CRU Work Orders - MSD365



Lenovo Global Product Education

Latest Update: 04/05/2020 | version 2.5

Learning Outcomes

- Create a CRU Work Order.
- Diagnose and Order Replacement Parts.
- Release the Work Order.
- View the Progress and Status of the Work Order.



Display the Case

1. Create a CRU Work Order.

2. Diagnose and **Order Parts**

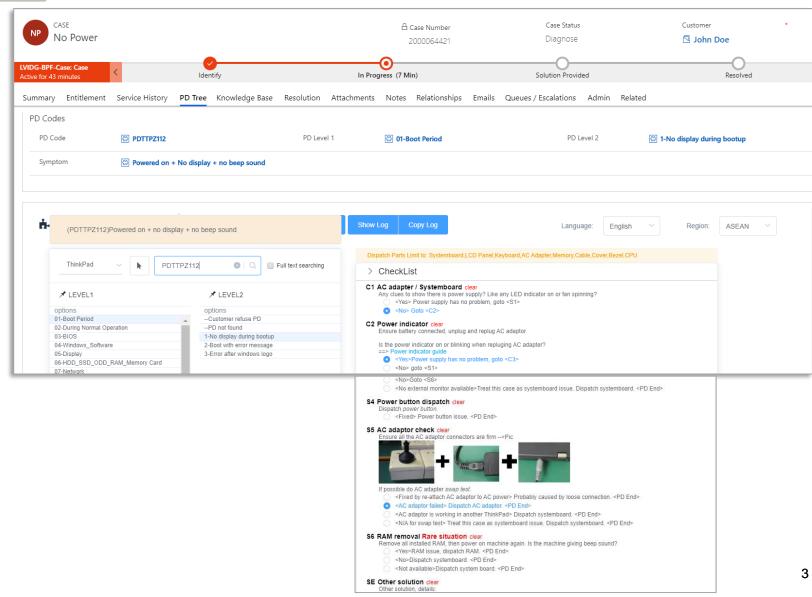
3. Release Work Order.

4. View Progress & Status of WO

Display the Case.

Create the Work Order.

- For the CRU Work Order, the Agent diagnoses the problem and orders the parts.
- A Part Vendor receives the parts order and ships the hardware to the customer.
- The Customer replaces the parts.
- All Work Orders begin with a Case. If the issue cannot be resolved at the Case level, a work order will be initiated.



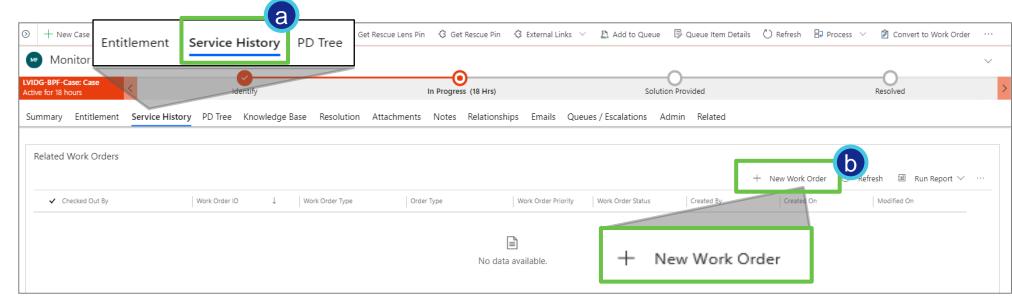
Display the Case.

<u>Create New Work</u> <u>Order.</u>

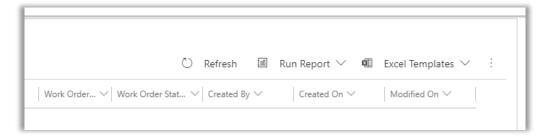
To create a new CRU Work Order:

- a. In the existing Case record for this customer's issue, click the **Services History** tab.
- b. In the Related WorkOrders section, click+ New Work Order.

A multi-tabbed **New Work Order** form
appears for you to
complete (see next
slide).



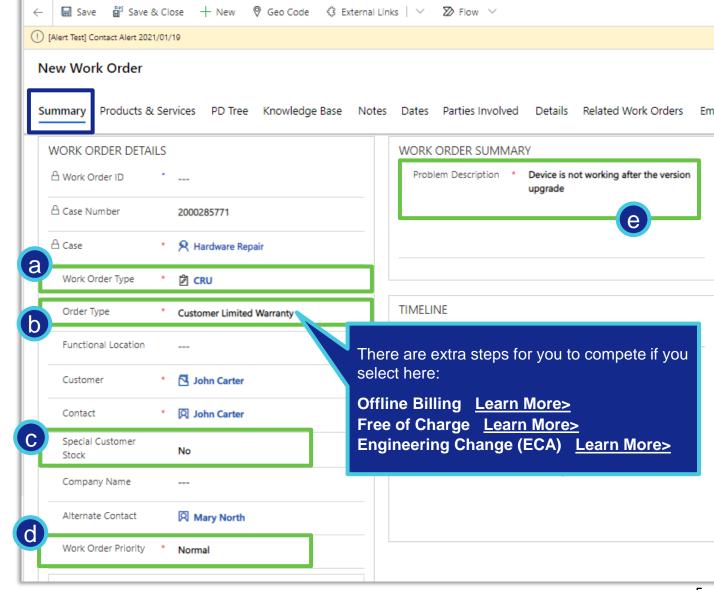
Note: if + New Work Order does not appear in the Related Work Orders section, then you have the Call Reason field set to *Information Call*. To remedy, click Learn More >



Display the Case.

<u>Create New Work</u> <u>Order.</u>

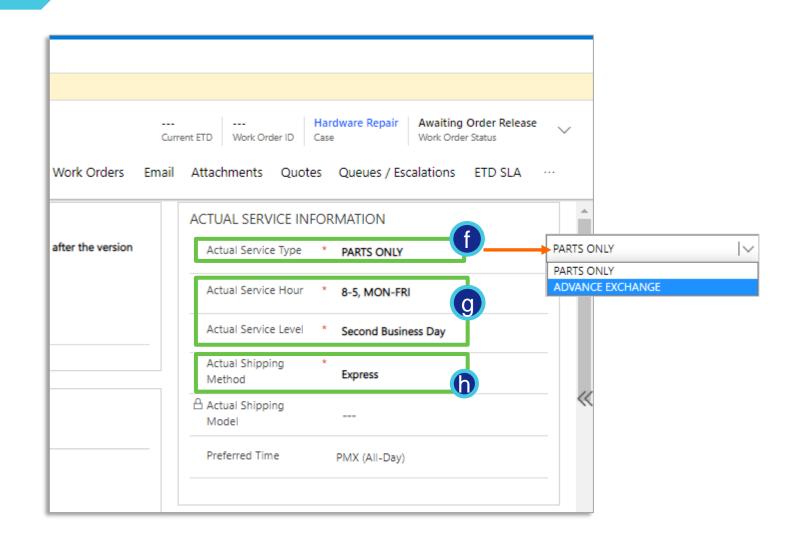
- To complete the first two columns of the Summary tab:
 - a. In **Work Order Type**, begin typing *CRU* and then select it when you see *CRU* in the drop-down menu.
 - b. In Order Type, identify how the work will be covered, such as Customer Limited Warranty.
 There are extra fields for you to complete if you select one of three other options (see the callout).
 - c. (*optional*) If parts should be taken from inventory on reserve just for the customer's Account, select *Yes* in **Special Customer Stock**.
 - d. Verify the **Work Order Priority**. There are six priority levels available.
 - e. If needed, edit the **Problem Description** (taken from the Case).



Display the Case.

Create New Work Order.

- To complete the last column on the form:
 - f. Ensure **Actual Service Type** shows *Parts Only*, <u>unless</u> the whole asset is being replaced (then select *Advanced Exchange* here).
 - g. You have the option in the next two fields – Actual Service Hour and Actual Service Level – of keeping the default settings or making changes, as needed.
 - h. Specify the **Actual Shipping Method**. Commonly used are *Express* (the default) or *Standard*.



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4. View Progress & Status of WO

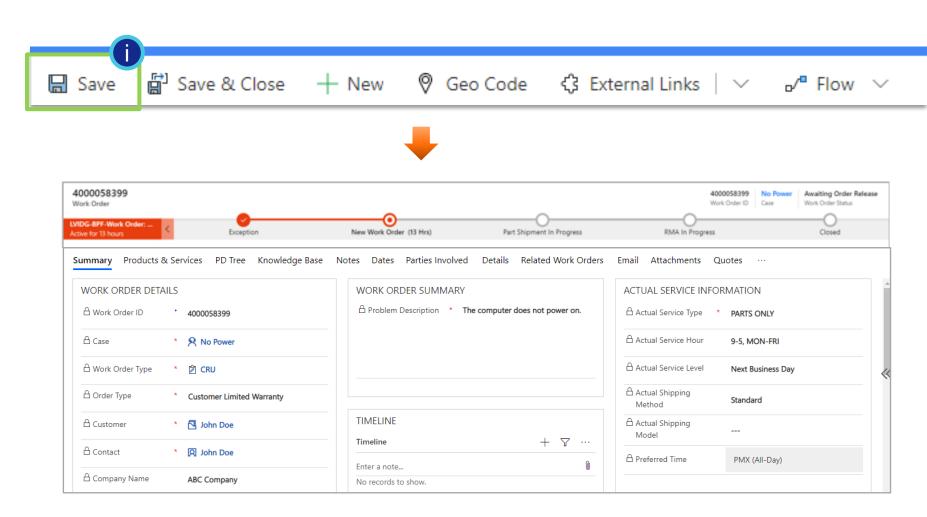
Display the Case.

<u>Create New Work</u> <u>Order.</u>

- Finish creating the CRU Work Order:
 - i. At this point you can create this Work Order.In the Command Bar click Save.

A new CRU Work Order appears.

 Next comes the work of confirming the diagnosis made in the Case record for this customer issue.



Confirm Case Diagnosis

1. Create a CRU Work Order. 2. Diagnose and Order Parts.

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Confirm the Diagnosis.

Confirm Customer Delivery Date.

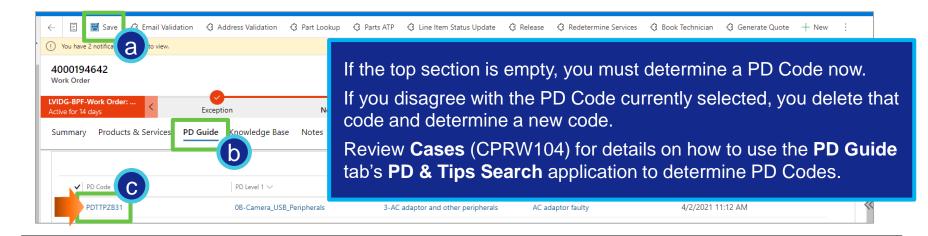
Part Lookup.

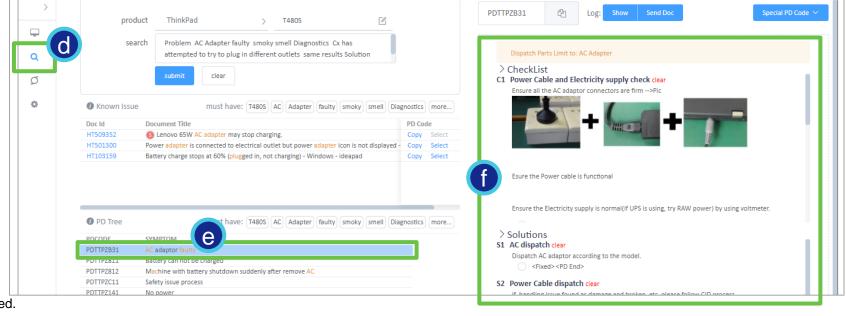
Parts ATP.

Parties involved.

As much as possible, confirm the problem determination (PD) made at the Case level.

- a. Ensure you are in **Edit** mode.
- b. Click the **PD Guide** tab.
- Take note of the PD Code in the top section.
- d. In the bottom section,ensure you are in the PD &Tips Search application.
- e. In the **PD Tree** section, click the PD Code from Step c.
- f. Step through the Checklist/ Solutions to verify the PD code selection.





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Confirm Customer Delivery Date.

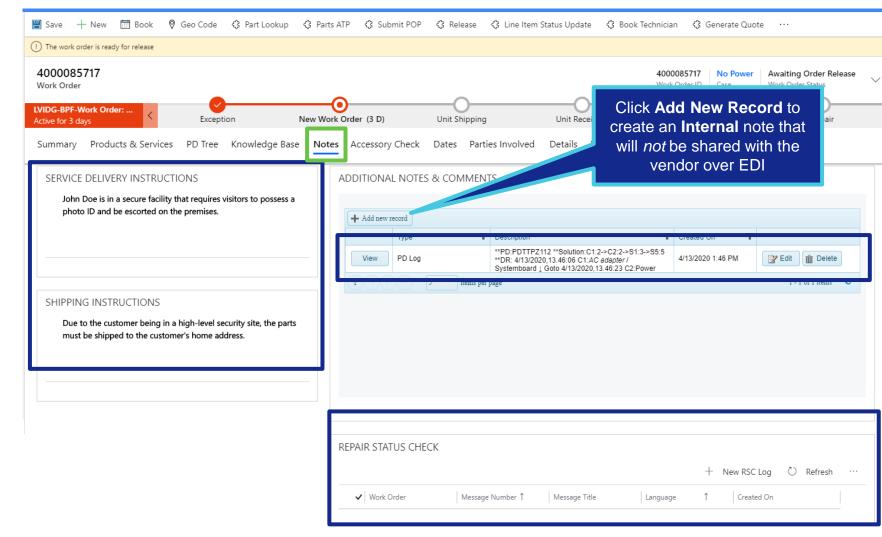
Part Lookup.

Parts ATP.

Parties involved.

(optional) You can enter/view notes or shipping instructions in the **Notes** tab.

- In the Additional Notes and Comments section, you can view saved PD Logs and Internal notes (not shared with the vendor over EDI).
- Both the Service
 Delivery/Instructions and Shipping Instructions
 fields will be shared with the vendor over EDI.
- In Repair Status Check appear key messages the customer can see online.



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Confirm the Diagnosis.

Confirm Customer Delivery Date.

Part Lookup.

Parts ATP.

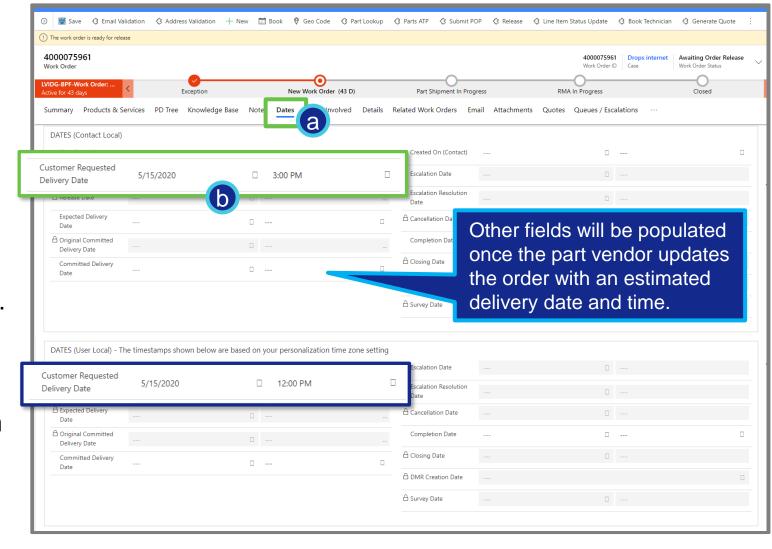
Parties involved.

Before ordering the parts, confirm the **Customer Requested Delivery Date**.

A guideline is 48 hours in the future, but this can be adjusted, as needed.

- a. Click the **Dates** tab.
- b. Look in the Dates (Contact Local)
 section (this is the date/time according
 to the customer's time zone). Click in
 the Customer Requested Delivery
 Date field to change the date, if needed.

After you Save, the bottom section, **Dates (User Local)** shows in the field with the same name the date/time from the perspective of your local time. The example shown here is three time zones west of the customer.



Part Lookup

. Create a CRU Work Order.

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Confirm the Diagnosis.

Confirm Customer Delivery Date.

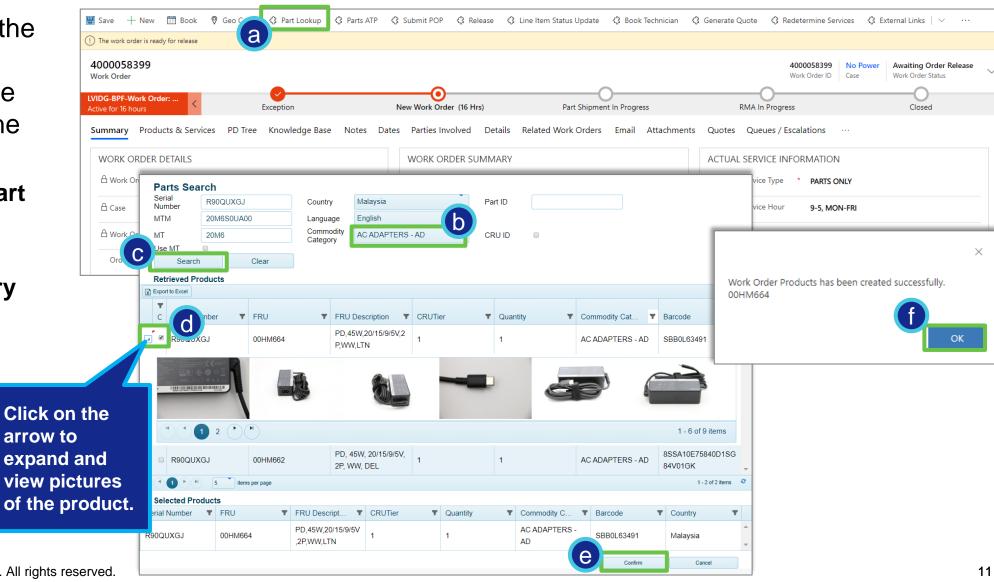
Part Lookup.

Parts ATP.

Parties involved.

To order the parts for the repair, a Part Lookup and Parts ATP must be competed. To begin the Part Lookup:

- a. In Edit mode, click Part Lookup.
- b. If needed, use the **Commodity Category** field to narrow your search.
- c. Click Search.
- d. Select a part from the results.
- e. Click Confirm.
- f. Click **OK**.



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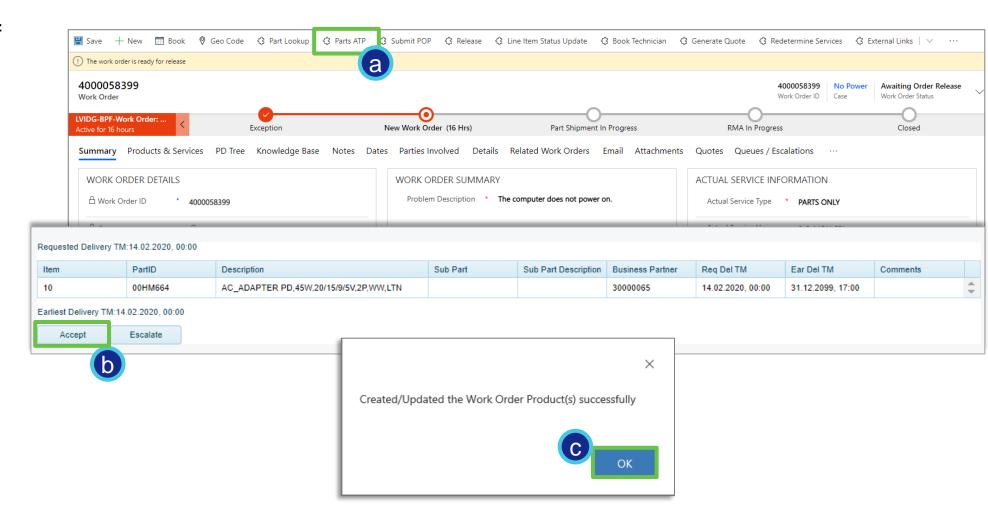
Confirm Customer Delivery Date.

Part Lookup.

Parts ATP.

Parties involved.

- Confirm availability of the parts at the vendor.
 - a. On the Command Bar, click **Parts ATP**.
 - b. Verify the information in the Parts ATP window and click **Accept**.
 - c. Click OK.



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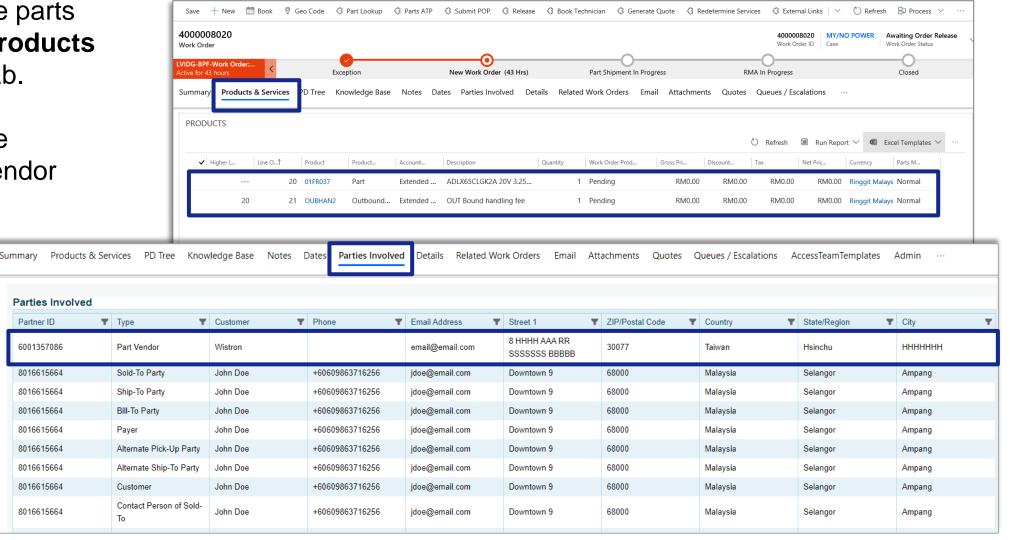
Part Lookup.

Parts ATP.

Parties involved.

- You can view the parts ordered in the Products and Services tab.
- You can view the assigned part vendor in the Parties Involved tab.

If you want, you can validate the current Ship-To Party's email and address information.
Learn More>

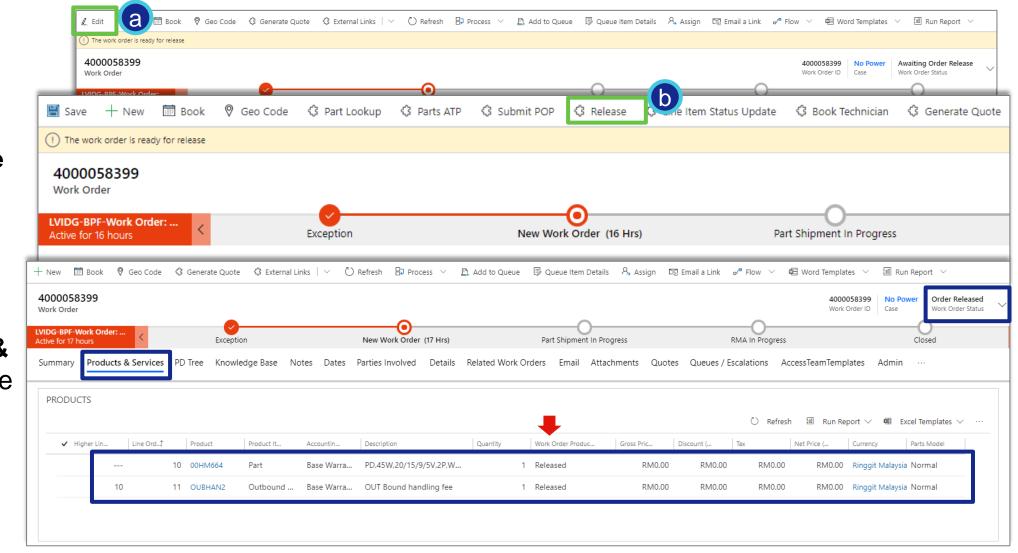


Release the Work Order.

- Release the Work Order.
 - a. Click the **Edit** button.
 - b. Click the Release button.
- The Work Order
 Status changes to
 Order Released.
- On the Products & Services tab, in the Products section, the Part line items show Released.

Release Parts Exceptions.

Parts Update.



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Release the Work Order.

Release Exceptions.

Parts Update.



There are two conditions that will prevent you from completing the Release.



- Having a security issue caught by the Restricted Party Screening feature. More >
- Having a field called Accounting Indicator show Out of Warranty. More >

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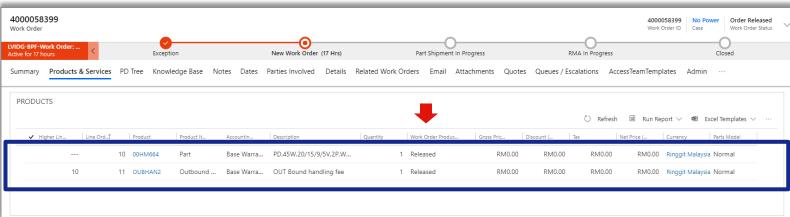
Release the Work Order.

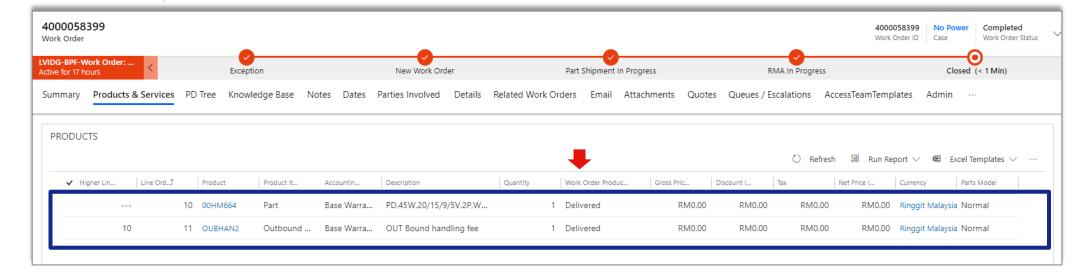
Release Exceptions.

Parts Update.

The Work Order Product Status changes automatically with Electronic Data Interface (EDI) updates from the vendor. The sequence is:







3. Release Work Order.

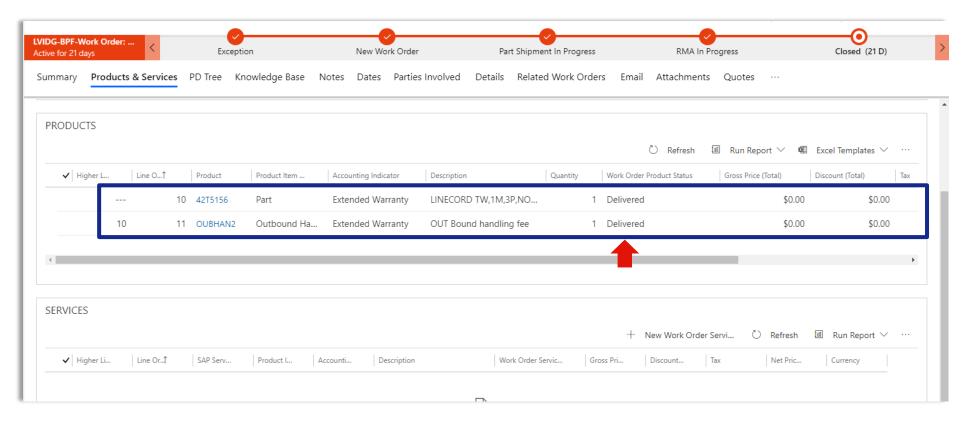
4. View Progress& Status of WO

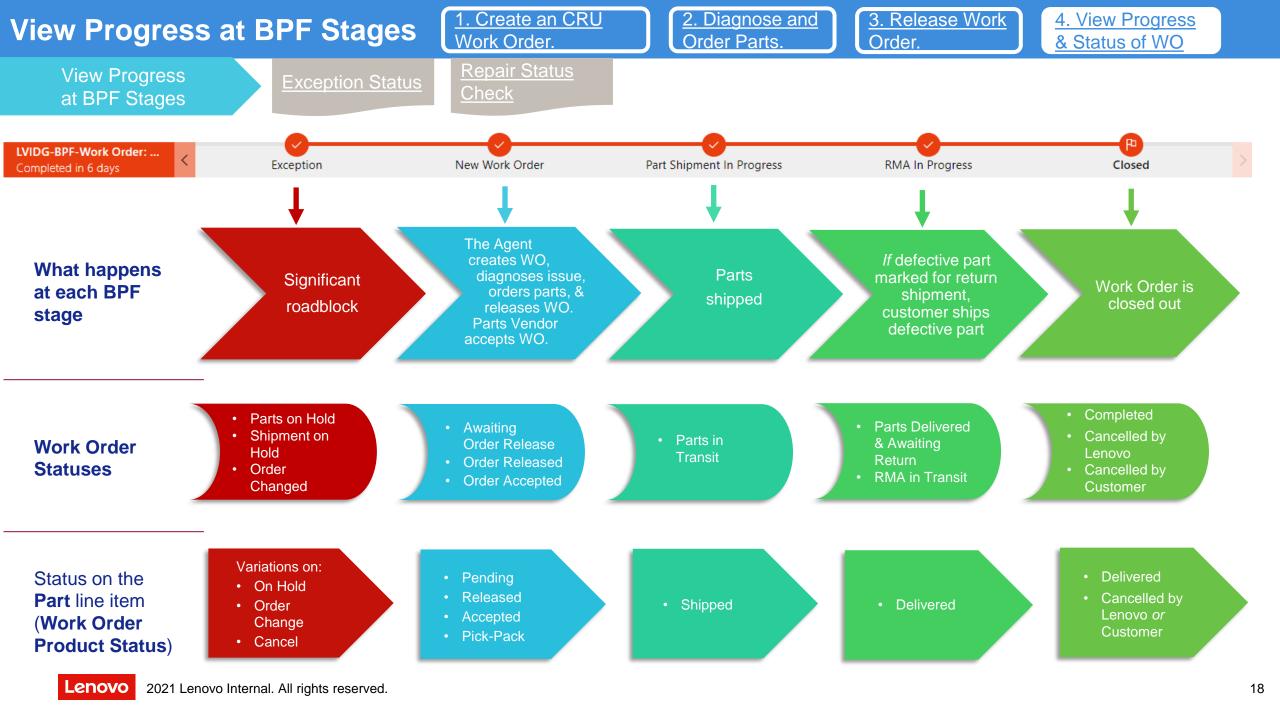
View Progress at BPF Stages

Exception Status

Repair Status Check

- If a customer contacts you for an update on the status of their issue, you need to read key parts of the Work Order to give an accurate answer. We provide tips on how to that in the following slides.
- You can monitor progress by displaying the Work Order and checking the current BPF stage, the Work Order Status field, and (shown below) the Products & Services tab.





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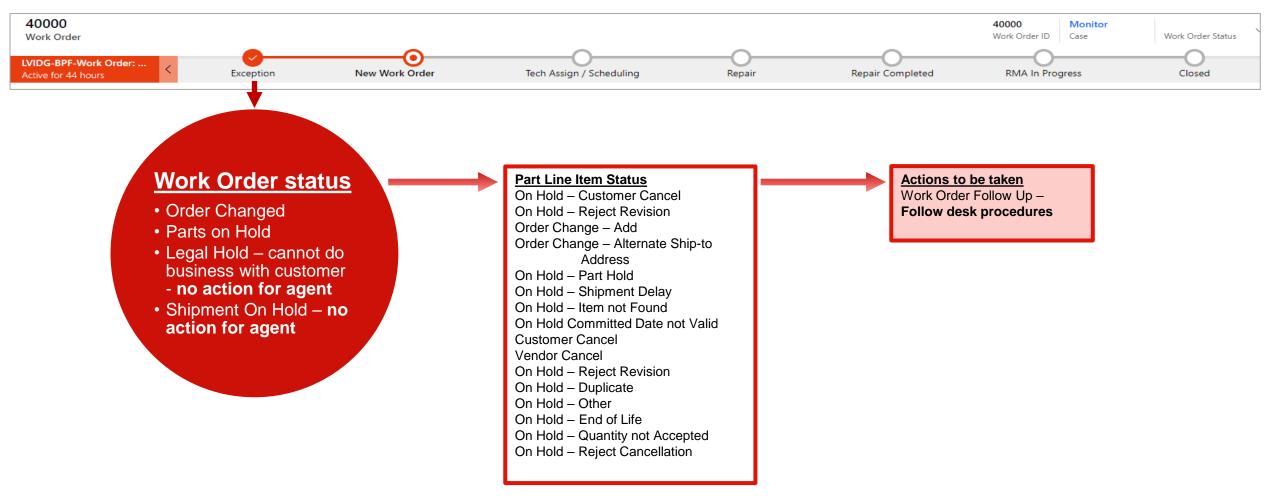
4. View Progress & Status of WO

View Progress at BPF Stages

Exception Status

Repair Status
Check

The Exceptions listed below include the Work Order Status, the Onsite Labor Status, and the Actions to be taken.



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SHOP

SUPPORT

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upport > Repair Status Check

View Progress at BPF Stages

Exception Status

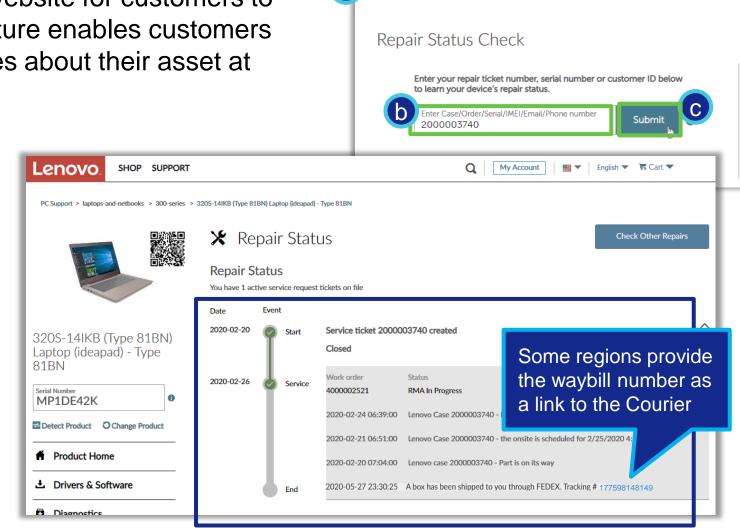
Repair Status
Check

The system also supports a self-service website for customers to use. This Repair Status Check (RSC) feature enables customers to read system-generated repair messages about their asset at their convenience.

What the **customer** sees:

- a. The customer uses a browser to open a Lenovo support website (the URL depends on the country).
- b. They enter the Case number, Work Order number, or serial number.
- c. They click **Submit**.

 In the **Repair Status** window, next to a vertical timeline, are timestamped messages the customer can read.



Repair Status Check

View Progress at BPF Stages

Exception Status

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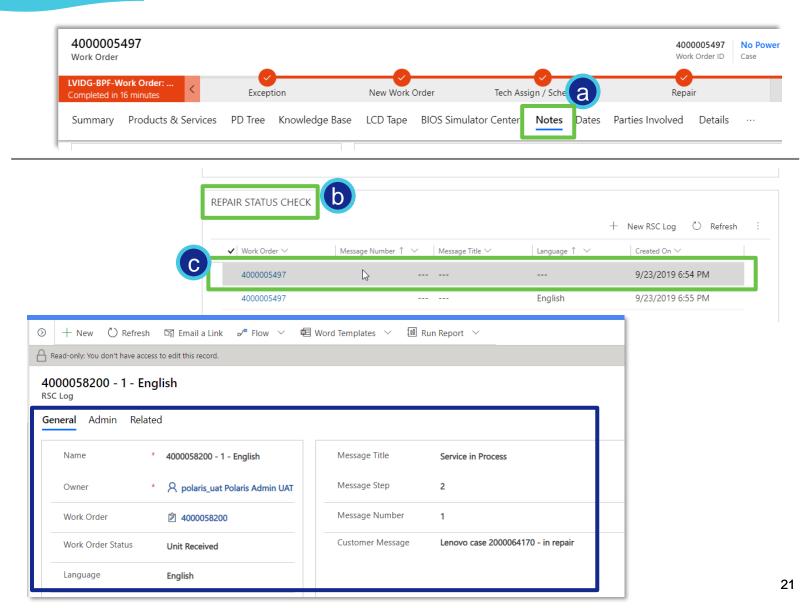
4. View Progress & Status of WO

Repair Status
Check

What **you** see with RSC:

- a. In the Work Order, click the **Notes** tab.
- b. Scroll down to the **Repair Status Check** section in the last column.
- c. For more information, <u>double-click</u> a log message. (Clicking the link in the first column only re-opens the Work Order.)

An **RSC Log** page opens with more details about the message.



thanks.



Change Log

Version	Update Date	Update by	Remark
v2.5	04/05/2021	Matthew Heck	Sprint 16 updates
v2.4	07/06/2020	Matthew Heck	Sprint 6 updates
v2.3	06/12/2020	Matthew Heck	Sprint 5 updates and RSC
v2.2	05/14/2020	Matthew Heck, Annette Kamau	Add additional PD Tree tab info; various edits
v2.1	04/01/2020	Annette Kamau	Updated with RPS
v2.0	02/12/2019	Annette Kamau	
v1.0	11/17/2019	Annette Kamau	Updated with SME feedback.

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