2-way texting

Two way email

Need to be able to log calls with approvals, etc. for customers who don’t want texts and/or don’t respond.

Stand Alone or work within Fleet, IATC, or FIEE

Ability to print conversation history (with Header)

Retention requirements

Does it get attached to a customer record?

Accept

Sign

Attach Documents

Do inspections. Send inspections to customers

Must be able to toggle on/off data on inspection report to a customer viewable module. Customer module will be formatted (like the fuel log)

Integrate with work order status in business system. Send texts on status changes identified by customer – in process, complete.

Must use the text service that does not require an extension

Do I always have a work order?

Can the process start with the inspection and/or add?

Building in Fleet

All assets installed in Manage Assets (AEMP feed?).

Customers set up as contacts in Security Setup – customer table in EQUIP?

Customers are assigned to their assets

Does customer contact link in EQUIP? Based upon IATC, I don’t think so.

What is the order of inspection vs work order setup?

Give dealer the ability to auto-send request for approval when inspection is completed

Does the Work Order include contact information?

Work order pulls from business system and creates a work order in Fleet associating the business system Work Order.

Workflow includes, provide inspection, get sign off on proceeding or declining. If inspection is approved, update status in Fleet.

Maintain history like the PO Tool

Update status as work order status changes in EQUIP. Will probably need to make unique statuses per customer.

Customer info is on the customer work order. Serial number is tagged to customer.

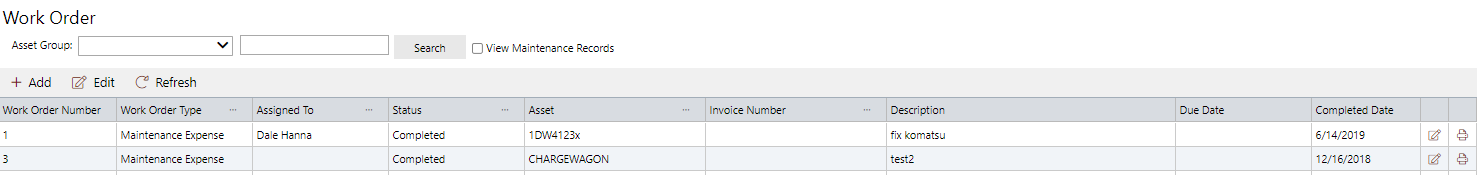
Don’t use contacts?

Beard does not want auto update

Work order is created in business system

FI pulls work order. Based upon asset in work order VIN, make, model and year are pulled from the asset information table (system dependent) and customer contact information, POC, POC email, POC phone and preferred contact method (if available).

Work order is placed in a Fleet Intelligence-type work order.



**Columns on screen – should have the ability to set Layout**

Work order number matches business system.

Work Order #

Contact Name

Contact Company

Contact Phone

Preferred Contact Method

Status

Creation Date

Last Communication Date

Follow Up Date

Assigned To

Advisor

WO Type: Field, Shop, etc.

Description

**Explanation of Columns**

Work Order Number – Manually Entered via +Add or pulled from business system. Manually entered begins with “M.”

Contact Name – Need to create a contact file. It should allow for an excel import.

* Contact will be linked to assets.
* There will be a many to one relationship assets to contacts.
* User will need ability to add and update contacts either permanently on the asset link level or on the work order level.
* If permanently editing. User should be asked if they would like to update all associated assets or just the one with the work order (if contact is associated with more than one).
* Must allow the option in email to Opt out. If selected, remove texting as an option.

Contact Company, Mobile Phone, Email Address, and Contact Preference should all be stored on the contact record. Would also like a Notes field for additional information.

Status – Customer Admins should be able to define their own statuses that will be used by the entire Company Site. This will be unique per customer. They will be things like, To Be Sheduled, Assigned, In Progress, Waiting on Parts, Etc. Will be assigned when the WO is created by the business system. After that, the changes will be manual. Allow statuses to have additional fields – like if you select Scheduled, choose date.

Creation Date – First pull time or when the work order was created in FI.

Last Communication Date – Last time a communication was logged for the customer (text, email, phone call logged).

Follow Up Date – Manually Entered. Ex – if a WO is delayed for Parts, when should the user check on it?

Assigned To: To be selected from a drop down list of technicans. This will be stored in the application.

Advisor – drop down list of advisors in application.

WO Type – Should be able to pull from business system.

Description – Should come over from Business System when Work Order is created. From there, it should be editable on main screen. Field should be displayed as large as the text, but be collapsible to 2 or 3 lines (for longer messages).

**Messages**

* Must allow for both internal messages (not to be shared with customers) and customer messages.
* All messages must be saved

Graphical user interface, chart, application

Description automatically generated

* Must be able to log calls and emails.
* Internal messages can just be typed in the short term.
* Screen must indicate that a work order has been updated even if they are not working on that particular work order. If user clicks on a note, they are taken to the work order the note applies to. Should be able to see either just my messages or all (user preference).

For Example:

Graphical user interface, text, application, chat or text message

Description automatically generated

**Inspection**

Customer only sees items that are identified as problems (not all questions are required).

There will need to be a customized letterhead.

Output can be texted to customer if they would like.

Can change an inspection so that it is not visible to customer.

Dealer will attach a file, spreadsheet, etc and dealer includes pricing and notes. Customer is sent to a link where they see this information and can sign.

Customer can reaccess from text even after work is completed.

Graphical user interface, application

Description automatically generated

**Use Case Workflow**

Work Order is Created

Work Order is uploaded

Work Order is displayed on Work Order Screen with Filters, Sorts and Layout Options.

Service Administrator (full access user) assigns work order and notifies customer via manually typed text. If information is not available on customer like name, email, phone number, contact preference, or the Service Administrator wants to change it, they can.

Work Order is now displayed in Assigned Technician Mobile APP. Fields related to Cost should be removed. Description will be pulled from the description field in this application. Notes will update internal notes in application.

Most communication between the technician is via phone or text that we don’t have to capture. Administrator will log what is needed.

Administrator schedules tech and texts customer. Message is customizable but is something like – Tech will be there at XXX.

Administrator can text any time. Message might be like – Beginning work, Tech is on the way, etc.

Once the Technician gets access to the asset, they do an inspection. Inspection gets associated with the work order and is attached as an attachment. There must be a customer facing version unless the inspection is marked as “internal.” The customer facing inspection will be like the “first page” of the current FI inspection and only show those items that have information entered. There needs to be a specific “letterhead.”

Service Administrator then prepares a quote that will contain an uploaded attachment (with the work that needs to be done).

Customer receives quote in text. They are linked to a place where they can view the inspection and the quote. There is a place to sign off (similar to signing our current inspections). Dealer has the ability to indicate that customer has approved quote in call as well.

Service Administrator is notified that the quote was signed and updates the work order status (if appropriate). Technician is told to begin work.

When technician begins, customer is notified via text message.

Customer is notified via call or text message when work is completed.

Service Administrator closes work order.