

Gold Service Portal

Head Office processes

Version 0.5

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Overview

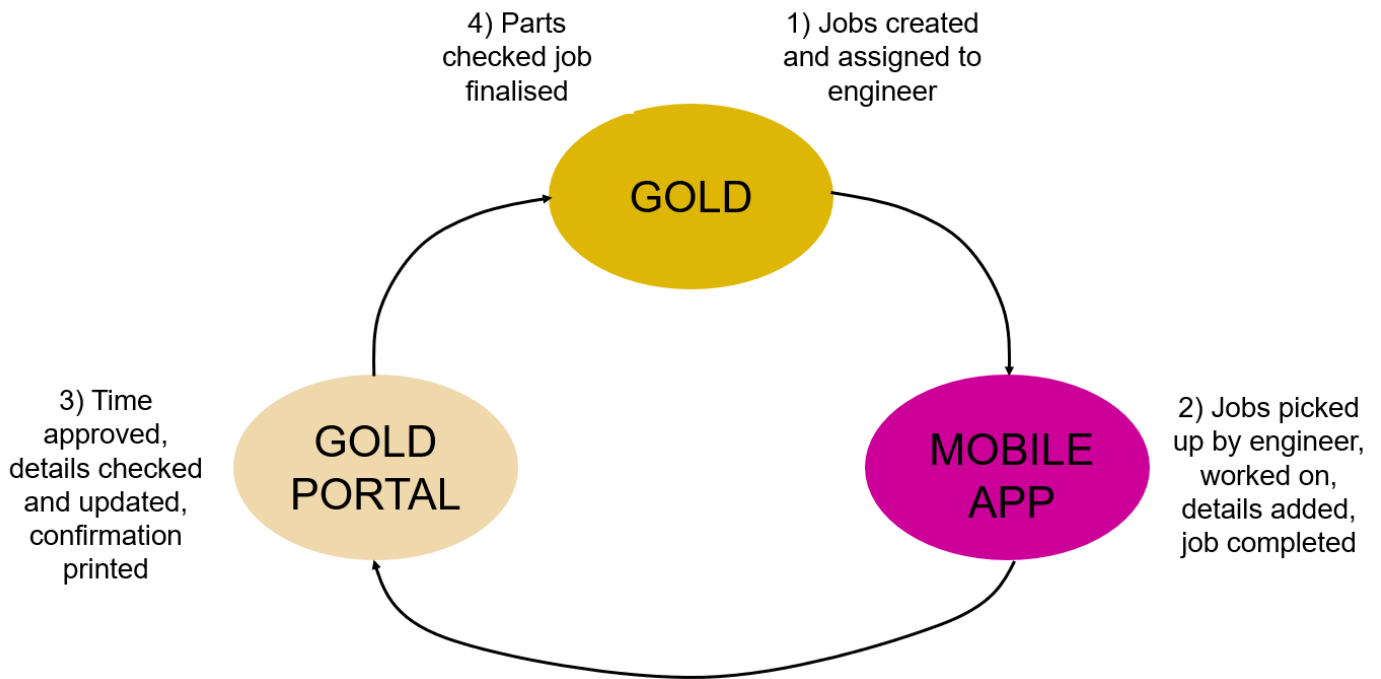
What is Gold Service?

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 users based in the dealership and includes all the processes and screens used in the Gold Service portal to approve the jobs completed by engineers on the Gold Service mobile app itself. A separate document is available aimed at engineers.

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

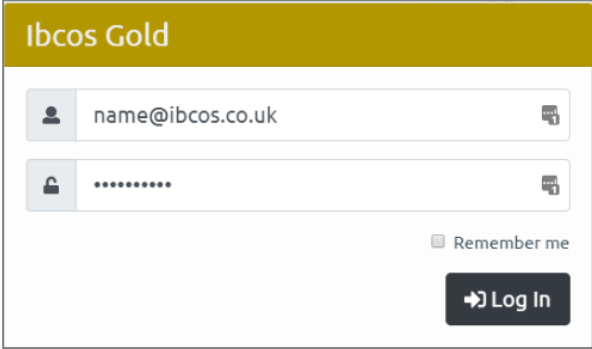
Using the Gold Service Portal

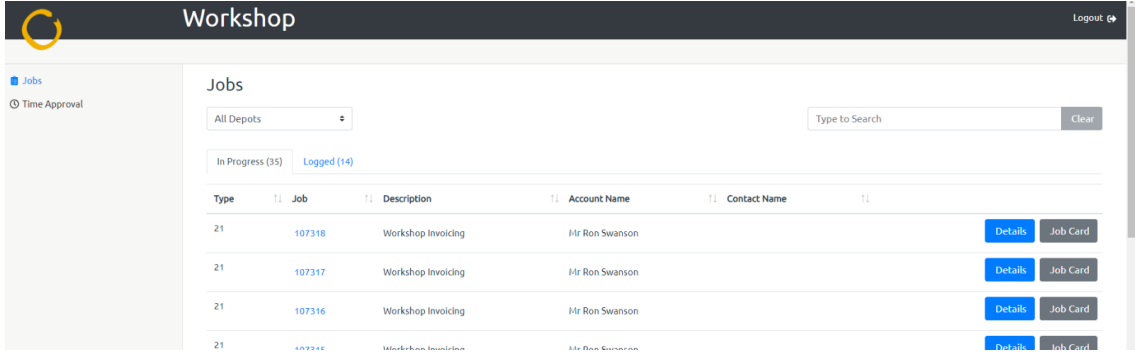
The following steps are for users at the dealer to review jobs in progress and approve completed jobs. The information on the jobs comes from the mobile app and includes:

- Stop and start times for travel and labour
- Clock hours
- Travel mileage
- Job story
- Parts used
- Customer signature


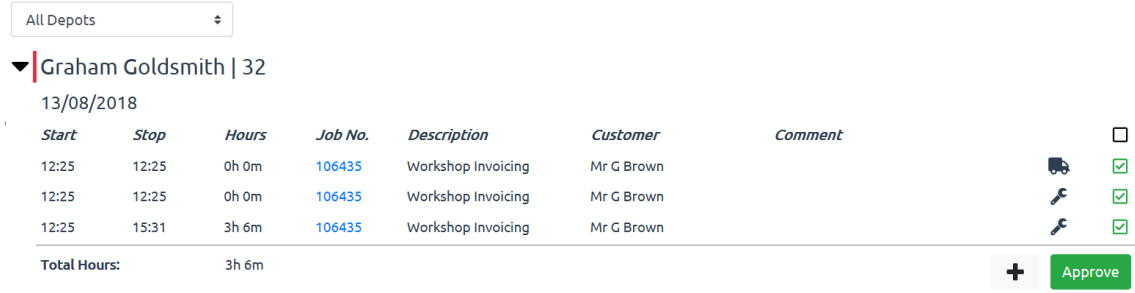
NOTE: the following steps for approval are only applicable to engineers using the latest version of Gold Service mobile app i.e. that which includes the features described above. If you have a combination of users, i.e. some using the barcode scanner version and some using this version, you'll need to approve time and jobs in 2 places – original Gold screens for the former and the new Gold Service portal for the latter. Once all engineers have downloaded the latest version, approval will just be done in the new Gold Service portal.






Log into the Gold Service portal

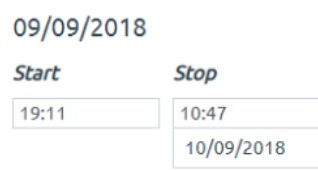
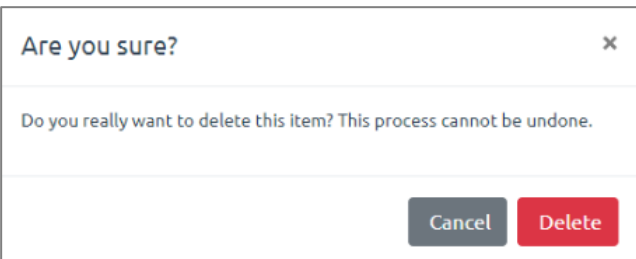
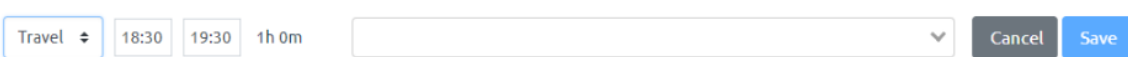
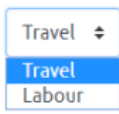
Action	Screenshot
Access the Gold Service portal	Open a web browser and enter a specific url. This will have been provided by Ibcos and is unique to the Dealer
Enter your email address and password	<p>Enter your username and password</p> <p>NOTE: this will be different to your normal Gold user name and password and will be supplied by your system administrator. The system administrator will have set this up in the user maintenance screens in Gold</p> 

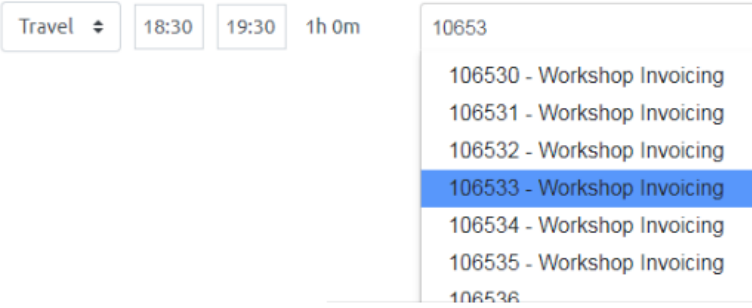
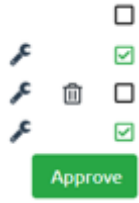


Action	Screenshot
Once logged in, review the information on screen	 <p>There are 2 views accessed via the left hand links:</p> <ul style="list-style-type: none"> • Jobs – this has 2 tabs: In Progress (this is the default view) and Logged • Time Approval

Approve time

Action	Screenshot
Click on Time Approval in the left-hand menu	<p>The default view is All Depots, showing all engineers, but can be changed using the drop down box.</p>  <p>When you select an individual depot, only the engineers belonging to that depot will be shown. However all time, regardless of depot, will be shown for each engineer.</p>
Click on an engineer to expand the details	<p>Engineers Time Entries</p>  <p>Only unapproved time entries will be shown; these are in date order with the oldest first.</p> <p>A red bar shows that there are rows waiting to be approved; the arrow shows that the information is expanded. A green bar shows that all rows are approved</p> <p>Start Shows the start time</p>

Action	Screenshot												
Stop	Shows the end time												
Hours	Calculated from the Start and Stop times												
Job No.	Shows the job number												
Description	Automatically populated from the job and cannot be changed												
Customer	Shows the associated customer												
Note	This will display any job related comments that have been added by the engineer on the Gold Service mobile app												
	Shows that the time is related to labour												
	Shows that the time is related to travel												
	This allows you to delete a row; this will only appear against unapproved rows												
<input type="checkbox"/>	Shows that a row is unapproved. This box will also be displayed at date level; if selected, all unapproved rows within that date will be ticked ready for approval. You can only select multiple rows and approve within a single date												
<input checked="" type="checkbox"/>	Shows that a row is approved												
	Used to approve single or multiple rows within a specific date												
	Allows you add further rows												
Total Hours	Shows the total number of hours for the day. This will help you to ensure that the total number of hours for the engineer are correct												
Review the rows and assess whether you need to make changes to the Start and Stop times	<p>The times must be in the format hh:mm. If this format isn't used, a red box will appear around the offending field. The Approve button will be disabled until the issue is corrected:</p> <table border="1"> <thead> <tr> <th>Start</th> <th>Stop</th> <th>Hours</th> </tr> </thead> <tbody> <tr> <td><input type="text" value="12:3"/></td> <td><input type="text" value="16:00"/></td> <td></td> </tr> </tbody> </table> <p>If you enter a time range that is invalid e.g. where the Stop time is earlier than the Start time, the contents of the Hours field will turn red. The approve button will be disabled until the issue is corrected:</p> <table border="1"> <thead> <tr> <th>Start</th> <th>Stop</th> <th>Hours</th> </tr> </thead> <tbody> <tr> <td><input type="text" value="12:30"/></td> <td><input type="text" value="11:00"/></td> <td><input type="text" value="-1h 30m"/></td> </tr> </tbody> </table>	Start	Stop	Hours	<input type="text" value="12:3"/>	<input type="text" value="16:00"/>		Start	Stop	Hours	<input type="text" value="12:30"/>	<input type="text" value="11:00"/>	<input type="text" value="-1h 30m"/>
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Action	Screenshot														
	<p>If the engineer forgets to stop time against a job on the mobile app so that the job spans 1 or more days, a date will appear beneath the end time in the portal screen. In the following example, the start time is 19:11 on 09/09/18 and the end time is 10:47 on 10/09/18:</p>  <p>To adjust this, click on the date to get a date picker and select the required date e.g. 09/09/18 and then adjust the time.</p>														
Decide if you need to delete any rows	<p>Press the Bin icon and the following message will appear. Press Delete to continue the action or Cancel to abort out of it:</p>  <p>The row will initially appear crossed out on screen:</p> <table border="1"> <thead> <tr> <th>Start</th> <th>Stop</th> <th>Hours</th> <th>Job No.</th> <th>Description</th> <th>Customer</th> <th>Note</th> </tr> </thead> <tbody> <tr> <td>12:30</td> <td>16:00</td> <td>3h 30m</td> <td>106532</td> <td>Workshop Invoicing</td> <td>Mr A.L. Barlow</td> <td>Finished early, as t</td> </tr> </tbody> </table> <p>Once the screen is refreshed, the row will be removed from the screen completely</p>	Start	Stop	Hours	Job No.	Description	Customer	Note	12:30	16:00	3h 30m	106532	Workshop Invoicing	Mr A.L. Barlow	Finished early, as t
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Decide if you want to add any rows	<p>Press the + icon and the screen will update showing a new blank row:</p>  <p>If the time is against Travel, leave the first button as it is. Otherwise use the drop down box to select Labour:</p>  <p>A default Start time will be shown, which is immediately after the last Stop time. However, this can be changed if required</p> <p>Add the Stop time; the duration will calculate automatically, and the same rules apply if you enter invalid data</p> <p>Start typing the job number and a list will appear of matching options:</p>														

Action	Screenshot
	 <p>Select the appropriate one and press enter If you are happy with the row, press Save. If you want to remove the row, press Cancel</p>
Approve rows	<p>Press <input type="checkbox"/> against a row and it will show as <input checked="" type="checkbox"/></p> <p>Press the Approve button and all rows against that date with <input checked="" type="checkbox"/> will be approved. Once approved the <input checked="" type="checkbox"/> will become <input checked="" type="checkbox"/>:</p>  <p>Once all the rows have been approved for a specific engineer/date combination, the Approve button will be unavailable (it be a paler shade of green):</p>  <p>All approved times will be updated in Gold.</p>  <p>As you start to approve rows, these will remain visible on screen. This is so that you can have a full picture of the day against an engineer. Once all rows for an engineer/date combination have been approved and the screen refreshed, these will be removed from view</p>

View and edit job details

Once the time entries have been approved, you can check and confirm the other details added on the Gold Service mobile app by the engineers.

Action	Screenshot
Click on Jobs in the left-hand menu and	<p>The default view is All Depots, showing all engineers, but can be changed using the drop down box.</p> <p>The 'In Progress' tab shows all the jobs currently being worked on by engineers</p>

Action

Screenshot

view the In Progress tab

Type to Search

Use this to search for any text that matches what has been entered e.g. start to enter warranty and the search will return valid rows as the text is entered:

 Clear

In Progress (2) **Logged (2)**

Type	Job	Description	Account Name	Contact Name	
37	240009	Barlow 5400 Oil Leak	Warranty Cost-MF Equipment		Details Job Card
37	106418	Warranty - MAIN	Warranty Cost-MF Equipment		Details Job Card

Details button

This allows you to view and edit the information that has been added to the job so far by the engineer on the Gold Service mobile app. The assumption is that the core process of viewing and editing will be done once the job has been completed i.e. shown in the Logged tab. This button is therefore explained in the next section

Job Card button

This allows you to view the Job Confirmation, with the information that has been added to the job so far

Click on the Logged tab

Action	Screenshot
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This shows the same buttons as before. The search function works in the same way.

Click on the Details tab and view the Job tab

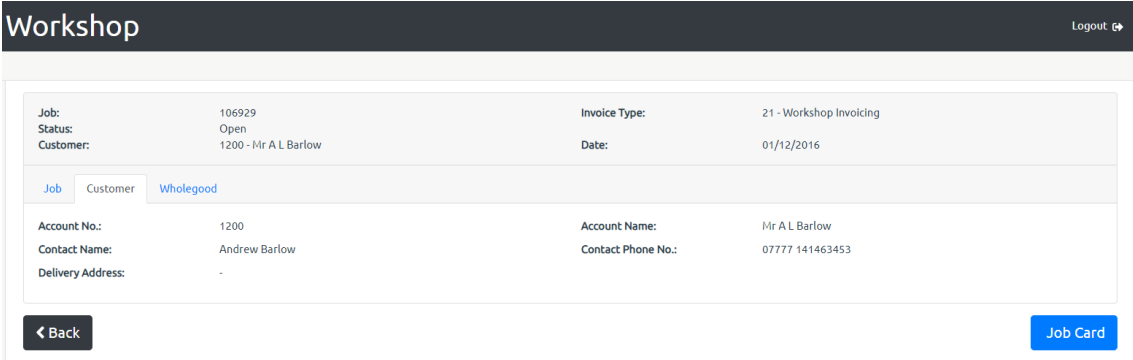
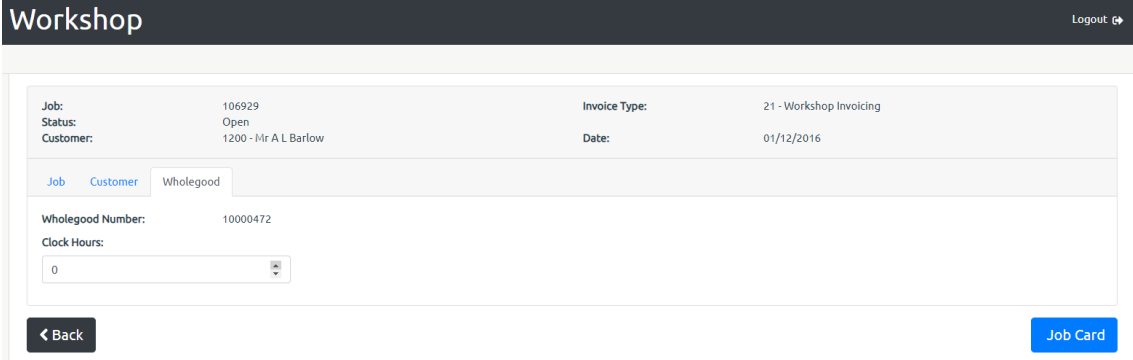
3 fields can be edited in this tab:

- Mileage** If entered on the Gold Service mobile app, this will appear. If not it can be added. It can also be amended
- Story** Although this screenshot shows 'No job story', this is mandatory on the Gold Service mobile app and will be completed. If the engineer has stopped and started the same job a number of times, there will be multiple entries in this box. The text can be edited as this will ultimately end up on the invoice to the customer
- Parts** If entered on the Gold Service mobile app, a note of any parts used will be displayed. If not, information can be added. It can also be amended

As you start to change information, new buttons of Reset and Save will appear:

Reset will remove the changes you made on that screen

Save will save the changes you made on that screen

Action	Screenshot
Click on the Customer tab	 <p>This screen is for information purposes only and cannot be amended.</p>
Click on the Wholegood tab	 <p>1 field can be edited on this screen:</p> <p>Clock Hours If entered on the Gold Service mobile app, this will appear. If not it can be added. It can also be amended</p>

View and print PDF Job Confirmation

Once the details have been checked and edited on a completed job, you can print off a PDF copy. This can be given to the Parts department so that the parts can be added to the job using the standard Gold screens and processes.

Action	Screenshot
Click on the Job Card button	The following screenshots show the complete Job Confirmation. If you want to amend anything further at this stage, go back to the job view covered earlier.

Action	Screenshot																							
	<div style="border: 1px solid black; padding: 10px;"> <div style="background-color: #333; color: white; padding: 5px;"> Workshop Logout ↗ </div> <hr/> <p style="text-align: center; font-weight: bold; font-size: 0.9em;">Job Confirmation - Job No: 300000</p> <hr/> <p>Customer PDI/FREE SERV-OTH.TRACTORS USE ON INV.28 ONLY POSTS TO 431611* Tel: 431611*</p> <hr/> <table style="width: 100%; border-collapse: collapse; font-size: 0.8em;"> <tr> <td style="width: 20%;">Acc/Order No 61/</td> <td style="width: 20%;">Date</td> <td style="width: 20%;">Stk No. 10000919</td> <td style="width: 20%;">Reg No.</td> <td style="width: 20%;">Job Type PDI Other</td> </tr> <tr> <td>Make/Model Specification</td> <td colspan="4">Case CS150 150hp., 6 cylinder, 40fwd/40rev., Transmission PST, pto 540/1000.</td> </tr> <tr> <td>Serial No 475673/632</td> <td>Clock</td> <td colspan="3">Van Mileage</td> </tr> </table> <hr/> <p>Job Description PDI Cost CS150 Contact</p> <hr/> <p>Job Instructions</p> <div style="border: 1px solid black; height: 40px; margin-bottom: 5px;"></div> <p>Job Story</p> <div style="border: 1px solid black; height: 40px; margin-bottom: 5px;"></div> <p>Parts</p> <div style="border: 1px solid black; height: 40px; margin-bottom: 5px;"></div> <hr/> <p>Customer Signatures Customer Names Signature Dates</p> <p> <input type="checkbox"/> Service Administrator <input type="checkbox"/> Parts Department <input type="checkbox"/> Service Delivery Manager </p> <table style="width: 100%; border-collapse: collapse; font-size: 0.7em;"> <thead> <tr> <th style="width: 15%;">Date</th> <th style="width: 30%;">Name</th> <th style="width: 15%;">Hours</th> <th style="width: 40%;">Description</th> </tr> </thead> <tbody> <tr> <td style="height: 20px;"></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> ← Back Export PDF </div> <div style="background-color: #333; color: white; padding: 5px; text-align: right; font-size: 0.8em;"> </div> </div>	Acc/Order No 61/	Date	Stk No. 10000919	Reg No.	Job Type PDI Other	Make/Model Specification	Case CS150 150hp., 6 cylinder, 40fwd/40rev., Transmission PST, pto 540/1000.				Serial No 475673/632	Clock	Van Mileage			Date	Name	Hours	Description				
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