

# CSS Service Ticket Creation & Dispatch Training Supplement

February 2017

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## EMGC Banking Value Updates

Wells Fargo is adding a priority code of EMG which corresponds to an emergency request and requires a 15 minute SLA response. For incoming EDI service orders that have an EMB priority code assigned, Astea will auto-apply the EMGC sub category (status in SBN), the EMGC urgency code, and a 15 minute T&M contract. The 15 minute contract will appear on the Billing & Misc. tab of the service order.

**Note:** these codes are intended to be used for banking (Wells Fargo) customers only.

### Example: EMGC Urgency & Priority

The screenshot displays the Astea Employee Portal interface for a Service Order. The main form is titled "Service Order" and contains the following information:

- Customer:** SERVO
- Requested By:** ZEKE RODRIGUEZ
- Product Item:** UNKNOWN1231385791
- Provider:** Indianapolis (Branch)
- Category:** Service Processes
- Importance:** 1h:30m
- Priority:** .81 HIGH: EMGC am...
- Urgency:** EMGC - EMERGENCY
- Problem Code:** ZONES FALSEING, KEYPAD
- Request Type:** Service

Additional details visible in the form include the Request ID (19178348948), Creation Date (2/15/2017 4:55:36 PM), and various scheduling and contact information fields.

## Example: EMGC Sub Category (Status)

**Service Order**

Request ID: SV1702150024 Line: 1 Customer ID: 805123130212400 Status: Open Site ID: 805123130212400 Total Duration: 1h 30m ETA: 2/15/2017 6:39:00 PM  
 Creation Date: 2/15/2017 6:24:00 PM Node: BR734 Action Group: AD734 Labor Stat: Not started IFL Status: Agent: Mat. Stat:

**Customer** **SERV** **Product/Item** **Provider**

Requested By: AUSTIN BOO BOO Panel: UNKNOWN1231382124... Agent: ...  
 Customer: WELLS FARGO CID: 123138212400... Action Group: Action group for Indianapolis...  
 Site: WELLS FARGO AKA: SERV. 7788 Node: Indianapolis (Branch) ...  
 Contact: BEVIN FARTHING STANLEY Sub Type: BANK EMOC Call Time: ...  
 Phone: 0 Vendor: ...  
 Vendor Form: ...  
 Send Form to Vendor  
 Vendor Email: ...

**Category** **Importance** **When**

Category: Service Processes Duration: 1h 30m Open Date: 2/15/2017 6:24 PM  
 Sub Category: EMGC - BANKING EMERG Reference: 8817428 Follow-Up Date: ...  
 Priority: 21 SPRO - Special ... Follow-Up Time: ...  
 SBN Sched Date: ...  
 SBN Sched Time: ...  
 Contractual ETA: 02/15/2017 6:39  
 ETA Date: 2/15/2017 6:39 PM  
 Callback Date: 2/15/2017 6:39 PM

**Problem**

Impact: ... Problem Code: FALSE ALARM-UNKNOWN  
 Urgency: SPRO - SPECIAL PRO Request Type: Service UM ...  
 Short Desc: alarm not working  
 New Problem Notes: ...

## Example: 15 Minute Contract

**Service Order**

Request ID: SV1702150018 Line: 1 Customer ID: 805123130212400 Status: Open Site ID: 805123130212400 Total Duration: 1h 30m ETA: 2/15/2017 6:18:00 PM  
 Creation Date: 2/15/2017 4:55:00 PM Node: BR734 Action Group: AG734 Labor Stat: Not started IFL Status: Agent: Mat. Stat:

**General Info**

Created By: Ashley Rodriguez  
 Order Source: ...

**Billing Info** **Contract**

P.O.: ... Contract No.: 15\_MIN

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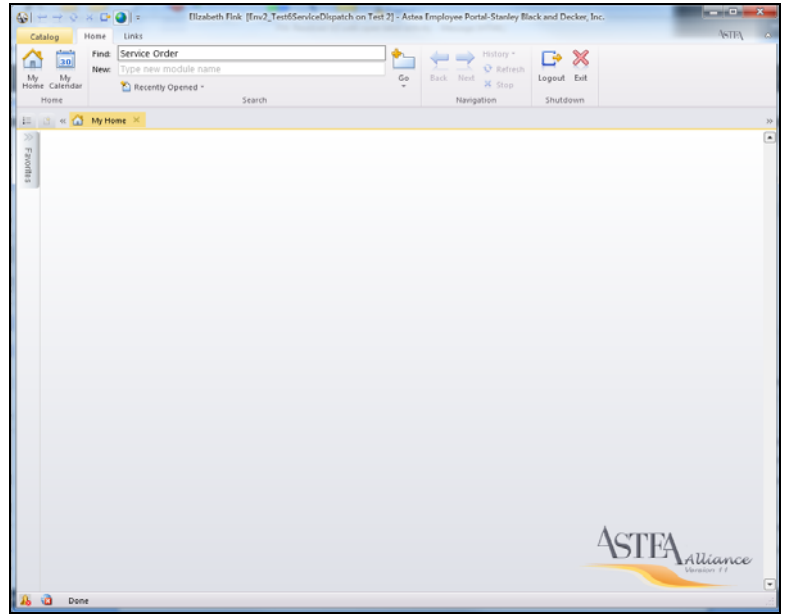
## Security Update – Deleting Labor Activities

In order to preserve historical data accurately and with minimal disruption to the normal business processes, the ability to delete a labor activity has been removed from all user roles (Call Intake, Dispatch, and Branch Associate). In lieu of deleting a labor activity, when one is created in error or no longer needed, users should simply cancel that labor activity by updating the Disposition to Not Done.

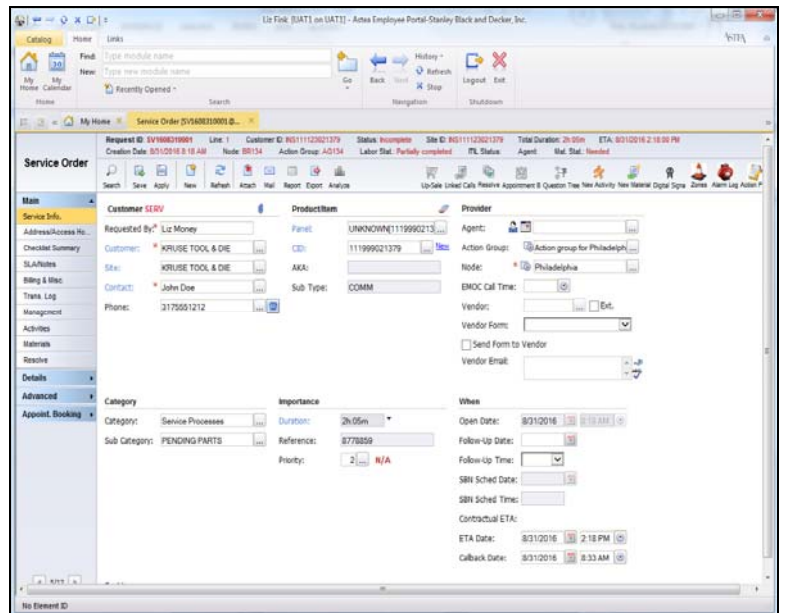
### Example: Changing the Disposition of a Labor Activity to Not Done

Action	Result
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1. Enter **Service Order** in the Find field of the Ribbon bar.



2. Search for and select the service order for which you wish to cancel a labor activity.

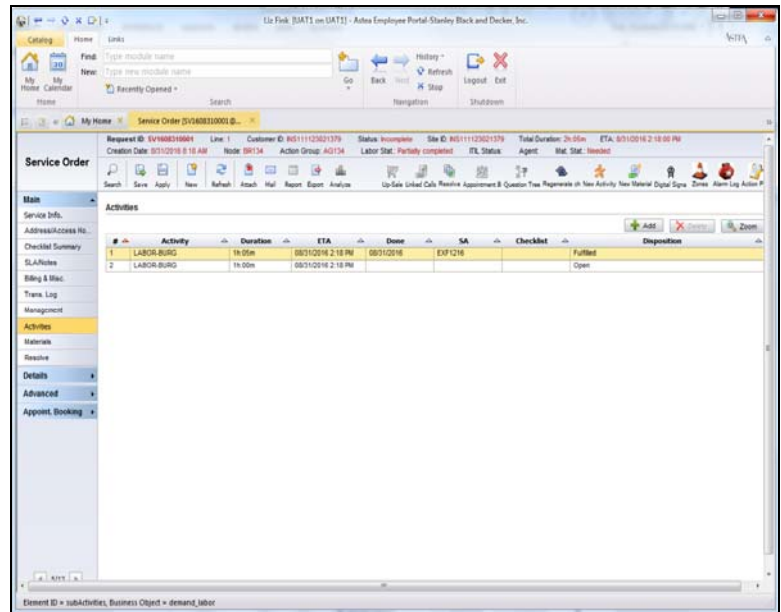


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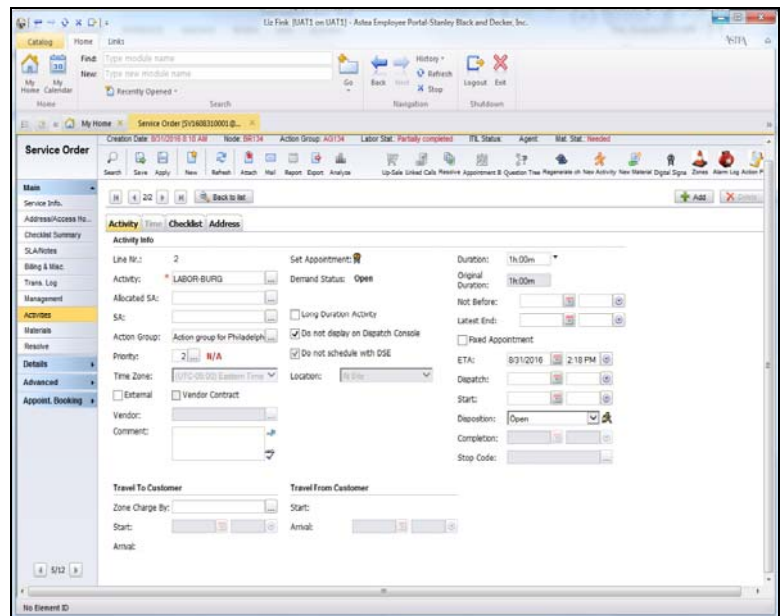
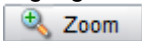
**Action**

**Result**

3. Select the **Activities** tab.



4. Highlight the open activity and select



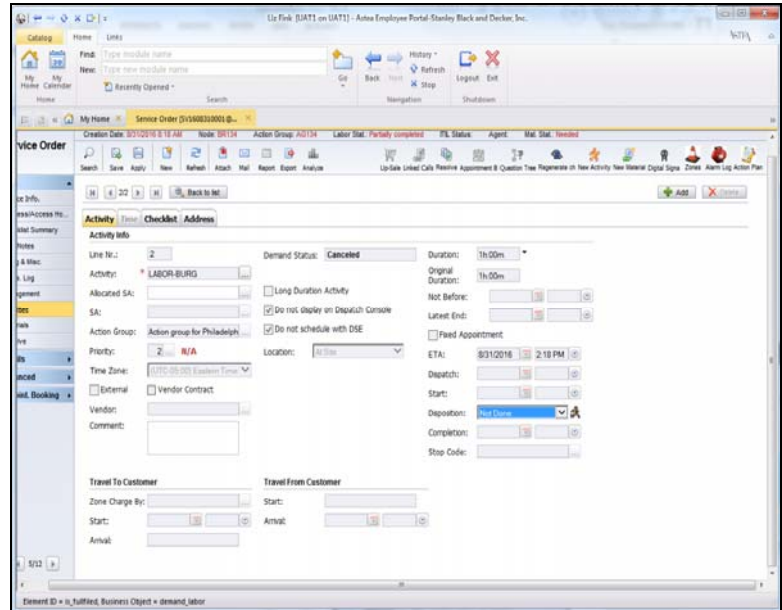
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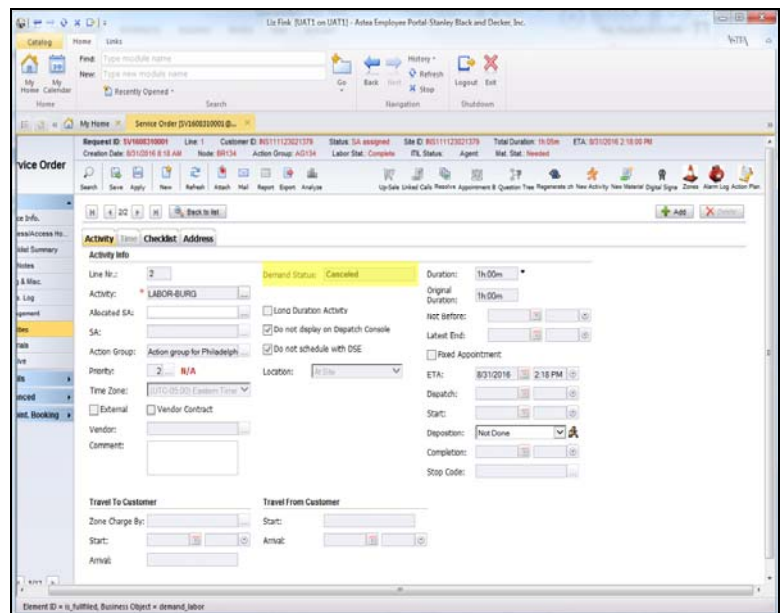
**Action**

**Result**

- Click on the Disposition drop down and select **Not Done**.



- Select **Apply** to save the changes and to update the labor activity status to Canceled.

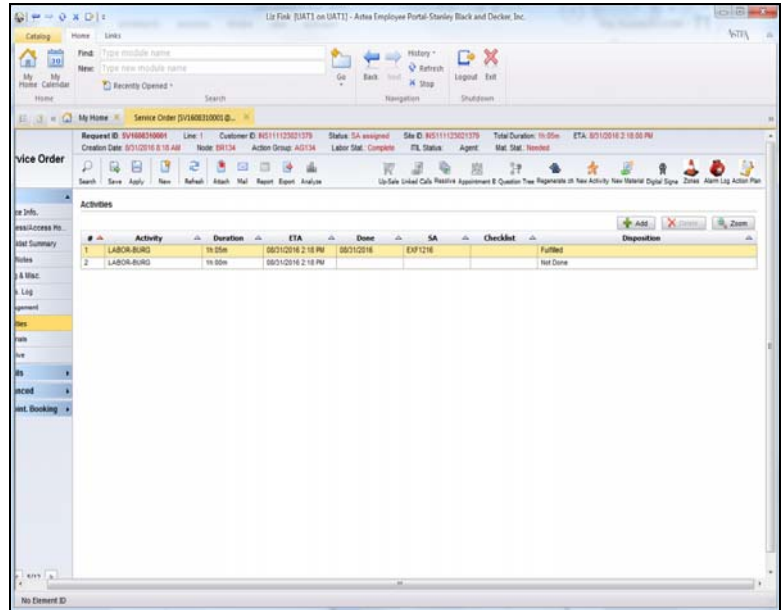


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**Action**

7. Select **Back to List** to verify the status of each labor activity is now correct.

**Result**

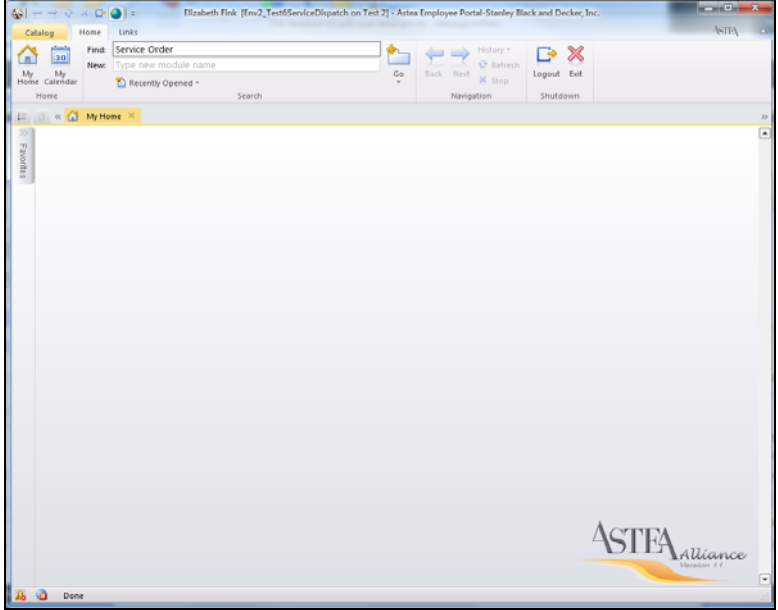


## Quick Tips – Call Intake & Dispatch

Capturing key data during the call intake process greatly improves the ability of the dispatchers and/or DSE to accurately prioritize and allocate labor activities. The following quick tips demonstrate how to use the Urgency Code properly during the call intake process, regardless of the dispatch method applied. Once created, the same process is used to update the Urgency Code in the event dispatch needs to reset the call priority based on the call description.

### Example: Using the Urgency Code to prioritize calls by Priority (4 hour, 8 hour, etc. ETA response times)

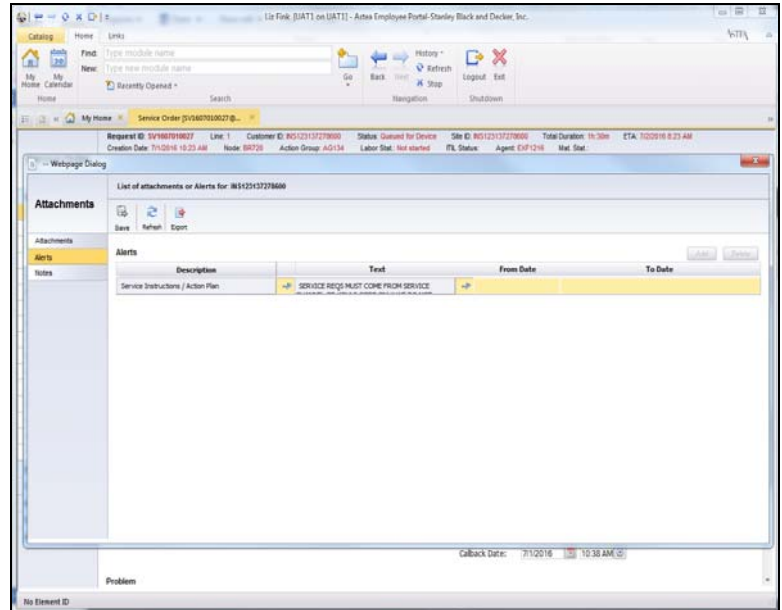
In some cases, a customer has a service contract that requires a specific response window (4 hour, 8 hour, etc.). Because contract data is not yet available in Astea and Service Bulletins and Alerts are not actionable data usable by DSE (both are considered notes and are not dynamic data that can be used by DSE), it is critical that an Urgency is assigned to the call. Therefore, when creating a service order for a customer with an Alert that indicates specific ETA requirements, an Urgency Code indicating those ETA requirements **must** be assigned in order to determine the call Priority.


Action	Result
<ol style="list-style-type: none"> <li>1. Enter <b>Service Order</b> in the Find field of the Ribbon bar.</li> </ol>	 <p>The screenshot shows the Astea Alliance software interface. The 'Find' field in the Ribbon bar contains the text 'Service Order'. The interface includes a navigation pane on the left with 'My Home' selected, and a main content area with a search bar and navigation buttons. The Astea Alliance logo is visible in the bottom right corner.</p>

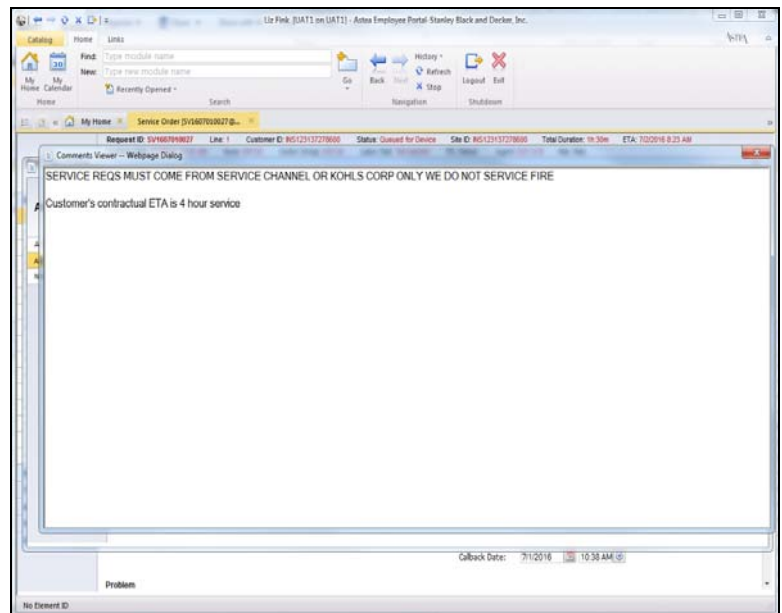
**Action**

**Result**

2. If a customer requires a particular response window, the information is contained within the Alert (Service Instructions) that appear when the customer is selected during the new service order creation process.



3. Open and read the alert by selecting the  (View) button. Select the red X to close the Alert.

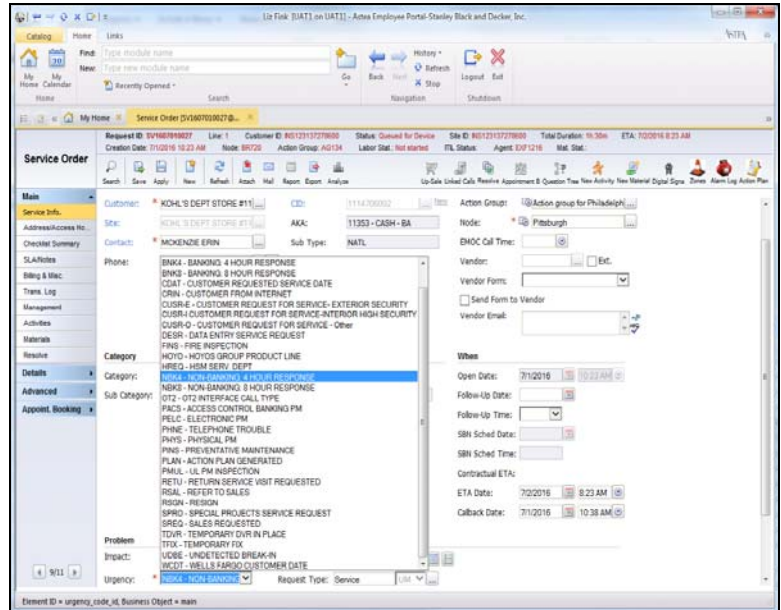


**Action**

**Result**

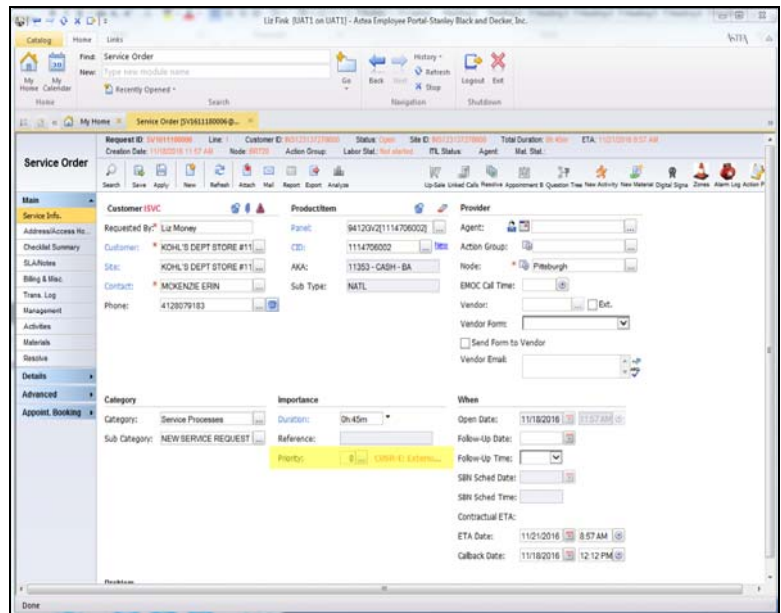
4. Select the **Urgency** drop down and based on the information in the alert, choose the appropriate response time:

- BNK4 – Banking: 4 Hour Response
- BNK8 - Banking: 8 Hour Response
- NBK4 – Non-banking: 4 Hour Response
- NBK8 – Non-banking: 8 Hour Response



5. Select **Apply** to:

- Trigger the Astea escalation rules to update the service order Priority and attach a Time and Materials contract to update the ETA.
- Create actionable data (time and materials contract & ETA) for use by DSE or the dispatcher to prioritize the activity correctly within the defined parameters when scheduling the work

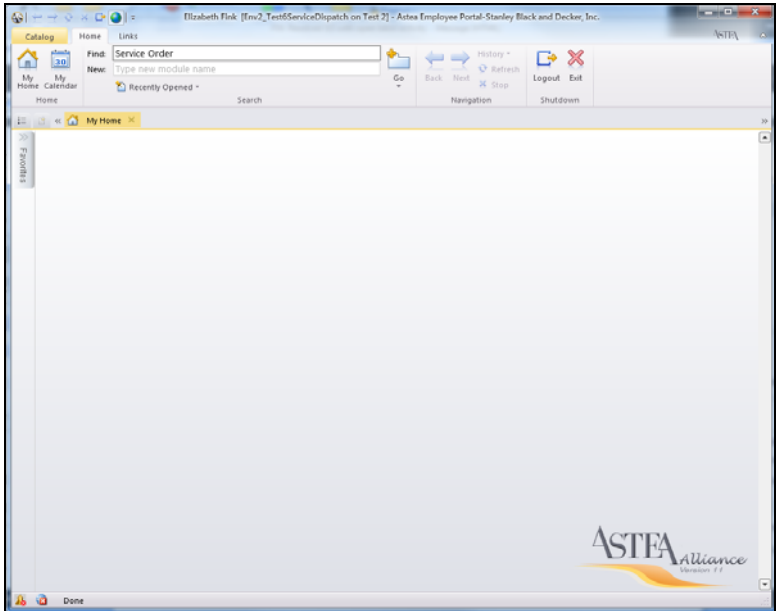


### Example: Determining customer request for service priorities (CUSR)

Currently, if a customer calls in with a standard request for service, call intake selects an Urgency of CUSR – Customer Request for Service. However, some requests should be considered higher priority than others; therefore, we have split the CUSR urgency code into the following three codes in Astea:

- CUSR-E – exterior premise issue that affects the ability for the site to be secured
- CUSR-I – interior, high security area (for example: vault) where the service technician must have an escort to perform service
- CUSR-O – any other request for service

Splitting the CUSR urgency code into three options allows Astea to assign a higher priority based on defined rules.

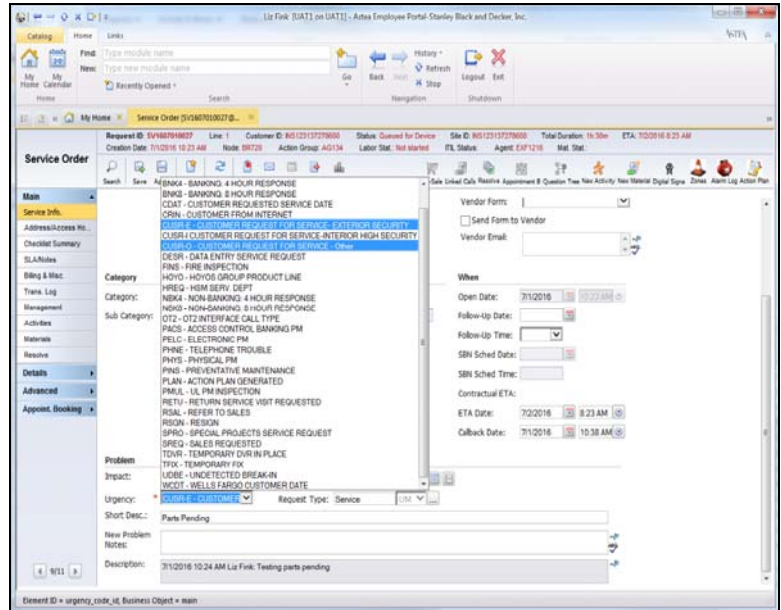
Action	Result
<p>1. Enter <b>Service Order</b> in the Find field of the Ribbon bar.</p>	 <p>The screenshot shows the Astea Employee Portal interface. The 'Find' field in the ribbon bar contains the text 'Service Order'. Below the ribbon bar, the search results area is mostly blank, with a 'My Home' tab visible. The bottom right corner of the window displays the 'ASTEA Alliance' logo and 'Version 1.1'.</p>

**Action**

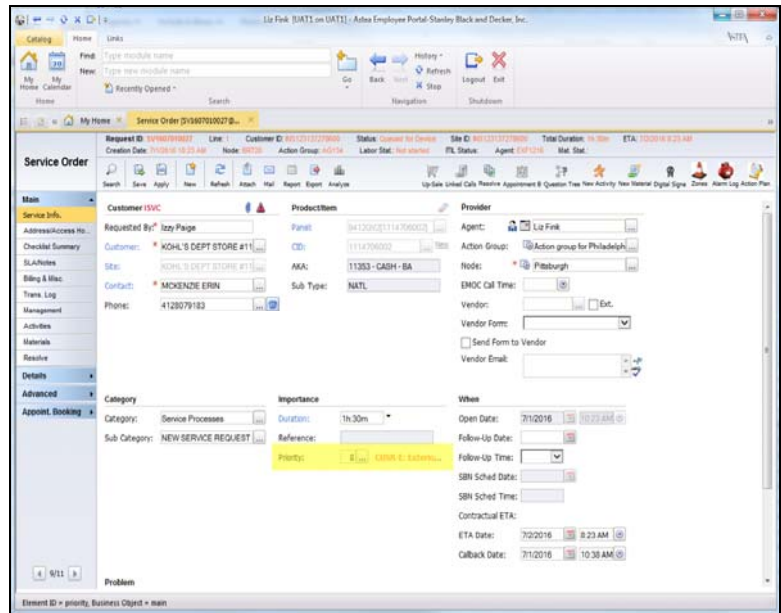
**Result**

2. Select the **Urgency** drop down and based the problem description, select the appropriate CUSR value:

- CUSR-E – exterior premise issue that affects the ability for the site to be secured
- CUSR-I – interior, high security area (for example: vault) where the service technician must have an escort to perform service
- CUSR-O – any other request for service



3. Select **Apply** to trigger the Astea escalation rules to update the service order Priority based on the Urgency selected.



**Action**

Note: the Priority is visible in the Service Order module (see screen shot in step #3), the Dispatch Console, and the mobile application. Priority is used automatically by DSE or manually by the dispatcher to determine which calls should be scheduled first.

**Result**

The screenshot shows a web-based dispatch console. At the top, there's a navigation bar with 'Home', 'Links', and 'Logout'. Below that is a 'Live Updates' section with a 'Schedule Board' for Saturday, July 02, 2016. The board shows a grid of time slots with colored bars representing different technicians: Mark E. Star, Michael Dreck, Michael Rissa, Michael Smith, Jackson Group/2d, and Brigham L. Oh. Below the board is a table of service orders.

Address	City	State	Zip	Exclude It	Reason for not being so	Priority	Material Status	Order Status	Short C
JAHOO DR	WILLIAMSPORT	PA	17701	False	Outside of DSE/Dispatch	High	Needed	Open	resting
JAHOO DR	WILLIAMSPORT	PA	17701	True	Outside of DSE/Dispatch	Low	None	Incomplete	resting
JAHOO DR	WILLIAMSPORT	PA	17701	False	Outside of DSE/Dispatch	High	None	Incomplete	resting
JAHOO DR	WILLIAMSPORT	PA	17701	False	Outside of DSE/Dispatch	High	None	Incomplete	resting
JAHOO DR	WILLIAMSPORT	PA	17701	False	Outside of DSE/Dispatch	High	None	Open	jacky/alek/2d
JAHOO DR	WILLIAMSPORT	PA	17701	False	Outside of DSE/Dispatch	High	None	Open	jacky/alek/2d
JAHOO DR	WILLIAMSPORT	PA	17701	False	Outside of DSE/Dispatch	High	None	Queued for Device	df/jk/dff/2d
JAHOO DR	WILLIAMSPORT	PA	17701	False	Outside of DSE/Dispatch	High	None	Open	multitech/scket
JAHOO DR	WILLIAMSPORT	PA	17701	False	Outside of DSE/Dispatch	High	None	Open	multitech/scket
WELER CROSSING	BUTLER	PA	16001	False	Outside of DSE/Dispatch	High	None	Open	Partly Pending
JAHOO DR	WILLIAMSPORT	PA	17701	True	Outside of DSE/Dispatch	Low	None	Incomplete	Resting Script #6
REGON PKE	LANCASTER	PA	17601	True	Outside of DSE/Dispatch	Low	None	Incomplete	Service #6 - General Lab
REGON PKE	LANCASTER	PA	17601	True	Outside of DSE/Dispatch	Low	None	Incomplete	Script #6
JAHOO DR	WILLIAMSPORT	PA	17701	True	Outside of DSE/Dispatch	Low	None	Incomplete	Script #7

The screenshot shows a mobile application interface for a service order. The top bar displays the phone number 'SV1611110008@@1' and a 'Menu' button. Below the bar are tabs for 'Details', 'Activities', 'Alarm Testing', and 'It'. The main content area shows the following details:

- Priority:** CUSR-E: Exterior Premise Security
- ETA:** Nov 11, 2016 1:43 PM
- Status:** Received on Device
- Short Descr:** Related Problems: BATTERY TROUBLES
- Contact Name:** HALL BRENT
- Contact Phone:** 3176988299
- Site:** CREW CARWASH #0011
- Address:** 10229 E WASHINGTON ST INDIANAPOLIS, IN 46229

At the bottom, there are several expandable sections: 'Order Information', 'Contacts', 'Customer Reference Info', 'Notes', and 'Contract Information'.

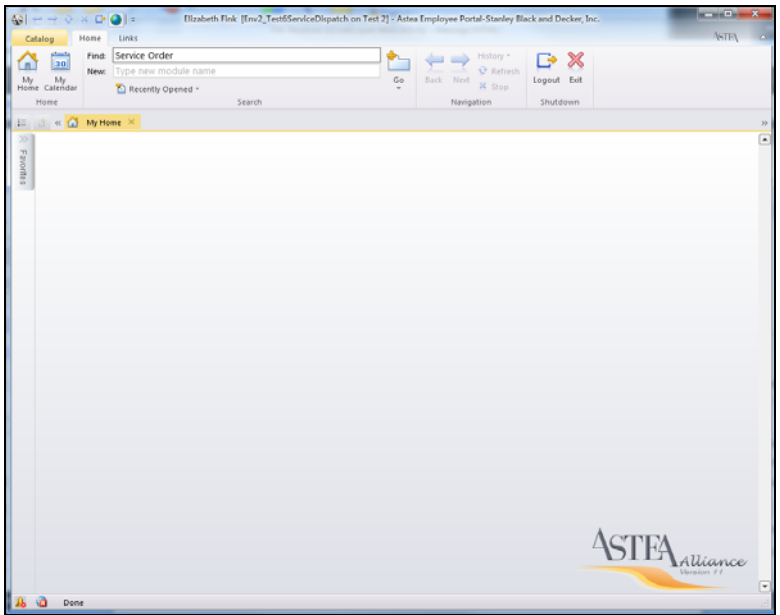


## Monitoring Status Updates

As a means to improve accurate CID selection when searching for a customer during the service order creation process, the SBN Monitoring Status is now available from the AKA field. This change allows users to not only search by the monitoring status, but to filter search results by the monitoring status as well. Back office users will now have the ability to view, search, and filter by Monitoring Status from the following modules:

- Service Order [New]
- Service Order (within the QBE and existing service order)
- Customer Center QBE

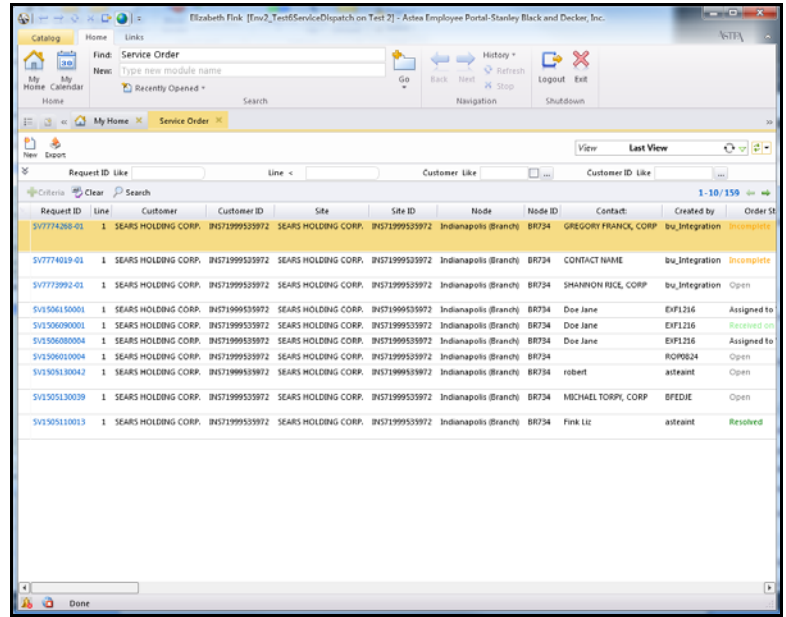
### Example: Searching and filtering by AKA/Monitoring Status

Action	Result
<p>1. Enter <b>Service Order</b> in the Find field of the Ribbon bar.</p>	 <p>The screenshot shows a software interface for 'ASTEA Alliance Solution 1.1'. At the top, there is a ribbon bar with a 'Find' section. The 'Find' section contains a search field where the text 'Service Order' has been entered. Below the ribbon bar, the main content area is mostly blank, with a 'My Home' tab visible. The bottom right corner of the window displays the 'ASTEA Alliance Solution 1.1' logo.</p>

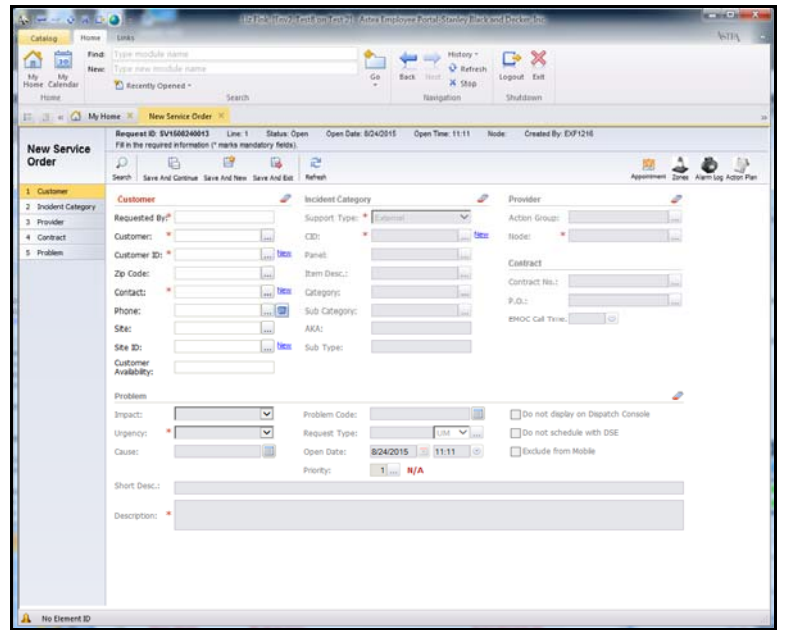
**Action**

**Result**


2. Select **Go**.



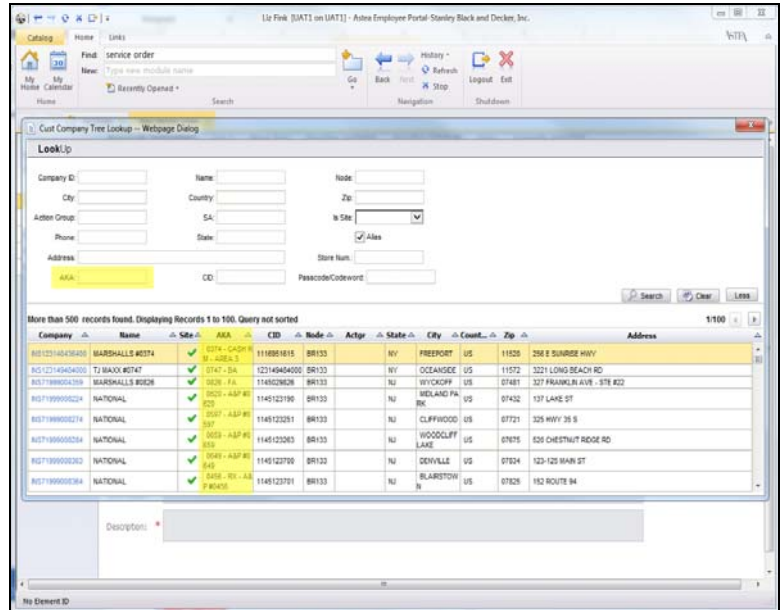
3. Select the **New** (New) icon.



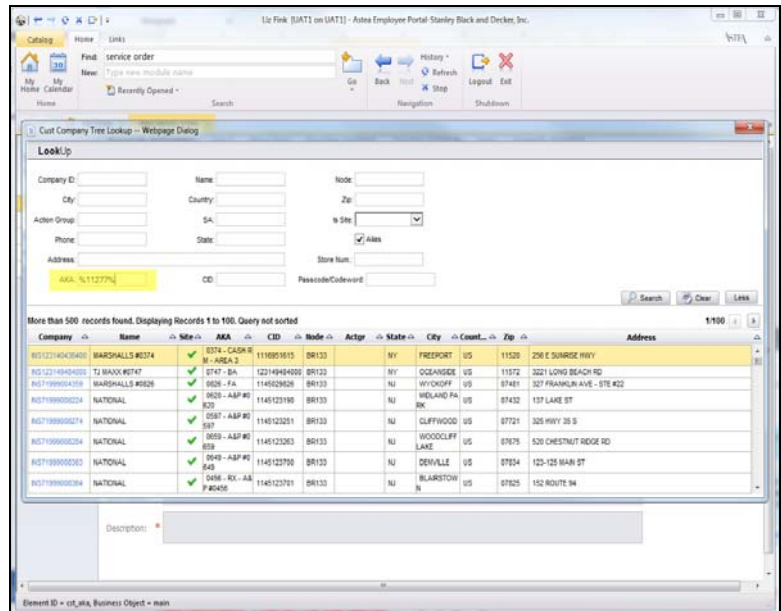
**Action**

- Select the  (Lookup) button to the right of the **Customer** field.

**Result**



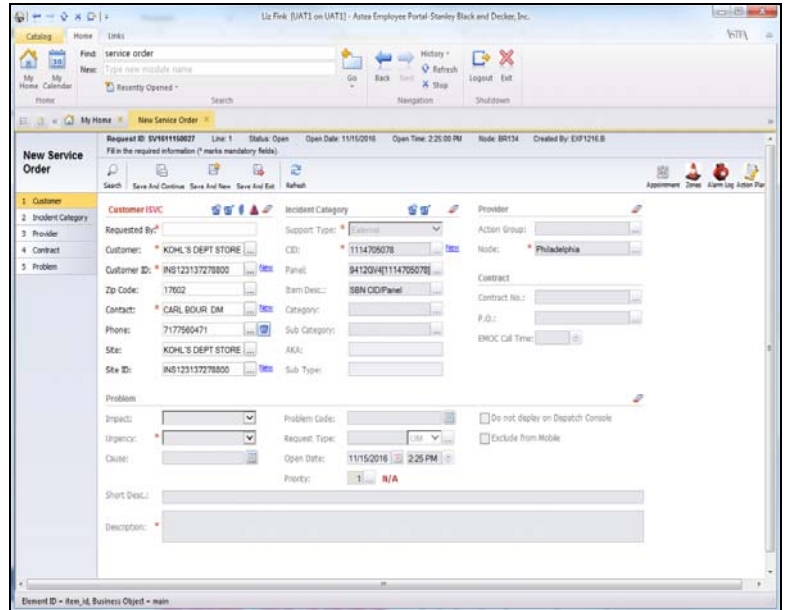
- The AKA column is prepended with the Monitoring Status. Enter the search criteria in the AKA field and select Search. Search criteria can include: AKA, monitoring status, or store number.



**Action**

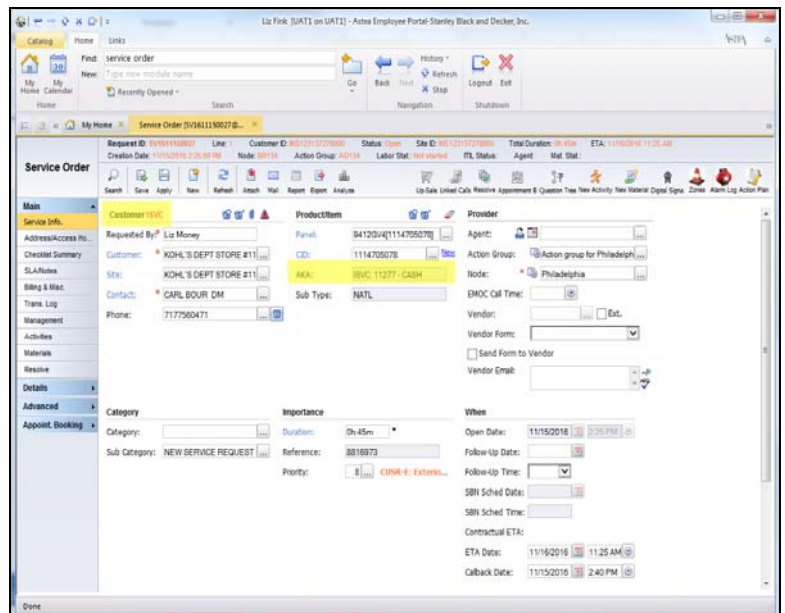
**Result**

- Finish entering/selecting the necessary information to complete the service order and choose **Save & Continue**.



- The Monitoring Status can be viewed from the Service Order above the Requested By field and in the AKA field. Additionally it can be viewed from the AKA column in the Service Order and Customer Center QBEs.

**Note:** while the Monitoring Status is now available from the Service Order and Customer Center modules, it **will not** be displayed on the Service Order Vendor form or the Service Ticket.



## MTE/SBN Labor Time Updates

In order to ensure labor time is being reported accurately, we are now preventing updates to labor times on an SBN work order that is Closed or in a Held Reason (SRV-RTI, SRV-RTB, or SRV-RTC) when the labor time in MTE is updated.

### Example: Preventing Labor Time Updates

If time is updated in MTE by a service technician and the SBN work order is **Closed** (C.Flq = X) the labor time on the SBN work order is now prevented from updating.

#	System Date	Tran Date	C.Flq	Appr.	Inv.Flq	Close Date	User Id	Description	Held Reason	Held Description	Acc
	09/16/08		X	X				NEW MONITORING	STATUS-2	CUSTOMER NEEDS	
	11/09/16	11/09/16	X	X		11/09/16	DHARRISO	SERVICE CALL			
	11/09/16	11/09/16						SERVICE CALL			
	11/09/16	11/09/16						SERVICE CALL			
	11/10/16	11/10/16	X	X		11/10/16	DHARRISO	SERVICE CALL			
	11/10/16	11/10/16						SERVICE CALL			
	11/10/16	11/10/16		X				SERVICE CALL	SRV-OUT	Service Work Order	
	11/10/16	11/10/16		X				SERVICE CALL	SRV-OUT	Service Work Order	
	11/10/16	11/10/16		X				SERVICE CALL	SRV-OUT	Service Work Order	
	11/11/16	11/11/16		X				SERVICE CALL	SRV-RTB	Service Work Order	

Similarly, if time is updated in MTE by a service technician and the SBN work order is in a **Held Reason** (SRV-RTI, SRV-RTB, or SRV-RTC), the labor time on the SBN work order is now prevented from updating as well.

System Date	Tran Date	C.Flq	Appr.	Inv.Flq	Close Date	User Id	Description	Held Reason	Held Description	Acc #
11/10/16	11/10/16						SERVICE CALL			
11/10/16	11/10/16		X				SERVICE CALL	SRV-RTI	Service Work Order	
11/10/16	11/10/16		X				SERVICE CALL	SRV-RTB	Service Work Order	
11/10/16	11/10/16		X				SERVICE CALL	SRV-RTC	Service Work Order	
11/10/16	11/10/16		X				SERVICE CALL	SRV-OUT	Service Work Order	
11/10/16	11/10/16						SERVICE CALL			
11/10/16	11/10/16						SERVICE CALL			
11/10/16	11/10/16						SERVICE CALL			
11/11/16	11/11/16						SERVICE CALL	SRV-RTC	Service Work Order	
11/11/16	11/11/16		X				SERVICE CALL	SRV-OUT	Service Work Order	
11/11/16	11/11/16						SERVICE CALL			