



BluWave Service Manager System Setup Manual

Use the **System Setup** Tab of the system to set up all the user configurable areas of the system

The following are the areas required to be configured before **BluWave Service Manager** can be used in a live environment. Please research your existing manual or automated systems so as to define all the types of data required regarding your job types and escalation processes.

Terminology

A **Job** is a service incident logged by the customer.

A **Job Type** is a type of job with a definable process; e.g. Installation Call, Service Call, Preventative Maintenance Call, or Telephone Support Call.

A **Job Process** is a series of steps or stages that define the process that a particular call type has to progress through. Thus a service call could progress as follows: Call Logged; Work Ordered; Technician Assigned; Appointment Scheduled; Job Completed; Job Invoiced; Job Closed. Job Invoiced; Job Closed.

Getting Started | Change Password? | Log Out?

Home | Activities | Jobs | Contacts | Assets | Companies | Reports | System Setup

System Setup | Administer Users | Edit Profile | Service Manager Setup | Documents |

Search

Search

Within

Quick Create

Calendar

February 2015

Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

System Setup

Select Dropdown List to Edit:

- Activities
- Define Job Processes
- Job Statuses
- Job Types
- Product Groups
- Product List Management
- Products
- Service Teams
- Roles
- Team Names
- Fault Codes

1. Team Names

There can be several service teams in one *BluWave* branch. Each service team has a name: Define your team Name or Names.

NB You will need to add these first before adding your users under the Administer Users Menu option under the System Setup Tab.

2. Roles

A service team has team members whom are defined a specific role. This means they are responsible for some of the steps in the jobs process. They will be assigned responsibility for certain steps in the job workflows. In some cases a team member may even take on more than one role. For example, a service manager may also perform a technician role. Roles can be defined using your company terminology. Common roles are: technician (or service engineer), service manager, service administrator, purchaser, team leader, commercial manager.

It is useful to use roles to assign responsibilities as it give you the flexibility to assign a different person in the team to a role and they can immediately take over that role in a service team. This may be required if a team member is not present for a period – on leave or off sick. Another person can be assigned that persons duties by simply being given that role.

The screenshot shows the BluWave Software interface. At the top, there is a navigation menu with tabs: Home, Activities, Jobs, Contacts, Assets, Companies, Reports, and System Setup. Below the navigation menu, there is a sub-menu with links: System Setup | Administer Users | Edit Profile | Service Manager Setup | Documents |. The main content area is titled "Roles Setup" and contains a table of roles. The table has columns for Code, Description, Rate/Hr., and Travel/Rate. Below the table is an "Add New Role" form with input fields for Code, Role Description, Rate per Hour, and Travel Rate, and Save/Cancel buttons.

	Code	Description	Rate/Hr.	Travel/Rate
Edit Delete	CUS	Customer	0	0
Edit Delete	DEV	Developer	0	0
Edit Delete	SAL	Sales	0	0
Edit Delete	SC	Support Consultant	0	0

Add New Role

Code: Role Description: Rate per Hour: Travel Rate:

Rates

You are able to define both the hourly rate, and the travel costs for each role.

3. Service Teams

A service team is a group of technicians (each of which has a role) whom work together to service equipment. They may be grouped by a particular product range; or particular geographical area. There may be several service teams within a branch, however each of these must have a name (as defined under **Team Names**).

4. Fault Codes

When a job is closed a “Fault Code” is required. This should detail the type of repair/service performed. It can be used to analyse the repair history of a machine or type of machine. Define a list of the repair types that occur.

5. Job Types

Define the job types that occur in your service function. You will need to define different job types where the process the job goes through is different. Use your teams’ terminology to define the job types. Some example Job Types could be:

- Installation Call
- Service Call
- Service Call Quote First
- Preventative Maintenance Call
- Telephone Support Call

6. Job Statuses

This field is used define the **Statuses** each job will follow as it is processed.

7. Define Job Processes

Define the major steps in each of the call types. These steps or statuses should be written in the present tense – i.e. this is what is happening while at this status. Each step must be assigned to a role player who will be responsible for performing each step. (See Appendix A for examples)

The screenshot shows the BluWave Software interface. The main content area is titled "Define Job Processes" and features a "Cancel" button. Below the title, there is a dropdown menu for "Please select Job Type" set to "Advantage Application Support" and a "Re-order Grid" button. A table lists the job process steps:

#	Status Description	Role Description	Critical	Urgent	Normal
> Edit New Delete	Logged	Support Consultant	0	0	0
> Edit New Delete	Refer To Support Team	Support Consultant	0	0	0
> Edit New Delete	Refer To Technical Team	Support Consultant	0	0	0
> Edit New Delete	Refer To Client - Additional Information	Developer	0	0	0
> Edit New Delete	Refer To Client - IT	Developer	0	0	0
> Edit New Delete	Online Support Consultation	Developer	0	0	0
> Edit New Delete	Possible Solution Given To Client	Developer	0	0	0
> Edit New Delete	Resolved With Client	Support Consultant	0	0	0

Workflow Emails

Define Any Notification Events (Emails) that should be sent when the above statuses are reached. (See Appendix A for examples).

Define Job Processes Cancel

Please select Job Type BluWave Application Support Re-order Grid

#	Status Description	Role Description	Critical	Urgent	Normal
▼	Edit New Delete Logged	Support Consultant	0	0	0

Events Escalations

#	To Whom	Delivery	Email Text
Edit New Delete	Support Consultant	Automatic	Your BluWave CRM support request has been logged and your Job Number is {Job No}. Please quote this number in any further communications regarding this support request. Regards Nkuli Moloi Application Support Consultant nkuli@bluwave.co.za
Edit New Delete	Support Consultant	Automatic	Your BluWave CRM support request has been logged and your Job Number is {Job No}. Please quote this number in any further communications regarding this support request. Regards Nkuli Moloi Application Support Consultant nkuli@bluwave.co.za

>	Edit New Delete	Refer To Support Team	Support Consultant	0	0	0
>	Edit New Delete	Refer To Technical Team	Support Consultant	0	0	0
>	Edit New Delete	Refer To Client - Additional Information	Developer	0	0	0

There are specific **Key Words** that can be used in these emails to populate important information, relevant to the work ticket/job card. Please see list below. **(The first letter must be capitalised)**.

{Company}	- Customer's Company Name
{Contact}	- Customer Contact Name
{Date}	- Date job Logged
{Time}	- Time Job Logged
{Asset}	- Asset Number of customer's Asset selected.
{JobNo}	- Job No of current Job.
{Tel}	- Customer Contact Person's Tel no
{Cell}	- Customer Contact Person's Cell no
{Jobtype}	- Job Type selected of Current Job.

Each step in the workflow can have a time frame within which it must be completed and if this is the case a warning message if this period is exceeded. There are 3 time frames for each status for normal, urgent and critical job types.

8. Loading of Serialised Equipment

If you have a register of installed equipment by customer with serial numbers stored electronically you may wish to have this loaded into Service Manager. The equipment will require to have a product, unique serial number and we will need to link them to a customer. If the customers are going to be loaded from your financial/accounting system then you may need to link this equipment via the customer's account number. Please send us samples of this data or discuss with your implementation consultant to see how this can be loaded.

If you do not have access to an electronic list of this data then you may have to load the equipment as the customers log their calls. The following data could be imported:

Customer
Product code/model
Serial number
Date of purchase
Warranty expiry date
Service frequency (months)
Last service date.

9. Loading of Parts Lists

If you will be using parts lists for issuing quotes from Service Manager then you may wish to import lists of parts for this purpose. These can be imported from a financial system if available there. The quotes module will allow you however to enter a part code and description that is not in the system – you do not have to pre-load parts in order to do a quotation. The parts are also used in the costing side of service manager.

10. Activities

Define all the activities support staff performs in order to service customers for e.g.: “Site Visit” or “Install Machine”. These should correspond to the job process. For example, if one of the statuses is “Book Technician”, then one of your activities would be “Book Technician”. The activities should be as descriptive as possible and should relate to the service process as described in the Job Process. If you use descriptive activities it helps everyone to know exactly what is scheduled or was done at a customer.

Activity Code & Description

Each Activity has a 3 character code as well as a 20 character description. The activity description is used by the user in the system but the activity code is stored by the system so **once the code is in use it should not be changed** or it will affect the activity history. The activity description however can be changed if required. For Example you may wish to change a description called Follow Up to Second Visit because it better suits your sales process. This would mean that the activity history would show as First Visit assuming you keep the code the same and just change the description.

Appendix A

SAMPLE WORKFLOWS

1. Installation

Seq #	Status	Responsible Role	Normal	Urgent	Critical	Auto Event
1	Logged	Service Administrator	0	0	0	
2	Await Equipment Arrival	Service Manager	0	0	0	
3	Assign Technician	Service Manager	0	0	0	Technician Booked
4	Install done check completed job card	Service Manager	0	0	0	
5	Do Costing	Service Administrator	0	0	0	Costing Printed
6	Close, Invoice	Service Administrator	0	0	0	Invoiced
7	Arrived On Site	Service Administrator	0	0	0	

2. Preventative Maintenance

Seq #	Status	Responsible Role	Normal	Urgent	Critical	Auto Event
1	Refer Service Mgr	Service Administrator	0	0	0	
2	Request Parts Quote	Service Manager	0	0	0	
3	Prepare Cust Quote	Purchaser	0	0	0	Quote Printed
4	Quote Tech Approval	Service Manager	0	0	0	
5	Commercial Approval	Commercial Manager	0	0	0	
6	Send Quote	Purchaser	0	0	0	Quote Emailed
7	Call for order number	Purchaser	0	0	0	
8	Order Parts	Purchaser	0	0	0	
9	Await Parts	Purchaser	0	0	0	
10	No Parts required	Purchaser	0	0	0	
11	Assign Technician	Service Manager	0	0	0	Technician Booked
12	Repair Done	Service Manager	0	0	0	
13	Close, Invoice	Service Administrator	0	0	0	Invoiced

3. Service Call

Seq #	Status	Responsible Role	Normal	Urgent	Critical	Auto Event
1	Enter customer order number	Service Administrator	0	0	0	Ordered
2	Refer Service Mgr	Service Administrator	0	0	0	
3	Call Customer for technical information	Service Manager	0	0	0	
4	Assign Technician	Service Manager	0	0	0	Technician Booked
5	Order Parts	Service Manager	0	0	0	
6	Await Parts	Purchaser	0	0	0	
7	Assign Tech to Rep	Service Manager	0	0	0	Technician Booked
8	Repair Done	Service Manager	0	0	0	
9	Check completed job card	Service Manager	0	0	9	
10	Do Costing	Service Administrator	0	0	0	Costing Printed

11	Authorize to Invoice	Service Administrator	0	0	0
12	Close, Invoice	Service Administrator	0	0	0 Invoiced

4. Service Call Quote First

Seq #	Status	Responsible Role	Normal	Urgent	Critical	Auto Event
1	Refer Service Mgr	Service Administrator	2	1	0.5	
2	Assign Technician	Service Manager	0	0	0	Technician Booked
3	Assess Repair	Service Manager	0	0	0	
4	Request Parts Quote	Purchaser	0	0	0	
5	Prepare Cust Quote	Purchaser	0	0	0	Quote Printed
6	Quote Tech Approval	Service Manager	0	0	0	
7	Quote Comm Approval	Commercial Manager	0	0	0	
8	Send Quote	Purchaser	0	0	0	Quote Emailed
9	Call for order number	Purchaser	0	0	0	Ordered
10	Order Parts	Purchaser	0	0	0	
11	Await Parts	Purchaser	0	0	0	
12	Assign Tech to Rep	Service Manager	0	0	0	Technician Booked
13	Repair Done	Service Manager	0	0	0	
14	Do Costing	Service Administrator	0	0	0	Costing Printed
15	Close, Invoice	Service Administrator	0	0	0	Invoiced

Events for Refer Service Mgr

Events

Email	Cust Pref Route	Responsible Role	Optional / Auto
		Customer	Optional
Email Message	Your {Call Type} for your Machine: {Machine}, Serial#: {Serial No} was logged on {date} at {time}. Your reference number for this job is {Job No}.		
		Service Manager	Optional
Email Message	A {Call Type} for {Company}, Machine: {Machine}, Serial#: {Serial No} was logged. By {Contact} {Cell}. Problem is {Notes}		

Escalations

Email	Cust Pref Route	Responsible Role	Optional / Auto
		Service Administrator	Automatic
Email Message	New Job for: {Company}, {Contact}, {Machine}, {Notes}. Logged on {Date} at {Time} has not yet been referred to the Service Manager to action.		

Assign Technician

Events

Email	Cust Pref Route	Responsible Role	Optional / Auto
		Booked Technician	Automatic
Email Message			

Request Parts Quote

Events

Escalations

Email	Cust Pref Route	Responsible Role	Optional / Auto
		Commercial Manager	Automatic
Email Message	Too long for request for price and delivery on {Company} {Job No}		

Await Parts

Events

Escalations

Email	Cust Pref Route	Responsible Role	Optional / Auto
		Commercial Manager	Automatic
Email Message	The parts ordered for {Job No} for customer {Company} are overdue.		
		Purchaser	Automatic
Email Message	The parts ordered for {Job No} for customer {Company} are overdue.		

5. Telephonic Support

Seq #	Status	Responsible Role	Normal	Urgent	Critical	Auto Event
1	Refer Service Mgr	Service Administrator	0	0	0	
2	Call Customer for technical information	Service Manager	0	0	0	
3	Confirm Resolved	Service Manager	0	0	0	