Gold Service - Customisable Job Story

Background

When creating a workshop job in Gold, you have the ability to customise the job story. This enables elements of the job story to be completed at any time by the engineer on the Gold Service Mobile app, and when saved, the information will reach the Gold Service Portal immediately and be displayed in the Job Story box. This is without the engineer having to complete the job.

Set Up

This feature has 2 methods of set up:

PRE-SET HEADINGS: provides the engineer with separate sections to complete on the App based on pre-set headings in the story. Set them manually when creating a job or set them as a default story against an invoice type to automatically populate the job with this information. This process can be repeated for different combinations. Pre-set headings are often used for Warranty purposes e.g. headings of Complaint, Cause, Correction, Causal Part.

FREE TEXT BOX: You can keep the job story in the App as a 'free' textbox, allowing the engineer to input any information without being prompted by specific headers.

It is not mandatory to customise the job story when creating the job in Gold. However, if you choose not to follow this process, then the engineer cannot edit the story and can only enter final remarks when the job is completed.

We recommend using the Customisable Job story feature if you want the story to reach the Portal before this point. Every time the engineer enters text into the story and saves it, the text will appear in the Portal. This feature works particularly well if the job is expected to last longer than a day and is for one engineer.

Please note: there are some constraints relating to multiple engineers working on the same job. Before you assign the job to another engineer, please ensure the previous engineer has checked the cloud icon in the app, and manually sent any outstanding data to the portal. If you do not follow these steps, and their story has not reached the Portal, the information will not be visible in the App to the next engineer and will not become part of the story in the Portal. Please also remember to upload Activities or documents first, and job completions last to ensure all the information reaches the Portal correctly.

The following table shows what symbols you need to use to customise your job story. It is important that the text is entered correctly as it is the # and the = symbols that create the text boxes and single line fields. If this isn't done, the headings will not be split out into the separate sections for the engineer to complete. The symbols must be used at the start of the sentence. If you use them anywhere within the middle of text that you write, it will not have any impact.

Text to enter on Job Story in Gold	What shows up in the Job Story on the App	Example
# Section Name	Generates a multi text area that the engineer can complete on the App	# Complaint
# Section Name Some pre-defined text		# Complaint Enter details of the complaint
= Field Name	Generates a single line field that the engineer can complete on the App	= Causal Part
= Field Name: Field Value		= Causal Part: enter part number
General Text	Will just appear on the App	Complete the following sections in full

Pre-set heading example

Here is an example of how to create pre-set headings. For any stories set up in this way, the text is displayed back on the portal and in other areas of Gold, like prints or reports, as plain text. It will match the format set up in the story:
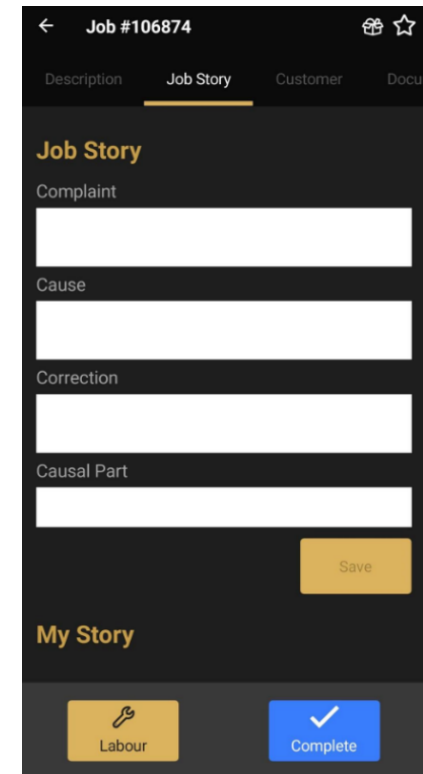
Free text box example

Here is an example of how to create a single free text box for any stories set up in this way, the text is displayed back on the portal and in other areas of Gold, like prints or reports, as plain text. It will match the format set up in the story:
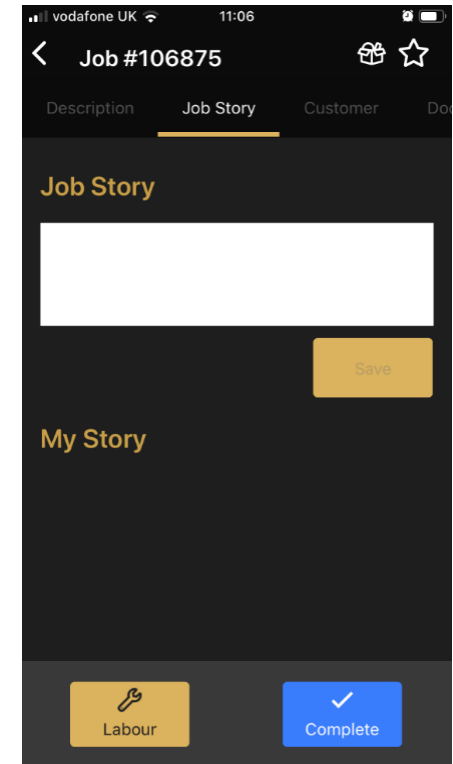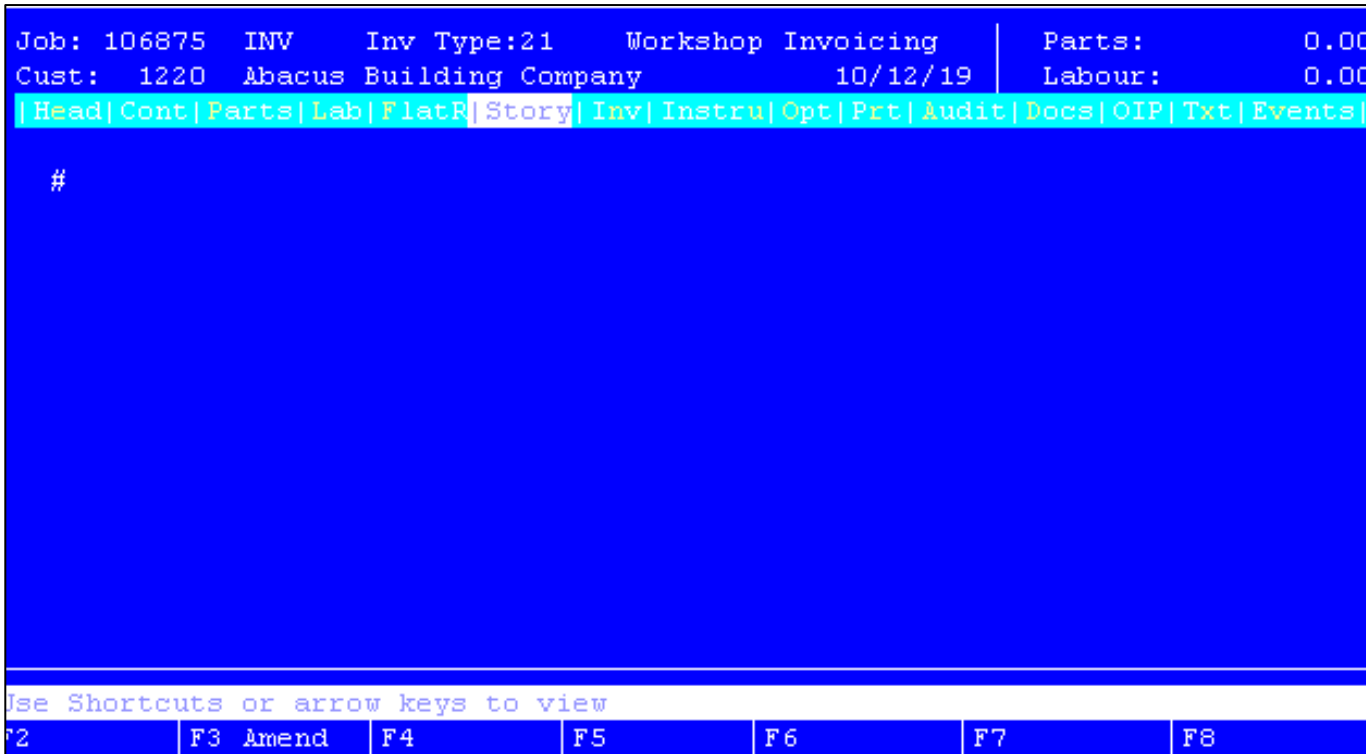
Understanding the different comment areas

There are 3 areas that the engineer can add comments into Gold Service which will reach the Portal:

- Labour Line Comments
- Job Story (if it has been customised in Gold at the point of job creation)
- Final Remarks

Each area should be used in a specific way to maximise their benefits.

Labour line comments should be used to enter information about the labour carried out and is designed for small pieces of information. For example: the engineer can use this comments box if they have forgotten to stop labour time.

Job Story comments should be used to enter any information relating to the work they are carrying out. This information should be comprehensive and provide full visibility of what has been done throughout the job.

Final remarks should be used to enter any final thoughts about the job.

The next few pages provide a brief explanation of what each one should be used for.

Labour Line Comments: When the engineer presses the button to stop logging time, a comments box will appear on the screen. It is not a mandatory requirement to use this box, but we do encourage the engineers to provide brief information about the labour time they have just recorded. For example: they can explain that they forgot to stop logging time, and actually finished earlier. This information is sent to the Portal immediately and is visible next to the labour line in the Time Approval screen. It will also be visible in the 'my story' section of the Gold Service App.

As soon as the labour line has been authorised, this comment will appear in the history tab.

Job Story: The Job Story section should be used by the engineer to provide information about the work they have carried out. If you have added any text into the Job Story when creating the job in Gold, it will show in the Job Story section on the Gold Service Mobile App.

If you have customised the job story, the text box will be available immediately for the engineer to complete at any time on the Gold Service Mobile app, and when saved, the information will reach the Gold Service Portal and Gold mmediately and be displayed in the Job Story box. This is without the engineer having to complete the job. (See Image 1 below)

If you haven't customised the job story, the text box will not be available to the engineer until they complete the job. (See Image 2 below).
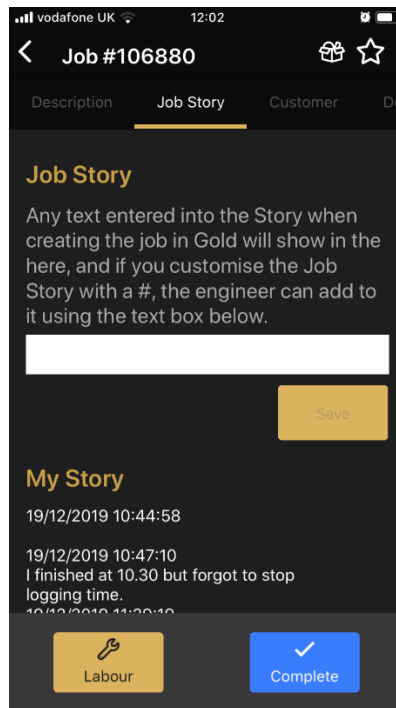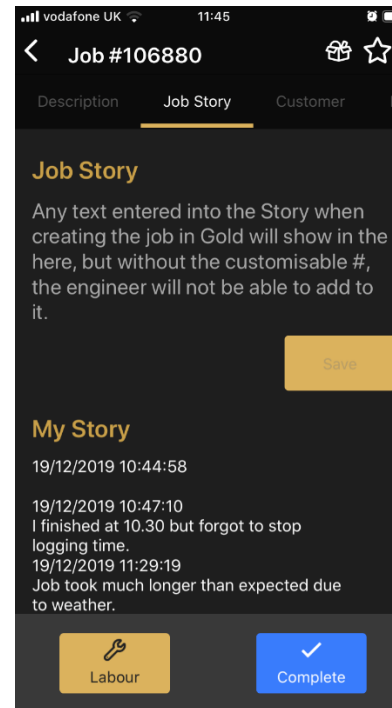
<div align="center">

IMAGE 1
Customised Job Story

IMAGE 2
Non-Customised Job Story

</div>

Final Remarks: When the engineer presses the 'Complete' button, the Job Story will be visible to refresh their memory of what has been added during the course of the work carried out. The Final Remarks box should be used by the engineer to add any final thoughts at the point of completing the job. This information will reach the Portal and be visible in the Job Story box.
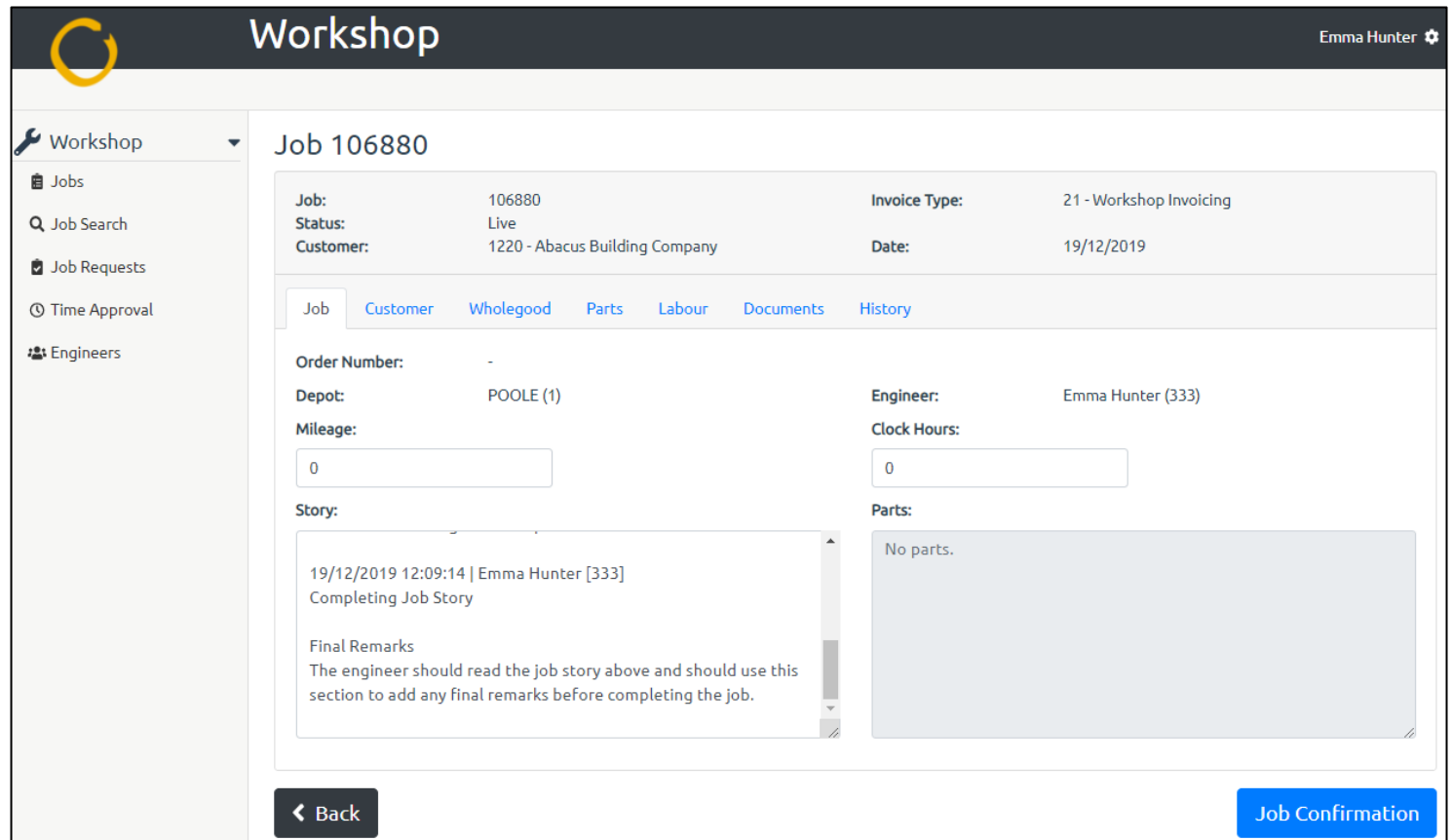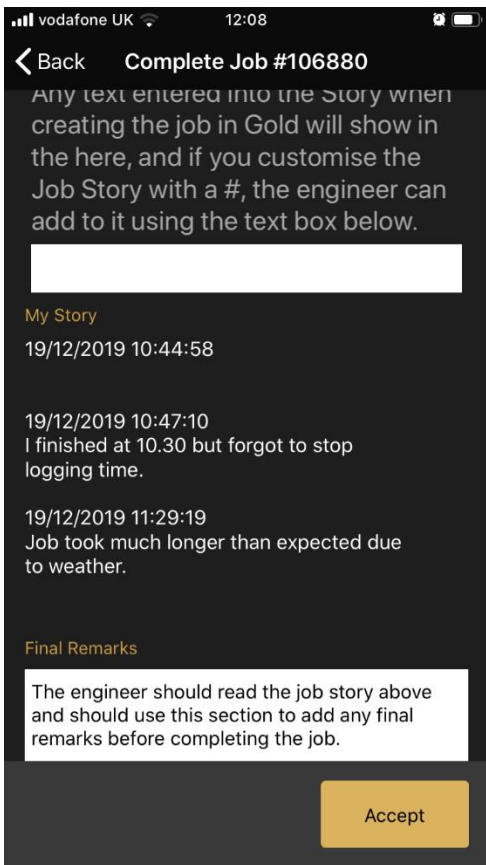
Process Flow

Once the job story has been set up in Gold and is available on the App, the engineer should follow this process: