

Gold Service Mobile App Engineer Processes

Version 0.6

Date – 14th September 2018

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Overview

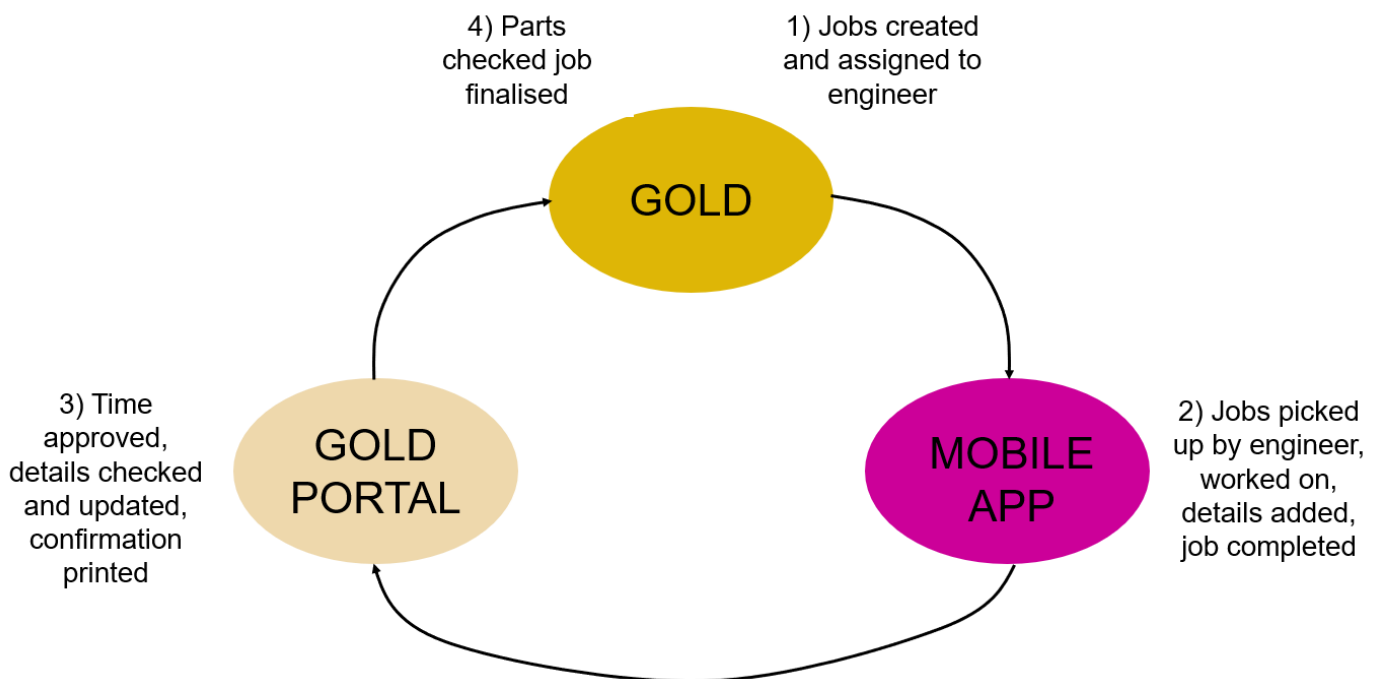
What is Gold Service?

Gold Service is split into 2 elements:

- User processes at the dealer using a combination of existing Gold screens and a new Gold Service portal accessed separately via a web browser
- Engineer processes using the Gold Service mobile app

What is the overall process?

The following diagram shows the key actions taken by approvers based in the dealership and engineers out in the field:




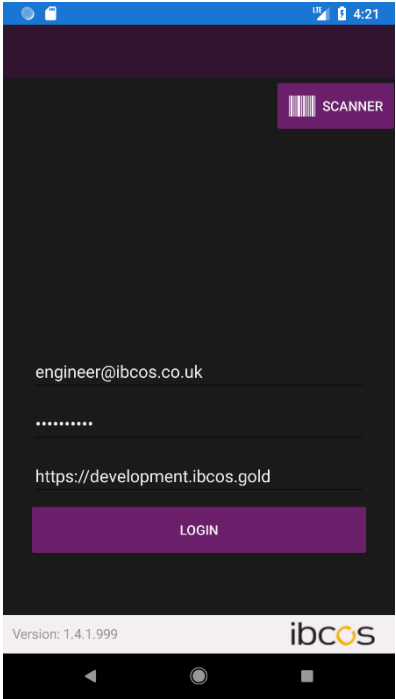
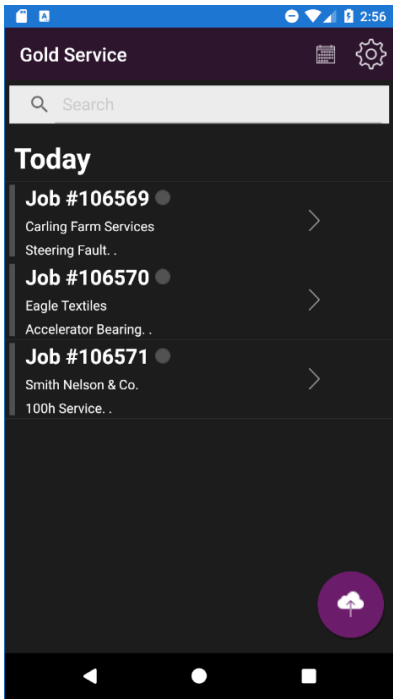
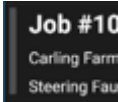
What does this document contain?

This document is aimed at the engineers out in the field and includes all the processes and screens used to complete the job on the Mobile App. A separate document is available aimed at users based at the dealership.

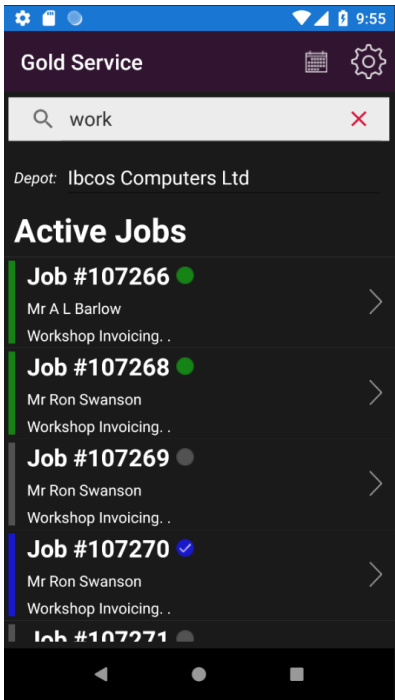
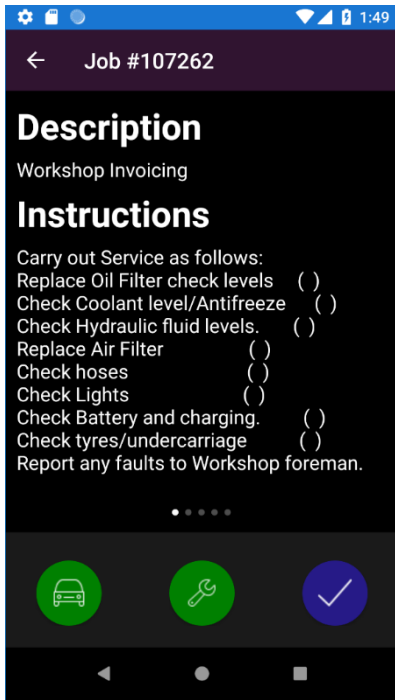
There are also lots of short training videos available, explaining each of the different actions.

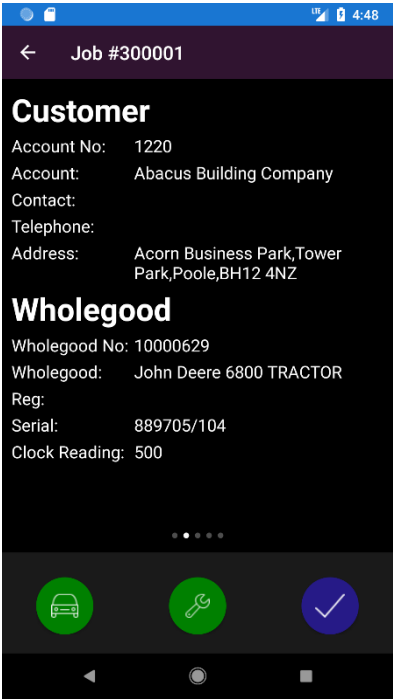
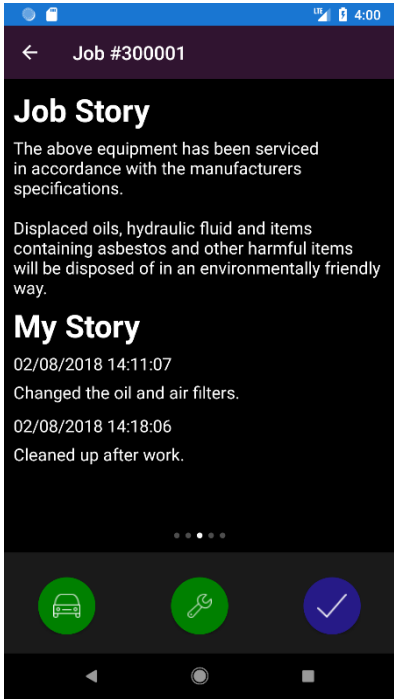
Using Gold Service Mobile App

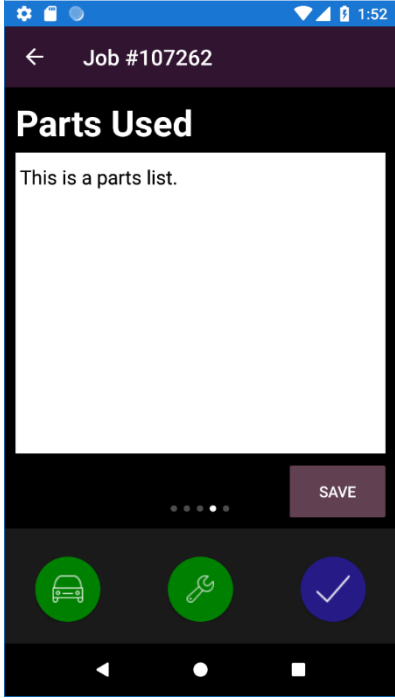
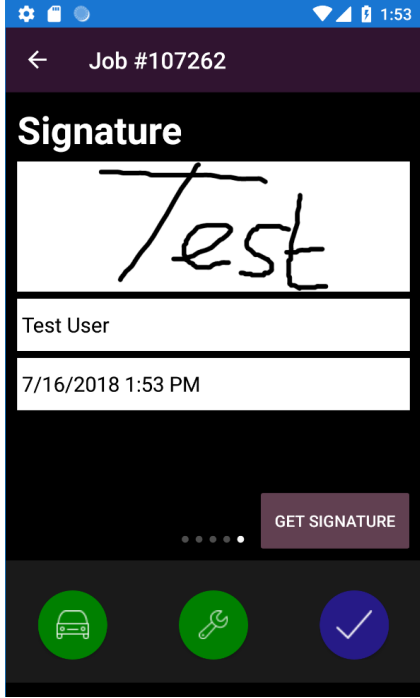
Log into Gold Service Mobile App

Action	Screenshot
Open the app and log in	<p>When you open the app, there is a scanner button:</p>  <p>If you are an existing user of the barcode version of the app, pressing this will take you to this version. However this manual explains all the brand new functionality that removes the need for scanning barcodes completely.</p> <p>Enter your username and password and press Login. The app will open and the main screen will appear:</p> <p>Login screen</p>  <p>Main screen</p>  <p>This example shows jobs that are scheduled for today and tomorrow. The grey bar alongside the job denotes that job has not been started yet:</p>  <p>Once logged in, any data that you enter on the app will be automatically transferred back to the Gold portal, assuming that you have a signal. However if you have been somewhere without a signal, you can press the 'cloud' icon when you have a signal again to force a data upload.</p>

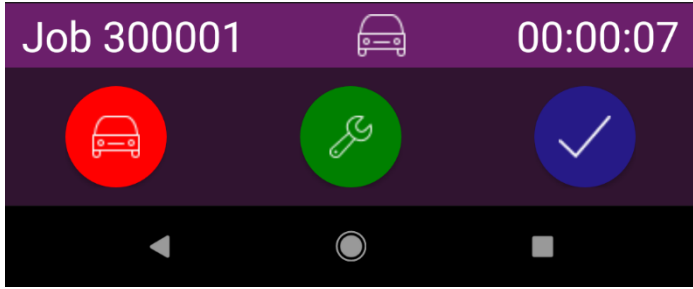
Display jobs

Action	Screenshot
<p>Find the job you want to work on</p>	<p>If no jobs are displayed, 'pull down to refresh'. Any scheduled jobs will then appear.</p> <p>The coloured bars alongside the jobs allow you to understand the state of the job quickly:</p> <ul style="list-style-type: none"> • Grey – job not started • Green – job started i.e. something has been done against the job but it has not been completed • Blue – completed. No further changes can be made on the app relating to the job <p>You can also search for jobs using the field at the top of the screen. Enter a key word, phrase or job number and the screen will refresh to show any jobs that match the criteria.</p> <p>Once you have found the job you want to work on, press to select it and you'll see the job instructions on the first page.</p> <p>Search function e.g. work</p> 
	<p>Job instructions (info only) – page 1</p>  <p>The dots show that there are more screens relating to this job. In this example, you are on screen 1 of 5.</p> <p>The buttons at the bottom of the screen remain static regardless of which screen you are looking at:</p> <p>Car button Relates to travel time applicable to the job. This will only be displayed if travel has been enabled on Gold</p>

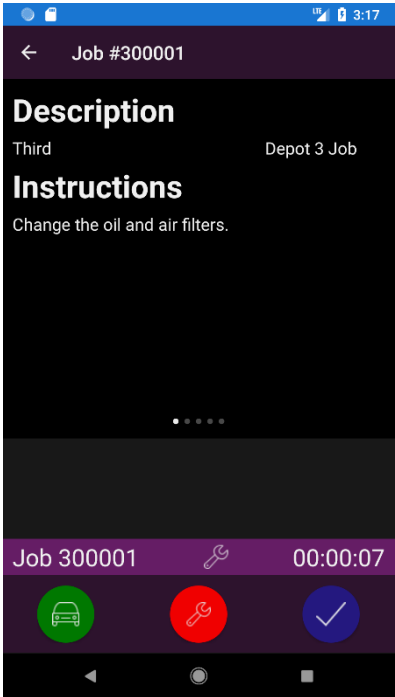
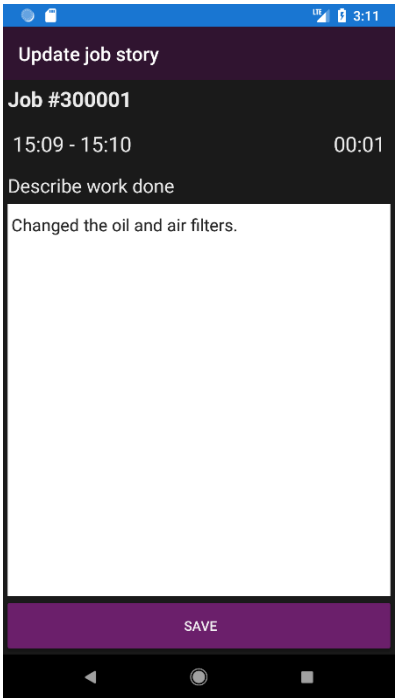
Action	Screenshot
	<p>Spanner button Relates to labour time applicable to the job</p> <p>Blue tick Allows you to complete the job</p>
<p>Look at the information on the other job-related screens</p>	<p>Swipe to the left to move through the screens available. Some are for information purposes only and some you'll need to add details to at various stages in the job completion process. These steps are shown in section 'Complete job by adding details':</p> <p>Customer details (info only) – page 2 Job story (user enters) – page 3</p> <div style="display: flex; justify-content: space-around;">   </div> <p>The Contact, Telephone and Customer Address the Customer details screen will come from the details on the job header if the information exists. If not, it will come from the main customer record.</p>

Action	Screenshot
	<div style="display: flex; justify-content: space-around;"> <div style="width: 45%;"> <p>Parts used (user enters) – page 4</p>  </div> <div style="width: 45%;"> <p>Signature (user obtains) – page 5</p>  </div> </div>

On a job, start/stop travel

Action	Screenshot
Press the car button to start recording time	<p>The button will turn red and a counter will appear showing the time:</p> 
Press the car button again to stop recording time	<p>The button will turn green and the time will stop</p>

On a job, start/stop labour

Action	Screenshot
<p>Press the spanner button to start recording time</p>	<p>The button will turn red and a counter will appear showing the time:</p> 
<p>Press the spanner button again to stop the recording time</p>	<p>The button will turn green. A mandatory screen will appear asking you enter details of what you have just completed on the job. Whatever you write will be added to the overall job story. At the point you press Save, the time will be stopped:</p> 

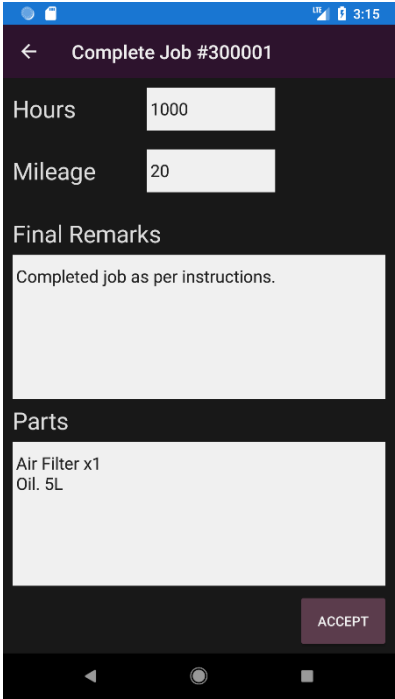
Complete job by adding details


Details need to be added to the job before it is considered complete. As these steps are intended to replace the paper job card, you'll need to enter as much detail as possible. The job story is the most important and the job cannot be completed unless a story is there. Some of this information can be entered whilst you are working on the job and other information will be added during the job completion workflow:

Information to be added	Description	Will I be able to complete the job without this information?	Best practice?	When can it be done?
Job story	Enter details of the work that has been done	No		<p>Every time the red button on the labour time is pressed, you'll be prompted to enter details</p> <p>If the job was just paused and you start the time again, you'll be asked to enter details again at the point you next press the red button</p> <p>All the different entries will be collated into one job story for you to review during the job completion workflow. At this point you'll be able to review the comments and add a final comment before completion. You will not be able to complete the job without having a job story</p>
Hours	Enter the clock hours for the related wholegood	Yes	Should be entered	During the job completion workflow only
Mileage	Enter the mileage that you travelled for the job	Yes	Should be entered	During the job completion workflow only
Signature	Capture a signature	Yes	Depends on business process	At any point during the process e.g. on arrival, during time spent working on the job or at the job completion stage

The following instructions show the workflow when you complete the job.

Action	Screenshot
Press the blue tick	Once you have finished all the labour on the job, press the blue tick to go through the job completion workflow

Action	Screenshot
View the job completion screen and any missing details	<p>Complete the Hours Complete the Mileage Review the Story and add any final remarks if required Add any parts that will need to be added to the job back at the dealer. This is a manually entered field and should give enough information so that the parts department are clear on what needs to be added before the invoice is raised</p> 
Press the Accept button	<p>If anything is missing, you'll be shown different warning messages, which will need to be acknowledged You will be taken to a final summary screen</p>
Review the final summary screen	<p>This is your final chance to check that everything has been entered Signature:</p> <ul style="list-style-type: none"> • If you have already captured a signature earlier on in the process, it will be displayed here • If you want to capture a signature, press the Get Signature button • If you don't need to capture a signature, press the Not Present button

Action	Screenshot
	
<p>Press the Accept button</p>	<p>A warning will appear saying that if you continue, the job will be locked. After it is locked, no further editing can be done and the job will be available in the Gold portal for the user at the dealer to review, edit if required and then approve</p> <p>NOTE: any time that is being recorded for this job will be stopped at this point</p>