

Permanent Services Requests Process Guide

Introduction

Permanent Services are needed when a customer has a Compactor or Permanent Open Top Container at their site for the duration of their service contract. Unless the customer is on a preschedule, they must call/email Waste Harmonics Keter to request a haul. Customer Service manages these requests and schedules a haul with a vendor. This guide details the process of scheduling Permanent Services.

Responsibilities

- Customer: requests a haul.
- Customer Service (CS): manages the Case in NetSuite, scheduling the haul with a vendor and handling
 any issues.
- Vendor: confirms the PO when received and hauls the customer site.

Tools

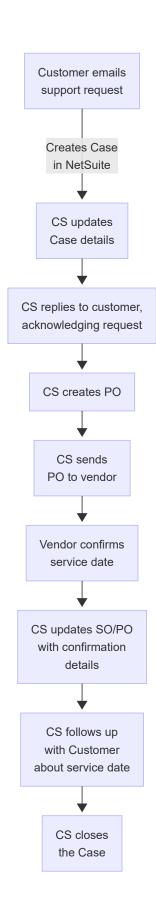
- NetSuite
- Outlook
- Desk phone

Standard Operating Procedure

- 1 The **customer** emails a request to their internal customer support email address. This creates a Case in NetSuite.
- CS updates the relevant Case details and replies to the customer, acknowledging their request

(Instruction).

- CS creates a PO (Instruction).
- CS sends the PO to the vendor (Instruction).
- The vendor confirms the service date.
- CS updates the PO with the vendor's confirmation details (Instruction).
- **CS** follows up with the **customer**, informing them of the expected service date.
- CS closes the Case (Instruction).



Checklist

Receive customer's request (creates Case)
Update Case & reply to customer
Create PO
Send PO to vendor
Vendor confirms service date
Update PO with vendor's confirmation
Follow up with customer with service date
Close the Case

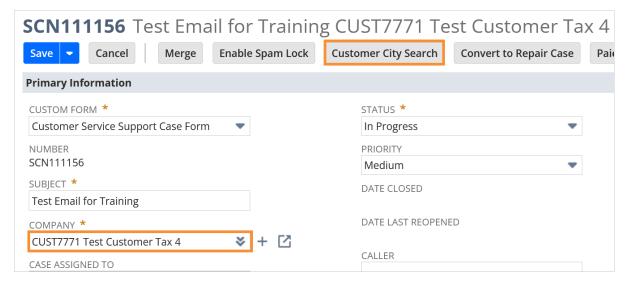


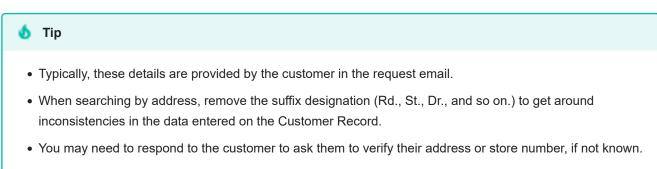
Scheduling Permanent Service from a Support Case

This guide details how to schedule a Permanent Service from a NetSuite Support Case.

Updating the Request Case

- Sign in to NetSuite.
- Grab the Case from your queue.
- Verify the customer by address or store number by entering the address into the Customer City Search tool.





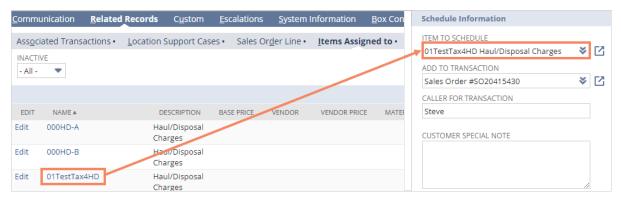
Update the **SUBJECT** line to the request type and requested day of service to the next business day unless otherwise specified.



- For **MAIN ISSUE** and **ISSUE DETAILS**, choose the most applicable options. See Support Case Main Issue/Issue Details Definitions for more information.
- Go to Communication. Respond to customers email advising receipt.



- Be sure to check that the service being requested isn't already on schedule. Go to Related Records > Sales Order Line and verify that there are no hauls already scheduled for the requested service date.
 - If there are, update the customer and close the case.
 - If not, then continue to the following steps.
- Go to Related Records > Item Assigned to. Locate Item Group Code.
- Copy Item Group Code. Paste in to ITEM TO SCHEDULE.



- Copy vendor number for the requested container. Paste it in CASE VENDOR.
- Go to Communication. Copy the time stamp of the original request. Paste it in CALLER DATE/TIME.

1 Update ADD TO TRANSACTION with the current month Sales Order #. You can find this under Related Records > Sales Order Line.



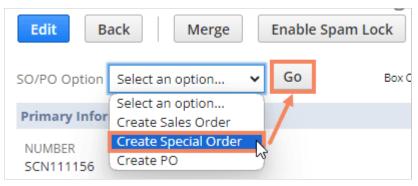
Update CALLER FOR TRANSACTION with the request name/phone #/Work Order #.



- Update SERVICE DATE FOR TRANSACTION to the next business day unless otherwise specified.
- Select Save.

Creating the PO

For **SO/PO Option**, choose **Create Special Order**. Select **Go**. The SO opens.





Info

This creates a Special Order. Special Orders refer to the NetSuite action of creating both a Sales Order and Purchase Order in one go. When you create a Special Order, it uses an existing Sales Order (or creates a new one should one not exist), and then it creates a linked Purchase Order.

Warning

Don't select more than once. That creates multiple purchase orders that need to be canceled.

- If creating a brand-new SO, select **Edit**. Update the **DATE** to the 1st of the month.
- Select Save.
- After saving, locate PO you created, which defaults to the bottom of the SO. Select the PO #.
- On the PO, select Edit.
- Update **DATE** to the next business day, unless otherwise specified.



🄥 Tip

Enter the current unformatted date (for example, 10172023). Press | Space |+ | Tab - | This autofills the formatted date and exact time.

- Update CALLER to necessary identifier (Email PO), WM portal, Gotjunk portal/ call in).
- Update the **PO CALL DATE** with current time and date.
- Select Save.

Sending the PO to the Vendor



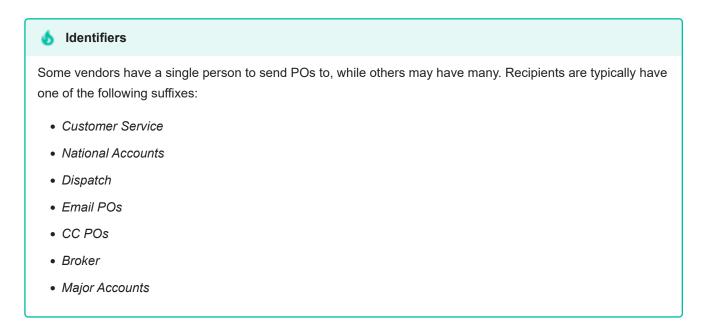
Important

Request Waste Management (vendor) services via the WM Portal, not by emailing the PO.

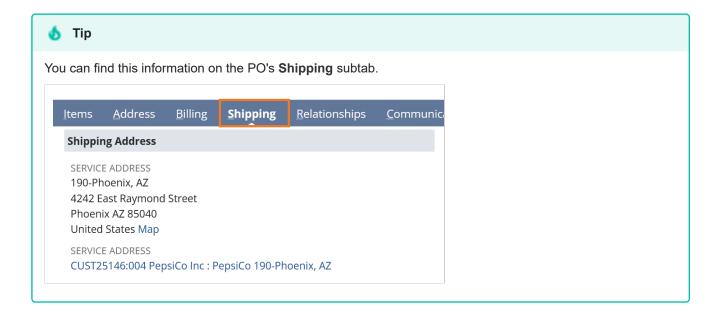
On the PO, hover over **Actions**. Select **Email**.



From RECIPIENT, select the necessary identifiers. Select all that apply.



- Go to Message. Remove everything from SUBJECT except for the PO #.
- Paste the name of location at beginning of SUBJECT line, along with container attributes (if applicable), request type, and service date.



- Write a MESSAGE requesting service. Include any applicable container attributes to help the vendor. End every message request with please confirm.
- o Go to **Attachments**. For **TYPE**, choose *PDF*. This attaches a PDF of the PO to the email for the vendor to review.
- Verify everything is correct.
- Select Merge & Send.

Confirming the PO

- 🚺 After sending the PO to the vendor's email, wait for them to respond with confirmation. You may have to send another email or call if they don't respond.
- If needed, call the vendor contact. Request the service and confirm the date of service.



You can find a contact number under the Contacts subtab on the Vendor Record (select the CASE VENDOR link on the Case to access).

After confirming with the vendor:

- Open the PO. Select Edit.
- Update the confirmation fields at the top:
 - Enter the CONFIRMED BY name of the vendor representative who confirmed the service.
 - Enter the PO CONFIRMED DATE.
- Update DATE to the date confirmed by the vendor.
 - If the date is different than requested by customer
 - 1. In the SO, under **Items**, update the **SERVICE DATE** for each line item receiving service to the date confirmed by the vendor.
 - 2. In the PO:
 - Under **Primary Information**, update the **DATE** field.
 - Under Items, update the SERVICE DATE field for each line item to the date confirmed by the vendor.
- Select Save.

Closing the Case

When you've completed all the steps necessary in the NetSuite Support Case, update the following:

- Return to the Support Case in NetSuite. Select Edit.
- Follow up with the customer. Inform them of the service date.
- Update STATUS to Closed.
- Update MAIN ISSUE, ISSUE DETAILS, and RESOLUTION with the most applicable options.
- Select Save.