CLAAS Service Office PRO Product Manual







In partnership with

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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).

Workshop Invoicing	Cnp.951/1 ShNn_1	IBC Claas	DSM Tes
CREATED – CLAAS DSM			
	And Hadabas Cala	Developer	0.00
Job: 135703 INU Inv Type:14			0.00
Cust:110004 Name_110004		Labour:	0.00
<pre>[Head Cont Parts Labour FlatR S</pre>		udit Docs Eve	ents
Cust A/c.: 110004	Name_110004		
Settl. % : Sett Date:	Address1_11000	4	
Labour Disc.: 0.00	Address2_11000	4	
Inv Desc: Agric Workshop Sa	les Address3 11000	4	
	Address4 11000	4. XX124CD	
Advice Note:	Tel No:		
Order No.:			
Wholegood: 11171505			
Tractor	Clock Reading:	G	
Est Next Serv.	CLOCK Reading.	U	
	0		
Salesman: A1 SrpName_A1	Repeatable:		
Contact Name:	Tel.:		
		IS Messages? N	10
Wholegood Advice No: Cu	stomer Required Date:		

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

ed. Priority					
			Yes	No	Cancel
Repeatable	e				
Clock Read	2	Job Instruct	ions required for CLA	AS DSM Failure	details. Enter
	1000000	mputers Ltd			×

Figure 3 Reminder to enter Job Instructions in Windows Gold

st Next Serv. Job Instructions r	required for CLAAS DSM Failu	re details. Enter now? <mark>Yes</mark>
equired Date:	Time:	Send SMS Messages? No



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.

:do	ID - CLAAS DSM																				
	343516	INV	In	v Type:	14	A	nic Works	hop Sales		_	Parts:				8.60						
ŧ .	110014	DSM P	Farms Lt	d					3	1/12/23	Labou	r .			0.00						
eade	er Contract	Parts L	abour P	Tal Rates	Story In	NOICE	Instruction	ns Option	s Print	Audit	Docs Te	t 1	Events								
Seq	verce PartNur	iber			Description	cn			Price		Seld	0	der	Disc	Value		Bin				
	CL-0000	014961			BRAKEC					122.83		0	4	0	00	0.00	NP				
	CL-0009	076120			KEY 10K	5X40				8.60		1	0	0	00	8.60	0240	8			
	7 Ord © A4	0 Sel	5.60 Cet	0.00 M/% 10	20 00																

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**



·Q.

Did you know?

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

J Inv Tj ne 110004	ype:14 Agric Workshop Sales 31/12/23	Parts: Labour
s <mark>L</mark> abour F	latR Story Inv Instruct <mark> Opt</mark> Prt	Audit Do
	Select Option	
	Delivery Address	
	Receive Order	
	Change Invoice Type	
	Header - Copy	
	Parts Transfer – Between Jobs	
	Labour Transfer – Between Jobs	
	Override Sales Total	
	Status Change	
	Job Deletion	
	Order Parts	
	Set Blank Sequence Numbers	
	Insurance Job	
	Exclude from CLAAS DSM	
e No: 🖵		

Invace Instructions Options Print Aust Docs Tut Events
🜠 Mart Open
Determination of the second se
Delivery Address
Roceive Order
Change Invoice Type
Header - Copy
Parts Transfer - Between Jobs
Labour Transfer - Between Jobs
Override Sales Total
Status Change
Job Deletion
Order Parts
Set Blank Sequence Numbers
Insurance Job
Exclude from CLAAS DSM

Figure 6 Excluding jobs in Classic 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.

J Inv Type:14 Agric Workshop Sales he_110004 31/12/23 Labour: Labour FlatR Story Inv Instruct[Opt Prt Audit Docs Select Option Delivery Address Receive Order Change Invoice Type Header - Copy Parts Transfer - Between Jobs Labour Transfer - Between Jobs Override Sales Total	ppe: 65 CON OTHER PDI Parts: 194.73 Labour: 250.00 Rates Story Invoice Instructions Options Print Audit Docs Txt Events
Status Change	Override Sales Total
Job Deletion	Status Change
Order Parts	Job Deletion
Set Blank Sequence Numbers	Order Parts
Insurance Job	Workshop Budgets
Assign to CLAAS DSM	Assign to CLAAS DSM

Figure 8 Including jobs in Classic 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.





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 softbooking 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 12 Scheduled job on the calendar



PI	В	Peter Brown Technician, Foreman		td – C860042	ie has oil Leak 6 (LEXION 880	

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.



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.



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.

≡	CLAAS Serv	ice Office Search by machine num	iber				30005822
				No attachments			
1	✓ Solution						
3%	Description						
#* #11	Problem solved	File name	Description		Туре	Size	D
ía)				No attachments			
ii	✓ Consumed Parts						
	Part number †	Description	Quantity	Price	Status		Comment
	0000014981	BRAKE DISC	074	1	Not consumed		-
	0000076120	KEY 1048640	1/1		Consumed		-

Figure 15 Order quantity appearing in Service Office PRO

Consumed Parts

 \checkmark

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.

Task ID	
#0000004741	
Part number	
0000014981	
Description	
BRAKE DISC	
Order quantity	Unit*
4	Piece
Used quantity	Remaining quantity
2	2
Comment	
I	
Status	
Not consumed	

Figure 16 Sold quantity appearing as consumed in Service Office PRO



Figure 17 Partially consumed parts in Windows Gold

Van Stock

Image: A start of the start of

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

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.

1. 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 20 Changing status of job to In Progress



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

	TERRA TRAC
āsk Status	#0000001902-
Change status	Finalize
Overview Machine Se	ervice Times
Failure	
Initial situation Machine has Track Fault doesn't work.	and Telematics
Main failure part - numb	er >
Main failure part - descri	ption >
Affected assembly group	os >
Performance data	

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.

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	Incoming topics								• •	
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ke	• 244	10.00	a ippermitte	Repairment i	00000	Lation 8500 Term Track	10.04.2655	Network.	Details	
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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.

≡	ELAAS	Digital Service Manager	Search by machine number	CLAAS Manns Ltd Bury S* EN * III MP
\leq	Work Orders			Create new order
iii iii	Filter	WorkOrder status	Task status	

Figure 27 Work order filtering options

	<i> [L</i> AA5	Digital Se	rvice Manager	Sear	rch by machine number						CLAAS Manns Ltd Bury	S* EN * III MP
Work	Orders											Create new order
Filter		In prog	ress		Sompletou							
	ID ↓	DMS ID	Due date		Clarification	/pe	Customer	Machine	Task Stat	us	Subject	Description
>	71 🗹	W00027670	02.11.2023	In p [In progress	-STD		USED 2012 CLAAS TELEHANDLER 7045	Open	1/2		
>	0000001894 🖾	-	01.12.2023	In p [On hold	I-STD	-	LEXION 8700 TERRA TRAC	Done	1/1	Repair Oilpump	Oilpump in leaking
>	0000001892 🖾	-	30.11.2023	In p C	Cannot complete	I-STD	-	LEXION 8700 TERRA TRAC	Done	1/1		
>	000000130 🖾	W00030744	06.11.2023	In g	Completed	▼.std		NEW CLAAS COMBINE LEX8900 LEXION 8900TT,CONVIO FLEX 138	Done	1/1		
>	000000128 🖾	W00030743	27.11.2023	In proç	gress 💌	E-STD		NEW CLAAS COMBINE LEX8900 LEXION 8900TT,V1380	Open	1/3	10 million 100	10 million 100
>	000000124 🖾	-	03.11.2023	In proç	gress 👻	W-SI	-	AXION 850	Open	1/3		
>	000000116 🛛	W00030741	01.11.2023	In prog	gress 💌	E-STD	100	NEW CLAAS COMBINE AVERO 240 C370 CUTTERBAR	Done	1/1		
>	000000088 🖾	W00025050	20.10.2023	In proç	gress 💌	E-STD		S10	Open	1/2	S10	S10
											Entries per page 10 -	1 - 8 of 8 < >
	Filter	Work Orders Filter ID + 71 [2] 0000001892 [2] 00000001892 [2] 0000000120 [2] 0000000120 [2] 0000000124 [2] 0000000124 [2] 0000000124 [2]	Work Orders Filter In prog ID + DMS ID 71 [2] W00027670 0000001894 [2] - 00000001892 [2] - 00000001892 [2] - 00000001892 [2] - 0000000128 [2] W00030744 0000000124 [2] - 0000000124 [2] -	Description Description Diagname ID + DMS ID Diagname 7 1 E W00027670 02.11.2023 0000001694 E - 01.12.2023 00000001692 E - 30.11.2023 00000001692 E - 30.11.2023 0000000128 E W00030744 06.11.2023 0000000124 E - 08.11.2023 0000000124 E - 08.11.2023 0000000124 E - 08.11.2023	Description Description Statute 1D + DMS 1D Due date Statute 71 I2 W00027670 02.11.2023 In pr 0000001892 I2 - 01.12.2023 In pr 00000001892 I2 - 30.11.2023 In pr 00000001892 I2 - 30.11.2023 In pr 0000000128 I2 W00030744 06.11.2023 In pr 0000000128 I2 - 03.11.2023 In pro 0000000124 I2 - 03.11.2023 In pro 00000000116 I2 W00030741 01.11.2023 In pro	Work Orders Filter In progress Completed ID + DMS ID Due date Status 71 E W00027670 02.11.2023 In r 0000001692 E - 01.12.2023 In r 00000001692 E - 30.11.2023 In r 0000000116 E W00030744 06.11.2023 In progress * 00000000124 E - 03.11.2023 In progress * 00000000124 E - 03.11.2023 In progress *	Due Completed ID + DMS ID Due Carification > 71 IZ W00027670 02.11.2023 In Carification > 0000001682 IZ - 01.12.2023 In On hold FSTD > 00000001682 IZ - 30.11.2023 In Carification FSTD > 00000001682 IZ - 30.11.2023 In Carification FSTD > 0000000128 IZ W000030744 06.11.3023 In FSTD STD > 0000000128 IZ W000030744 03.11.2023 In progress F.ESTD > 0000000128 IZ - 03.11.2023 In progress F.ESTD > 0000000116 IZ W00030741 01.11.2023 In progress F.ESTD	Due Completed ID + DMS ID Due Asta Statut Clarification necded Carnfoldation Statut 71 I2 W00027670 02.11.2023 In r 0000001684 I2 - 01.11.2023 In r 00000001682 I2 - 30.11.2023 In r 00000001682 I2 - 30.11.2023 In r 0000000128 I2 W00030744 06.11.2023 In r STD 00000000128 I2 W00030744 06.11.2023 In progress E.STD 00000000128 I2 - 03.11.2023 In progress W-SI 00000000124 I2 - 03.11.2023 In progress W-SI 00000000116 I2 W00030741 01.11.2023 In progress W-SI	Work Orders Filter In progress Completed ID + DMS ID Due data Dispatched ID + DMS ID Due data Clarification needed PP Customer Machine > 71 IZ W00027670 02.11.2023 In g On hold STD USED 2012 CLAAS TELEHANDLER 7045 > 0000001682 IZ - 01.12.2023 In g On hold STD LEXION 8700 TERRA TRAC > 00000001682 IZ - 30.11.2023 In g Campleted STD NEW CLAAS COMBINE LEX800 LEXION 88000TT.CONNO FLEX 138 > 0000000128 IZ W000030744 06.11.2023 In g Completed STD NEW CLAAS COMBINE LEX800 LEXION 88000TT.CONNO FLEX 138 > 0000000128 IZ W00030743 27.11.2023 In progress E-STD NEW CLAAS COMBINE AUERO 240 C370 CUTTERBAR > 0000000116 IZ W00030741 01.11.2023 In progress E-STD NEW CLAAS COMBINE AVERO 240 C370 CUTTERBAR	Work Orders Filter In progress Completed ID + DMS ID Due date Status Clarification needed pp Customer Machine Task Status 7 11 /// 12 W00027670 02.11.2023 In g On hold STD UseD 2012 CLAAS TELEHANDLER 7045 Geore > 0000001684 /// 2 - 01.12.2023 In g On hold STD LEXION 8700 TERRA TRAC Geore > 0000000130 /// 300000130 /// 3000000130 /// 3000000130 /// 3000000000130 /// 30000000000	Work Orders Filter In progress Completed ID + DMS ID Dispatched ID + DMS ID Bispatched Clarification needed STD USED 2012 CLAAS TELEHANDLER 7045 GC00 1/2 0000001692 E - 01.12.2023 In progress STD LEXION 8700 TERRA TRAC GC00 1/1 00000001692 E - 30.11.2023 In progress STD LEXION 8700 TERRA TRAC GC00 1/1 00000001692 E - 30.11.2023 In progress STD LEXION 8700 TERRA TRAC GC00 1/1 > 00000001982 E - 30.11.2023 In progress STD NEW CLAAS COMEINE LEX8900 LEXON GC00 1/1 > 0000000128 E W00030744 06.11.2023 In progress STD NEW CLAAS COMEINE LEX8900 LEXON GC00 1/3 > 0000000128 E W00030741 01.11.2023 In progress V-SI - AXION 850 GC00 1/3 > 00000000116 E W00030741 In 1	Work Orders Filter In progress Completed ID + DMS ID Die Status Completed ID + DMS ID Die Status Clarification In progress Clarification needed StD USED 2012 CLAAS TELEHANDLER 7045 Groot 1/2 > 0000001894 IZ - 01.112.2023 In p On hold STD LENION 8700 TERPA TRAC Groot 1/1 > 0000001892 IZ - 80.11.2023 In p Cannot complete STD LENION 8700 TERPA TRAC Groot 1/1 > 00000001892 IZ - 80.11.2023 In p Completed STD NEW CLAAS COMBINE LEX8800 LEXION Groot 1/1 > 0000000128 IZ W00030744 27.11.2023 In progress E-STD NEW CLAAS COMBINE LEX8800 LEXION Groot 1/2 > 0000000128 IZ W00030744 27.11.2023 In progress E-STD NEW CLAAS COMBINE LEX8800 LEXION Groot 1/1 > 0000000128 IZ W00030741 01.11223 In progress E-STD NEW CLAAS COMBINE AREPO 240 C370 G

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.

>	000000131 🛛	W00030746	07.11.2023	Completed -	E-STD
>	000000130 🖾	W00030744	06.11.2023	New	E-STD
>	000000128 🖾	W00030743	27.11.2023	In progress	E-STD
>	000000125 🖾	W00025054	03.11.2023	On hold	E-STD
>	000000124 🖾	-	03.11.2023	Cannot complete	W-SI –
>	000000118 🖾	W00030742	-	Completed 🗸	E-STD
				Cancelled	

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.



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:

+44 (0) 1202 714200 Press Option 1 ଡି(

CLAAS Support Email: cuk.serviceoffice.support@claas.com



Support Email: support@ibcos.co.uk



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For more information on Ibcos Computers Ltd., please visit **www.ibcos.co.uk**.

To get in touch with us, please email us at **sales@ibcos.co.uk** or ring us at **+44 (0) 1202 714200**