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:
 - $\circ~$ A Call Ticket will automatically be created and linked back to the order etc. you generated it from.
 - $\circ~$ 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 Action Styles | | | | | | | | |
|---|--------------------------|------------------|------------------|---------------------|----------|--------------|--------------|-----------------------|--|
| [| | Corrective Style | Action Type | Default Description | Јор Туре | Job Category | Ticket Style | Ticket Classification | |
| | Þ | 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 | |
| ſ | | | | - | | | | | |

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 | | | | | |
|---|-------------------------------|------------------|-----------------------|--------|--|--|
| | List Detail Template Settings | | | | | |
| | Sequenc A | Туре | Description | Option | | |
| Þ | · 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) | \bigcirc |
|-----------------|------------|
| New Job Request | ۲ |
| Quote Request | \bigcirc |
| Sales Inquiry | \bigcirc |

• 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 |
| Descript | tion |
| Hot wat | ter leak from an ex-Demo unit. |

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

| 018 -ri | , 1 | 8 N | /lay | / | | |
|-------------------|------|-----|-------|----|----|----|
| < | | м | ay 20 | 18 | | > |
| s | м | т | w | т | 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 | | |
| | Cano | el | | | ок | |

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

| 1-Urgent | \bigcirc |
|----------|------------|
| 2-High | \bigcirc |
| 3-Normal | ۲ |
| 4-Low | \bigcirc |

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



• 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
- \circ $\,$ The Corrective Action Notes have been copied through from Freeway into the Job Notes $\,$

| Irder No Order Date Status | Customer | | |
|---|-------------------------------------|-----------------------------------|---------------|
| 0B401053 11/05/2018 🔽 Open 🔽 | Cafe's Express | | <u>~</u> |
| tescription | Additio | nal Order Address Deta | ils |
| fot Water leak trom ex-Demo unit | Billing Customer | | |
| ob Type Job Style | Cafe's Express | | <u>~</u> |
| Standard M Lustomer V | Additio | nal Billing Address Deta | uls |
| Not Printed | Job Scheduling - | Persuented Time of Day | |
| | 18/05/2018 | nequested time of Day | Job Tasks |
| Site Name Lompany | Estimated Duration | Job Booking Statu | |
| Settings Dims Scheduling Overrides Financial | 2 Hours | Not Booked In | Job Booking |
| Credit Terms Purchase Order | Planned Start Date | | |
| 20th of Month | Planned End Date | | |
| Tax Group Sales Person | Job Values — |] [| Ŧ |
| Project Job Category | Invoice Style From Actual Entries 💌 | | |
| | | ob 🔲 Nett Value | \$0.000 |
| | Invoice Currency | | a Data 1 |
| Service | Invoice cullency | M Invoice | shale |
| Mobility I earn or Employee Name | | | |
| Employee | Ordered Values | Invoiced Values 1 | o Be Invoiced |
| Elapsed Days Before Req Date 0 🗧 🗌 Urgent Order | Nett \$0.0 | 0 \$0.00 | \$0.00 |
| 🗆 Fixed Req Time Assign Style Standard Job 💌 | Tax \$0.0 | 00.00 | \$0.00 |
| Style Name 🖉 | | φ3.00 | φ0.00 |
| | Total \$0.0 | 0 \$0.00 | \$0.00 |
| Order Discount Order Deposit | | | |
| | | | |

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
- \circ $\;$ The Corrective Action Notes have been copied through from Freeway

| Call Centre | | | |
|---|---|----------------------------------|---|
| 🔒 Customers 📠 Customer St | tatistics 🤱 Suppliers 🚑 C | ustomer Assets 📌 Location | Map 🛛 🛃 Sales Orders 🖉 📋 Job |
| List Detail | | | |
| Ticket ID Call Method Call 9 | ityle Date Request 🔎 11/05/20 | Time Ser 18 💌 1:58 PM 🛟 Log | vice Status Call Status gged Action Required |
| Who Address | | | |
| Type Contact Customer Jeen'ze Additional Details Corrective | Company Cafe's Express Action from Data Sheet: SV2108 | P 🛃 | Standard Customer |
| Phone Mobile | Email | Lead Sou | rce 🖉 📝 |
| What Type of Call Classification Description Hot Water leak from | Sub Class | P 📝 Tracking | Code 🛛 🖌 📝 |
| Call Relates to | | | |
| Relates To Job Order | Create Order | Linked To JOB401053 | |
| Call Notes Action Information | all Resolution Information Servic | e Level Service Response Jol | Request Information Time Line |
| Corrective Action from Data Sheet: S This unit is ready for sale however h | SV2108998 as a slight water leak from the Ho | t Water pipe. Check and clean an | d 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 S 1159 Visit Job Request Introduction 11/05/2018 1:58 PM L | ervice Status Call Status Additional |
| Who is Ticket for | |
| Type Contact Company | |
| Customer 🔽 Jeenize 🖉 📝 Cafeis Express 🖉 | Standard Customer |
| Additional Details Corrective Action from Data Sheet: SV2108998 Asset | |
| Phone Mobile Email Lead Sc | burce 🖉 🎽 |
| | |
| What Type of Call | |
| Lassification | |
| Hor water leak from ex-Demo unit | |
| | |
| Helates to Job Urder Viceare Urder Linked to JUB401053 | |
| Call Notes Action Information Call Resolution Information Service Level Service Response | lob Request Information Time Line |
| Seq Stage Action Seq Action Description | Assigned To CC To |
| New Job Request 10 Authorise New Job Request | Bob Drum |