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ISERVICE PLATFORM TRAINING

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REVISION HISTORY

Document	Version	Issue Date	Remark	Participant	Status
ISERVICE PLATFORM TRAINING MANUAL	1.0	2019.05	Initial	Leon	Editing
ISERVICE PLATFORM TRAINING MANUAL	1.0	2020.03	update	Leon	Editing

Introduction and workflow

For quick learning, please check the video in below link.
1.iService Introduction
http://etraining.grgbanking.com/?g=training&m=Video&a=detailview&id=1068
2. iService Roles and Workflow
http://etraining.grgbanking.com/?g=training&m=Video&a=detailview&id=1070

About iService Training Course

Range→

This Training is designed for the operation level
(Including introduction and operation)

Trainee→

Administrators\ operators\ field Service team\ warehouse
team\Repair team\Other related staff

Target of this training

Target→

1\ Understand the logic and working process of field service tickets\ spare parts handling\warehouse management\repair tickets handling\ system management based on different role definitions.

2\ Familiar the operation of different working flow and data input/output in web end and mobile end.

3\ Be able to introduce the functions and benefits to the customers and partners.

Role definition

No	Role	Authority Duty
1	Customer	A. Submit service application form
		B. View and follow up service tickets
2	Operator	A. Handle the hotline
		B. Create tickets
3	Service Manager	A. Create service station and user account
		B. Dispatch tickets to service engineers
		C. Check and approve service tickets
		D. Check and approve spare parts stock in/stock out application
4	Service Engineer	A. Ticket processing
		B. My spare parts management
5	Warehouse Manager	A. Stock In/Out management :Check and confirm stock in/Out application
6	Warehouse Keeper	A. Create "stock in" "ship out" order
		B. Stock In/Out management: Execute "Storage" or "Outbound" action
		C. Create Inventory profit/loss management
7	Repair Manager	A. Check and approve Repair tickets
8	Repair Engineer	A. My spare part management
		B. Create and process repair ticket
9	QC Inspector	Quality control of maintenance
10	Administrator	System management

Training time frame

1\ Basic introduction and demonstration (1 Hour)

2\ Operation (About 4 Hours)

→Setup basic database (30 minutes)

→Create user with different roles and familiar functions (30 mins)

→Role-Based working flow process practice (3 hour)

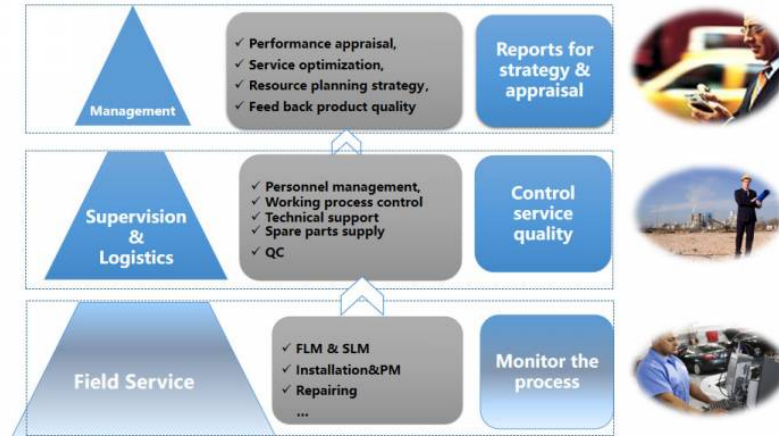3\ Case study (30 mins)

4\ Q&A (30 mins)

Index

**Part 1
Basic Introduction**

1.1 What is iService

iService

i + Service

IService - A professional service management software in ATM Field

IService system is based on the **PHP** Program language and **Browser/Server** technology，provides effective service solution for ATM field：Equipment management，High quality FLM&SLM, Warehouse management, Repair management，Report management,and Personnel organization.
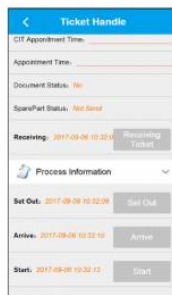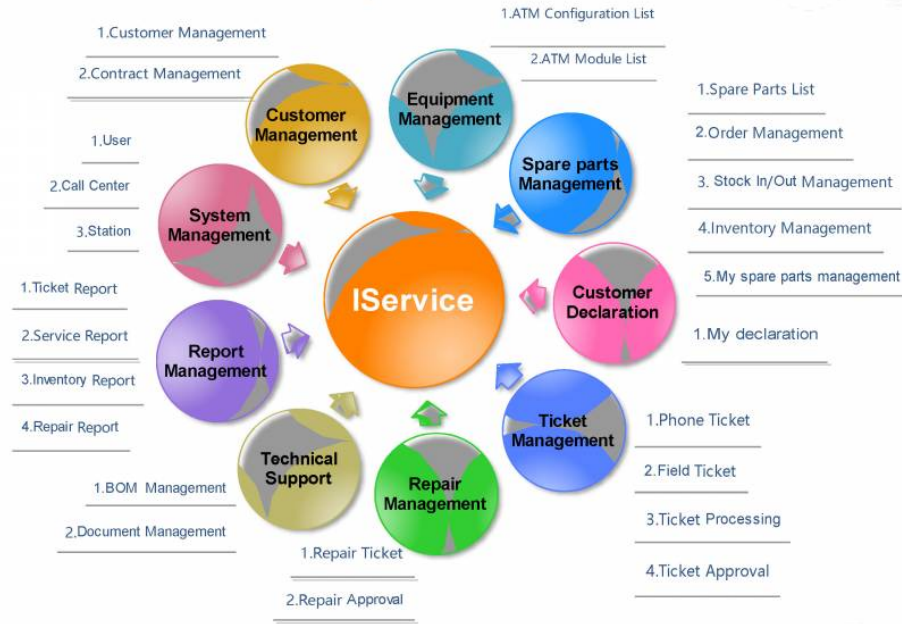

IService Overview

IService Functionality

1. Customer Management
2. Contract Management

1. User
2. Call Center
3. Station

1. Ticket Report
2. Service Report
3. Inventory Report
4. Repair Report

1. BOM Management
2. Document Management

Customer Management

Equipment Management

1. ATM Configuration List
2. ATM Module List

Spare parts Management

1. Spare Parts List
2. Order Management
3. Stock In/Out Management
4. Inventory Management
5. My spare parts management

System Management

IService

Customer Declaration

1. My declaration

Report Management

Technical Support

Repair Management

1. Repair Ticket
2. Repair Approval

Ticket Management

1. Phone Ticket
2. Field Ticket
3. Ticket Processing
4. Ticket Approval

IService Technical Features

Safety
- Communication safety(MD5)
- Data exchange safety (Role authority)
- PHP security policies

Reliability
- Robust system
- Steady communication

Processing ability
- Cloud computing technology
- Large user volume
- Support multi-business interaction

Compatibility
- Web: Windows/Mac/Linux/Unix
- APP: Android/iOS
- Open interface for integration
- Allow secondary development

Server

GRGHKCSS Network Layout

Provide Delicacy Management

Warehouse Management

On-site Maintenance

Call Center

Cloud Service

Customer Declaration

iService System

Information Management

QC Control

Repair Workshop
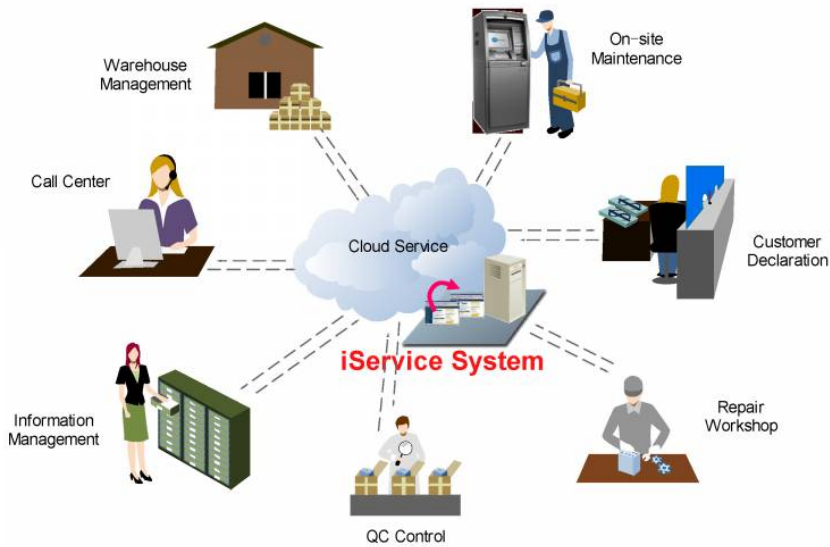
✓ Business management

✓ Asset management (equipment, spare parts)

✓ Staff management

Cut Management Cost &Optimize Service

Manage without Iservice

Manage with Iservice

Manage without Iservice		Manage with Iservice
Manual management— crushing	VS	System management-- convenient
Maintenance ATM per engineer<50 units	VS	Maintenance ATM per engineer>80 unit
High dull rate; slow turnover	VS	High efficient turnover, reducing dull rate
Quarrel/complaint/ penalty	VS	Intelligent and transparent process supervising, 100% satisfaction

Monitor ATM Performance&Quick Response to Service Request

Plan1: Full-automatic service request

✓ High efficiency and real time feedback

✓ Supervising machine easily

Plan2: Semi-automatic service request

✓ Supervising on-site service process

Feel View software

Send Error Message to the iService & Create ticket automatically

Send Error Message

Dispatch ticket to FE APP

Call center

Customer create ticket in iService & Monitor the ticket status
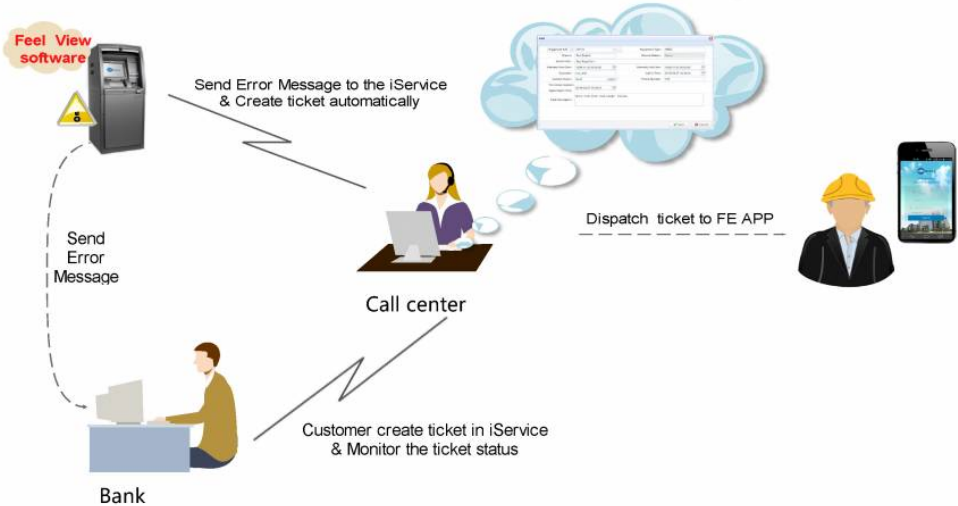
Bank

Guarantee Service Quality to Prevent Bank Penalty

Supervise ticket process to manage and control service quality.

Call in time

Depature time

Start time

Receiving time

Arrive time

Completion time

Internet

Call Center

Bank
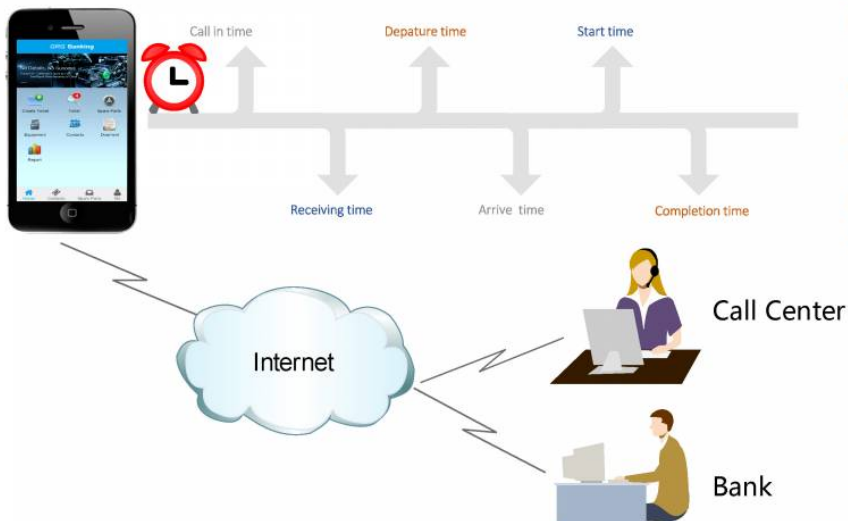
√ Set time counting for each steps to follow the SLA of service contract.

√ Ticket form is easy to fillout: 87% objective options,13%Main ticket options

√ Eevery ticket will goes to service manage for double check and approve

√ Office can supervise and support ticket process

√ Timeout reminder mail

APP function Support

√ New ticket reminder

Alert & Notification
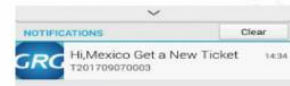
√ Take Picture&Upload files

Upload

√ Electronic Signature

Signature

√ Online Technical Document Support

Solutions + CKS + TB + Muanual

Spare parts Management – Making Rational Purchase Plan

Spare part statistic report

Analysis Data：
a. Stock inventory
b. Monthly in and out stock
c. Dull rate
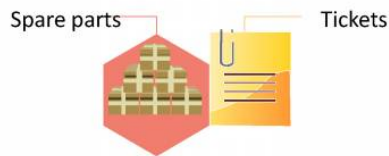d. Turnover rate
e. Safe inventory (upper limit & lower limit)

Making Rational Purchase Plan

Spare parts Management – Tracking Spare Parts to prevent losing

Every step of spare parts connected with tickets can be tracked.

Spare parts   Tickets

Service Engineer

Spare part Apply/Return Order

Service Ticket(Change spare part)

Warehouse

Onsite Equipment

Spare part Apply/Return Order

Workshop

Repair Ticket

✓ Tracking the spare parts used for which machine

✓ Tracking the parts in which engineer's hand

✓ Tracking where the bad parts come from

✓ Tracking whether the bad parts is repairing in workshop
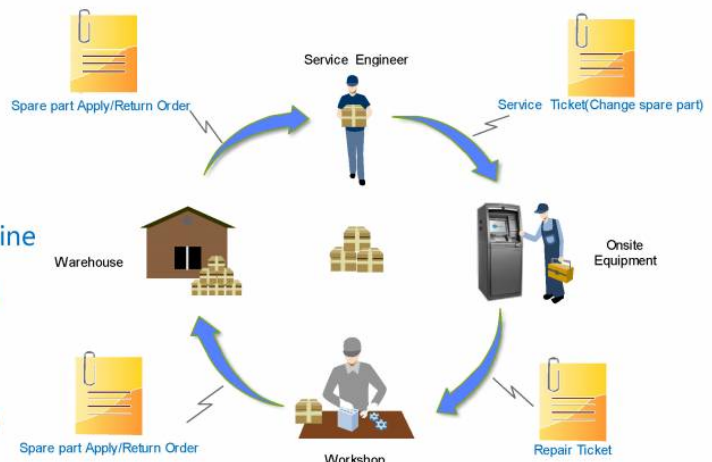
Spare parts Management- Consuming cost accounting

FSO KPI report

Section 1. Service Key

Section 2. Service Key

Section 3. Service Key

Section 4. Service Key		
	3.Service Cost	
Engineer	Spare parts Value Used in Ticket	s Value Ticket
all	182.81	2.7
Bülent Uluhan	167.65	
Hakan Çil	96.4	1.03
Fatih Karbukan	195.18	1.67
Bulent Yakup Ayb	241.06	
Ceyhan Zugurli	302.05	0.13
Hatem AKIN	262.05	1.26
Mustafa Simsek	162.69	
Barış Güçlü	162.74	3.52
Ercan.Acar	253.04	0.56
Salih Tatli	293.53	1.19
Emrah Ozer	143.51	
Nuri Kirbacoglu	323.97	0.05
Harun Cagman	207.64	0.28
Salif Sen	112.81	2.75
Serdar Tasar	234.52	
Emin Ozkok	89.87	2.35
Huseyin Akbas	107.75	0.81
Abdullah Basbar	226.72	

Spare part cost KPI:
a. Spare part Value/ATM
b. Spare part value in service ticket

Spare part Cost Statistics:
✓ Evaluate the cost per machine
✓ Evaluate consuming cost by machine type
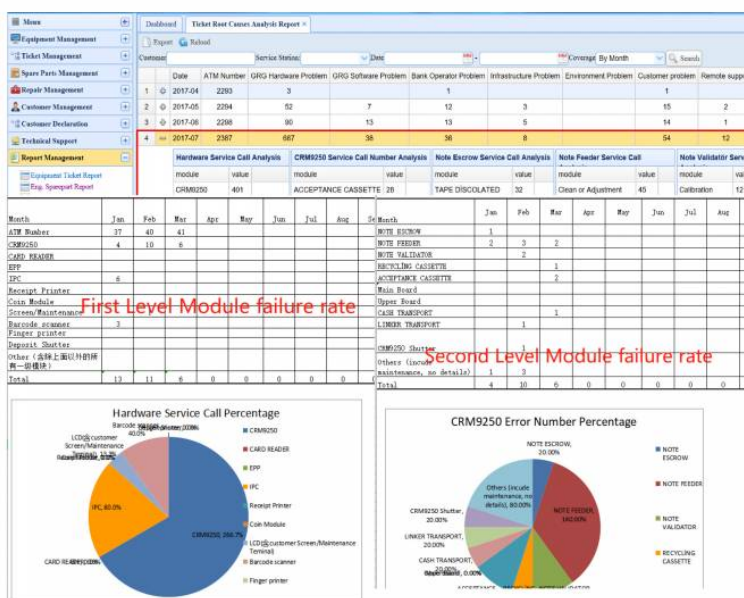✓ Assess consuming cost by service team
✓ Assess consuming cost by FE

Help making reasonalble service quotation
Make reasonalbe KPI for spare part consuming

Make Rational Labor Cost Plan

◆ Work load
   (ATM qty, Ticket qty)
◆ Work KPI comparison
   (Ticket/FE, ATM/FE)
◆ Service quality comparison
   (CTR, SAR, Repeat call rate)

Compare between Teams

Recruiting or downsizing
Personnel resource reallocation

Rely on actual data to avoid Manager's experience mistake!

Section 2. Service Key Performance by Station

Station	FE qty.	1.Service Productivity		2.Service Efficiency				3.Service Quality		
		ATM qty.	Total Ticket Qty.	ATM/FE	Call/FE	Call/ATM*Year	Qualified Call Qt	SLA Compliance	SAR	Repeat Call Rate
all	16	335	53	21	3	1.92	32	60.38%	99.8%	20.13%
TAMIKA-BO	11	211	35	19	3	2.04	15	42.86%	99.96%	23.16%
TAMIKA-FIE	4	60	18	15	5	3.6	17	94.44%	99.02%	15.25%
o;AIB&	3	64	0	21	0	0	0	0	100%	0
Sudan	1	0	0	0	0	0	0	0	0	0
IIKA-Wareh	15	0	0	0	0	0	0	0	0	0
TAMIKA D	0	0	0	0	0	0	0	0	0	0

Ticket Root Causes Analysis

⭐ Help to make purchase plan for important spare parts

⭐ Make training plan for the module with high failure rate

⭐ Repairing tasks arrangement

Report Management - Flat and Transparent Management

➢ FSO Analysis Report： Total task quantity，CTR, Repeat call rate.
➢ Service Monthly Report: SAR ， CIR，Repeat call rate，Call/ATM，Call/FE
➢ Warehouse KPI Report: Inventory balance ,Cost,Supply efficiency,Dull rate
➢ Work Shop KPI Report: Repair quantity, Repair success rate,Repair value

Office can easily monitor the onsite performance!
The boss can manage and control all important procedure and assess KPI reasonably!

Service Monthly KPI re...

Warehouse KPI Report

Monthly KPI of repair engineers

Warehousing cost & spare part supply
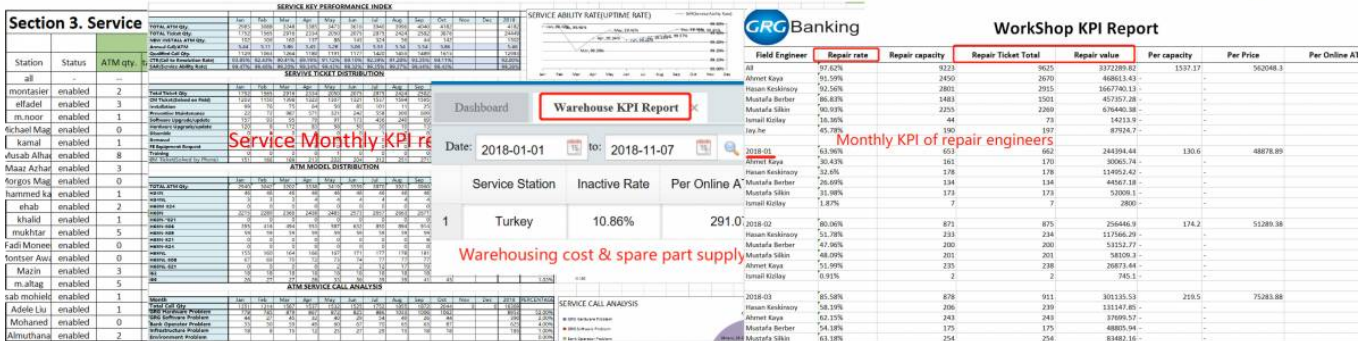
1.2 System Interface

Login Website: http://esupport.grgbanking.com:9999

Login: Input account, password and random verify code

1.2 System Interface
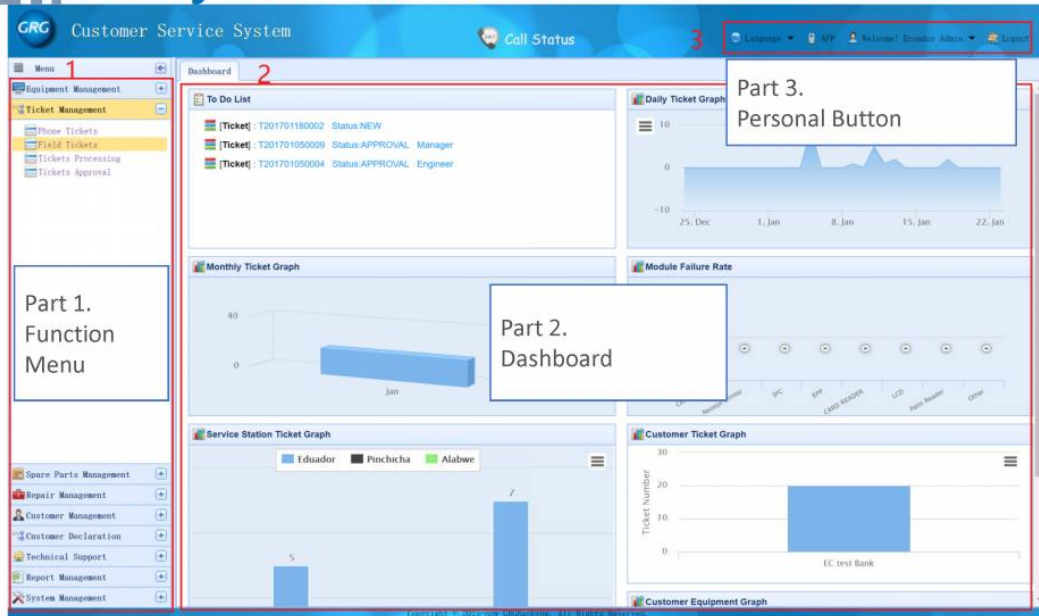
1.2.1 Function Menu Introduction

Part1:Click the Function to expand, click again to fold up

1. Equipment Management – to import the machine info and check the machine details

2. Ticket Management– to create and process service tickets for

3. Spare Parts Management– to manage to spare parts inventory for warehouse

4. Repair Management– to create and process repair tickets for workshop

5. Customer Management– to manage the customer and service contract info

6. Customer Declaration– for customer to create and follow the ticket status

7. Technical Support– to manage and inquiry the technical support document

8. Report Management– to export the report for field service, warehouse and repair report

9. System Management– to manage the system user account and service stations

1.2.2 Dashboard Introduction

Patr2:Show the data graph for different section

1. To Do List– show the tasks for the account user to follow up

2. Daily Ticket Graph– show the ticket quantity each day in a graph

3. Monthly Ticket Graph– show the ticket quantity each month in a graph

4. Service Station Ticket Graph– show the ticket quantity in different station and different status in a graph

5. Customer Ticket Graph– show the ticket quantity for different customer

6. Customer Equipment Graph– show the equipment quantity for different customer

1.2.3 Personal Buttons Introduction

Patr3: 1 🌐 Language ▼   2 📱 APP   3 👤 Welcome! Ecuador Admin ▼   4 Logout

1. Language
   – to select the language that you prefer

2. APP
   – scan QR code to download the android app for processing the service tickets(if you want IOS app,please contact us)

3. Welcome
   – to change personal info and account password

4. Logout
   – to exit the system

1.3 APP Introduction

1. Ticket
   – to process service ticket in different status
   *Number in red(**5**) shows 5 tickets assigned to this account
2. Spare Parts
   – to submit apply order to warehouse to get spare parts for service
3. Equipment
   – to inquire equipment information
4. Contacts
   – to inquire contacts info of engineer in the system

Part 2
Database Set Up

GRG Banking Customer Service System

| Step 1. Create Station |
| Step 2. Add User Account |
| Step 3. Customer Info. |
| Step 4. Contract Info. |
| Step 5. Equipment Info. |

Station
- Service Station
- User Account

Customer
- Customer
- Contract

Equipment
- Basic Info
- Configuration
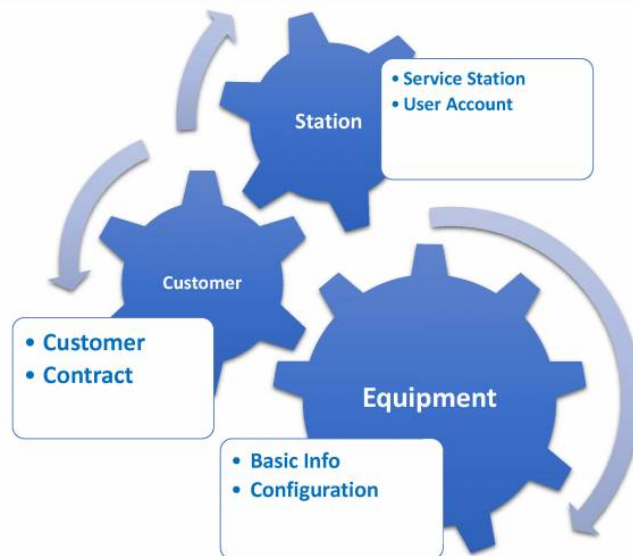
2.1 Create Station

1. Add a new station

	Service Station	Create Time	Modify Time	Status
1	Yangon	2016-07-21 15:53:35	2016-07-27 13:53:57	Enable
2	Mandary	2016-07-27 13:53:11	2016-08-19 10:59:09	Enable

Menu
Equipment Management
Ticket Management
Spare Parts Management
Customers Management
Report Management
Customer Declaration
System Management
- CallCenter Config
- User Management
- Station Management

Add

Service Station
Owned service station :
Status :

2 Save   Cance

Step 2: Fill in needed info.
① Service Station:station's name
② Owned Service Station: the head station of the new station
③ Status:enable station or stop to use station
④ Click Save

2.2 Add User Account in the Station

After creation of the station, we should add staff/ users with different roles to run the station.

Step 1: Click Add to fill in info. Needed.

Step 2: Tick off a role or several roles for the user based on user's duties.

Step 3: Assign the service station to the user.

Input all data

Not needed if no call center.

Enable the user.

Operator with call center only.

Role Name	Service Station	Status
Administator	Yangon	Enable
Customer	Yangon	Enable
Administrator	Yangon	Enable
Repair Engineer	Yangon	Enable
QC Inspector	Yangon	Enable
Repair Manager	Yangon	Enable
✓ Warehouse Keeper	Yangon	Enable
Warehouse Manager	Yangon	Enable
Service Engineer	Yangon	Enable
Service Manager	Yangon	Enable

Assign Station

Account : Ingen3
Service Station : Yangon

Yangon
- Mandary
- Bagan
- Musel

2.3 Customer Information

Go to customer management after finishing system management about creating station. As the station aims to provide service to customer（bank）, so next we need to add customer data and contract.

Add customer information.

Add contact person of the customer .

bank's name and its address.

Name of the legal person of the bank.

Add Customer

Basic Information
- Customer
- address

Corporate
- Customer Name
- Gender
- Title
- Charge of the work
- Office Number
- Mobile Number
- home phone

Account information
- Customer
- Customer level
- Account Name
- Account Number

Add Contact
- Contact Person
- Title
- Office Number
- Mobile Number
- Gender
- Email

2.4 Contract Information

All SLM service must be delivered according to the contract signed with customer. So fill in the contract information.

Step 1: Click Add

Step 2:
Fill in service contract No. and select customer who signed the contract. Select contract period.

Fill in service level. Different models and service areas have different Service Level.

Upload service contract if you have

Save and Return

2.4.1 Contracts List-How To Fill In Service Level

To monitor the maintenance performances which should reach the standard Service Level (SL) in the contract, we should add SL in the contract according to different model of machine and service areas. Each SL will connect to corresponding machines.

Select the service level for the same model.

ATM Model such as H68NL

PM: Preventive maintenance
SAR: available hours of machine/ total service hour in regulated period.
Response Time: time period of receiving the call to arrive onsite.
Repair time: time period of starting repair to finish repairing.
Resolved time: time period of receiving the call to problem solved.

CTR: (Number of incidents met SL in the month / Total number of incidents in the month)

Input several machine serial number under this SL, use coma to separate different serial number.

You can click this button to add more SL based on the contract.

2.5 Equipment Information-Input One By One

The station delivers maintenance service of equipments to banks. We should put in the equipment information. There are two ways to add equipment information：1.Input each equipment information one by one　2. Upload in bulk.
Way 1: Add one by one.

Step 1:add
Step 2:.Fill in basic info. & installation info. needed.

Notice:After filling in the S/N,click any place blank, system will grab the contract information automatically.

Step 3: Fill in configuration information by downloading template.

2.5.1 Equipment Information-Upload Equipment Info. In Bulk

Way2: Upload lots of equipments and configuration data in bulk.

Instructions:
1. Download template to fill in the necessary information.
2. Do not change the format of the template.
3. Keep the same format as the excel on the right to ensure successful upload.
4. Click Import to upload it. "Success" out of the right corner indicates the operation is successful.

2.5.2 Equipment Information-Upload Configuration In Bulk

Each equipment is made up of dozens of configurations. After upload ATM info., you should upload all modules of all ATM in bulk .

Menu	Dashboard	Equipment Information ×	Creat Equipment ×
Equipment Management	+ Add / Edit / View Import Template Download Import configuration Configuration Templete Export
Equipment Information	Equipment Type: Equipment S/N: Service Station: Terminal No.:
Modules Inquiry	Customer: All Branch: Address: Equipment Status
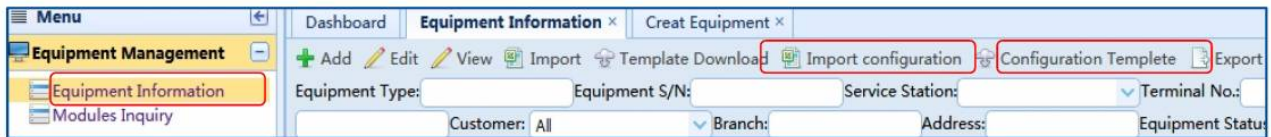
Instructions:
1. First download Configuration Template and fill in all necessary data.
2. Do not change the format. Keep the same format as the excel on the right.
3. Click Import to upload configuration info. . "Success" out of the right corner indicates the operation is successful.

XLS 工作表

Part 3
Spare Parts Stock in /out

3 Warehouse Operation Management
—Spare Parts Stock in/Out (Purchase from/Ship off to other service station)

Stock in

1. Warehouse keeper fills in Stock in order .
2. Service Manager approval
3. Warehouse manager approval.

4. Warehouse keeper stocks in spare parts.

Service Manager

Warehouse Manager

Stock out

1. Warehouse keeper fills in ship order .
2 Service Manager approval
3. Warehouse manager approval

4. Warehouse keeper stocks out spare parts.
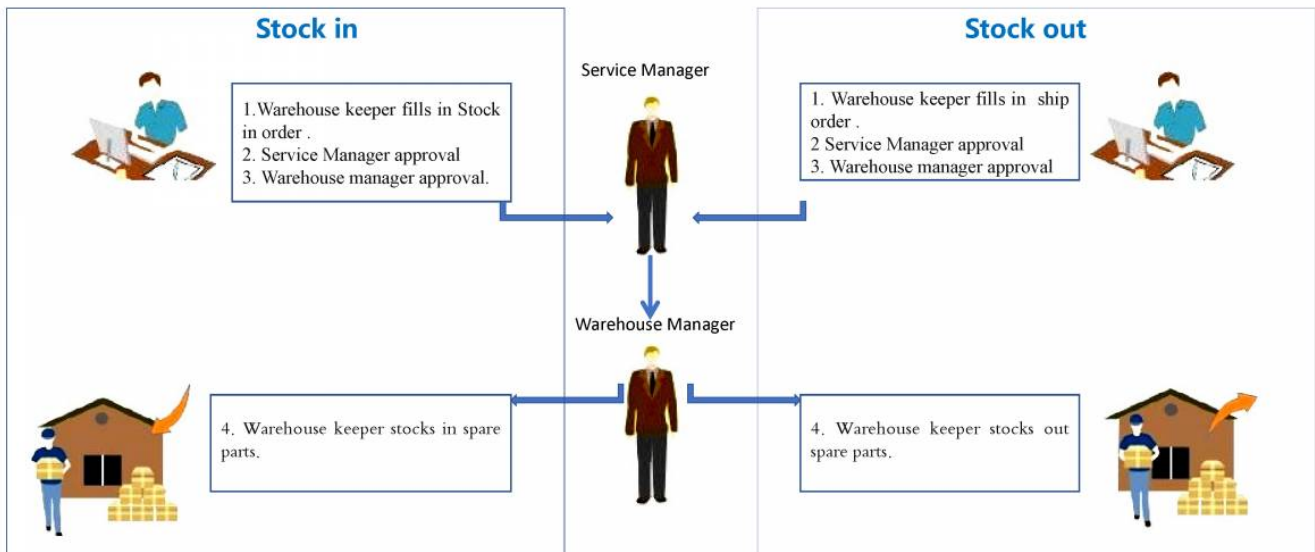
3.1 Stock in
3.1.1 Add Stock in Order

Menu	←
🖥 Equipment Management	+
Customer Declaration	+
Ticket Management	+
🏛 Spare Parts Management	−

- FILTERFIELDSET
- Spare Parts Information
- Spare Parts Location Managen
- Spare Parts Order Managemer
  - Stock in Approval
  - Deliver From HQ
  - **Stock In Order**
  - Stock out Approval

Dashboard

1. Add a Stock in Order

1 ✚ Add   ✐ Edit

Service Station:

	No.
1	I20181122002
2	I20181122001
3	I20181119002
4	I20181116002
5	I20181116001
6	I20181115001
7	I20181101002

Situation：Warehouse keeper shall stock the puchased spare parts in the warehouse.

Step1.Warehouse keeper should add a **stock in order** and fill in spare parts information.

3.1.2 How To Fill In Stock In Order

GRG Banking

Stock In Order

No.:I20181122003

1. Select attribute of the spare parts

3. Select the service station

The unique number of the order for easily tracking will be created.

Basic Information

No.:	I20181122003	Service Station:	Demo
Applicant:	opeartion test	Create Time:	2018-11-22 10:42:19
Attribute:	Good / Bad / SCRAPPED	Submit Status:	No Submitted
Order Type:		Note:	

2. Select order type

PURCHASE_HQ
PURCHASE_TR
FROM_ENGINEER
FROM_TRANSFER
INVENTORY_PROFIT

Add one by one

Sparepart List

➕ Add ✖ Delete ✏ Edit 📋 Import ⛑ Template Download

| Part No. | Old Part No. | Part Description | Request Qty | Inbound Qty | Module Level | Stock Location |

20 ▾ |◀ ◀ Page 0 of 0 ▶ ▶| 🔁

Displaying 0 to 0 of 0 items

6. Submit it to manager for approval.

✔ Submit 💾 Save 💾 Save and Return

Add one by one

Or upload in bulk:
4. Download the template to fill in parts number and quantity which is going to be stocked.
5. Import the completed template.

Template Downloaded for reference.

XLS 工作表

3.1.3 Service Manager Approve Stock In Order

Step1:select the order.
Step 2. Service manager check and approve stock in order numbered I20181126002.

🔲 Equipment Management
🔲 Customer Declaration
🔲 Ticket Management
🔲 Spare Parts Management
  📁 FILTERFIELDSET
  📄 Spare Parts Information
  📄 Spare Parts Location Manag
  📂 Spare Parts Order Manager
    📄 Deliver From HQ
    📄 Stock In Order
    📄 Stock out Approval
    📄 Stock in Approval
    📄 Ship Order
  📂 My Spare Parts Managemer
    📄 Consume Detail
    📄 CONSUME APPROVAL

✅ Approve ↩ Retract ➖ Reject

No.: Service Station: Status: All Attribute: Order Type: All 🔍 Search

	No.	Service Station	Order Type	Submit Status	Applicant	Submit Time	Service Manager	Approval Time	Warehouse Manager	Approval Time	Wareh
1	I20181122006	Demo	PURCHASE_HQ	Submitted	Admin	2018-11-22 15:39:57					
2	I20181115001	Demo	PURCHASE_HQ	Submitted	opeartion test	2018-11-15 11:00:46					
3	I20181101002	Demo	INVENTORY_PROFIT	Submitted	opeartion test	2018-11-01 09:14:15					
4	I20181101001	Demo	INVENTORY_PROFIT	Submitted	opeartion test	2018-11-01 09:13:47					
5	I20181026004	Demo	INVENTORY_PROFIT	Submitted	Admin	2018-10-26 12:04:16					
6	I20181026003	Demo	INVENTORY_PROFIT	Submitted	Admin	2018-10-26 12:03:57					
7	I20181026002	Demo	INVENTORY_PROFIT	Submitted	Admin	2018-10-26 12:00:04					
8	I20181023002	Demo	PURCHASE_HQ	Submitted	Admin	2018-10-23 10:14:39					
9	I20181126002	guagnzhou	PURCHASE_HQ	Approved	opeartion test	2018-11-26 11:44:08	opeartion test	2018-11-26 11:46:06			

3.1.4 Warehouse manager confirms the order

The stock in order with number of I20181126002 will be sent to warehouse manager.
Step3: Warehouse Manager should check and confirm(a or b) the order .

3.1.5 Warehouse keeper complete stocking

Step4: Warehouse keeper should check and stock the spare parts in the warehouse.

3.2 Stock Out
3.2.1 Submit Ship Order

3.2.2 Service manager approves Ship Order

3.2.3 Warehouse manager confirms Ship Order

Warehouse manager will check the order and confirm it. If inventory is not enough, retract it to previous step.

3.2.4 Warehouse Keeper Completes Stock out

5.Complete stock out.

1. Click in and input serial number

2. If the part numbers are the same, click disperse to input separate serial number.

3. Edit to input serial number of each item.

4. All serial numbers will show here.

3.3 Transfer-Between stations

Transfer means the spare parts will be delivered from one station to another station,the processing is the same with stock out and stock in processing.

eg.Station A transfer to station B,for station A,it is stock out processing(view3.2),for station B ,it is stock in processing (view3.1).First, station A warehouse keeper should add ship order and select order type of Transfer as shown below.When station A complete stock out process, station B will receive the transfer order in "Stock In Approval"(view 3.1.3） automatically, then station B continue the stock in process.

3.4 Apply and return order
3.4.1 Add apply order (Engineer)

When engineer provide onsite maintenance,sometimes they need to replace broken module.So before start off, engineer should apply spart part from warehouse.

3.4.2 Approval Spare Part (Service Manager)

After engineer add a apply order,need to approve the order by service manager.

3.4.3 Confirm And Stock Out Spare Part (Warehouse Keeper)

After service manager approve the order,warehouse manager should confirm the order.
Warehouse keeper give the spare part to engineer,then select the order and click outbound.

3.4.4 Update Spare Part Status (Engineer)

When engineer receives spare part, he can check the log in my spare parts.

3.4.5 Return Spare Part (Engineer)

After changing spare parts and solved the problem onsite, engineer should return the fault part after back to warehouse. First create return order as below. Then the following approve and stock in actions are the same as Stock in order(view from 3.1.3).

3.5 Apply Spare Parts in APP

Engineer also can apply spare parts in APP

(Home=>Spare Parts)/
(Spare Parts)=>
Spare Parts Apply=>
Click to Apply
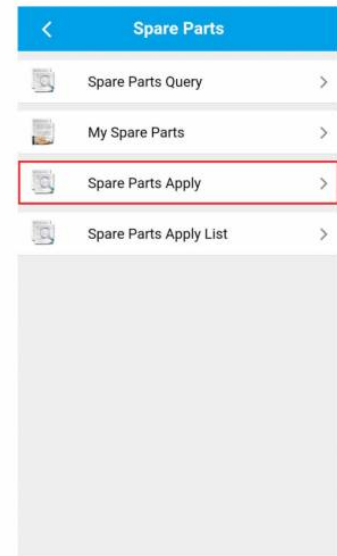
3.5.1 Apply Spare Part(APP)

Select Attribute=>
Search Spare Part No.=>
Input Qty.=>
Confirm & Submit

Part 4
Ticket Processing

Service Processing Flow

Customer	Operator	Field Engineer	Service Manager
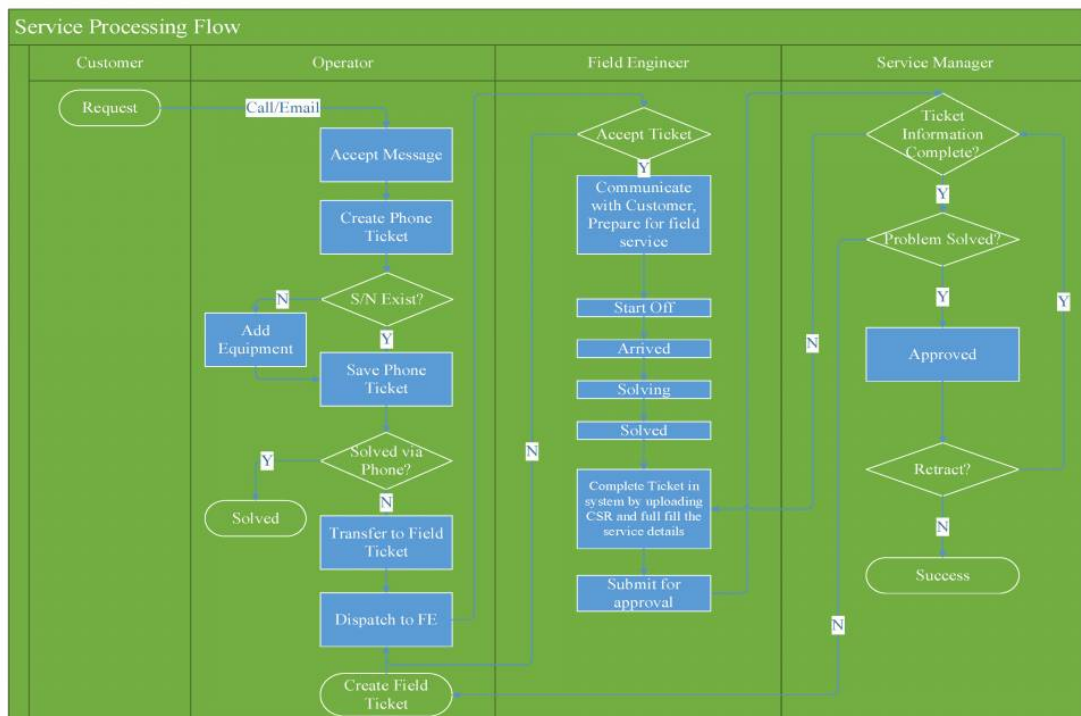
4.1 Field Ticket Status

1.NEW
   – A service ticket created has not been assigned to Engineer
2.Assign
   – Ticket assigned to Engineer
3. Receiving
   – Engineer confirmed ticket info and accepted the task
4.Start off
   – set out after preparation and leave for customer site
5.Arrived
   – Engineer arrived at the customer site
6.Solving
   – Engineer started fixing the issue at customer site
7.Solved
   – Engineer finished and solved the problem for customer
8.Approval
   – Ticket has been submitted to service manager for review
9.Success
   – Service manager has approved the ticket
10.Rejected
   – Tickets have been rejected by service manager
11.Discard
   – Tickets have been canceled

4.1.1 Create Phone Ticket (Operator)

Customer send a request to operator,operator create a phone ticket

4.1.2 Solved Via Phone (Operator)

If the ticket solved via phone,then problem solved,only need to undate the ticket status.

Step 1:
Ticket Management=>
Phone Tickets=>
Double Click Ticket/Click and Edit

Step 2:
Fill in Solution=>
Ticket Status: Solved

4.1.3 Transfer To Field Ticket (Operator)

If can not solve via phone,then need to transfer to fileld ticket

Step 1:
Ticket Management=>
Phone Tickets=>
Double Click Ticket/Click and Edit

Step 2:
Fill in comments=>
Ticket Status:Transferred

4.1.4 Field Ticket (Operator)

Fileld ticket can be added new one directly,or transfered by phone ticket(view4.1.3).

4.1.5 Dispatch Ticket To Field Engineer(ServiceManager)

Manager dispatch ticket to engineer to solve the problem.

4.1.6 Ticket Processing (Engineer)

After Service manager dipatch new field ticket to engineer,the engineer can receive field ticket to process it,and update the ticket status.

Tickets Processing=>
Click to Choose ticket=>
Click Status to Update

4.1.7 Submit For Approval (Engineer)

After engineer solved the field ticket,need to submit to service manager for approval.

Step 1:
Ticket Processing=>
Double Click to Edit

Step 2:
Fill Necessary Info.=>
if solved using spare part need to add
the new parts and faulty parts info.=>
Upload supporting file

Step 3:
Submit for approval
Ticket Status: Approval

4.1.8 Tickets Approval (ServiceManager)

Service manager can Approve or Reject the field ticket.

Ticket Approval:
Select a submited field ticket, then check whether the problem solved or the necessary info. is completed.=>
select Approval or Reject=>
Ticket status: "Success" or "Rejected"

4.2 Dispatch Ticket To Field Engineer in APP (ServiceManager)

APP side is the same processing with PC side.

Home=>
Ticket=>
New Ticket=>
Click Ticket to Dispatch

4.2.1 Receiving Ticket In APP (Engineer)

GRG Banking

Customer Service System
Welcome

Ticket (5) Spare Parts Equipment

Contacts

Home Contacts Spare Parts Me

Ticket

Q Ticket No/Serial No/Terminal No

ReceivingTicket (3)

EC test Bank
Ticket No：T201701130001
Engineer： Engineer
Fault Level： undefined
Appointment Time：

EC test Bank
Ticket No：T201701110005
Engineer： Engineer
Fault Level： minor
Appointment Time：

EC test Bank
Ticket No：T201701110002
Engineer： Engineer
Fault Level：
Appointment Time：2017-01-11 10:59:18

Solving Ticket

Solved Ticket (1)

1. Home=>
2. Ticket=>
3. Receiving Ticket=>
4. Click Ticket to Update
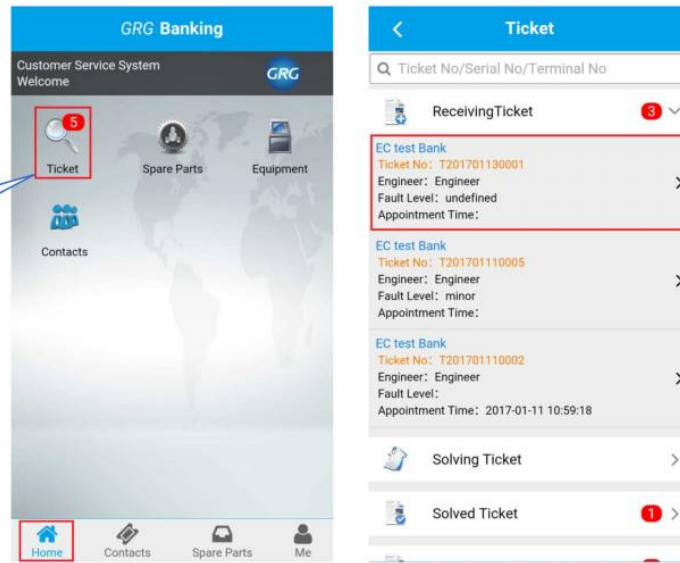
4.2.2 Ticket Status Update In APP (Engineer)

Ticket Handle

Service Station:Eduador

Warranty Start Date:2017-01-01

Warranty End Date:2017-01-31

Service Status:

Trend Analysis：

Appointment Time:

CIT Appointment Time:

Fault Description:asdfasd

EngineerEngineer

Comments:

Receiving Time： Receiving Ticket **1.**

Ticket Handle

Process Information ∨

Set Out Time Set Out **2.**

Arrive Time Arrive

Ticket Handle

Process Information ∨

Set Out Time
2017-01-12 22:10:30 Set Out

Arrive Time Arrive **3.**

Start Time Start

Trend Analysis：
--Please Select--

Ticket Handle

Process Information ∨

Set Out Time
2017-01-12 22:10:30 Set Out

Arrive Time
2017-01-12 22:10:37 Arrive

Start Time Start **4.**

Trend Analysis：
--Please Select--

Problem Description：

Process Description：

Ticket Handle

Trend Analysis：
--Please Select--

Problem Description：

Process Description：

Completion Time： Complete **5.**

Replace Sparepart >

Approval Log >

4.2.3 Submit Tor Approval In APP (Engineer)

Screen 1 — Ticket

🔍 Ticket No/Serial No/Terminal No			
ReceivingTicket	**3** >
Solving Ticket	>
Solved Ticket	**1** ∨

EC test Bank
Ticket No：T2017010500
Engineer：Engineer
Fault Level：minor
Appointment Time：201____15:11:22

Rejecte____
Appr____
Close____

> Home=>
> Ticket=>
> Solved Ticket=>
> Click Ticket to Update

Screen 2 — Ticket Handle

2017-01-05 10:59:03

Completion Time：
2017-01-05 10:59:03   [Complete]

Replace Sparepart >

Approval Log >

Ticket File：

[+]

Customer Satisfaction：
--Please Select--

[Submit]

Screen 3 — Replace Sparepart

Old Spare Part

Code	Des	S/N	Qty
2. 🔍 3.		4.	5.

[Add] [Save]
1.   6.

New Spare Part

Code	Des	S/N	Qty

Replace Sparepart

Old Spare Part

Code	Des	S/N	Qty
207040007009	TRP-003R Thermal Receipt Printer		1

[Add] [Save]

New Spare Part

Code	Des	S/N	Qty
207040007009	TRP-003R Thermal Receipt Printer		1

[Add] [Save]

Screen 4 — Ticket Handle

2017-01-05 10:59:03

Replace Sparepart >

Approval Log >

Ticket File：

[delete]

[+]

Customer Satisfaction：
Excellent

[Submit]

4.2.4 Approve Ticket In APP (ServiceManager)

Screen 1 — GRG Banking

Customer Service System
Welcome   **GRG**

5
🔍 Ticket   Spare Parts   Equipment

👥 Contacts

> Home=>
> Ticket=>
> Approval Ticket=>
> Click Ticket to Approve/Reject

🏠 Home   Contacts   Spare Parts   Me

Screen 2 — Ticket

🔍 Ticket No/Serial No/Terminal No

New Ticket	**1** >
Assigned Ticket	**4** >
Solving Ticket	>
Solved Ticket	**6** >
Rejected Ticket	**1** >
Approval Ticket	**1** ∨

EC test Bank
Ticket No：T201701050004
Engineer：Engineer
Fault Level：major
Appointment Time：

Closed Ticket **4** >

Screen 3 — Ticket Approval

Process Description：
111

Replace Sparepart

Approval Log

📋 Approval Information ∨

Comments:
OK,approve

[Approval] [Reject]

Screen 4 — Ticket Approval

Process Description：

Replace Sparepart

Approval Log

📋 Approval Information ∨

Comments:
Process detail is required.

[Approval] [Reject]

Part 5
Repair Ticket

5 Repair Ticket Processing Follow

1.Repair engineer Apply bad spare parts.
2. Service Manager approve apply order .
3. Warehouse manager confirm apply order.
4.Warehouse keeper give spare parts to repair engineer.
5.Repair engineer add a repair ticket.

6. Repair manager approve repair ticket.
7.after repairing,bad spare parts turn to good spare parts,need to   return ,so repair engineer add a return order.
8.Service manager approve return order.
9.Warehouse manager confirm return order.
10.Warehouse keeper stock in the good spare parts.

Repair Engineer	Service Manager	Warehouse Manager	Warehouse Keeper	Repair Engineer
1	2	3	4	5

Warehouse Keeper	Warehouse Manager	Service Manager	Repair Engineer	Repair Manager
10	9	8	7	6
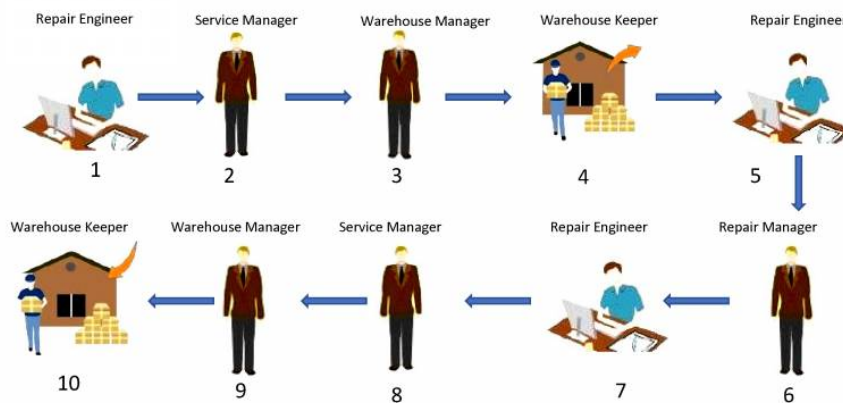
5.1 Apply Bad Spare Parts
5.1.1 Submit Apply Order (Repair engineer)

Menu

Equip...

Customer Declaration

Ticket Management

Spare Parts Management

- FILTERFIELDSET
- Spare Parts Information
- Spare Parts Location Manag...
- Spare Parts Order Manager
  - Stock out Approval
  - Stock in Approval
  - Deliver From HQ
  - Stock In Order
  - Ship Order
- My Spare Parts Managemen
  - SPAREPART CONSUME
  - Consume Detail
  - CONSUME APPROVAL
  - Apply Order
  - Return Spare Part

Dashboard | **Apply Order** ×

+ Add × Delete ✔ Reception Confirm

Service Station: [____] Attribute: [____] 🔍 Search

1. As a repair engineer, add Apply Order before repair the faulty part.

GRG Banking

Apply Order

No.:O20181123001

Basic Information

No.:	O20181123001	Service Station:	Demo
Applicant:	opeartion test	Create Time:	2018-11-23 08:46:47
Submit Status:	No Submitted	Attribute:	
Note:			

2. Select the attribute (bad)

Sparepart List

3. Finish Sparepart list

+ Add / Edit × Delete 💾 Import 🔗 Template Download

Part No. | Old Part No. | Part Description | Confirm Qty | Stock Qty | pack num | Module Level

20 [▾] |◀ ◀ Page 0 of 0 ▶ ▶| 🔄

4. Submit

Displaying 0 to 0 of 0 items

✔ Submit 💾 Save 💾 Save and Return

5.1.2 Two ways to add Spare Part List

GRG Banking

Apply Order

No.:O20181123001

Basic Information

| No.: | O20181123001 |
| Applicant: | opeartion test |

No Submit...

1. add spare parts one by one.

2. download template to fill in all spare parts info. at one time and import in bulk.

Sparepart List

+ Add / Edit × Delete 💾 Import 🔗 Template Download

Part No. | Old Part No. | Part Description | Confirm Qty | Stock Qty | pack num | Module Level

20 [▾] |◀ ◀ Page 0 of 0 ▶ ▶| 🔄

Select Sparepart

Double click to select a sparepart

Part No.: [____] Part Description: [____] 🔍 Search

	Part No.	Old Part No.	Part Description	Part Model	Module Level
1	502011115003		CM400,NT transmission axis comp...		Level 1
2	724010531		Cross - groove head self - tapping s...		Level 2
3	725022467001		H22nl-cen (IV) turntable lock platen		Level 2
4	728021623002		Code lock tongue extension block (C...		Level 2
5	502011163002		CM400, NV, MTS Component		Level 1
6	213020207		4G wireless router (dominican-spec...		Level 2
7	501012942001	YT4.100.2139	H22NL CEN IV EX GAS Safe Compo...		Level 1
8	301010830003	YT2.503.0497PCBA	IO signal co...		Level 2
9	211020269019	S.N0001329	Hard Disk R...		Level 1
10	201050004019	YT2.291.073R	After 9250C...		Level 1

Double click to select a spare part and input quantity.

10 [▾] |◀ ◀ Page 1 of 6654 ▶ ▶| Displaying 1 to 10 of 66531 items

Sparepart Information

Part No.: [____] Part Description: [____] Qty: [____]

✔ Submit ✖ Cancel

✔ Submit 💾 Save 💾 Save and Return

5.1.3 Approve Apply order (Service Manager)

5.1.4 Outbound (Warehouse Manager&Keeper)

5.2 Repair Bad Spare Parts
5.2.1 Submit repair ticket (Repair Engineer)

Add Repair Ticket when start the repairing work.

Select the spare part applied just now.

5.2.2 Fill in Repair Ticket

If the repairing work need to replace bad part with good part, you can add information here. Replace part indicates the good part which will be used to repair the bad part. Faulty parts indicates the bad part.

After repairing, submit it for repair manager.

5.2.3 Approve Repair Ticket (Repair Manager)

1. The submitted repair ticket need to be approved by Repair manager.

2. After check, make comments

3. Approve or reject

APPENDIX: iService business workflow

Role definition

No	Role		Authority\Duty	Note
1	Customer	A.	Submit service application form	In Use
		B.	View and follow up service tickets	
2	Operator	A.	Handle the hotline	In Use
		B.	Create tickets	
3	Service Manager	A.	Create service station and user account	In Use
		B.	Dispatch tickets to service engineers	
		C.	Check and approve service tickets	
		D.	Check and approve spare parts stock in/stock out application	
4	Service Engineer	A.	Ticket processing	In Use
		B.	My spare parts management	
5	Warehouse Manager	A.	Stock In/Out management :Check and confirm stock in/Out application	In Use
6	Warehouse Keeper	A.	Create "stock in"/ "ship out" order	In Use
		B.	Stock In/Out management: Execute "Storage" or "Outbound" action	
		C.	Create Inventory profit/loss management	
7	Repair Manager	A.	Check and approve Repair tickets	In Use
8	Repair Engineer	A.	My spare part management	In Use
		B.	Create and process repair ticket	
9	QC Inspector		Quality control of maintenance	Non-use
10	Administrator		System management	In Use

Business Workflow

1. Ticket Management
1) SLA Service General Workflow
Phone tickets→Field tickets→Ticket processing→Tickets approval
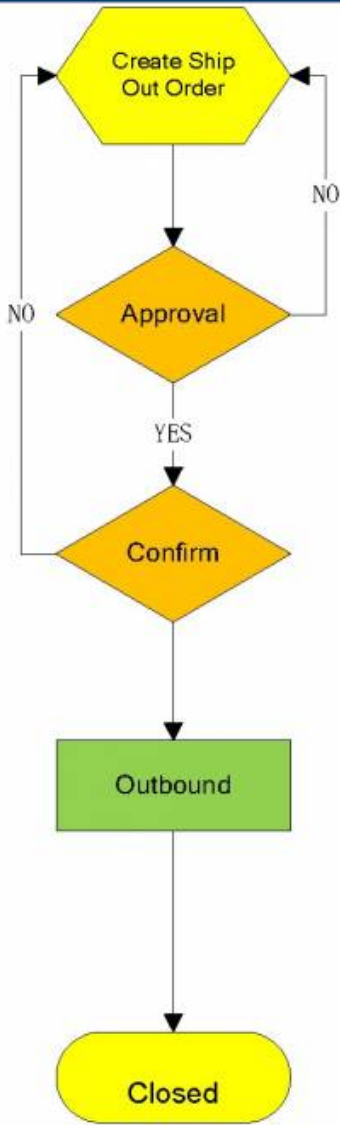
Work Flow	Description	Role	Related Function
Create Phone ticket → Solved by phone → Closed	1.Create Phone ticket.	Operator	Phone tickets : Create
Transfer to Field ticket	1.Transfer Phone ticket to Field ticket.	Operator	Phone tickets : Transfer
Dispatch Field ticket	(Or create field ticket directly) 1.Dispatch field ticket to service engineer.	Service Manager	Field tickets : Dispatch
Receiving / Start Off / Arrive / Fixing / Complete	1. Engineer process the ticket: Receive-> Start off-> Arrive-> Fixing -> Complete->Submit for approve	Service Engineer	Tickets processing
Approval (No / Yes)	1. Service manager check and approve the completed ticket. If anything wrong, reject it back to service engineer to modify.	Service Manager	Tickets Approval
Success	Call back	Hotline Operator	

2. Spare parts Management
1) Stock In Workflow

Work Flow	Description	Role	Related Function
Create Stock In Order	1. Create Stock In Order: Stock in the purchased spare parts.	Warehouse Keeper	Stock In Order
Approval	1. Service Manager check and approve the submitted order, or reject to the applicant.	Service Manager	Stock in Approval
Confirm	1. Warehouse Manager check and approve the approved order, or reject to the applicant.	Warehouse Manager	Stock In Management
Stock In	1. Warehouse Keeper check the received spare parts according to the confirmed order list. If anything wrong, feedback to warehouse manager or reject to applicant. 2. Store parts in the warehouse.	Warehouse Keeper	Stock In Management
Closed	1. System will record stock in details, and update warehouse inventory.		Stock In Details/ Inventory Inquiry

2) Stock Out Workflow

Work Flow	Description	Role	Related Function
Create Ship Out Order	1.Create Ship Order	Warehouse Keeper	Ship Order
Approval	1.Service Manager check and approve the submitted order, or reject to the applicant.	Service Manager	Stock Out Approval
Confirm	1.Warehouse Manager check and confirm the approved order, or reject to the applicant.	Warehouse Manager	Stock Out Management
Outbound	1. Warehouse Keeper prepare spare parts according to the confirmed order list. If some parts are out of stock, make purchase plan or reject the order to applicant to modify. 2. Send out the spare parts to destination.	Warehouse Keeper	Stock Out Management
Closed	1. System will record stock out details, and update warehouse inventory.		Stock Out Details/Inventory Inquiry

3) Transfer Workflow

Work Flow	Description	Role	Related Function
Create Ship Out Order	Station A transfer parts to Station B. 1.Station A: Create Ship Order	Warehouse Keeper A	Ship Order
Approval	Station A: 1.Service Manager check and approve the submitted order, or reject to the applicant.	Service Manager A	Stock Out Approval
Confirm	Station A: 1.Warehouse Manager check and confirm the approved order, or reject to the Applicant.	Warehouse Manager A	Stock Out Management
Outbound	Station A: 1. Warehouse Keeper prepare spare parts according to the confirmed order list. If some parts are out of stock, make purchase plan or reject the order to applicant to modify. 2. Send out the spare parts to destination.	Warehouse Keeper A	Stock Out Management
Approval	Station B: 1.Service Manager check and approve the transfer order.	Service Manager B	Stock in Approval
Confirm	Station B: 1.Warehouse Manager check and confirm the transfer order.	Warehouse Manager B	Stock In Management
Stock In	Station B: 1. Warehouse Keeper check the received spare parts according to the confirmed order list. If anything wrong, feedback to warehouse manager. 2. Store parts in the warehouse.	Warehouse Keeper B	Stock In Management
Closed	System will record stock out/in details, and update warehouse inventory of Service station A and B.		Stock Out/In Details, Inventory inquiry
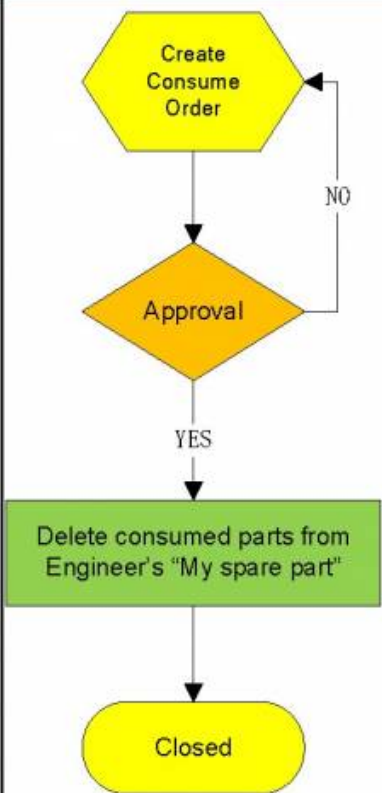
4) Application Workflow

Work Flow	Description	Role	Related Function
	1. Create Apply Order: Service engineer apply good part. Repair engineer apply bad part.	Service Engineer /Repair Engineer	Apply Order
	1. Service Manager check and approve submitted order, or reject to the applicant.	Service Manager	Stock Out Approval
	1.Warehouse Manager check and confirm the approved order, or reject to the Applicant.	Warehouse Manager	Stock Out Management
	1. Warehouse Keeper prepare spare parts according to application order list. If some parts are out of stock, make purchase plan or reject the order to applicant. 2. Hand over the spare parts to engineers.	Warehouse Keeper	Stock Out Management
	1. System record the stock out details. 2. System transfer the parts records from warehouse inventory to Engineer's "My Spare Parts".		Stock out details /My Spare Parts

5) Return Workflow

Work Flow	Description	Role	Related Function
Create Return Order (NO)	1. Create Return Order	Service Engineer /Repair Engineer	Return Order
Approval (NO / YES)	1. Service Manager check and approve the submitted order, or reject to the applicant.	Service Manager	Stock In Approval
Confirm	1. Warehouse Manager check and confirm the approved order, or reject to the Applicant.	Warehouse Manager	Stock In Management
Stock In	1. Warehouse Keeper check the received spare parts according to the confirmed order list. If anything wrong, feedback to warehouse manager or reject to applicant 2. Store parts in the warehouse.	Warehouse Keeper	Stock In Management
Closed	1. System will record stock in details. 2. System will transfer the parts records from Engineer's "My Spare Parts" to warehouse.		Inventory Inquiry /My Spare Parts

6) Consume Workflow

Work Flow	Description	Role	Related Function
	1. Create Consume Order: Consume spare parts without serial number (eg.print paper)	Service Engineer /Repair Engineer	Consume Request
	1.Service Manager check and approve the submitted order, or reject to the applicant.	Service Manager /Repair Manager	Consume Approval
	1. After Consume Order approved, System will delete the parts records from Engineer's "My Spare Parts".		My Spare Parts

3. Repair Management
1) Repair Workflow

Work Flow	Description	Role	Related Function
	1. Apply faulty parts from warehouse. (Refer to the "Application Workflow")	Repair Engineer	
Create Repair Ticket	1. Create Repair Ticket 2. Choose the faulty parts from "My spare Parts".	Repair Engineer	Repair Ticket
Repairing	1. Do maintenance. 2. Complete maintenance details in the repair ticket. 3. Submit for approval.	Repair Engineer	Repair Ticket
Approval (NO)	1. Repair Manager check the repaired parts according to the submitted ticket. Confirm and approve the ticket, or reject to the applicant.	Repair Manager	Repair Approval
YES Closed	Repair ticket closed.		
	1. Return the repaired parts back to warehouse. (Refer to the "Return Workflow")	Repair engineer	

DOCUMENT LIST

Reference documents

1.grgbanking_iservice_quick_guide_servcie_ticket_processing_.pdf

2.grgbanking_iserivce_quick_guide_warehouse_workshop_.pdf

3.grgbanking_iservice_business_workflow_all_.docx

iService customer platform list

Country/Area	Domain
demo	http://DEMO.grgiservice.com
Mexico	http://MX.grgiservice.com
Hong Kong	http://HK.grgiservice.com
Congo	http://CG.grgiservice.com
Sudan	http://tamika4.grgiservice.com
Vietnam	http://VN.grgiservice.com
Myanmar（MIT）	http://MIT.grgbanking.com
Indonisia	http://ID.grgiservice.com
Turkey	http://TR.grgiservice.com
Tanzania	http://TZ.grgiservice.com
Kenya	http://KE.grgiservice.com
Ecuador	http://EC.grgiservice.com
Russia	http://RU.grgiservice.com
Germany	http://DE.grgiservice.com
LAO	http://LA.grgiservice.com
Singapore	http://SG.grgiservice.com
Myanmar	http://MM.grgiservice.com
Saudi Arabia	http://SA.grgiservice.com
Nigeria（CWG）	http://CWG.grgiservice.com

Training ppt

grgbanking_iservice_.pptx

Training video

iservice_operation	Service Process
iService_operation	**Service Process**
Warehouse management	repair management
Warehouse management	**Repair management**