

# CLAAS Service Office PRO

## Product Manual



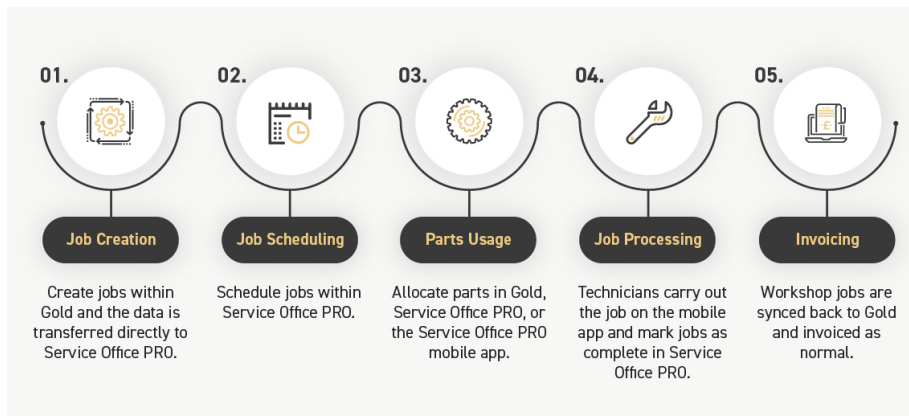
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# 1. PRODUCT OVERVIEW

This is a seamless integration between Service Office PRO and Gold that makes planning, executing and documenting a service job quick and hassle free.

Jobs are created in Gold with customer, machine and parts information. Jobs are scheduled in Service Office PRO by assigning a technician and setting dates and times. Parts usage information can be updated in both Gold and Service Office PRO and changes are reflected on both platforms. Technicians can carry out the job in the Service Office mobile app and updates are reflected on Gold and Service Office PRO. And finally, with workshop jobs synced, invoices and payments are processed within Gold.



# 2. JOB CREATION IN GOLD

## 2.1 Creating a Job in Gold

Jobs are created in Gold through the standard process and it is recommended that you continue creating them in Gold as the most up to date customer information is held here. Gold also holds information on non-CLAAS machines that CLAAS systems will not be aware of. On Gold, Service Office PRO may be shown as **CLAAS DSM** or **DSM**.

Workshop jobs are known as **Work Orders** in Service Office PRO. When a workshop job is created for a machine with a CLAAS prefix or a valid additional prefix, it is automatically recognised as a Service Office PRO job and flagged CLAAS DSM in the job header (top left of the screen).

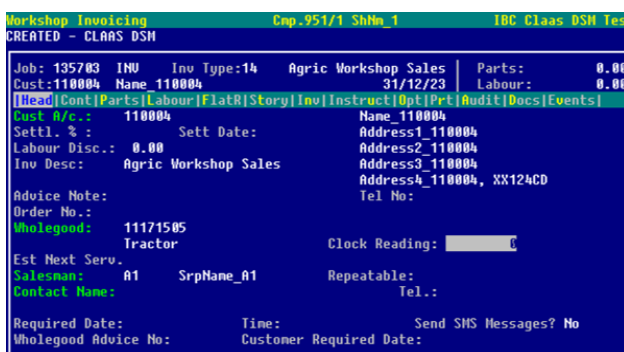


Figure 1 Workshop Job header in Classic Gold

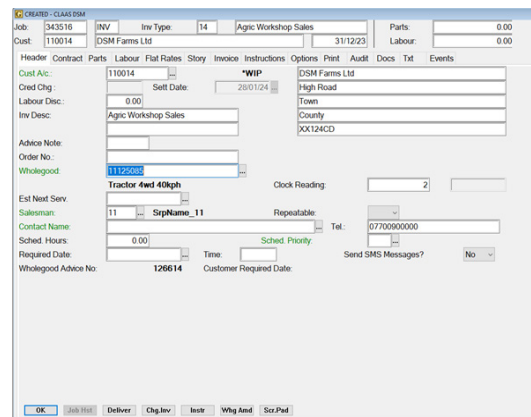


Figure 2 Workshop Job header in Windows Gold

When completing and exiting the new job, a warning will be displayed if no **Job Instructions** have been added, giving the user the opportunity to go back to the job and enter these before saving.

The prompt will say: **Job Instructions required for CLAAS DSM Failure details. Enter Now? Yes/No**

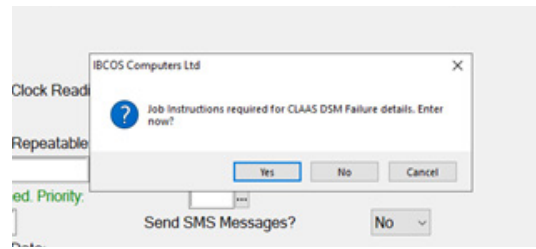


Figure 3 Reminder to enter Job Instructions in Windows Gold



Figure 4 Reminder to enter Job Instructions in Classic Gold



### Did you know?

After the job is created, any subsequent changes to job instructions must be made in Service Office PRO as updates on Gold are not reflected on Service Office PRO.

## 2.2 Adding Parts

The process for adding parts has not changed, so continue adding parts using the same method as before. For more information on parts usage, ordering and sold quantities, view Section 4.

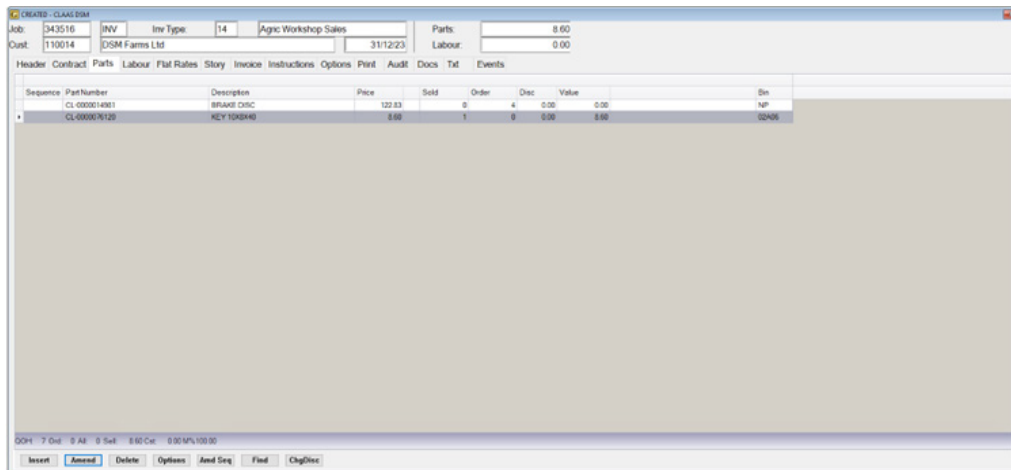


Figure 5 Adding parts in Gold Windows

## 2.3 Excluding Jobs

You may want to exclude a job from Service Office PRO, for example if the engineer has already completed the job.

Follow the steps below to exclude jobs from Service Office PRO  
 Within the Workshop job select the **Options tab** > select **Exclude from CLAAS DSM**



### Did you know?

You can exclude specific invoice types from Service Office PRO, for example non-agricultural invoice types.

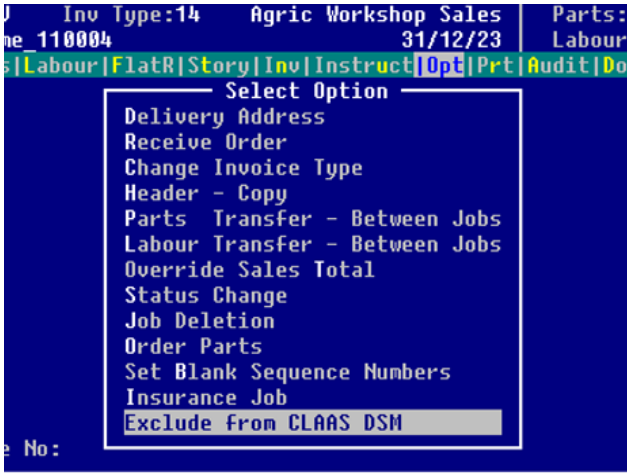


Figure 6 Excluding jobs in Classic Gold

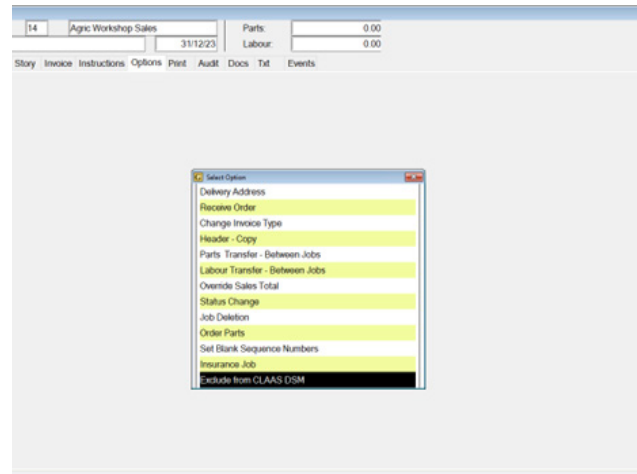


Figure 7 Excluding jobs in Windows Gold



### Did you know?

A job that has been excluded from Service Office PRO can be activated again if required in the **Options tab** and selecting **Assign to CLAAS DSM**. As work is carried out in the Service Office PRO mobile app and Service Office PRO for a job, the details are synced to Gold.

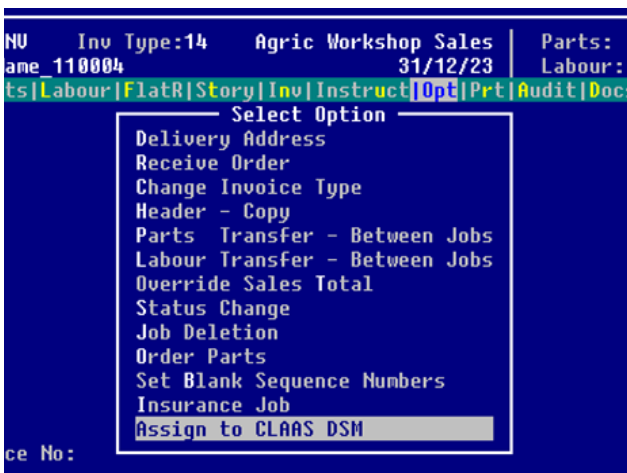


Figure 8 Including jobs in Classic Gold

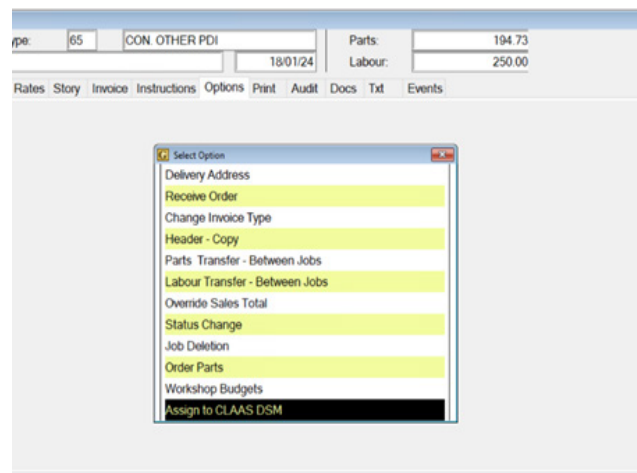


Figure 9 Including jobs in Windows Gold

### 3. JOB SCHEDULING

Once Workshop Jobs are created in Gold, they become visible within the Resource Planning worklist in Service Office PRO, ready to be scheduled.

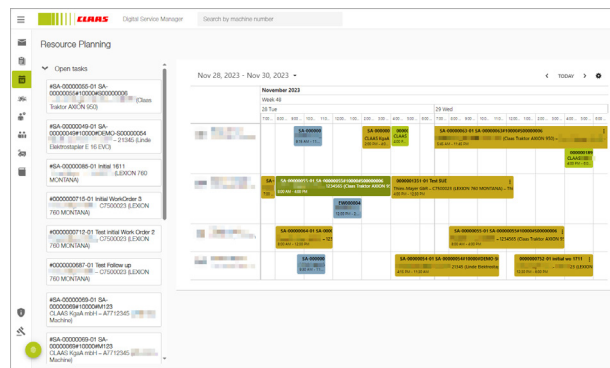


Figure 10 Job scheduling on Service Office PRO

Follow the steps below to schedule the job in Service Office PRO.

1. From the **Open tasks list**, drag and drop a **Workshop job** to the respective technician with a rough timing.

2. Once placed on the calendar, the technician is assigned to the job and the job status changes to **Scheduled**.

- A **Scheduled** status corresponds to a soft-booking of the appointment and allows forward planning without sending a notification to the scheduled technician. This allows you to visualise the workload in the planning horizon.

3. Adjust the scheduled time by **dragging the Workshop job** as needed.

4. When you're ready to turn the soft-booking into a hard-booking, **left click on the job** from the calendar and select **Dispatch**. As a result, the job status changes to **Dispatched** (blue) and the technician receives a push notification on their Service Office PRO mobile app.

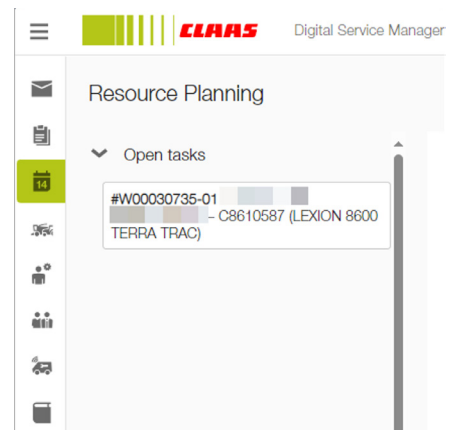


Figure 11 Open tasks list

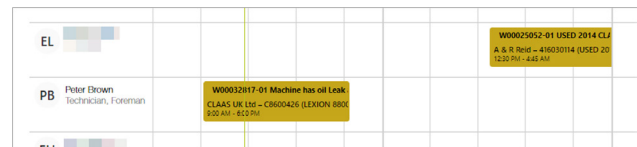


Figure 12 Scheduled job on the calendar

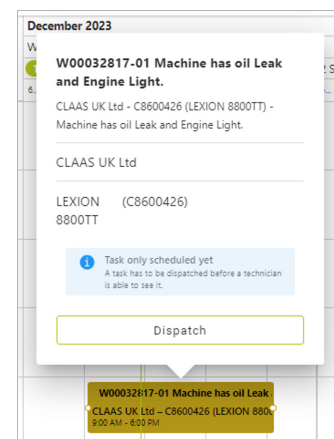


Figure 13 Dispatch option for job



Figure 14 Dispatched job appearing in blue

The colour coding on the calendar helps to recognise which status the respective job are in. See below the meanings of the different colour statuses.

**Standard status flow colour set:**



**Additional status colours:**



**Did you know?**

You can choose whether to update Gold with engineer labour recorded straight away from Service Office PRO or wait until the work order has been completed.

## 4. PARTS USAGE

Parts can be added to jobs in Gold and will be sent over to Service Office PRO. However, it is more likely that Parts will be added by the engineer via Service Office mobile app.

**Required Parts**

Parts added to workshop jobs in Gold with an Order quantity come through to the work order in Service Office PRO as Required showing they are required for the job.

If a part is added to a job in Service Office PRO as Required it comes through to Gold with an order quantity (updating the Req'd for PO field) even if there is available stock. Service Office PRO can be configured to use a different order type as not to accidentally order parts.

Part number ↑	Description	Quantity	Price	Status	Comment
000014981	BRAKE DISC	0 / 4	-	Not consumed	-
000076120	KEY 10BX40	1 / 1	-	Consumed	-

Figure 15 Order quantity appearing in Service Office PRO



### Consumed Parts

Parts added to workshop jobs in Gold with a Sold quantity come through to the work order in Service Office PRO as Consumed to indicate that they have already been used.

When parts are subsequently used in Service Office PRO they are marked Consumed and come through to Gold with a sold quantity, reducing available stock.

If a part line is partially Consumed the line is split in Gold between the original order and sold.

Used part

Task ID  
#0000004741

Part number  
0000014981

Description  
BRAKE DISC

Order quantity  
4

Unit\*  
Piece

Used quantity  
2

Remaining quantity  
2

Comment  
|

Status  
Not consumed

Delete Save

Figure 16 Sold quantity appearing as consumed in Service Office PRO

Sequence	Part Number	Description	Price	Sold	Order	Disc	Value	Bin
	CL-0000014981	BRAKE DISC	122.83	0	2	0.00	0.00	NP
	CL-0000076120	KEY 1000040	8.60	1	0	0.00	8.60	03A0K
	CL-0000014981	BRAKE DISC	122.83	2	0	0.00	245.66	

Figure 17 Partially consumed parts in Windows Gold



### Van Stock

The use of van stock has not been configured for Service Office PRO at this time and is with CLAAS for possible future consideration.

## 5. JOB PROCESSING IN SERVICE OFFICE MOBILE APP

- As soon as the job status is changed to **Dispatched** on Service Office PRO, the technician will receive a push notification on their phone and the job will appear on their task list.

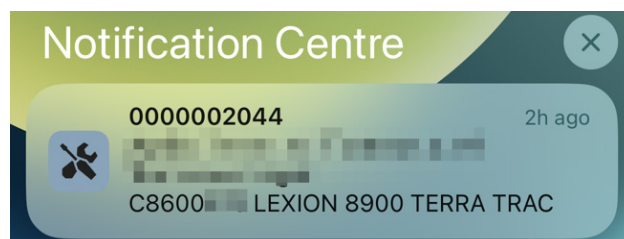


Figure 18 Notification on technician's phone



- To start the job, technicians will have to change the status to **In Progress**. This will enable editing of the Job documentation.

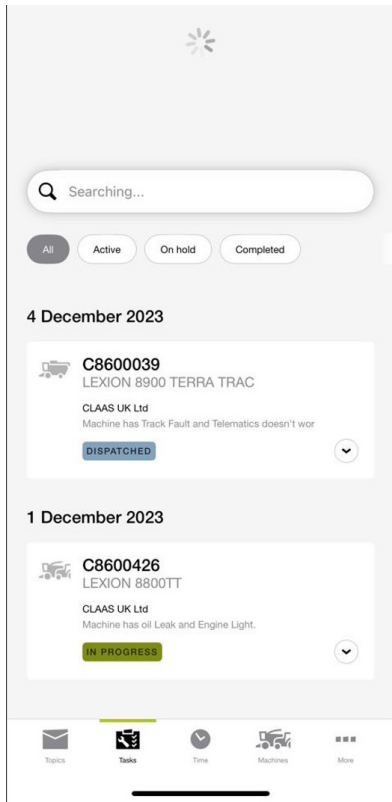


Figure 19 Workshop job appearing in task list

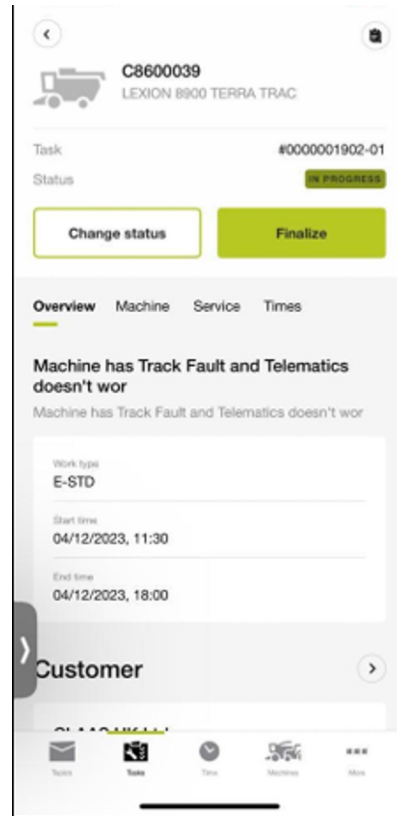


Figure 20 Changing status of job to In Progress

The Service Office Mobile App provides full visibility of spare parts. A **tick** beside the job indicates that the parts have been issued to the job.

In case additional parts are needed, these can be added. You can also add the vendor prefix (e.g. CL- for CLAAS parts or GRA- for Granit) or extra zeros if required.

Follow the steps below to add used parts.

- On the Workshop job, navigate to the **Service tab** and scroll down to **Used Parts**.
- Select the part and two options will appear. If you know the part number, select **Manual Input** and enter the number.

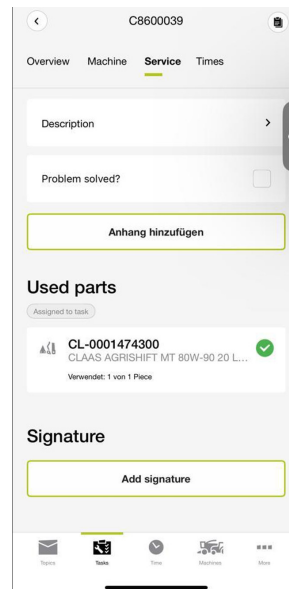


Figure 21 Used parts section under the Service tab

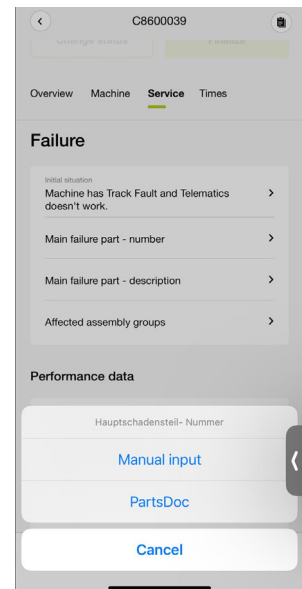


Figure 22 Options to add additional parts

3. If the part number is unknown, select **PartsDoc** to add required spare parts by accessing the CLAAS Spare parts catalogue.

- Once you select **PartsDoc**, a webpage will open in your browser, pre-filtered to the machine number of the job (login using your CLAAS credentials).
- Query for the required parts as usual and add those to your shopping cart.
- Access the shopping cart and select **Open in Service Manager** to transfer the items as consumed parts.

4. To complete the task, the technician will need to change the status to **Completed** by selecting **Finalise** next to **Change Status**.

5. An overview screen is presented which guides the technician through the included job documentation and time statements to review.

6. Scroll down and select **Next** to view a final confirmation screen where any missing mandatory fields are highlighted.

7. Once there is a tick next to each task, select **Complete task** to finish and close the job.

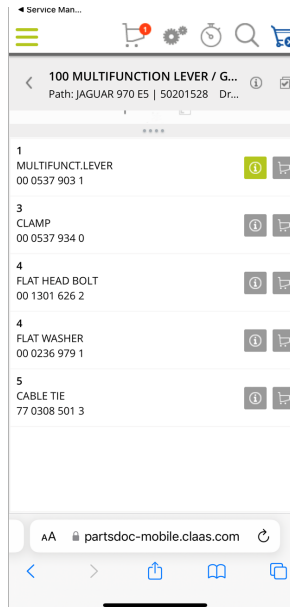


Figure 23 PartsDoc open on a new browser

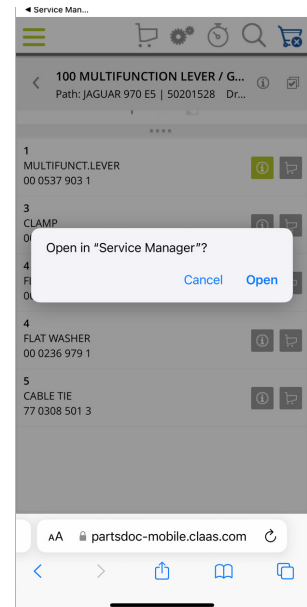


Figure 24 Transferring parts from your shopping cart to the app

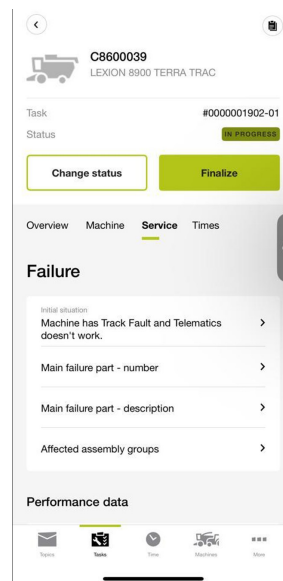


Figure 25 Changing status to Complete

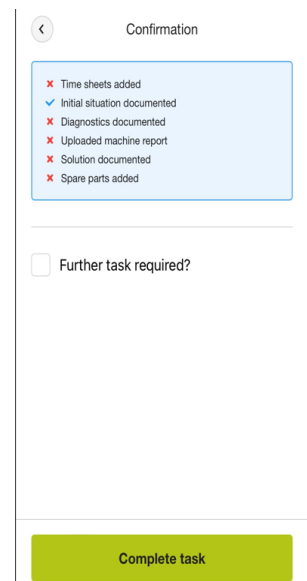
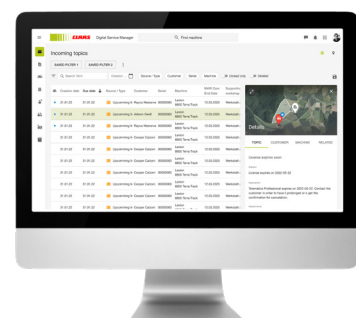


Figure 26 Final confirmation screen

## 6. JOB PROCESSING IN SERVICE OFFICE PRO

Once the technician completes the job on the Service Office PRO mobile app, the jobs will need to be marked as complete in Service Office PRO. A dedicated list view filter is necessary in order to keep track of those work orders where all comprised tasks are completed.



Follow the steps below to finalise the completed Workshop job and send it to Gold for invoicing.

1. Navigate to Work Orders and set the **Work Order Status** filter to **In progress**.
2. Select **Task status** and select **Completed** from the drop down menu.

This filter setting is typically used to review completed service jobs and trigger the finalisation of work orders.



Figure 27 Work order filtering options

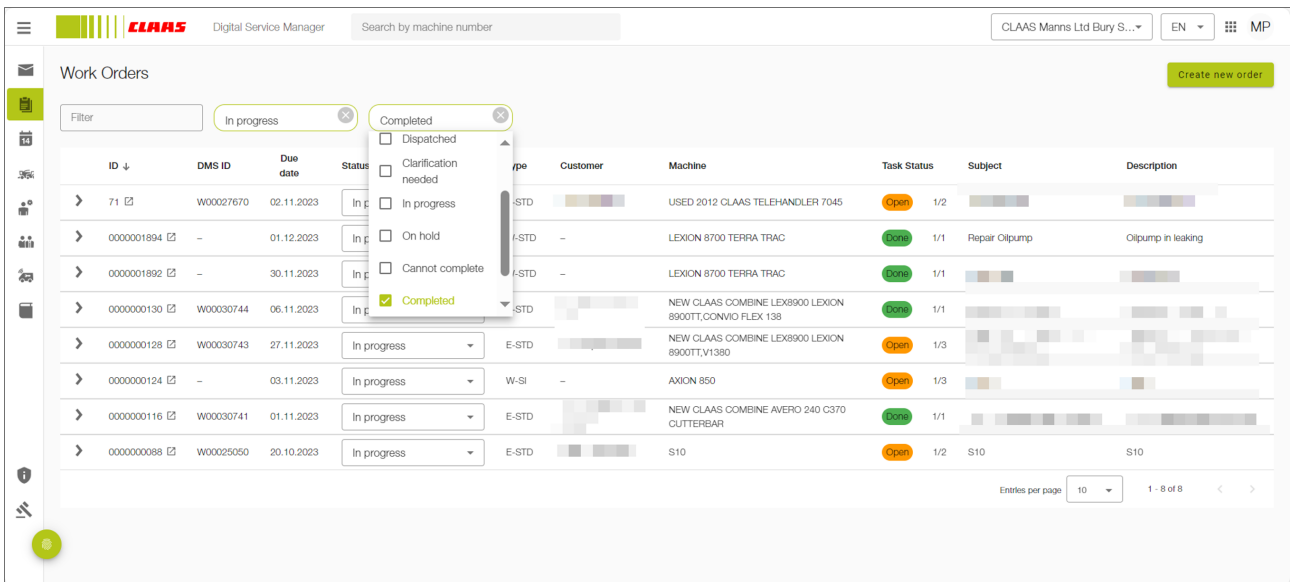


Figure 28 Completed service jobs appearing as a list

3. Change the status of your reviewed work order to **Completed** (either within the work order itself or directly from the list view page). This will now be synced with Gold and ready to be invoiced.

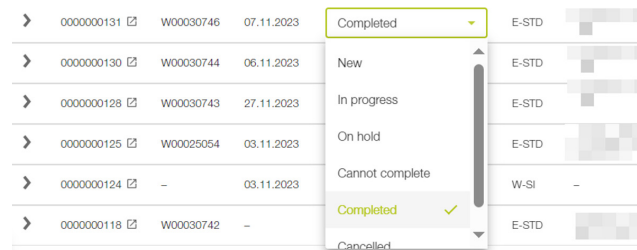


Figure 29 Changing status of job to completed



### Did you know?

A green colour on the overall Task Status summary column means that all tasks are completed. An orange colour means that there are open tasks remaining.

## 7. INVOICING

After completion in Service Office PRO, workshop jobs are synced back to Gold and can be invoiced as normal. Once jobs are invoiced or batched for invoicing in Gold, no further updates from CLAAS Service Office PRO will be processed.

## 8. VALIDATION ISSUES

If a job has not been synced over to Service Office PRO, check the Validation Issues before contacting our Support Team. There are a number of scenarios that will cause a job or update to be shown in the Validation Issues. Below are a few scenarios.

- **Gold to Service Office PRO**

Any jobs that are to be sent to Service Office PRO will show in the Validation Issues area of the job request portal if the machine/customer details cannot be matched.

**Serial Number Validation** - CLAAS require a serial number in order to create the job in Service Office PRO. When matching the machine information, the serial number is validated as follows:

1. Serial Number - used if populated.
2. Chassis Number - used if populated and no serial number exists.
3. Engine Number - used if populated and no serial or chassis number exist.

Only if all 3 of these are empty or cannot be matched will it give an invalid/missing serial number and therefore the job added to the Validation Issues list.

- **Service Office PRO to Gold**

Service Office PRO will reject works orders where the **invoice type** of the related works order has **not been registered** in the Service Office PRO system.

Any incoming jobs from Service Office PRO that cannot be validated against a Gold Customer and Machine will also show in the Validation list.

## 9. USEFUL INFORMATION



**Support Number:**

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Press Option 1



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