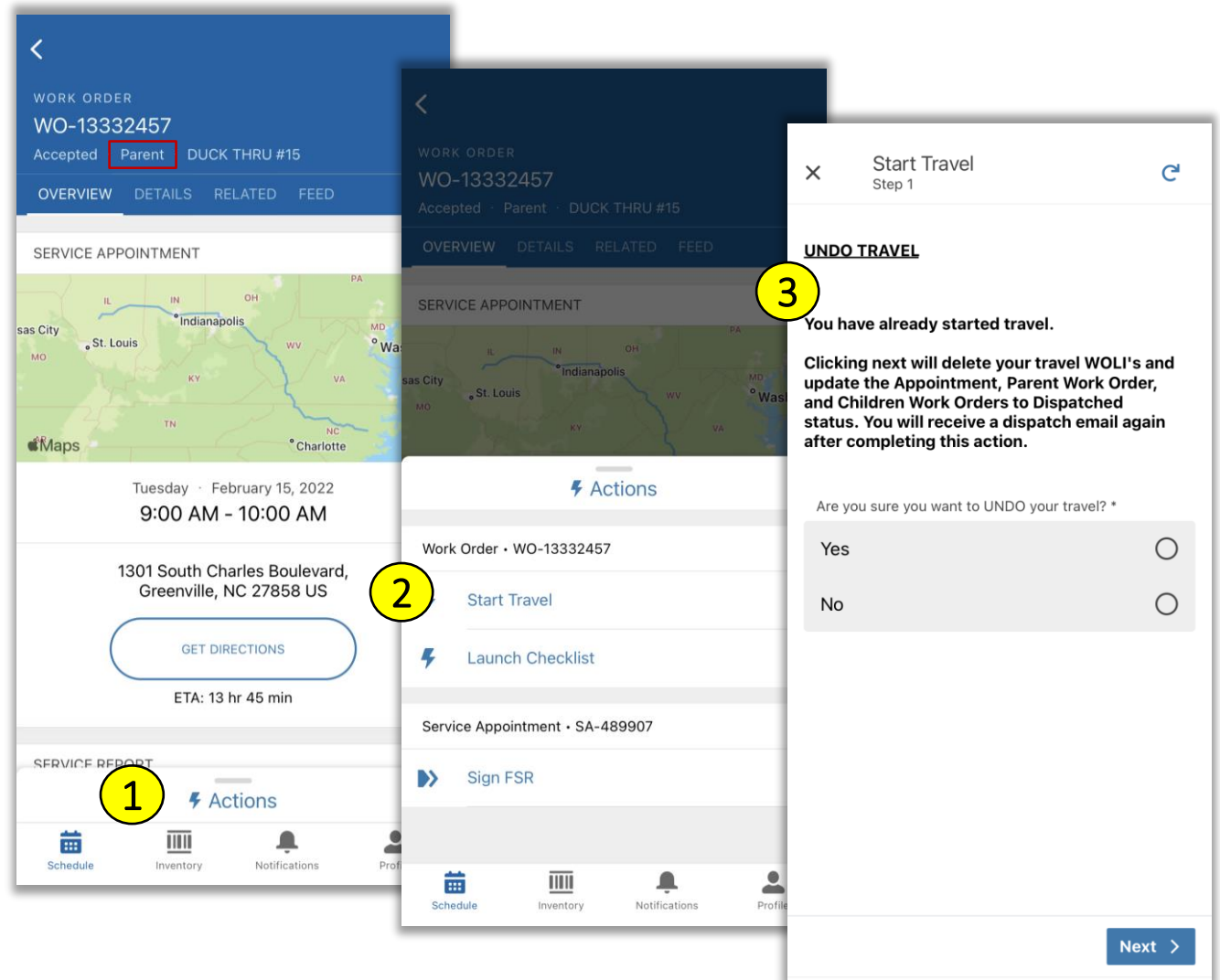
1. From the Schedule, select the Service Appointment to open the Parent Work Order.
2. From the Parent Work Order screen, tap the Actions button at bottom.
3. Tap Start Travel.
4. Adjust the travel start time and rate type as necessary.
5. Follow the onscreen prompts, tapping Next until you see Finish – tap Finish.



# Undo Travel

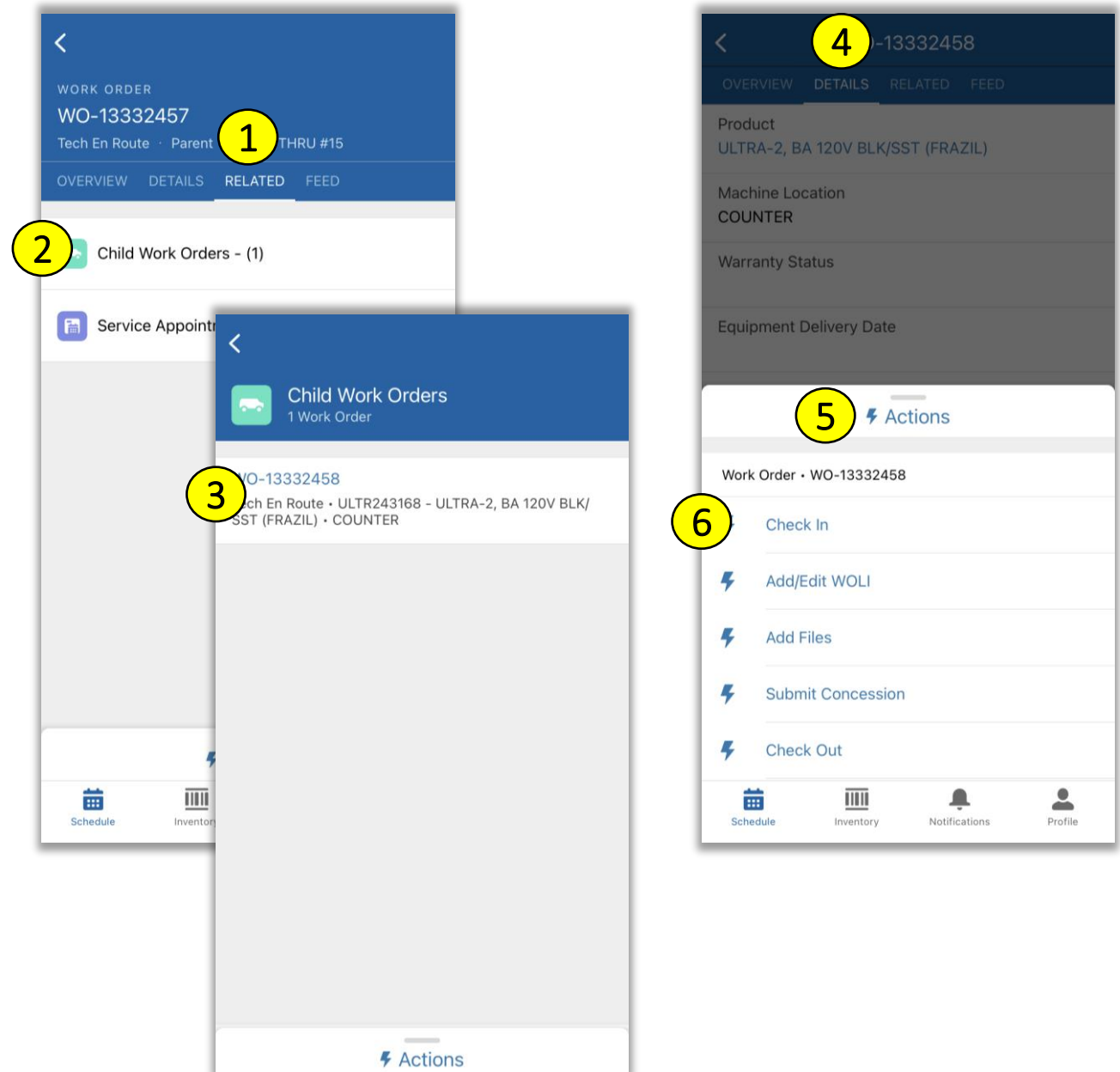
If you mistakenly start travel on the wrong work order or your home office redirects you, follow the below steps to “undo” your travel:

1. From the Parent Work Order screen, tap the Actions button at bottom.
2. Tap Start Travel.
3. The system recognizes you have already started travel and provides the ability to “undo” travel and return the appointment and work order to its prior state.



# Check In

1. Tap RELATED on the Parent Work Order.
2. From the related list, tap Child Work Orders to see a list of children.
3. Tap a Child Work Order to open it.
4. Tap DETAILS and review all Work Order details, such as the machine to be serviced, problem description, and more.
5. Tap the Actions button at bottom.
6. Tap Check In.





# Check In - Continued

7. The initial check-in screen provides general work order details, like the details tab on the prior screen. Review the details and then tap Next.
8. You have an opportunity to change your travel start here if needed. Otherwise, enter your Check In time and confirm your rate type before clicking Next.
9. Finally, relevant BUNN notes are displayed for your review. **Please read all notes\*** and tap Next until you see Finish, then tap Finish.

The image displays three sequential screenshots of a mobile application's 'Check In' process.

**Step 1: Check In**  
The screen shows the following details:  
**CHECK IN**  
Work Order Number: WO-13332458  
Product: ULTRA-2, BA 120V BLK/SST  
Serial Number:  
NTE: 850  
Problem Description: This is a test work order  
Machine Location: COUNTER  
Tap Next to Check In the Work Order.  
A yellow circle with the number '7' is positioned over the 'Next >' button at the bottom right.

**Step 2: Check In**  
The screen shows the following details:  
**CHECK IN**  
Check In Time for WO-13332458 must be later than the Travel Start Time: Feb 14, 2022 at 11:15 AM and duration must not exceed 16 hours.  
Update the Travel Start Time below if it is incorrect.  
Travel Start Time: February 14, 2022 11:15 AM  
Check In: February 14, 2022 12:14 PM  
Servicer Rates \*  
Regular (selected)  
OT  
Holiday  
A yellow circle with the number '8' is positioned over the 'Travel Start Time' field.  
A 'Next >' button is at the bottom right.

**Step 3: Check In**  
The screen shows the following details:  
**CHECK IN**  
Work Order Number: WO-13332458  
Account Notes: THIS IS A PRINTED WORK ORDER NOTE FROM THE ACCOUNT. PICTURE OF SERIAL NUMBER IS REQUIRED FOR ALL INSTALLS, REMOVALS, REBRANDS, PURCHASE REBRNADS AND SWAPS.  
Location Notes: THIS IS A PRINTED WORK ORDER NOTE FROM THE LOCATION.  
Product Line Notes: THIS IS A PRINTED WORK ORDER NOTE FROM THE PRODUCT LINE RECORD - GRANITA.  
Product Notes: THIS IS A PRINTED WORK ORDER NOTE FROM THE PRODUCT.  
Tap Next to Continue  
A yellow circle with the number '9' is positioned over the 'Next >' button at the bottom right.

\*Notes often include specific BUNN and/or customer requirements that are required to ensure claim payment.

# Add WOLI - Part

1. From the Actions menu, tap Add/Edit WOLI.
2. Select Add Parts from the list and click Next.
3. Enter the quantity.
4. Search for a product by typing the name, part number or by scanning the product barcode.
5. Multiple parts may match your criteria. Tap the part being installed.
6. Tap Next, Next, Finish.

The screenshots illustrate the following steps:

1. From the Actions menu, tap Add/Edit WOLI.
2. Select Add Parts from the list and click Next.
3. Enter the quantity.
4. Search for a product by typing the name, part number or by scanning the product barcode.
5. Multiple parts may match your criteria. Tap the part being installed.
6. Tap Next, Next, Finish.



*Part WOLI's should be added as parts are used, rather than when the job has concluded.  
This will us to warn you if you are nearing or exceeding the NTE.*

# Add WOLI - Expense

1. From the Actions menu, tap Add/Edit WOLI.
2. Select Add Expense from the list and click Next.
3. Select an expense type from the list of available options, like Parking, Tolls, Shipping, etc.
4. Enter the quantity.
5. Enter a dollar value.
6. Tap Next, Next, Finish.

The image shows a sequence of four mobile app screens illustrating the process of adding a Work Order Line Item (WOLI) expense. The screens are numbered 1 through 6, corresponding to the steps in the list on the left.

- Screen 1:** The 'Actions' menu for Work Order WO-13332458 is open. The 'Add/Edit WOLI' option is highlighted with a yellow circle 1.
- Screen 2:** The 'Add/Edit WOLI Step 1' screen is shown. The 'Add Expense' option is selected under the 'Please Select: \*' dropdown, highlighted with a yellow circle 2.
- Screen 3:** The 'Add/Edit WOLI Step 2' screen is shown. The 'Expense Type \*' dropdown is open, and 'Parking' is selected, highlighted with a yellow circle 3.
- Screen 4:** The 'Add/Edit WOLI Step 2' screen is shown. The 'Quantity #' field is set to '1' (highlighted with a yellow circle 4) and the 'Unit Price #' field is set to '8.00' (highlighted with a yellow circle 5). The 'Next >' button is visible at the bottom right, highlighted with a yellow circle 6.



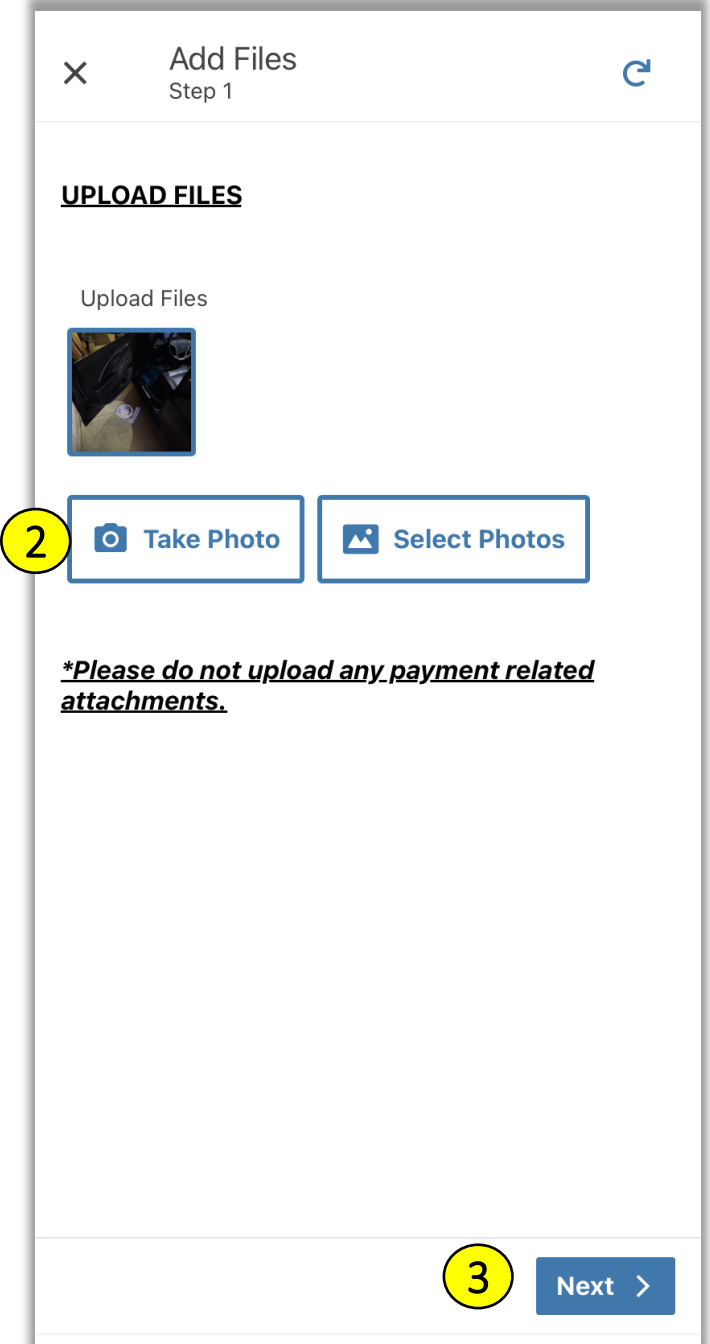
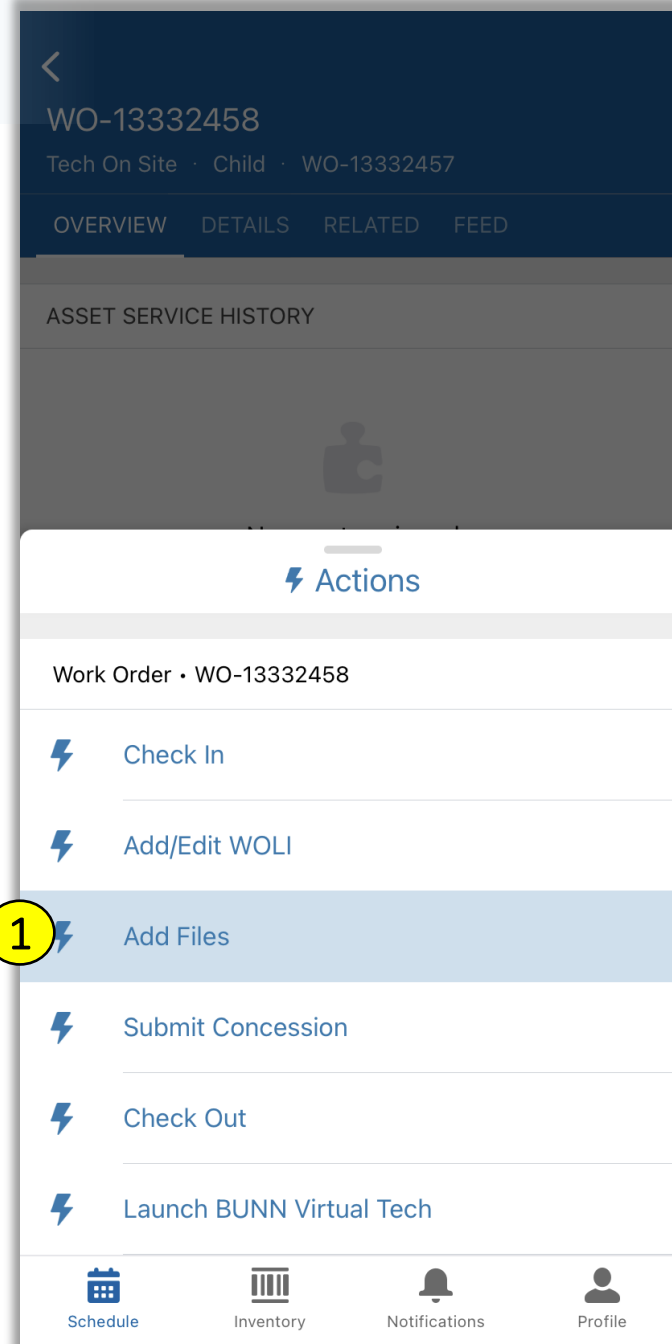
*Expenses, like parts, should be added as soon as you know about them.  
Adding WOLI's immediately allows us to warn you if you are nearing or exceeding the NTE.*



# Add Files

1. From the Actions menu, tap Add Files.
2. Tap the Take Photo option to launch your camera app and take a photo now or use the Select Photos button to browse for a photo from your mobile device.
3. Tap Next, Next, and Finish to attach the item to the work order.

Great for copies of your work slip, completed checklists, photos of equipment, etc.



# Check Out

Validation will prevent a user from checking out if the Check In action has not been performed.

From the Actions menu, tap Check Out.

1. Select a work status.  
*(If anything other than completed, the work order will move to Awaiting Return Trip. [Alert your home office of needs.](#))*
2. Complete the check out questionnaire, tapping Next after completing each screen.
3. Verify all work details are accurate.
4. Add additional parts or expenses or use the Continue Check Out option to proceed.

The image displays four overlapping screenshots of a mobile application's 'Check Out' process, numbered 1 through 4 in yellow circles.

- Step 1:** 'Check Out Step 1'. It shows a 'Work Status \*' dropdown menu with a yellow circle '1' over it. Other fields include 'Work Order: WO-10015903', 'Account Name: LEAN & LO...', and 'Location Name: THE BIG B...'. A 'Back' button is at the bottom.
- Step 2:** 'Check Out Step 2'. It shows 'Verified SN' (TB00038746), 'Verified Model' (TB3), a 'Verified' toggle switch, 'Arrival: Sep 16, 2019 at 3:2...', 'Restoration' (September 16, 2019 6:29), and a 'Repair Code \*' field. A 'Back' button is at the bottom.
- Step 3:** 'Check Out Step 3'. It shows 'Work Performed: Educated proper use.', 'Created WOLI's:', and a list of work order items (e.g., '00000002 - ACTUAL TR...', '00000003 - ACTUAL LA...', '00000004 - ACTUAL PA...', '00000005 - ACTUAL EX...', '00000006 - ACTUAL PA...'). A 'Back' button is at the bottom.
- Step 4:** 'Check Out Step 4'. It shows 'CHILD WORK ORDER CHECK OUT', 'NEXT: \*', and two radio button options: 'Add Part' and 'Add Expense'. The 'Continue Check Out' option is selected with a blue circle. A 'Next >' button is at the bottom.

# Check Out - Continued

5. Tap Work Completed when done adding WOLI's, then Next, Next, and Finish to complete the check out process.

*Reminder: The check in and check out process is per piece of equipment, and each piece of equipment should have its own child work order.*

5

Check Out  
Step 5

CHILD WORK ORDER CHECK OUT

Work Order: WO-10015903

Location: THE BIG BIB BBQ

Asset: TB00038746

Product: TB3

Created WOLI's:

NEXT: \*

Work Completed

Next >



Completing the check out process will place the work orders in a "Resolved" status. Claims do not get automatically submitted to BUNN. Claims must be reviewed (all details from tech will be present) and submitted via the portal.



# Field Service Report

1. From the Parent, tap and then Sign FSR.
2. Tap Get Signatures, and then select Customer.
3. Complete the Name field with the “printed name” and obtain the signature.
4. Repeat steps 2 and 3 selecting Technician.
5. Tap Generate Signed Report.

**1** Sign FSR

**2** Service Report  
September 16, 2019  
SERVICE REPORT PREVIEW  
Get Signatures

**3** Signature  
Please sign to confirm completed  
Name\*  
Joe Customer  
Customer\*  
[Signature]

**4** Service Report  
All signatures collected  
Generate Signed Report

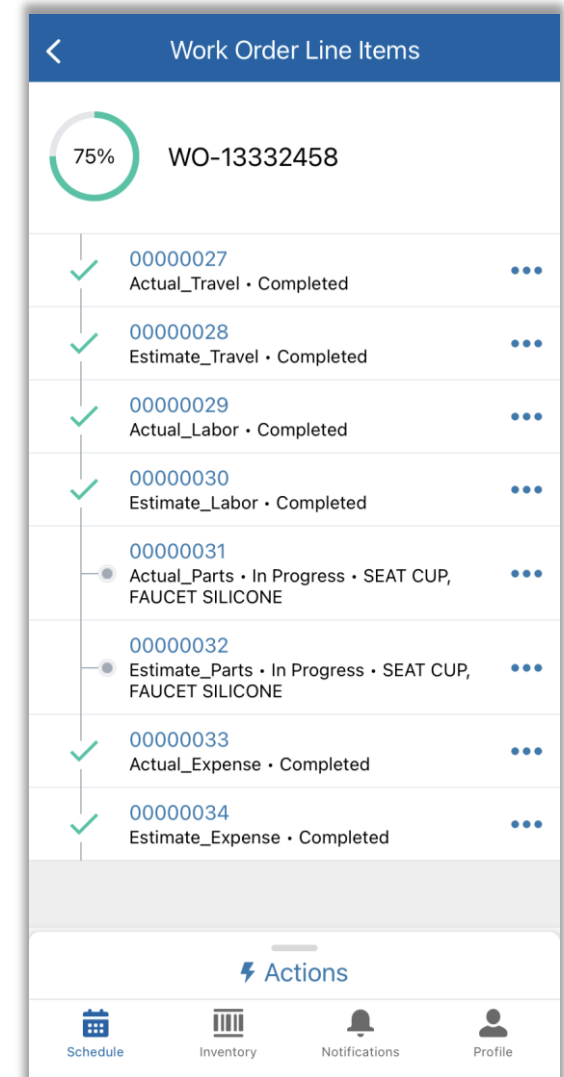
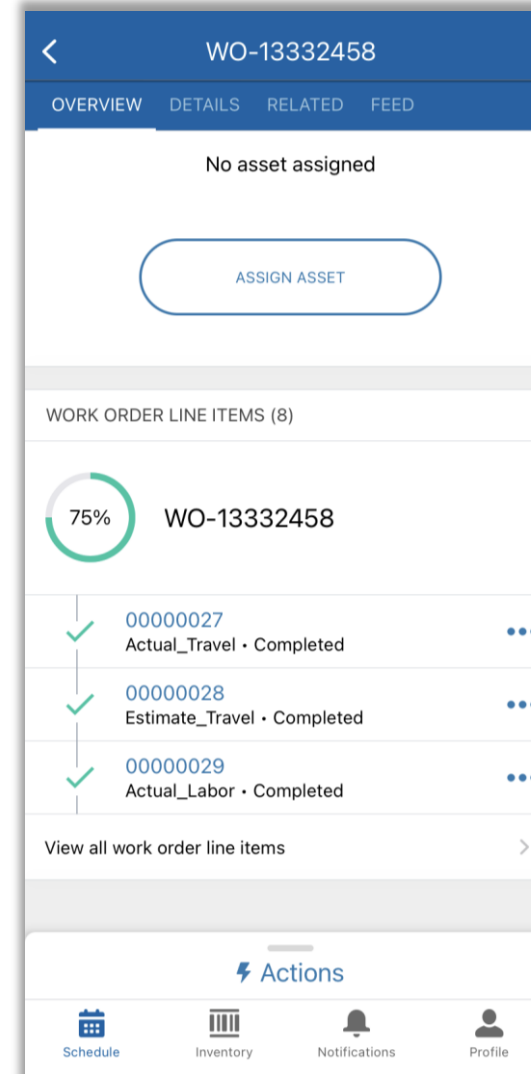
Signature	Time	Technician
[Signature]	Sep 16, 2019, 6:59 PM	Customer: Joe Customer
[Signature]	Sep 16, 2019, 7:00 PM	Technician: Joe Tech

# Submit Concession

Before submitting a concession, it's important to know that as you've used our mobile app to Start Travel, Check In, and Add WOLIs, we've been creating both estimate (used for concessions) and actual (used for billing) work order line items in the background. You can see the list of these WOLIs at the bottom of a child work order, shown at right.

Because we've been creating estimate lines for you, all the work you've done up to this point is already on file and you only need to add details that aren't yet on the work order – like additional travel, labor and parts for a second trip.

*Please see instructions for submitting a concession on the next slide.*



# Submit Concession

1. From the Actions menu, tap Submit Concession.
2. Review the list of WOLIs, tap Add or Review and click Next.
3. Here you can add travel, labor, parts or expenses. Select an option and follow the on-screen prompts. You will return to this page after each add. When done, select Review and Submit and click Next.
4. Provide a summary. This text will be shared with the customer.
5. If finished, use the Submit Concession option and tap next.

The screenshots illustrate the 'Submit Concession' process in a mobile application. The first screenshot shows the 'Work Order' details for WO-13332458, with the 'Submit Concession' button highlighted by a yellow circle with the number 1. The second screenshot shows the 'Submit Concession Step 1' screen, where the user can review the work order details and select 'Add or Review' (highlighted by a yellow circle with the number 2). The third screenshot shows the 'Submit Concession Step 2' screen, where the user can add or review WOLIs (highlighted by a yellow circle with the number 3). The fourth screenshot shows the 'Submit Concession Step 3' screen, where the user can provide a summary and select 'Submit Concession' (highlighted by a yellow circle with the number 4). A yellow circle with the number 5 is also present on the 'Submit Concession' button in the final screenshot.



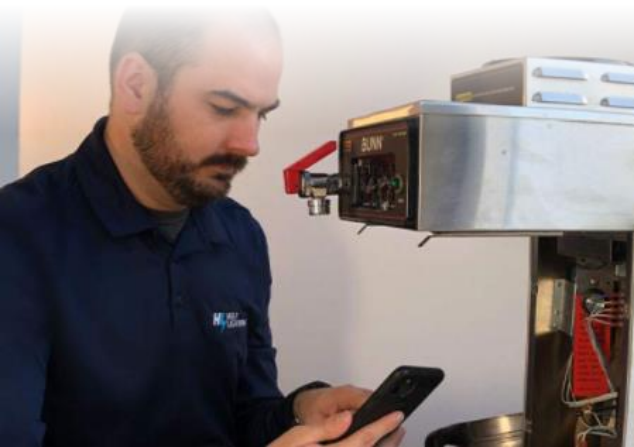
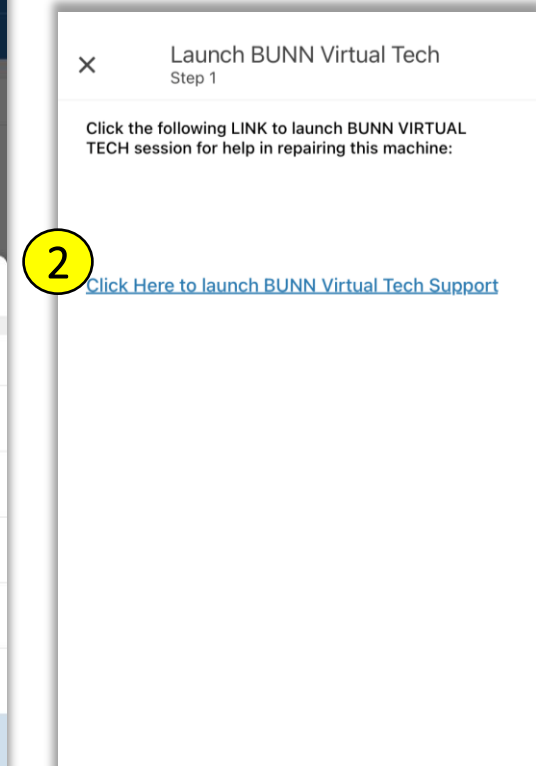
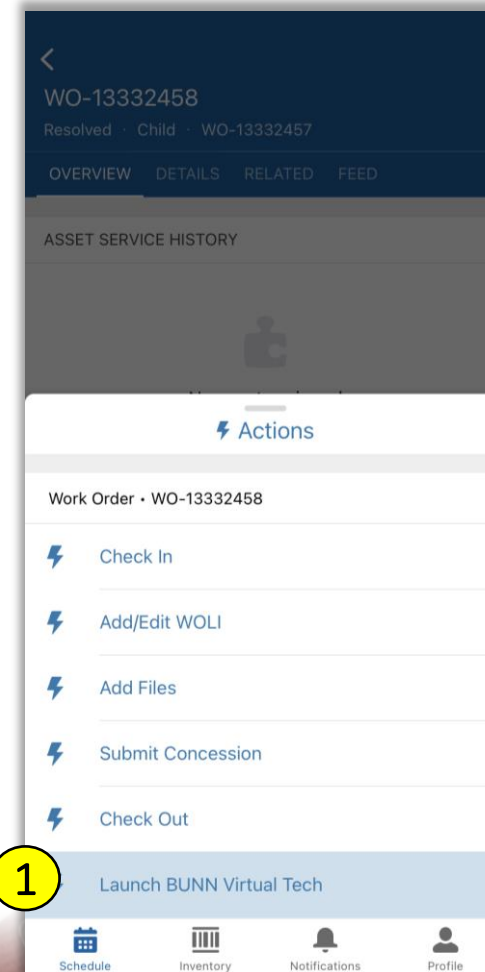
If you are on-site and capable of completing the repair once approved, please contact BUNNserve via phone to expedite approval.



# Virtual Tech

Virtual Tech can be used to bypass the on-hold queues that are sometimes experienced within our tech service department. Using Virtual Tech will connect you with a dedicated technician, so even if you opt not to take advantage of the video capabilities, you can usually get into support faster than you typically would on the phone.

1. From the Actions menu on a child work order, tap Launch BUNN Virtual Tech.
2. Click the link to launch the virtual tech platform.



The background of the slide is a light blue color, overlaid with a repeating pattern of speech bubbles. These bubbles are in various colors including white, light pink, light yellow, and light orange. Each bubble contains a large, dark blue question mark. The bubbles are scattered across the entire frame, creating a textured, question-themed background.

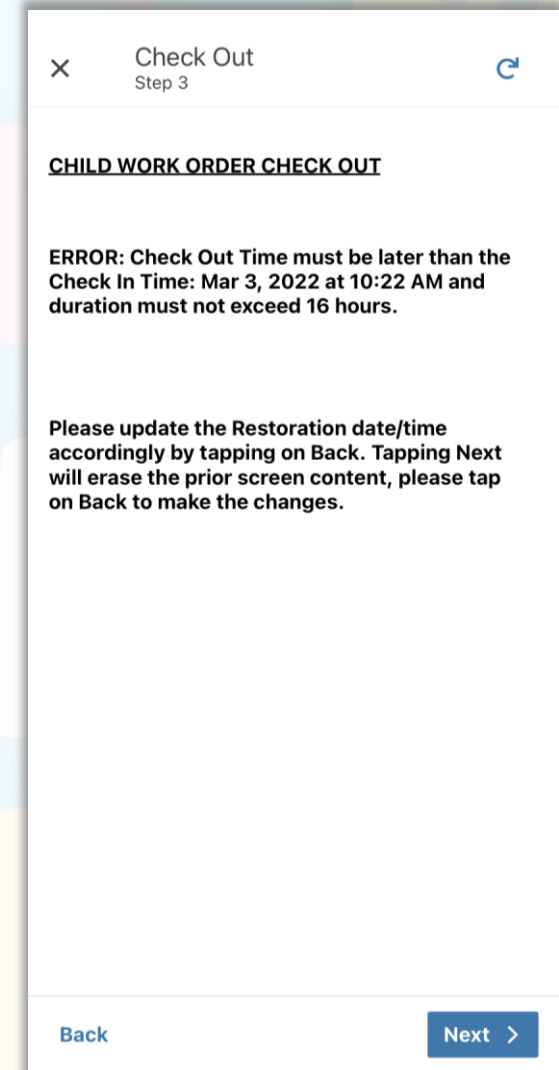
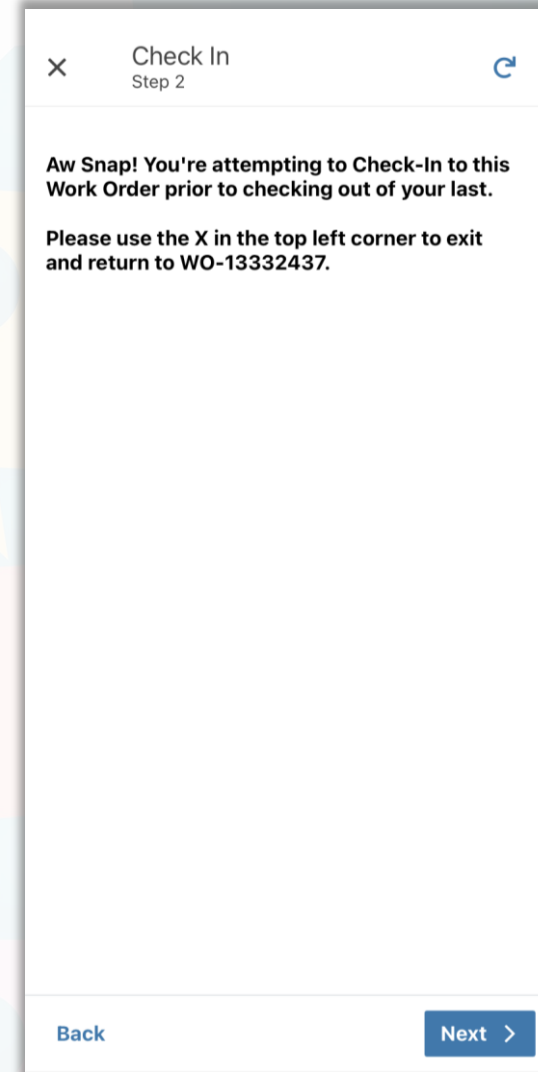
# App Error Handling

# On-screen Errors

Whenever possible, error handling is done within the app by alerting the user of a mistake and allowing them to correct it on the same screen.

The following are examples of actions that are prevented with on-screen error handling:

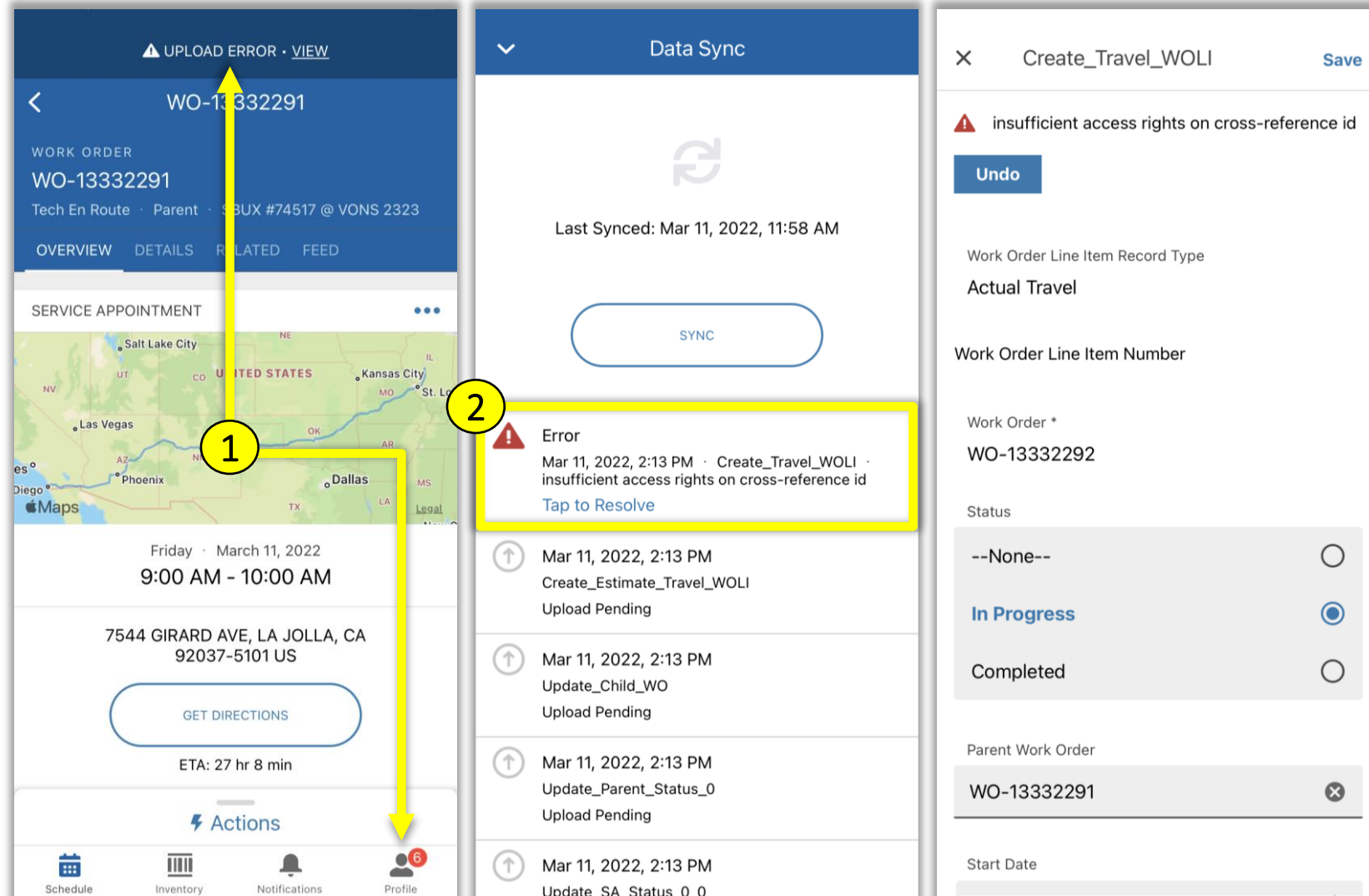
1. Starting travel with a future date/time
2. Checking in with a date/time that precedes your travel date/time
3. Checking into a second child before checking out of the prior
4. Checking out with a date/time that precedes your check in time



# Sync Errors

After each action within the app, data is synced. If this sync fails, it is critical that it's handled immediately as the presence of a sync error will prevent future appointment and work order updates from occurring.

1. Notification of sync errors happen as they occur by displaying "Upload Error" at the top of the screen, and depending on device, a red circle over the Profile icon. Tap View.
2. The Data Sync will list all pending updates, but the error will be identified as such. Tap it to view details. In some cases, the error can be corrected by the tech.





A blurred background image of a classroom. Several students are visible, with their hands raised in the air, suggesting an interactive session or a Q&A period. The text 'Frequently Asked Questions' is overlaid in the center in a blue, sans-serif font.

# Frequently Asked Questions



# Frequently Asked Questions

**Q: What do I do if I can't login?**

A: Contact your home office.

**Q: How do I know which service appointment is mine?**

A: Your home office will include the "SA" number on your dispatches.

**Q: I forgot to start travel, what do I do?**

A: Use the start travel lightning bolt action and back-date your start time.

**Q: The part I used doesn't show up in the Add Part screen. What do I do?**

A: Confirm part number is accurate. If yes, contact service parts.

**Q: Someone else has clocked into my work order.**

A: Contact your home office.

**Q: I need a part in order to finish the job. How do I order it?**

A: Contact your home office for instructions. They will follow the traditional parts ordering process.