

Ostendo

And

Freeway

Corrective Actions

(Update 233)

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## Corrective Actions (Update 234)

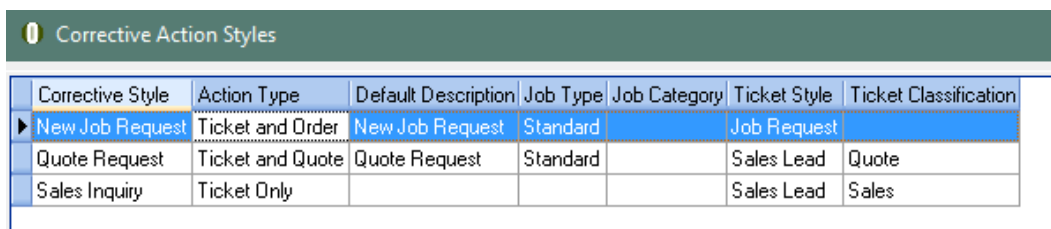
### Overview:

A Corrective Actions is a requirement in additional to the task you are performing in Freeway. Some examples of this are:

- Whilst working on a job in Freeway you discover or are advised that additional work will be required either on the same job or maybe a new requirement, resulting in a new job needing to be created
- You were taking an order from a customer, and the customer alerted you to a separate situation that may require a none related action. Eg: They mentioned that they had a technical problem with a previous order from you
- While entering QA data in a Datasheet, you needed to alert someone in your organisation about something in relation to the activity

### What form does a Corrective Action take?

- By logging a Corrective Action within a Datasheet, this will result in anyone of the following occurring:
  - A Call Ticket will automatically be created and linked back to the order etc. you generated it from.
  - A Job Quote or Order will be created, referenced back to the Datasheet
  - A Call Ticket along with either a Job Quote or Job Order will be created. In this case the Call Ticket will be linked to the Job
- In all scenarios resulting in a Call Ticket being generated, that ticket will be defined with it's own Ticket Style and Classification. For example, this means that a Ticket Style of 'Sales' could be directed back to the Sales Manager, whilst a ticket style of 'Technical' could be directed to a different person in your organisation.
- The matrix of these Corrective Action Styles is defined under the Mobility ->Settings->Corrective Actions Styles screen.



Corrective Style	Action Type	Default Description	Job Type	Job Category	Ticket Style	Ticket Classification
▶ New Job Request	Ticket and Order	New Job Request	Standard		Job Request	
Quote Request	Ticket and Quote	Quote Request	Standard		Sales Lead	Quote
Sales Inquiry	Ticket Only				Sales Lead	Sales

## Example:

In this scenario, we have been deployed a Job Order to Freeway and we are advised by the customer whilst performing the work that there has been another unrelated incident requiring a job to be created and scheduled for future work.

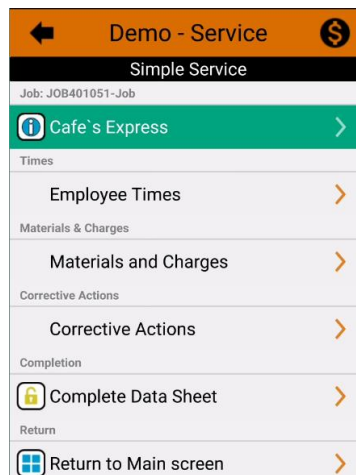
## Setup:

- Ensure your Mobility Style Template has a Type set up of 'CORRECTIVEACTION'

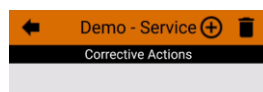
(i) Style Templates

Sequenc	Type	Description	Option
10	TIMES	Employee Times	
20	MATERIALS	Materials and Charges	
30	CORRECTIVEACTION	Corrective Actions	

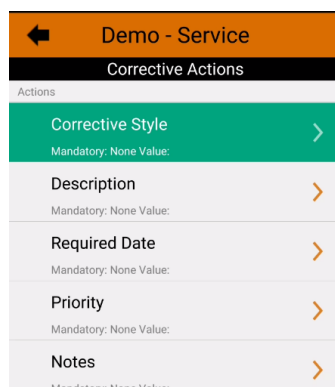
- Deploy your job to Freeway and select it to create a Datasheet



- Select the Corrective Actions Option when necessary



- Press the '+' button to add an Action



- Select the Corrective Style. (This displays a list of all your predefined entries from you Mobility settings. In this case we will select 'New Job Request' as this will not only create a ticket but also a job)

(blank)	<input type="radio"/>
New Job Request	<input checked="" type="radio"/>
Quote Request	<input type="radio"/>
Sales Inquiry	<input type="radio"/>

- Provide a meaningful Description. (This will become the Job Description along with the Call Ticket), then press the go back button

←
Demo - Service

Corrective Actions

Description  
 Hot water leak from an ex-Demo unit.

- Select the Required Date (in this case for the job), then press the go back button

2018  
**Fri, 18 May**

< May 2018 >

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Cancel
OK

- Select an optional Priority for this, then press the go back button

1-Urgent	<input type="radio"/>
2-High	<input type="radio"/>
3-Normal	<input checked="" type="radio"/>
4-Low	<input type="radio"/>

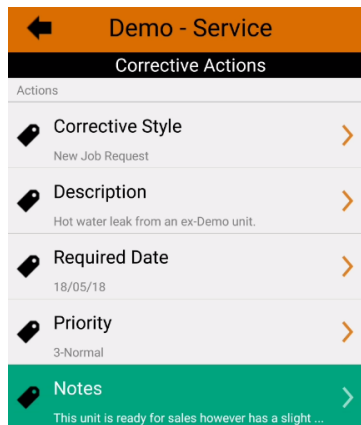
- Enter some notes applicable to this new requirement, then press the go back button.

←
Demo - Service

Corrective Actions

Notes  
 This unit is ready for sale however has a slight water leak from the Hot Water pipe. Check and clean and make ready for sale

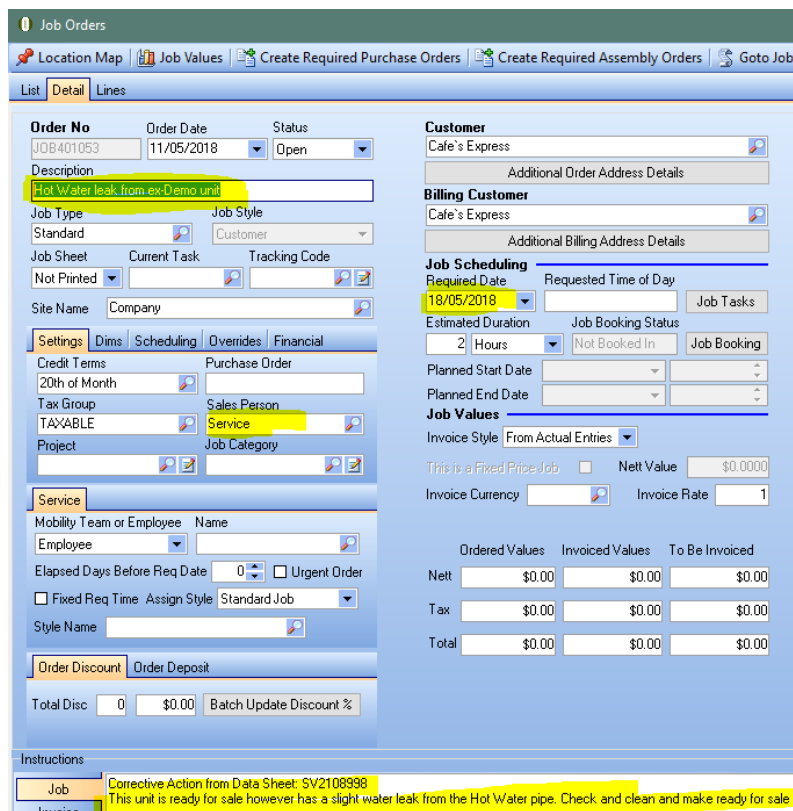
- You are now ready to either continue with your current work or even specify another Corrective Action.



- Once the Datasheet is Completed and Returned to Ostendo, in this case a Job will be created, along with a Call Ticket

### Job Creation from Corrective Action:

- The Corrective Action Description as the Job Description
- The Freeway Employee name is the Sales Person
- The Required date of the Correction Action, becomes the Job Required Date
- The Reference back to the originating Datasheet in the Job Notes
- The Corrective Action Notes have been copied through from Freeway into the Job Notes



## Ticket Creation from Correction Action:

- The Reference back to the originating Datasheet in the Additional Details
- The Corrective Action Description in the Ticket Description
- As this Ticket relates to a Job Order it has been automatically linked to that order
- The Corrective Action Notes have been copied through from Freeway

Call Centre

Customers Customer Statistics Suppliers Customer Assets Location Map Sales Orders Job C

List Detail

Ticket ID	Call Method	Call Style	Date	Time	Service Status	Call Status
1159	Visit	Job Request	11/05/2018	1:58 PM	Logged	Action Required

Who is Ticket for

Who Address

Type: Customer Contact: Jeen'ze Company: Cafe's Express Standard Customer

Additional Details: Corrective Action from Data Sheet: SV2108998 Asset:

Phone: Mobile: Email: Lead Source:

What Type of Call

Classification: Sub Class: Tracking Code:

Description: Hot Water leak from ex-Demo unit  Urgent Ticket

Call Relates to

Relates To: Job Order  Linked To: JOB401053

Call Notes: Action Information Call Resolution Information Service Level Service Response Job Request Information Time Line

Corrective Action from Data Sheet: SV2108998  
This unit is ready for sale however has a slight water leak from the Hot Water pipe. Check and clean and make ready for sale

- Because the Corrective Action is linked to a Call Style of 'Job Request' this ticket has automatically taken on the Action Information attributes from this Style. Ie: A Ticket Action has been Automatically created for 'Bob Drum' to deal with. This is based on the Pipeline Actions for the Ticket Style.

List Detail

Ticket ID	Call Method	Call Style	Date	Time	Service Status	Call Status
1159	Visit	Job Request	11/05/2018	1:58 PM	Logged	Action Required

Who is Ticket for

Who Address

Type: Customer Contact: Jeen'ze Company: Cafe's Express Standard Customer

Additional Details: Corrective Action from Data Sheet: SV2108998 Asset:

Phone: Mobile: Email: Lead Source:

What Type of Call

Classification: Sub Class: Tracking Code:

Description: Hot Water leak from ex-Demo unit  Urgent Ticket

Call Relates to

Relates To: Job Order  Linked To: JOB401053

Call Notes: Action Information Call Resolution Information Service Level Service Response Job Request Information Time Line

Seq	Stage	Action Seq	Action Description	Assigned To	CC To
1	New Job Request	10/	Authorise New Job Request	Bob Drum	