

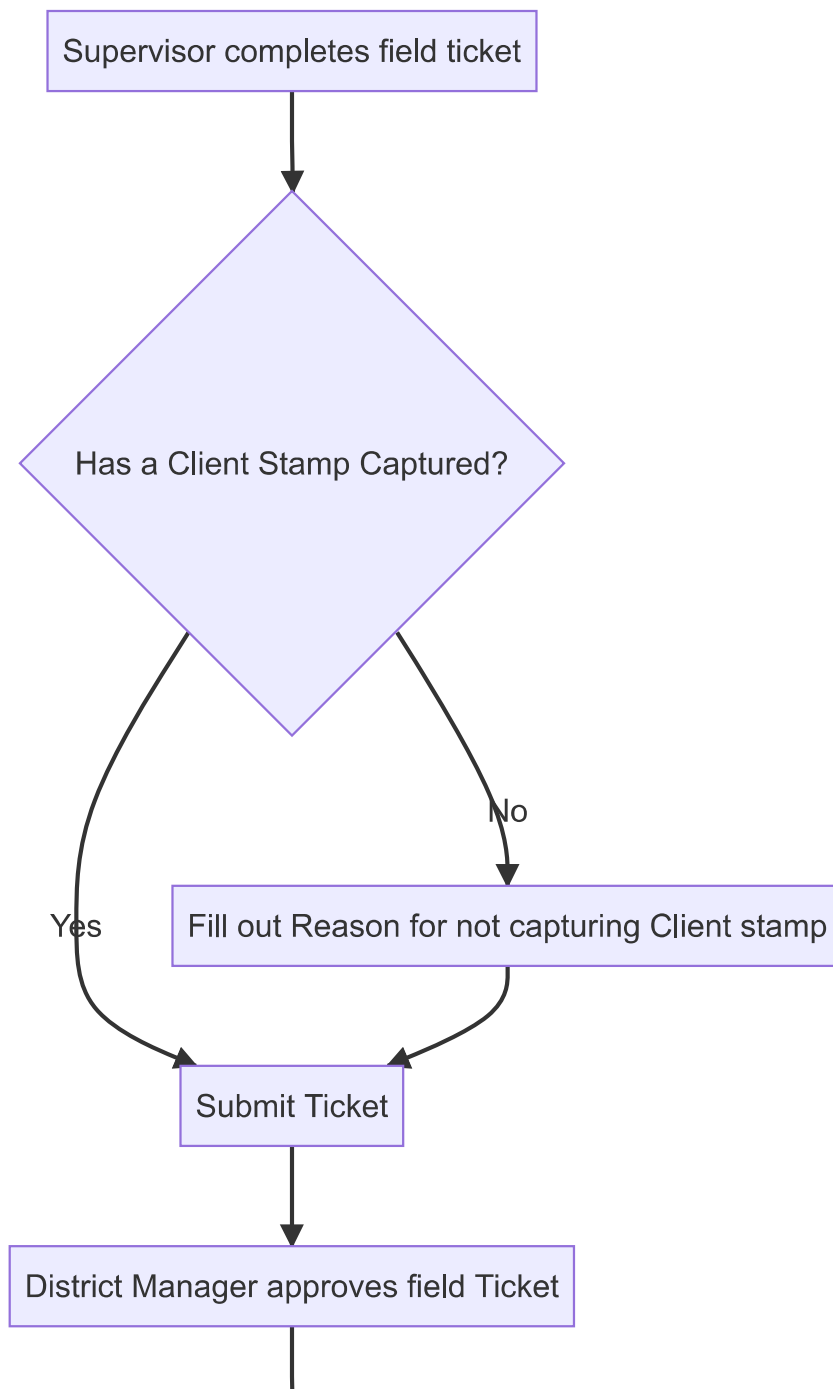
Solution Proposal for Client stamp tracking

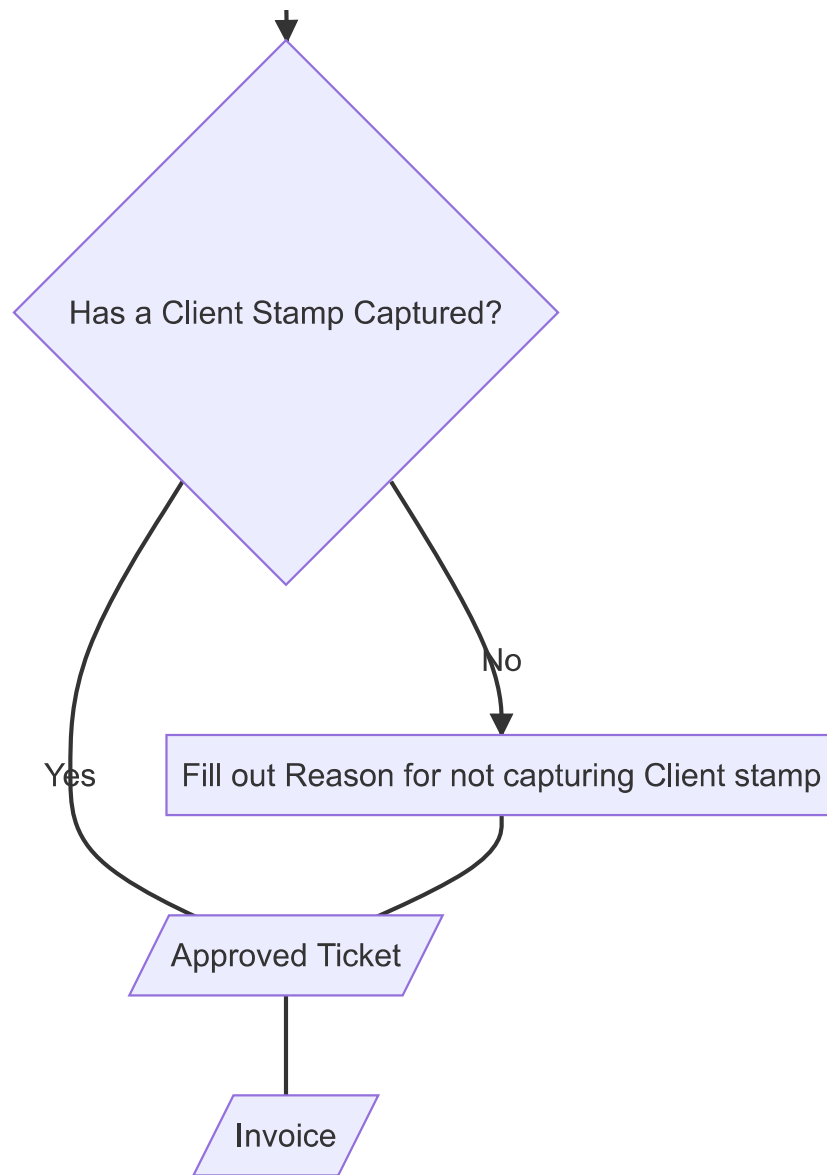
The solution will be implemented in eService application. The tracking flags are mandatory in eService for field ticketing and manager approval. This will help enforce the business process and allow all parties to be aware of client stamp missing and the causes.

Once the data is submitted to server, it will be exposed to AR and sales in BI dataset for further tracking and analysis.

This process will not block current process for invoice generation and OVPP processing.

Business Process for client stamp tracking



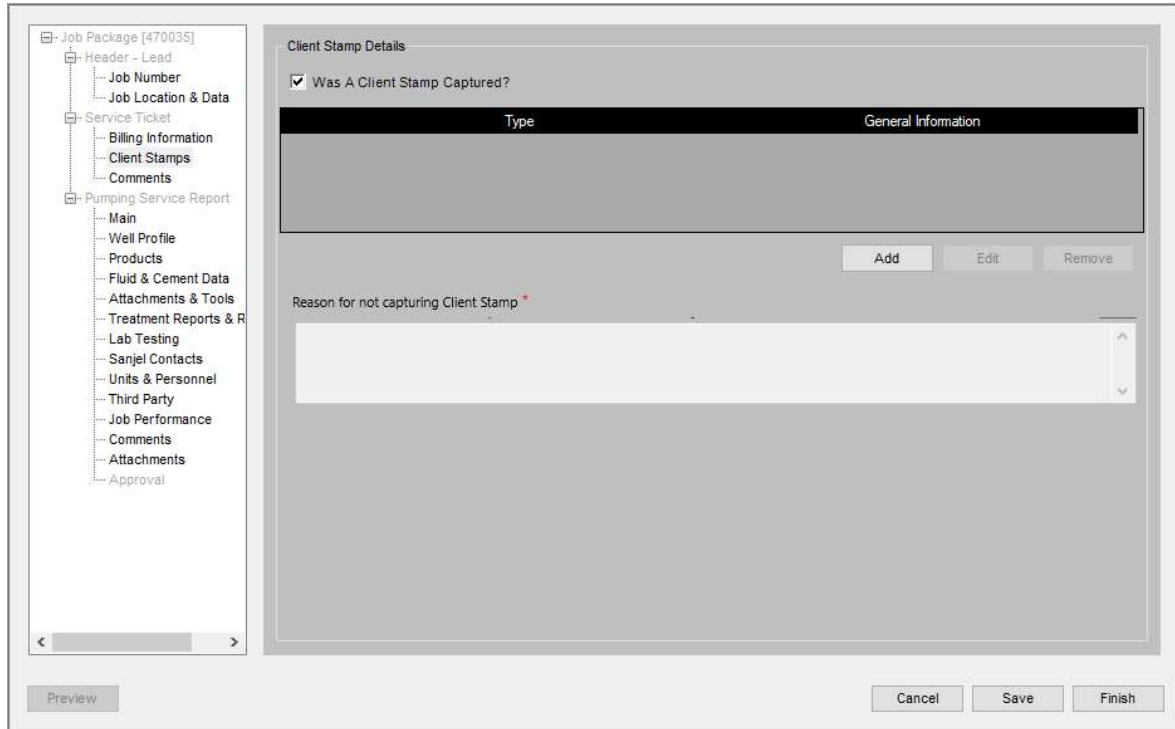


Solution Description

1. If the field supervisor has captured client stamp, he will toggle the checkbox "Is a Client Stamp Captured?" and fills in the stamp information.
2. If for any reason, the field supervisor is not able to capture the client stamp, he needs to fill out the reason in "Reason for not capturing Client Stamp"
3. The "Client Stamp Details" is mandatory for field ticket.
4. The supervisor submit ticket server
5. When district manager approves the ticket, the "Has a Client Stamp Captured?" checkbox will carry over the value from service ticket, district manager can modify it if field flag is wrong.
6. If for any reason, the checkbox is not toggled, the district manager needs to fill out the reason in "Reason for not capturing Client Stamp" within "Client Stamp Upon Approval".
7. Once the ticket is approved, the invoice will be generated.
8. All above tracking information will be available in daily job data in PowerBI. Sales and AR can use it for tracking and analysis purpose

UI Mock

- Job Package From Local



This UI mock shows a 'Job Package [470035]' window. On the left is a tree view with categories like 'Header - Lead', 'Service Ticket', and 'Pumping Service Report'. The 'Client Stamps' item under 'Service Ticket' is selected. The main area is titled 'Client Stamp Details' and contains a checkbox 'Was A Client Stamp Captured?' which is checked. Below this is a table with two columns: 'Type' and 'General Information'. The table is currently empty. To the right of the table are 'Add', 'Edit', and 'Remove' buttons. Below the table is a text area labeled 'Reason for not capturing Client Stamp *'. At the bottom of the window are 'Preview', 'Cancel', 'Save', and 'Finish' buttons.

Job Package [470035]

- Header - Lead
 - Job Number
 - Job Location & Data
- Service Ticket
 - Billing Information
 - Client Stamps
 - Comments
- Pumping Service Report
 - Main
 - Well Profile
 - Products
 - Fluid & Cement Data
 - Attachments & Tools
 - Treatment Reports & R
 - Lab Testing
 - Sanjel Contacts
 - Units & Personnel
 - Third Party
 - Job Performance
 - Comments
 - Attachments
 - Approval

Client Stamp Details

☒ Was A Client Stamp Captured?

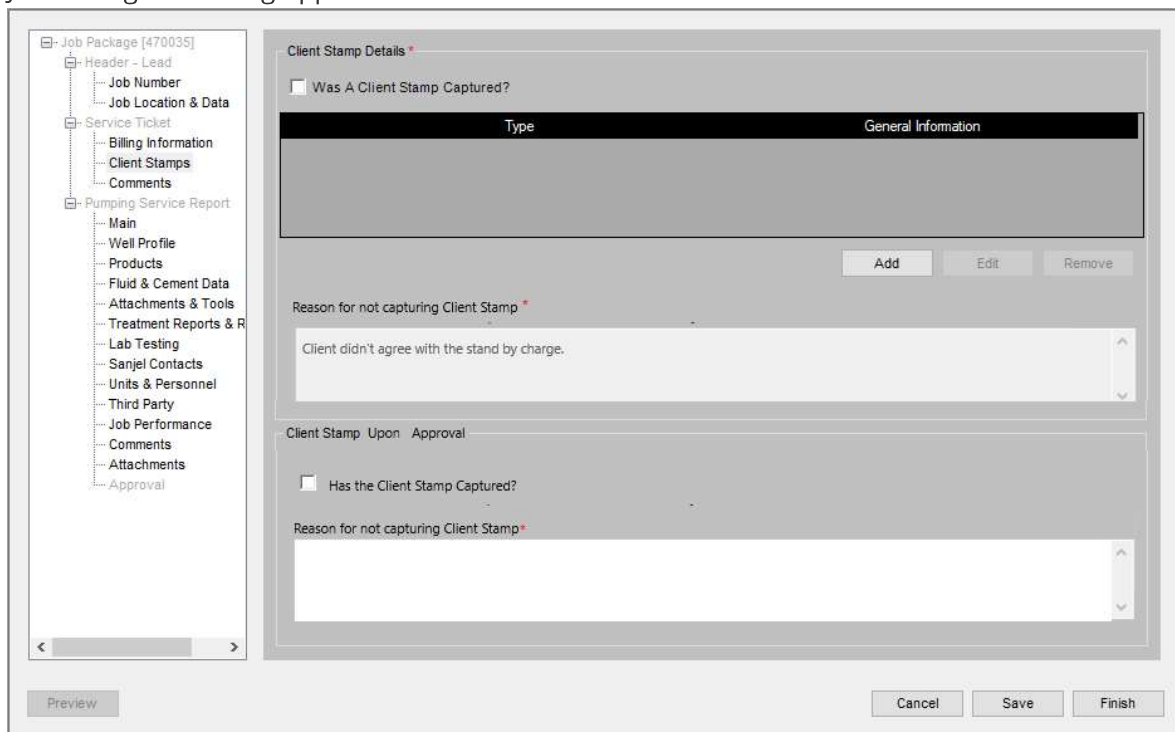
Type	General Information
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Add Edit Remove

Reason for not capturing Client Stamp *

Cancel Save Finish

- Job Packages Awaiting Approval



This UI mock shows a 'Job Package [470035]' window, similar to the first one, but with the 'Client Stamps' item under 'Service Ticket' selected. The 'Client Stamp Details' section has the checkbox 'Was A Client Stamp Captured?' unchecked. The table below it is empty. The 'Reason for not capturing Client Stamp *' text area contains the text 'Client didn't agree with the stand by charge.' Below this is a section titled 'Client Stamp Upon Approval' with a checkbox 'Has the Client Stamp Captured?' which is unchecked. Below this is another text area labeled 'Reason for not capturing Client Stamp *'. At the bottom of the window are 'Preview', 'Cancel', 'Save', and 'Finish' buttons.

Job Package [470035]

- Header - Lead
 - Job Number
 - Job Location & Data
- Service Ticket
 - Billing Information
 - Client Stamps
 - Comments
- Pumping Service Report
 - Main
 - Well Profile
 - Products
 - Fluid & Cement Data
 - Attachments & Tools
 - Treatment Reports & R
 - Lab Testing
 - Sanjel Contacts
 - Units & Personnel
 - Third Party
 - Job Performance
 - Comments
 - Attachments
 - Approval

Client Stamp Details *

☐ Was A Client Stamp Captured?

Type	General Information
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Add Edit Remove

Reason for not capturing Client Stamp *

Client didn't agree with the stand by charge.

Client Stamp Upon Approval

☐ Has the Client Stamp Captured?

Reason for not capturing Client Stamp *

Preview Cancel Save Finish