Job Request Portal

JCB LiveLink
And
Automated Machine Healthcheck (iMHC) Integration

Version 0.5

June 2020

Contents

Overview

What is the Job Request system?

The Job Request portal allows alerts received from 3rd party systems to be quickly turned into workshop jobs. It is available through a web browser.

This document provides information on how alerts from JCB LiveLink are handled, how information is sent to eDynamix and how health check information is sent back to the Job Request portal following completion of a health check.

Alerts are automatically sent to the Job Request Portal and include the following information:

- Wholegood details - the VIN number is matched to the Wholegood Chassis and Serial Number in Gold to correctly identify the machine and customer.
- Customer details
- Job requirements
- Priority

In the Job Request Portal, you can view and alter this information and use this to create workshop jobs in Gold at the touch of a button.

Process

Accessing the Web Portal

To access the Job Request Portal, open a web browser and enter the specific URL that will have been provided by Ibcos as part of the implementation process.

This URL is unique to each dealership.

The URL will prompt you to enter a username and password.

Note: This will be different to the username and password used to access Gold. It will have been provided by a system administrator.

Enter the username and password, and hit the Log In button

Job Request Portal

Select "Job Requests" from the side bar to view job requests by customer then wholegood.

If the wholegood has more than one job request, these will be grouped together, to enable efficiencies when the engineer visits a customer site.

The default setting is to show information for All Depots, but this can be changed to a specific depot if required using the Settings cog, bottom left.

Additional Information

Clicking the information symbol displayed next to the wholegood will show extra detail about the wholegood and customer.

Job Creation

Jobs can be Created from this screen or Rejected to remove them from the Job Request queue using the buttons at the bottom of the screen.

Jobs are created either as Retail jobs such as Servicing or Warranty jobs. Service alerts are sent before the service is due, for example 50 hours before a 500 hour service.

All information will be pre-populated and certain fields can be updated if required. Press the Cancel button to exit the job request without making changes.

Fields	Mandatory/Optional	Description
Invoice Description	Optional	This forms the 2-line description for the header of the Workshop job. Details can be edited if required.
Instructions	Optional	Alert notifications which will appear on the Instructions tab for the Job. These can be edited manually if required.
Invoice Type	Mandatory	Defaults to the Alert or Job notification invoice type (for example Warranty or Retail), the invoice type can be changed if required.
Invoice To	Mandatory	This shows the customer account from the wholegood record. For Warranty jobs this needs to be changed to an internal customer account matching the invoice type; a lookup from the customer list in Gold is available.
Wholegood Account	Mandatory	The customer account number in Gold that the wholegood is associated with.
Contact	Optional	Editable Contact Name and Contact Number.
Depot	Mandatory	Depot that the wholegood belongs to or is located; i.e. was sold, stocked or ordered from.
Engineer	Optional	Lookup of Engineers from Gold to assign an engineer if required, defaults to "No Engineer".
Date	Optional	Time and date, you wish the job to start (if you have the scheduler module, this will also be updated)
Estimated time	Optional	Duration is defaulted from the request if this information is available or from the invoice type if not. It can be entered in hours: minutes format. E.g. 2.5 hours would be entered as 230, the portal will display 2:30. This will also update the scheduler module with the duration of the job if your business is licenced to use it.

If you have the Gold Service module, on selection of the "create job" function, the job will be sent to the engineers device with all of the relevant information, exactly the same as if the job had been created in Gold.

The job information will also be sent to the iMHC portal for creation of a health check (see separate section below).

Click on the "Submit" button to create the job in Gold; or use Reject to cancel.

Validation Issues

This button will show how many job requests have been sent to the job request system, where the serial number could not be matched to a wholegood. There are three reasons why a job request can be invalid and not show on the main Job Request screen.

Validation Status	Reason
Multiple Wholegoods found for Serial Number	One or more wholegoods contain the same serial number. To correct this issue the recommendation is to put a hyphen at the end of the serial number of any 'duplicate' wholegoods.
No Wholegood found for Serial Number	Serial number sent from LiveLink cannot be matched in Gold. To rectify, simply access the wholegood record in Gold and edit the serial number field with the correct serial provided by JCB.
No Customer Number for Wholegood	The wholegood has no customer against it. To correct this issue the wholegood record must be amended in Gold to add the customer assigned to it. If this is a stocked wholegood, a customer of the dealer should be added to the record.

Once the validation errors have been corrected, go back to the main Job Request screen and press the refresh button.

Automated Health Check App

Jobs created in the portal are also send to the iMHC portal for allocation to an engineer to complete a health check. This removes the need to manually enter information to create a health check.

If an engineer has been assigned to the job this is also sent to iMHC.

The technician then completes the health check as normal in the iMHC app and records the results.

On completion of the health check the iMHC portal is updated.

The Service Advisor then reviews any required follow up work and prepares a quote for the customer where needed.

Once the quote has been authorised and the work accepted the information is sent back to the Job Request Portal as an alert.

Information provided includes machine and customer details. The health check concerns, authorisation status and any parts required are added to the job instructions.

1384 - H J Warmwell & Sons	11007950 - JCB 541-70 AG XTRA
Phone: 01234 456789	Clock Hours: -
Phone (Alt): -	Warranty:
Email: -	Warranty (Extended):

Incoming Requests

Type ↑↓	Priority ↑↓	Manufacturer ↑↓	Received ↑↓	Request Title ↑↓
🛢	Medium	JCB	13/05/2020 05:02am	Service interval - engine run
🛠	Medium	JCB	27/05/2020 10:38am	MHC-4467 - 270520

The information can be reviewed, and a job can then be created in Gold from these alerts using the same process as for alerts from LiveLink.

Create Job

Invoice Description:

MHC - 4467 | TRACKED EXCAVATOR

Invoice Type:

14 - WORKSHOP SALES 🔍

Priority:

[⇕]

Instructions:

Machine Health Check 4467 with 1 alerts
Job Id: 270520
Axle Oil/Leak - Oil Leak (Excessive)
Authorisation: Authorised

Invoice To:

1384 - H J Warmwell & Sons ✔ 🔍

Wholegood Account:

1384 - H J Warmwell & Sons ✔ 🔍

Contact:

Contact Name | Contact Number

Job Location:

H J Warmwell & Sons

Patchwork Farm

Tainbridge

Bromton

Worcs

Depot:

1 - LQG Agri Ltd (LQGAGRI) [⇕]

Engineer:

No Engineer [⇕]

Date:

[ ] 00:00 📅

Estimated Duration (hh:mm):

03:00

Post Code:

B61 NKD

‹ Cancel | 🗎 Create Job