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IFS FSM™ CORE PROCESSES

IFS ESSENTIALS COURSE – IFS FSM 6.0

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SENIOR BUSINESS SYSTEMS ANALYST

IFS ACADEMY





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AGENDA

FSM ESSENTIALS COURSE

01

FSM INTRODUCTION & SOLUTION OVERVIEW

02

FSM CORE ENTITIES

03

FSM CORE PROCESSES

04

BASIC CONFIGURATION AND MOBILE OVERVIEW





This is the agenda for the week’s course.
This morning is highlighted in the green box

AGENDA

01
INTRODUCTION
TO REVERSE
LOGISTICS AND
DEPOT REPAIR

02
REPAIR &
TASK
ASSIGNMENT

03
REPAIR
BOARD

04
REPAIR
COMPLETION





This is the agenda for the week’s course.
This morning is highlighted in the green box

AGENDA



01

INTRODUCTION

02

REPAIRS
INTRODUCTION

03

RETURN
REASONS

04

RMA CREATION

05

WRAP UP

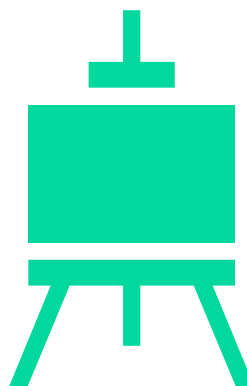


OUR TRAINING APPROACH

HOW WE LIKE TO DELIVER TRAINING

Learning Activities

Facilitator-led instruction
System Demos
Take home Exercises
Knowledge Tests



LEARNING ACTIVITIES

Facilitator-led Instruction

We try not to do too much of this, but it's inevitable that some of that we do during the course will involve me taking you through some slides and providing some information about how the system is structured, is designed to work and to show you how to configure the solution.

System Demos

Then, of course, we'll show you what this looks like in the system so that you can fully appreciate what we've been talking about

Hands-On

The most important part of what you'll do while you're here is get the opportunity to do some hands-on work in the training environment. This will always be a bit artificial compared to what you'll do back in the real world, but it's really important to have a go

Activities

These will be designed to give you a break from the screen and add a bit of fun!

Review sessions

This is where we'll aim to consolidate the learning that we've covered and make sure everyone has the basis they need to move on to the next steps

Knowledge Tests

Nothing heavy, just a little self-assessment so that you can check your learning progress and understand where your knowledge gaps are

LEARNING APPROACHES

Outcomes-based

For each lesson we'll set out, at the beginning, what we anticipate you'll be able to do by the end of the course – this means we're focused on what you'll be able to do with the training, not just on the training itself

Field service context-based

Field service is quite a distinctive business area and if you understand a bit about that context, it will really help you to appreciate what IFS customers are looking for when they implement this solution

Practically, functionally-based

We want to teach you things that are useful; whilst the code behind the scenes might be interesting to some, this course is about a practical, functional knowledge base that will allow you to implement the solution

Peer learning

There are people here from different backgrounds, with different experiences; if you get the opportunity to hear and share some of that, you'll find it makes the course more useful and more interesting

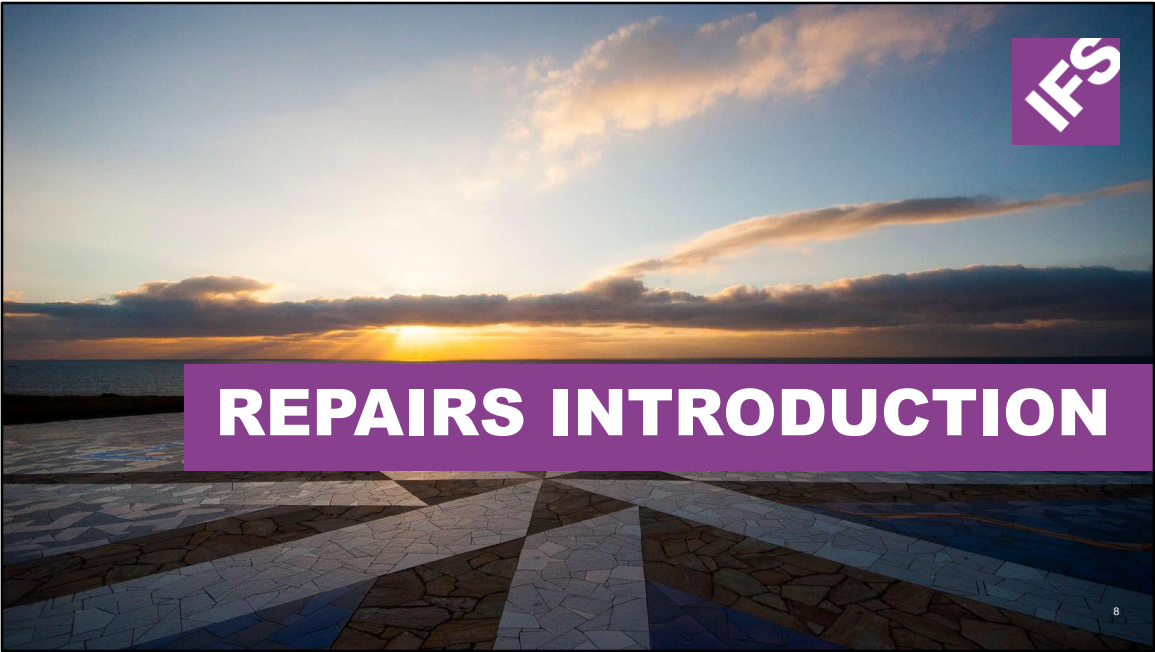
REPAIRS

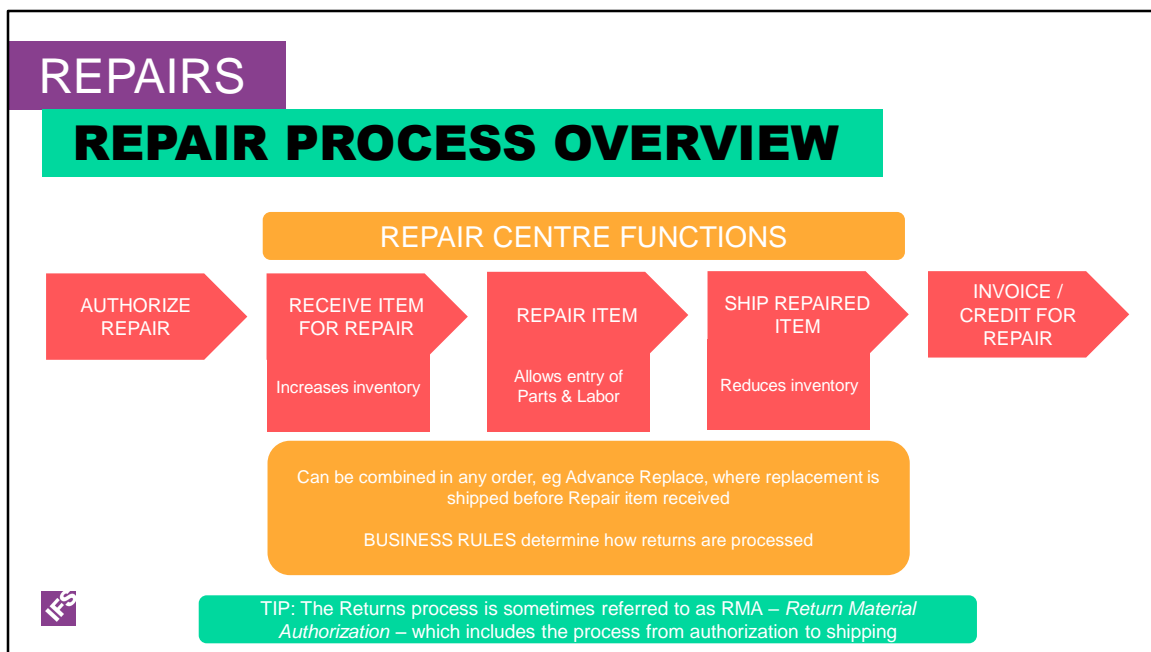
LEARNING OUTCOMES

By the end of this lesson, you should:

- Understand the concept of reverse logistics and depot repair
- Understand the basic Repair processes and when these will be used
- Understand the various Repair functions available in FSM







Depending on how you run your business, you can create an RMA either when the customer calls your depot or when you receive an item on your dock. An item can be either a part or a product. A unit is a single item. You can authorize individual units or quantities. Key events in an RMA's cycle—such as authorizing, receiving, picking, and shipping units—can be recorded in the request event log.

Authorization is required to begin the repair process.

Receiving increments inventory upon receiving the unit.

Repairing allows entry of Parts and Labor, movement of the unit through inventory, and indication that unit is ready to ship.

Shipping decrements inventory upon shipping the unit.

Billing is used to invoice and credit the repairs.

Repair Center supports three basic transactions: receiving, repairing, and shipping. You can combine these three transactions to support any repair center operation. For example, you can provide an Advance Replace transaction in which you ship a replacement before you receive, repair, and return the customer's damaged unit. Basic repair components consist of the different return reason/processes that are available. Once the RMA is created it then needs to be received into the repair centers stock, once received it depends on the return type what happens next which we will go through but majority of the time the unit is either repaired or swapped, unit is then shipped back to the customer.

As stated there is many different return types which drive what process will occur.

Business Rules determine HOW your business fits within the FSM application. These are some of the more significant business rules used within Repair Center.

Repair Center Place Rule assigns a place for repair center, shipping, and receiving.

Repair Center Turn-Around Time Rule assigns a default number of days turn-around time to a request line.

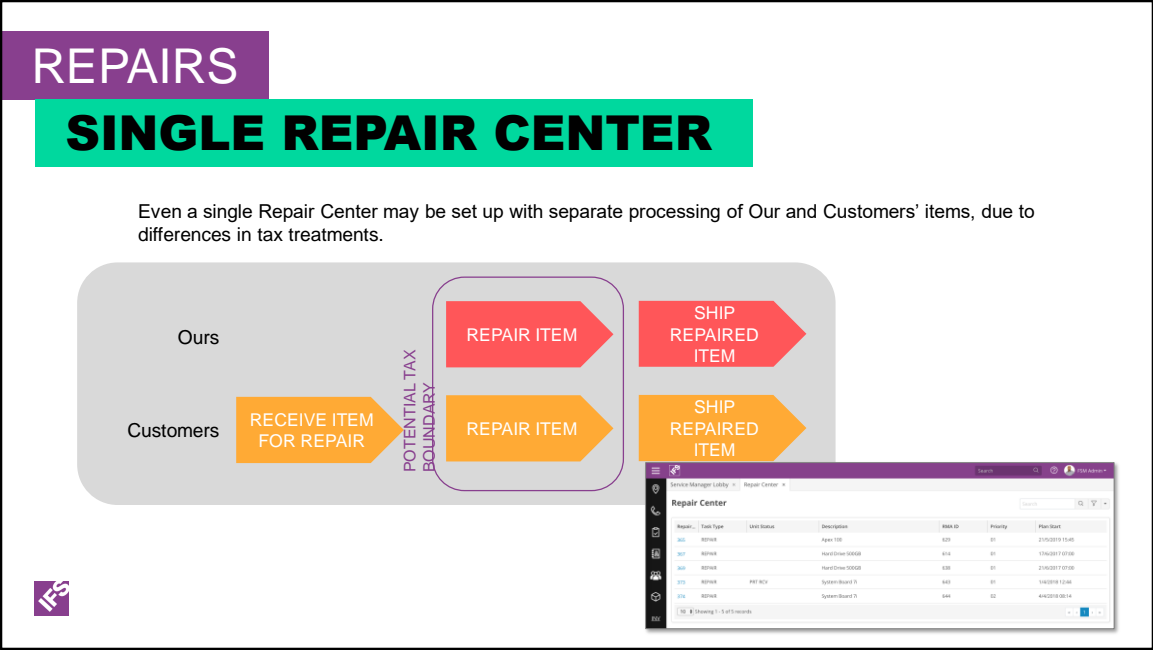
Service Warranty Generation applies warranty coverage to repaired parts or products.

Request Line Price Generation creates prices for request lines.

Repair Center Task Selection creates a task based on request unit information. Rules are evaluated when the **Assign** button is clicked on the Repair Center screen and evaluation stops after the first match.

Repair Center Return Reason sets the return reason on a request line.

Repair Center Location Rule sets a place and location to ship or receive repaired parts or products.

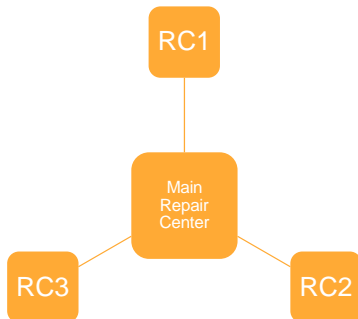


Repair Center is almost always involves inventory transactions. This diagram represents a single repair center operation. As you can tell there are a Receiving, Repair and Shipping areas – all stock transactions. Repair Center prefers to keep Customer (CUST) and Company (OURS) owned parts separated for taxation purposes hence the OURS vs CUST path thru the repair center. However, it is not a requirement. Also some customers tax the parts only within the 4 walls of the repair center whereby other customers do not. The application can be set up to do internal work orders (no shipping and receiving) to be done with the Repair Center.

REPAIRS

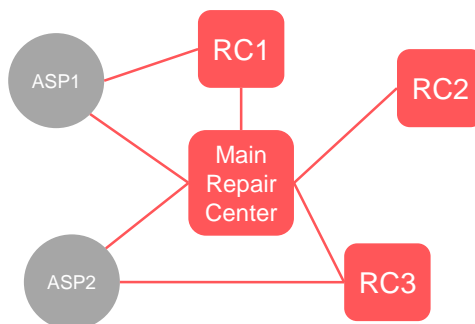
MULTIPLE REPAIR CENTER OPERATIONS

INTERNAL



TIP: Use the Place record to identify the owner of the Repair Center (Ours or Not Ours)

WITH ALTERNATIVE SERVICE PROVIDERS



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A multiple Repair Center (RC) operation would consist of the main RC with alternate or satellite RCs. These Alternate RCs or ARCs will be set up and using the FSM application. The application can be set up to have the parts shipped in transit so it can be received at the ARC and seen in the application. The **Whos_place** field on the Place record identifies the owner of the place (OURS or NOT OURS).

The **tat_in_hours** application parameter allows you to specify turn-around time in hours by setting the parameter to Y (yes). If you specify turn-around time in days, set the value of this parameter to N (no).

A multiple RC operation with ASPs would consist of the main RC with ARCs and ASP (alternate service providers / vendors). These ASPs do not use FSM application and purchase orders are created to receive in parts.

Using Repair Center you can:

Manage **3rd party repair** at depots other an your own.

Create a **Part disposition** RMA when a part is disposed or needs to be returned.

RMA Quotes are preliminary RMAs that contain estimated information to give customer an idea of how much the repair will cost.

Auto RMA is the creation of an RMA from service requests.

REPAIR CENTER & REVERSE LOGISTICS

ANY TYPE OF REPAIR

Regardless of repair

- Returns Tracking by Serial Number
- Manufacturing, OEM & Service Warranties
- Quotations, Repair Limits, Approvals
- Shop Floor Routing, Repair Templates
- Quality Assurance
- Component Repair
- 3rd Repair Handling
- Recall Management
- Repair Reporting & Analytics

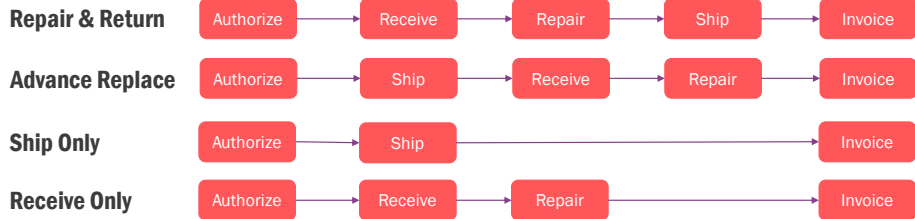


Create RMA via customer portal, FSM Smart-Client, Mobile Apps or via Inbound XML Message.



REPAIR CENTER

RETURN REASONS



- Loaner, Swap, Warranty Claim, Internal Work-order, DOA, (De-)Kitting, ECO Field Return
- RMA Created via Customer Portal, Mobile Apps, FSM Smart-Client or Inbound XML Message

Business Rules

- Turnaround Time
- Receiving Discrepancy
- Service Warranty

- Location to Receive
- Repair Center to Repair
- Resource Assignment

- Financials
- Repair Limits
- Consolidate Shipping



REPAIRS

USING PLACE RECORDS

The most common use of Place records for Repair Center are:

CUSTOMER SITES
Where service is delivered

WAREHOUSES
Where parts are stored

WORK SITES
Where employees work

Place Fields	Description as relevant to Repairs
Whose Place	Affects the process when the Place to Repair is not the same as the Place to Receive
Allow Products	Indicates whether Products are found at this Place
Stock Parts	Indicates whether Parts can be held at the location
Billing Place	Indicates whether bills can be sent to this Place, ie usually bills are not sent to a Warehouse
Calendar ID	Indicates opening hours; used to calculates turn around time and days due back
Currency	Flows down to any RMA that are created
Repair Center	Checkbox that indicates the Place is a Repair Center
Default Receive/Ship Location	Provides a default location for parts to be shipped to, or received from

While Places can be any physical or virtual site, for repair center, the most common uses are for:

- Customer Sites**, where service is performed,
- Warehouses** to store service parts, and
- Work sites**, where your employees work, such as a repair center, warehouse, call center, or headquarters.

There are fields on the place record that are significant to the repair process.

Whose Place determines whether the place belongs to your organization or to another organization such as a customer, supplier, third-party repair, and so forth. Used during the repair process to affect the process where the place to repair is not the place to receive—a place that is not ours is a third-party repair center and a purchase order is created to ship the unit instead of creating a transfer part need.

Allow Products determines whether products are found at this place. Products are generally not found at a billing place, for example.

Stock Parts is used to determine whether parts can be stocked at the location.

Billing Place determines whether billing is sent to this place. Billing is not sent to a warehouse, for example. If you attempt to bill a place that is not a billing place, vouchers cannot be posted to invoices and the vouchers are listed with an error status.

Calendar ID determines the hours that the place is open. This is used to calculate the turn around time and days due back.

Currency states what currency the place uses, this will also apply to any RMA that are created.

Repair Center checkbox that when checked means that the place is a repair center.

Default Receive Location is when receiving the parts shall default to the location that is added to this field.

Default Ship Location is when shipping the parts shall default to the location that is added to this field.

There are bins on the place record that are significant to Repair Center.

Locations and Bins if the place holds inventory.

Addresses can be associated by Type. Addresses are used with part needs and shipments.

Products are installed at your customer places or de-installed in inventory.

Global Name is a way to group places together with whom you have a “national,” “regional” or “organizational” relationship. Business rules can be set up using Global Name.

REPAIRS

USING PART RECORDS

Needed to indicate approved Alternate or Replacement parts for the Repair

Needed for Stock to be consumed during a Repair

Needed for use with Part-to-Product functionality

PART RECORD
AS RELEVANT TO
REPAIR CENTER

PART Fields & Tabs	Description as relevant to Repairs
Part-to-Product	Indicates whether the Part can be used a template for a Product record.
Serialized	Indicates whether a serial number must be provided in all stock movements
Controlled Part	Indicates whether a Part Disposition is required when the Part is uninstalled
Max Repair	Indicates the maximum number of times the part can be repaired before being scrapped
Bill of Materials	Template used to create Product Structures, Parts List, Kits and Component Repair

IFS

Part records are used to identify particular items that are sold to customers or used during service or repair. A part is the smallest unit of inventory and can be one item, a sub-assembly, or an assembly. Products are sometimes identified using a Part record so they can be tracked when sold. A part record needs to be created for inventory Stock records to be consumed during repair center operations. A part record needs to be created be used with part to product. The part-to-product option determines whether this part can be used as a template for a product record. If you are repairing this part, you must create a product record based on part information. A part record needs to be created to be an alternate parts which identify parts that can be manually substituted for the specified part. This is used during a part need process. A part record needs to be created to be a replacement parts which are automatically substituted for the specified part when the specified part is ordered after the effective date of the replacement and stock of the original part is zero. There are fields and tabs on the part record that significant to the repair process.

Part to Product determines whether this part can be used as a template for a product record. If you are repairing this part, you must create a product record based on part information.

Serialized determines whether a serial number must be identified for all inventory movements

Controlled Part determines whether a part disposition is entered when a part is deinstalled.

Max Repair identifies the maximum number of times a part can be repaired before it must be scrapped. This is visible in the repair center screen when the tech is working on the unit.

Bill of Materials is the template used to create product structures for products based on this model, a parts list for servicing products, creating kits, and component repair.

REPAIRS

RETURN REASONS

All RMAs have process codes, return reasons and business rules applied.

Activities in the Repair Center are classified by return reason on the request line.

Process Type are FSM Codes that cannot be changed, but have to be assigned to create a Return process (eg Swap, Repair & Return, Receive Only etc). This determines how receiving, shipping and serial number tracking are handled

The screenshot shows the IFS ADVR (Advance Replace) form. The form is divided into several sections. On the left, there is a section for Return Reason (ADVR), Description (Advance Replace), Process Code (Advance Replace), and Return Type (ADVANCE REPLACE). In the center, there are fields for Under Warranty (Verify), Priority, Status Condition, and Expedite Path. On the right, there are checkboxes for Active, Count As Failure, Post To Usable Stock, and Require Serials, along with a Sequence field. At the bottom right, there are checkboxes for Allow Credit, Allow Invoice, Install Product, and Deinstall Product, and a Message ID field.



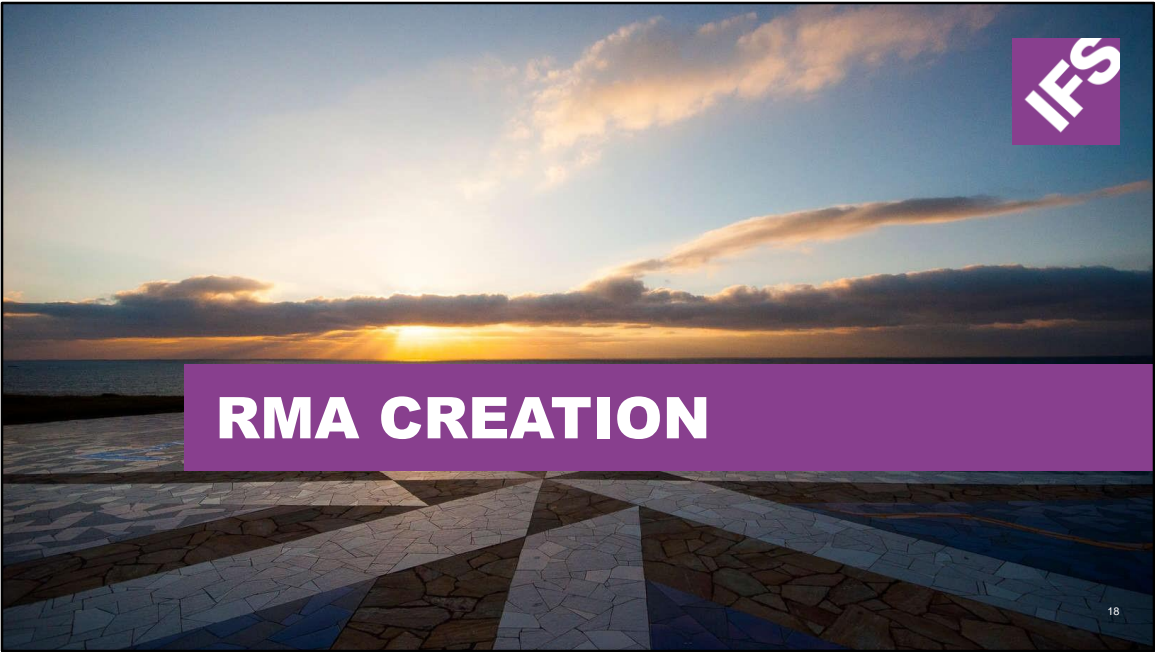
All RMAs have process codes, return reasons and business rules applied. In this lesson we will look at process codes and return reasons.

Happenings in the repair center are classified on a request line by return reason. The return reason is the visual indicator for the return process. The return process and the process type is what is allowed by the system.

Process type are FSM Codes that can not be changed (i.e., Swap, Repair and Return, Advance Replace, Internal Work Order, Ship Only, Receive Only, Loan) but have to be assigned to create a return process.

The process type on the **Return Process** record determines how receiving, shipping, and serial number tracking is handled, but also states if Serials are required, if it is invoiceable, Install, Deinstall etc.

When a request line is created, all the corresponding process type, return type, return reason and business rules get applied to the line. The user is allowed to change any of the values for this request line only. Also, if any process type, return type, return reason and business rules change, new RMAs will be affected, not existing RMAs.



REPAIRS

RMA HEADER

When creating a new RMA, some fields are provided by default.

Service Manager Lobby x RMA x

Search

FSM Admin

638

RMA ID: 638

Customer: A100

Name: Aero Corp

Address ID: 121

Address: 2513 Plaza Ct Waukesha, WI 53186

Description: Repair failed disk drive

RMA Type: Repair

Status: Open

Priority: High

Category: Current Customer

Action:

Group:

Due:

Plan Ship:

Owner: ADMIN

Issued By: MX CORP

Bill To: A100

Ship To: A100

Defaults from Place record

Defaults from Person record



Create a **Part disposition** RMA when a part is disposed or needs to be returned.

RMA Quotes are preliminary RMAs that contain estimated information to give customer an idea of how much the repair will cost.

Auto RMA is the creation of an RMA from service requests.

Now that we have the setup of the necessary records, we are able to create the RMA. Upon creation of the RMA, certain fields default. For example, from the Person logged in, the Owner and the Issue By. The “Issue By” is the place_person relationship of Works From Place. The Place record will default the Address (to be used on the part need), the Bill To and the Ship To. The “Bill To” and “Ship To” are from the place_place relationship.

REPAIRS

RMA LINE

Next, the RMA lines are required. Lines specify the quantities of items on the RMA.

1

Return Reason – indicates why the item is in the Repair Center

2

Item to Receive and Item to Ship fields can be populated from the Return Reason business rule (process ID 110)

3

Receive to Place and Ship from Place can be populated from the Repair Center Place rule (process ID 20)

Details

Lines 1

Contacts 1

Notes

Parts and Labor

Purchase Orders

Events 2

Attachments

Commitments 1

Escalations

Pa >

Details

Line

Return Reason

Item To Receive

Receive To Place

Item To Ship

Ship From Place

Quantity

8

Repair and Return

HD500

MX REPAIR

HD500

MX REPAIR

1.000

10

Showing 1 - 1 of 1 records

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TIP: If the Return Reason is Ship Only or Advance Replace, a Part Need is created

Once we have the header of the RMA populated, we need to add the lines. First, select the Return Reason. The return reason is WHY will this item be in your repair center. The Item to Receive and the Item to Ship fields can be manually entered or automatically populated based on values on the Return Reason business rule (process ID 110). The Repair Center Place rule (process ID 20) can populate the Receive To Place and the Ship From Place. We will discuss business rules in a later lesson.

Request Lines are the quantity of part/models to be returned are listed on the RMA as request lines. Each line has one or more of the same kind of unit, whether model or part. The quantity to be returned is specified on the line. **Request Units** are specified if parts are serialized. Then a unit per serial needs to be created. While you can enter serial numbers at authorization, we recommend that you enter them during receipt. Normally when a serial is authorized it is for a Loan or a Repair and Return transaction. If the serial ID is entered at authorization, it is visible in the receiving screen which may or may not be helpful to your receiving personnel. If this is a ship only or advanced replace RMA, a part need is created and values from the return reason, return process and business rules will apply to the line.

REPAIRS

RMA POPUPS AT CREATION

Open Requests

Open Requests

Request ID	Description	First Name	Last Name	Product ID	Model ID	Serial ID	Created	Created By	Modified	Modified By
1927				760	APEX100	20170508-01	5/8/2017 4:37 AM	ANVEDE	5/8/2017 6:00 AM	ANVEDE
1901							4/27/2017 3:32 PM	VVY	4/27/2017 3:33 PM	VVY
1900	f	Charlie	Weller	10014	DP21	89810155	4/26/2017 2:41 AM	CMCINTOSH	4/26/2017 2:42 AM	CMCINTOSH
1878	testing						4/19/2017 11:01 AM	TECH01	4/19/2017 11:01 AM	TECH01
1873	For service TED			414	APEX100	AP001	4/19/2017 7:50 AM	DITEDE	4/19/2017 7:53 AM	DITEDE

Contract Information

SystemTest - Contract Selection

Place ID	A100	Model ID	Product ID	Serial ID	
Active Contracts					
ID	VER	TYPE	START DATE	END DATE	COVG TYPE
101166	1	EXTEND BASIC COVERAGE	10/1/2011	9/30/2018	PLACE



All Repair Center processes begins with the authorization or creation of the RMA. Similar to the field request, several popups may appear. If there are more than one open RMA or request, you may get the Open Request popup as you identify the place ID. Likewise, if there is a place contract for the customer, you may receive a popup identifying the contract. This popup will also occur if there is a contract for the product you selected. If you click "OK" then contract details will be applied to the request.

These are some of the more significant application parameters used regarding popups at RMA creation.

Display_open_requests_for_place determines whether an alert appears with all open requests for the specified place when a place ID is entered on a new request. Values are Y (yes) and N (no).

Set **contract_types_to_exclude** value to the contract types for which corresponding contracts do not appear in the Contract Selection window.

Set **display_active_contracts** if you want active, posted contracts to appear on contract selection screens.

Default_req_contr_type identifies the default contract type on the Details tab of the Request screen for new requests. Values are defined on the Contract Type screen. Does not apply to preventative maintenance or engineering change order requests.

REPAIRS

RMA POPUPS AT CREATION

When the RMA is created, pop-ups may appear to alert the user to related information within FSM.

OPEN REQUESTS –
Indicates existing requests for the same Place ID which have not yet been closed

CONTRACTS –
Identifies contracts related to the Product selected

Open Requests

Place A100 has the following open requests:

Request ID	Description	First Name	Last Name	Product ID	Model ID	Serial ID	Created	Created By	Modified	Modified By
1927				760	APEX100	20170508-01	5/8/2017 4:37 AM	ANVEDE	5/8/2017 6:00 AM	ANVEDE
1901							4/27/2017 3:32 PM	VIV	4/27/2017 3:33 PM	VIV
1900	f	Charlie	Weller	10014	DP21	89810155	4/26/2017 3:41 AM	CMCINTOSH	4/26/2017 2:42 AM	CMCINTOSH
1878	testing						4/19/2017 11:01 AM	TECH01	4/19/2017 11:01 AM	TECH01
1873	For service TED	Fred	Taylor	414	APEX100	AP001	4/19/2017 7:50 AM	DITEDE	4/19/2017 7:53 AM	DITEDE

SystemTest - Contract Selection

Place ID	A100	Model ID	Product ID	Serial ID	
Active Contracts					
ID	VER	TYPE	START DATE	END DATE	COVG TYPE
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BASIC CONFIGURATION AND MOBILE OVERVIEW





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INTRODUCTION
TO REPAIR TASK
AND
ASSIGNMENT

02
REPAIR BOARD
FUNCTIONS

03
REPAIR
COMPLETION
PROCESS

04
WRAP UP &
DEMO



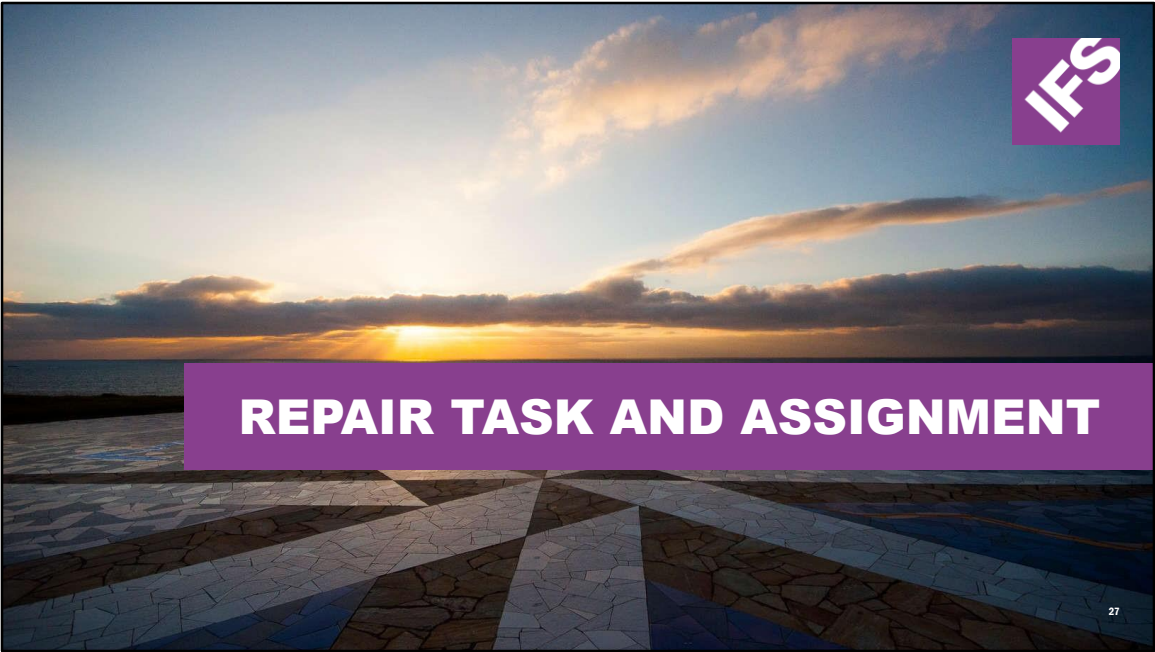
REPAIR TASK AND ASSIGNMENT

LESSON OBJECTIVES

By the end of this lesson, you should:

- Understand Repair Tasks and the differences between Tasks and Repair Tasks
- Be able to configure Repair Tasks in FSM
- Understand usage, setting and control of repair board
- Understand the Repair Completion functions and important steps





REPAIR TASK AND ASSIGNMENT

SETTING UP TECHS FOR REPAIR TASKS

1

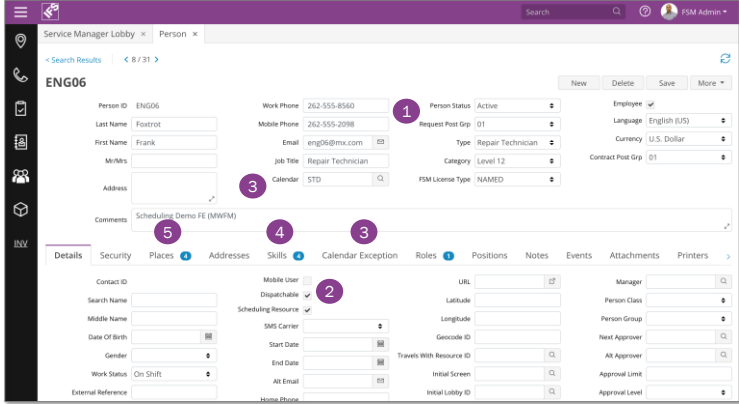
Status – determines whether Person is Active, Virtual or Inactive

2

Dispatchable – determines whether Person can be assigned Repair Tasks

3

Calendar – specifies working hours and exceptions



4

Skills – compared with skills required for the Product and Place

5

Places – indicates the default Place for the Person: required for Repair Board

On the Person record, we will need to populate the following fields for the Bench Technicians:

Status determines if the person is Active (Actual Application users, Actual Mobile users), Virtual (Portal users, Subcontractors, Integrations) or Inactive (No longer current users). If our technician is employed by our company and we want him to log into the application, we will want to make his Status = Active. If we have subcontractors whose work we want to record but they do not log into the application, set the Status = Virtual.

Dispatchable determines whether the person can be assigned tasks using the Repair Board. For notifications, either an email or mobile phone number needs to be populated.

Work Calendar are used to specify working hours and exceptions for persons or places.

The **Skill** tab includes skills and certifications associated with the person. These skills are used during work assignment to compare with the skills specified on the Product record and the Place record. For example, a product might require a certain type of certifications where a place might require proficiency in a certain language.

The **Place** relationship tab includes associated places by type of relationship. For example, the Works from place identifies default place for a person. This is required by Repair Board.

Place for stock identifies the default location of stock for service representatives. This is used with Tasks and Portals. Populating this field provides the technician with fewer keystrokes when creating part needs and part usage but also helps prevent typing errors.

TASK AND ASSIGNMENT

TASK TEMPLATE

- Use business rules to automatically select pre-populated tasks with default information
- Optional, but can speed up processing of repeatable tasks
- Task Template Groups put task templates into a hierarchy

STEP ID	STEP ORD	NAME	STEP TEXT	MODEL ID	TYPE	REQUIRED	ACTIVE
1378	1	Verify site stability	Verify site stability				
1379	2	Install DP17	Install DP17				
1380	3	Run diagnostics to ensure proper configuration	Run diagnostics to ensure proper configuration				

To facilitate the creation of tasks we will want to set up Task Templates. Tasks are normally created using task templates to default information. Task Template records are optional—they need not be set up. However, task templates enable you to use business rules for automatic task selection and succession as a request is assigned and completed. If you choose not to use task templates, all task information is entered manually. Task templates are most useful when multiple requests are received for the same services.

Task templates must be created to default certain information on the task, which are required by the **Task Selection rule (process 01)**. Rules are evaluated when the **Assign** button is clicked on the Request screen or the Task screen or preventative maintenance requests are generated and no task template was specified. You set up task templates for the types of work your organization usually performs. You can set up templates in hierarchical lists by using the Task Template Group screen. Task templates are found under the Service, Admin, Task Template menu item. Make sure that all the codes you want to select on the Task Template are first set up in the Global or Code tables.

Assignment is the process of assigning a team and optionally a person to a task. The **Work Assignment rule (process 04)** is used to perform assignment. Skill information assists you in selecting the appropriate person. Skills are specified on the Person record, the Place record, and the Model record. Skill levels are compared and the percentage match appears as a score on the Task Assign window. Persons appear sorted by score from highest to lowest. If you specify a value for the **appt_min_skill_score** application parameter, a person with a score lower than the specified minimum does not appear.

When adding part needs to a task template, you need to make sure that the part has a stocking location and available stock. Part needs are created without specifying place, location, or address values. Part needs have an entered and unallocated status until these attributes are specified, after which the part needs can be allocated, picked, and shipped. These status values can be assigned using business rules.

Task Steps of a task which a person/technician have to perform before the Task is completed. For example, a technician may have to do a pre-inspection of the unit before the service is performed, perform the service, then post-inspection of the unit after the service is performed. Note, on the Steps screen, you can see all the task templates that have those Steps. There are significant fields within Task Template screen. This screen is used to specify default information that is applied to a new RMA.

Task Duration Minutes determines the default task duration. When a value is specified for the **Team ID** field, work delegation rules are ignored and the task is assigned to the specified team.

REPAIR TASK AND ASSIGNMENT

ASSIGNING THE TECHNICIAN

Assign Button

MS700JA (MK3PDL40) - Task Assign

Template: BREAK FIX

Priority:

Type: Break Fix

Group: Field Service

Technician:

Team:

Description: A/C Unit stopped working

Status: Open

Plan Start:

Duration: 60

Plan End:

Ignore Skills: ☒

TECHNICIAN

TEAM

PLAN START

DURATION

PLAN END

SCORE

DISTANCE

EARLIEST START

LATEST START

TECH400	AVENGERS	6/7/2017 7:00 AM	60	6/7/2017 8:00 AM	100		6/7/2017 6:00 AM	6/7/2017 8:00 AM
RVTMMI	AVENGERS	6/7/2017 8:00 AM	60	6/7/2017 9:00 AM	100	961.81	6/7/2017 8:00 AM	6/7/2017 10:00 AM
ADMIN		6/7/2017 8:00 AM	60	6/7/2017 9:00 AM	100	967.30	6/7/2017 8:00 AM	6/7/2017 10:00 AM
RVTMMI	AVENGERS	6/7/2017 10:00 AM	60	6/7/2017 11:00 AM	100	961.81	6/7/2017 10:00 AM	6/7/2017 12:00 PM
ADMIN		6/7/2017 10:00 AM	60	6/7/2017 11:00 AM	100	967.30	6/7/2017 10:00 AM	6/7/2017 12:00 PM
RVTMMI	AVENGERS	6/7/2017 12:00 PM	60	6/7/2017 1:00 PM	100	961.81	6/7/2017 12:00 PM	6/7/2017 2:00 PM
ADMIN		6/7/2017 12:00 PM	60	6/7/2017 1:00 PM	100	967.30	6/7/2017 12:00 PM	6/7/2017 2:00 PM
RVTMMI	AVENGERS	6/7/2017 2:00 PM	60	6/7/2017 3:00 PM	100	961.81	6/7/2017 2:00 PM	6/7/2017 4:00 PM
ADMIN		6/7/2017 2:00 PM	60	6/7/2017 3:00 PM	100	967.30	6/7/2017 2:00 PM	6/7/2017 4:00 PM
RVTMMI	AVENGERS	6/7/2017 4:00 PM	60	6/7/2017 5:00 PM	100	961.81	6/7/2017 4:00 PM	6/7/2017 6:00 PM
ADMIN		6/7/2017 4:00 PM	60	6/7/2017 5:00 PM	100	967.30	6/7/2017 4:00 PM	6/7/2017 6:00 PM
TECH400	AVENGERS	6/8/2017 7:00 AM	60	6/8/2017 8:00 AM	100		6/8/2017 6:00 AM	6/8/2017 8:00 AM

Now it is time to assign the task. Assign button is located on the Repair Center screen. Assigning is the process to create tasks, schedule and perform skill calculations on who should do the work.

The Left panel is driven by Task Selection rules.

The Right panel is driven by Work Assignment rules. We will discuss the set up of the Task Selection and Work Assignment rules in a later course.

Creates a task using task templates The left panel of the assign window is where the task creation process can be triggered using task templates. The task selection business rule can default the task template ID.

The **Work Assignment** business rule can be used to predetermine which team and/or person can do the work. The result of the available people will be visible in the right panel of the assign window.

Skills Calculated Skill information assists you in selecting the appropriate person. Skills are specified on the Person record, the Place record, and the Model record. Skill levels are compared and the percentage match appears as a score on the Task Assign window. Persons appear sorted by score from highest to lowest. If you specify a value for the appt_min_skill_score application parameter, a person with a score lower than the specified minimum does not appear.

Work Calendar/Rosters Calculated The work calendar assigned to the person determines the person’s working hours. Any calendar exceptions are considered non-working hours unless the available indicator is selected. A person status of active and a selected dispatchable option determine that a person can be assigned to a task. If a Roster record is active for a team/person the shifts in the roster shall be used instead of the work calendar assigned to the person.

REPAIR TASK AND ASSIGNMENT

REPAIR TASKS VS TASKS

The process and set up for creating Repair Tasks is very similar to Tasks linked to a Service Request. The main differences between the two activity types are:

Repair Unit

A Repair Task always has an associated repair unit, ie the item to be repaired.

Repair Tag ID

A Repair Task also has a Repair Tag ID to associate the Task with the unit. A Repair Tag ID may have multiple associated tasks and is attached to the item that requires repair.

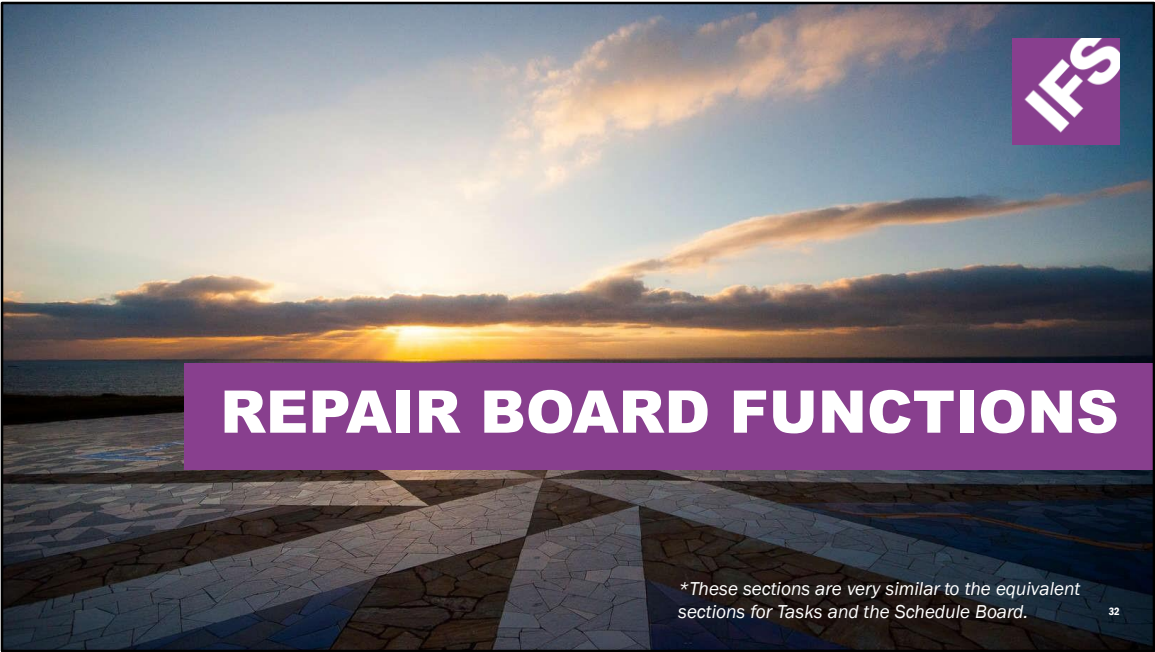
The screenshot shows the IFS Service Manager interface for creating a Repair Task. The form is titled 'Repair Center' and includes a search bar at the top. The main form area contains several fields: 'Repair Tag' (365), 'Task ID' (275), 'Product ID' (479), 'Model' (APEX100), 'Part ID' (APEX100), 'Description' (Apex 100), 'Qty' (1.00000), 'Unit Status' (Open), 'Days Open', 'RMA ID' (629), 'RMA Line' (6), 'Plan Start' (21/5/2019 15:45), 'Task Type' (Repair), 'Owner' (TECH02), 'Team' (MIDWEST), 'Duration' (30), 'In Transit' (Place), 'Location' (RECEIVE), 'Contract ID' (101166), and 'Plan End' (21/5/2019 16:15). Red boxes highlight the 'Repair Tag' and 'Task ID' fields.

Repair task creation and assignment is the process used to create at least one task for a new request unit and assign it to a person who performs the work. A request unit is the item you have received for repair. When the request unit is received, a repair tag ID is entered. You use the repair tag ID to find and track the tasks that are created for repair. Repair tags are frequently affixed to the unit for tracking purposes. Repair tasks are similar to tasks on service requests, with the following differences:

- Repair tasks are always associated with a repair unit
- Repair tasks have a repair tag ID to identify them with a repair unit at a particular point in time. For example, you may repair the same unit multiple times, but each repair instance has a different repair tag ID. You can use the Request Unit Default Repair Tag Value rule (process 75) to automatically fill the repair tag ID when the unit is received.

Using Repair Tasks you can:

- Determine team or person being scheduled.
- Duration is defaulted by template but can be overridden.
- Business rules will be processed based on type of tasks.



REPAIR BOARD FUNCTIONS

**These sections are very similar to the equivalent sections for Tasks and the Schedule Board.*

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REPAIR BOARD

REPAIR BOARD FEATURES

Assign Tasks

Display

Filters

Color Coding

15 - 21 May 2017

Team ID: REPAIR

Legend

Global Name:

Project ID:

Refresh

Go

Timeline

Day

Week

Month

Monday 5/15/2017

6:00 AM

8:00 AM

10:00 AM

12:00 PM

2:00 PM

4:00 PM

PWMOBILE (Weheragoda)

REPAIR01 (Mike)

REPAIR02 (Brad)

REPAIR03 (Gary)

REPAIR04 (Dana)

Clear

Search

Show

REPAIR TAK	TYPE	UNIT	STATUS	DESCRIPTION	RMA ID	PRIORITY	PLAN START	STATUS	PLAN SHIP
383	Repair			Product Repai	656	01	3/24/2017 5:51 AM	Open	3/31/2017 5:50 AM
566	Service				1081	03	3/28/2017 8:41 AM	Open	4/4/2017 8:37 AM
826	Repair			Product Repai	1352		3/28/2017 1:08 PM	Open	4/4/2017 1:07 PM
839	Repair	RDY		Product Repai	1392		3/28/2017 1:45 PM	Open	4/4/2017 1:43 PM

The **Repair Board** is a **graphic view** of the current assignments and to assign tasks to team members. You typically perform this procedure when managing multiple bench techs or when tasks must be assigned to a specific technician instead of anyone on the team. The view is persons by team and sub-team across multiple time zones, always appearing in local time zone. Local means call taker's time zone. For example, if you dispatch in the Central time zone and technicians and employees in all time zones use the 8:00 a.m. to 5:00 p.m. work calendar, your technicians in the Eastern time zone appear to you to work from 7:00 a.m. to 4:00 p.m. If a place in the Mountain time zone is open from 10:00 a.m. to 6:00 p.m., its availability appears to you as 11:00 a.m. to 7:00 p.m. If a task was manually assigned, the Repair Board can be used to reassign or unassign tasks. If the appropriate business rules are set up, events and notification messages are created. Assigned tasks can be **viewed** on a calendar by month, week, day or timeline. You can drag and drop single or multiple tasks to assign/re-assign.

The display is **grouped** by person, place or task and accommodates
You can use global name **filters** to view only tasks for places associated with specific global name
You can use **color coding** for easy identification. Color coding is under Admin, Color Settings menu item. You can customize most colors on Repair Board using color settings.
If you use **rosters**, the work times specified on the roster are used instead of work calendars.
There are business rules that are significant to the Repair Board.

Task Event Generation process creates task events. Rules are evaluated after specified information is inserted or updated on the database and all rules are evaluated.

Task Event Notification process creates notifications based on task events. Rules are evaluated after specified information is inserted on the database and all rules are evaluated with all matching values returned.

Person Event Generation process creates person events. Rules are evaluated after specified information is inserted or updated on the database and all rules are evaluated.

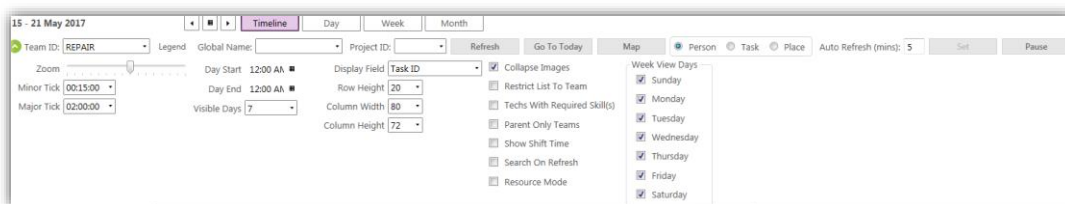
REPAIR BOARD

REPAIR BOARD VIEWS

View Options

Teams

Ticks



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At the top of the Repair Board, the following fields and options determine how Repair Board appears. To view all fields and options, click the orange toggle. Settings are retained between sessions.

View buttons by selecting one of **Timeline**, **Day**, **Week**, or **Month** changes the timeline or calendar view that appears below.

Team ID field enables you select the team and related sub-teams that appears. You can select more than one team. The application parameter, REPAIR_BOARD_TEAM_CATEGORY, identifies the team categories used to filter the teams that appear on Repair Board. Values are defined on the team_category code table. Multiple values can be specified and must be separated by commas without spaces. When a value is not specified, all teams appear.

Global Name field enables you to filter tasks by global name.

Project ID field enables you to filter tasks by project ID.

Refresh button enables you to refresh now instead of waiting for automatic refresh.

Go To Today button enables you to easily reposition timeline or calendar to today's date and current time.

Map button enables you to view a map of task locations and optionally person locations when using GPS-enabled devices.

Person, Task, and Place options enable you to group resources by the corresponding records.

Collapse Images option enables you to view or hide images such as pictures on Person records.

Restrict List to Teams option enables you to restrict search results to the specified teams.

Parent Only Teams option enables you to restrict search results to parent teams only.

Auto Refresh enables you to set the automatic refresh interval in minutes; the **Pause** button temporarily stops automatic refresh.

Zoom control enables you to expand timeline or calendar views to see time periods in greater detail.

Major Tick determines the major divisions that appear in the header, for example one day; **Minor Tick** determines the minor divisions that occur in time, for example 15 minutes. Task boundaries are on the minor tick, for example a task can start on the hour, or 15, 30, or 45 minutes past the hour. These settings are unique to timeline and each calendar view.

Day Start and Day End determine the times that are shown on the timeline and calendars. **Visible Days** determines the number of days that appear. These settings are common to all views.

Display Field enables you to determine what information appears on a task card: task ID, address name, global name, repair tag, request ID, or place name. You can select one or two items. This setting is common to all views.

Row Height field enables you to set the height of the row in timeline view. The height is specified in pixels.

Column Width field enables you to set the width of rows in day view and week view. The width is specified in pixels. **Column Height** field enables you to set the height of rows in day view and week view. The height is specified in pixels.

Parent Only Teams option enables you to select only parent teams instead of parent teams and sub-teams. This setting is common to all views.

Show Shift Time option enables you to select whether to show the shift times in the shift time blocks. This setting applies to all views.

REPAIR BOARD

HOW REPAIR BOARD IS USED - PERSON

View routes, tasks and person details

Update tasks

Update person information

Send SMS/Email

REPAIR01 (Mike)

REPAIR02 (Brad)

REPAIR03 (Gary)

REPAIR04 (Dana)

Person ID: REPAIR01
First Name: Mike
Last Name: Smith
Job Title: Repair Tech
Phone: 262-717-5550
Home Phone:
Mobile Phone:
Status As Of:
Work Status: On Shift
Email: msmith@mx.com

Bob Collins (TEC)
Carson Matthew
Molly North (TE)
Trelon House (T)
QUINN MALLO

Send Email To: tech03@mx.com
SMS Text: 414-555-7771
Skype: bobcollins

Change Work Status

On Shift
Off Shift
On Break
Off Break

Add Calendar Exception

Clear

Search

Show

Assign

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If you hover over a person, the Person Cards will appear with person information. If you double click on the Person, you will be taken to the Person record.

You can perform the following on persons:

- Send messages such as email, SMS or Skype to the technician.
- Change status option enables you to change the status of the person.
- Add calendar exceptions enables you to add a work calendar exception for the person.

There are application parameters significant to Repair Board.

Set **schedule_board_person_display_format** value to a value that identifies how you want a person's name to appear on the Repair Board. Values are 1 (person ID), 2 (first, last), 3 (first, last, person ID in parentheses), 4 (last, first), 5 (last, first, person ID in parentheses), and 6 (person ID, first in parentheses).

Set **schedule_board_person_tooltip_duration** value to the number of seconds that a person card appears when hovering on the person's name on the Repair Board.

Show_place_cal_except for an alert to appear when assigning a task for a place with a restricted calendar or the person has a work calendar exception that prevents assignment, set this value to Y (yes).

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REPAIR BOARD

USING THE REPAIR BOARD: TASK

REPAIR TASK FUNCTIONS VIA SCHEDULE BOARD:

- Reassign Task
- Unassign Task
- Change planned start date
- Assign Additional Resource
- Change Repair Task status
- Show ECO or PM Tasks in same Place



The screenshot displays a task card for Task ID: 1106, Type: Repair, Status: Open. It includes details such as Plan Start/End, Duration, Model #, Place ID, Place Name, Address, City, Request ID, Description, Customer Plan Start/End, Repair Tag, Project ID, Owner, Team, State/Prov, and ZIP Code. A right-click context menu is open over the task card, listing the following options: Change Status, Re-Assign Task, Unassign Task, Assign Additional Resource, Change Date, and Show.

If you hover over a task, the Task Cards will appear with task information. They identify the tasks that are assigned to a team member using colors you specify. If you hover on the task card using your mouse pointer, information about the task appears. If travel time is specified on the task, the outline of the task card is extended to include the travel time. By right-clicking on a task card, you can view the route on a map from the previous task to the specified task. There several ways methods to assign or re-assign task or to move tasks.

You can **drag and drop** to assign, re-assign or move tasks. Tasks can be assigned to any team member, regardless of the team to which the task is currently assigned. To work with one team at a time, collapse all other teams on the Repair Board and filter the task list. If an alert appears, you must assign the task at another date or time.

You can perform the following to tasks by using the **right click menu on the task**:

Reassign a task to a different person (runs Work Assignment rule- process 04).

The Unassign option enables you to remove a person as task owner.

Change the date and time option enables you to change the planned start date.

The Assign Additional Resource option enables you to add a resource to the task.

Change task status of the task.

The Show option enables you to show ECO or PM tasks for that place that could be assigned with the specified task.

If you **double click on the task**, you are taken to the Task Modify screen where you can assign, re-assign or move tasks.

There are application parameters significant to Repair Board.

Allow_parallel_tasks to allow multiple, overlapping tasks, set this value to Y (yes). If this value is N (no), an error occurs when a parallel task is assigned using Repair Board or a task is edited or assigned manually.

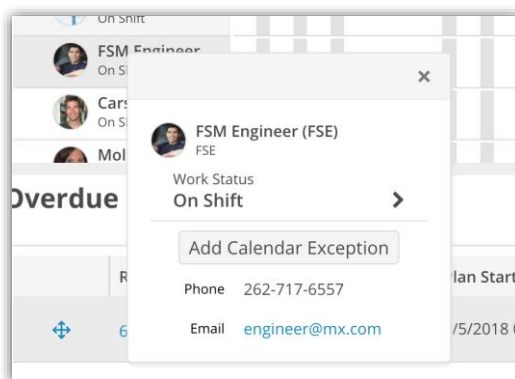
Schedule_board_show_eco_pm to show an indicator on the Repair Board for automatically-generated preventative maintenance and engineering change order tasks, set this value to Y (yes).

REPAIR BOARD

USING THE REPAIR BOARD: PERSON

PERSON FUNCTIONS VIA REPAIR BOARD:

- View routes, (if applicable) tasks and person details
- Update Repair Tasks
- Update Person information
- Send SMS / email



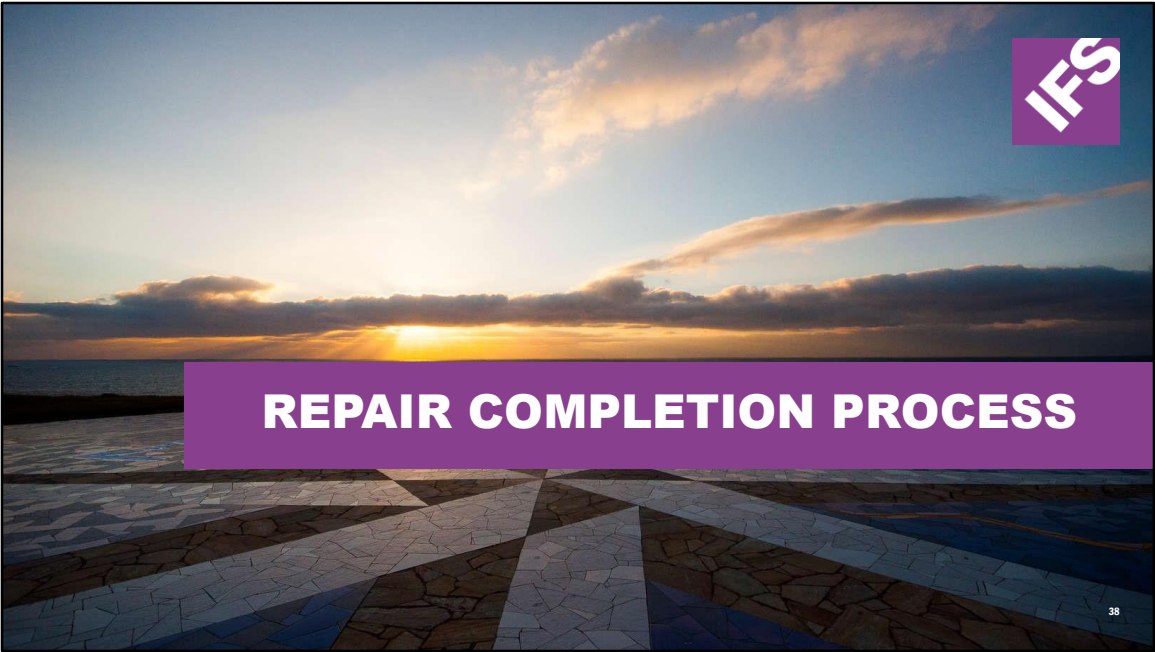
If you hover over a person, the Person Cards will appear with person information. If you double click on the Person, you will be taken to the Person record.

You can perform the following on persons:

- Send messages such as email, SMS or Skype to the technician.
- Change the Work Status, eg On Break
- Add calendar exceptions enables you to add a work calendar exception for the person.

There are application parameters significant to Schedule Board.

- Set **schedule_board_person_display_format** value to a value that identifies how you want a person's name to appear on the Repair Board. Values are 1 (person ID), 2 (first, last) 3 (first, last, person ID in parentheses), 4 (last, first), 5 (last, first, person ID in parentheses), and 6 (person ID, first in parentheses).
- Set **schedule_board_person_tooltip_duration** value to the number of seconds that a person card appears when hovering on the person's name on the Repair Board.
- **Show_place_cal_except** for an alert to appear when assigning a task for a place with a restricted calendar or the person has a work calendar exception that prevents assignment, set this value to Y (yes).



REPAIR COMPLETION

COMPLETING THE RMA

Similar to Service Requests, an RMA must also be completed. RMA completion may include the following steps:

- Similar to with Service Requests, **Part & Labor Usage** will be reflected in inventory and billing records
- If the consumed part is controlled, a record of the **Part Disposition** also needs to be created
- A records needs to be created of the **Transfer of the Request Unit**, to show it leaving the Repair Center via the Transfer Unit and/or Transfer Bin functions
- If there is a related **Warranty** that covers the repair, this will need to be applied
- If the Part-to-Product indicator has been set on the Part, a **new Product record** will be created



Similar to completing a service request, an RMA must also be completed.

As you perform the assigned work, you record certain information, such as **Part and labor usages**, usually for inventory and billing purposes.

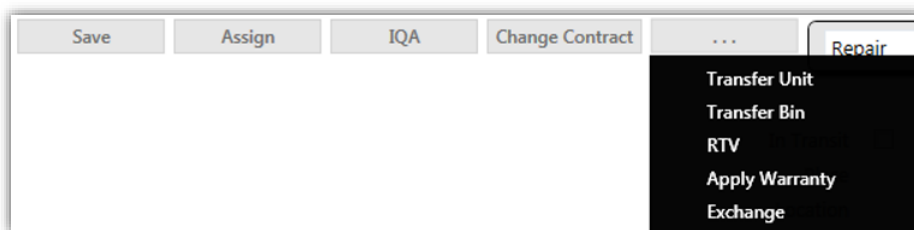
Sometimes, a **part disposition** needs to be performed, if it is a controlled part. At that time, you are prompted to enter a part disposition.

Request units are **transferred** to track them from receiving to the repair bench to shipping. Two buttons on the Repair Center screen, **Transfer Unit** and **Transfer Bin**, enable you to transfer a single unit or a bin full of like units. Items that you repair may be covered by **warranties** and may be applied when you ship the unit. Three types of warranties are recognized: OEM, Manufacturer, Service

For parts where the part-to-product option is set and the part is installed, a **new Product** record is created for that part.

REPAIR COMPLETION

DIFFERENT FUNCTIONS TRIGGERED BY BUTTONS



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There are buttons on the Repair Center screen that are significant.

Assign is used to create a new task and assign team/person.

IQA allows the use of Intelligent Questions and Answers that can narrow down a part dependent on the answer given. We will discuss IQA in a later lesson.

Change Contract allows the user to apply a different contract to the request unit.

Transfer Unit is a quick way to move stock to other locations or to a bin or change to a usable/unusable part.

Transfer Bin allows to move all stock within the location and bin id of the unit in the repair center to another place, location or bin id. This location is then stamped on the part need.

RTV, Return To Vendor, creates a part need to send the unit to an authorized service provider or supplier. If "do not return" is not checked then it will create a purchase order to allow the unit to be received back into the Repair Center.

Apply Warranty will update the update part usage and non-part usages to bill an OEM.

Exchange changes the product/serial assigned to the request unit.

There application parameters that are significant to repair completion.

Freeze_request_status to prevent changes to requests after they have been changed to a certain status

Freeze_task_status to prevent changes to tasks after they have been changed to a certain status

Set **parts_used_usage_part_line_code** to the part line code to use on part usage records that are created when a part need records part used option is selected.

Set_check_for_billing_on_request_status is to set the check for billing indicator on a request when the request is closed or completed.

REPAIR COMPLETION

PART AND LABOR/EXPENSE USAGE

Part Usage

- What was used performing a service
- Manual and automatic creation
- Decrements inventory

Labor and Expenses

- Time and expenses used performing a service
- Time and expenses not associated to a request
- Line codes determines billing



A **part usage** is an indication that a part was used during service. The part line code determines processing information such as how the part is billed. In general, you enter part usage for each part that was used. If the part was obtained using a part need, there is an option to indicate that the part need also indicates part usage. If you use a part need to sell a part, part usage is automatically created when the part is shipped to the customer. If you delete part usage, all related inventory transactions are reversed.

A **non-part usage** is usually an indication that time was spent performing the service. The line code determines processing information such as how the time is billed. In general, you enter non-part usage for each time block, for example, travel or labor. You can also enter non-part usage for miscellaneous charges, expenses, and freight. Time used is entered in two ways. First, for time spent specifically on requests, the time is entered as non-part usage on that request. Second, for employees who do not perform work that can be billed on a request, for example your office staff, time is entered using Time and Expenses screens.

Part and non-part line codes will be discussed in the *IFS FSM Application Administration* course.

REPAIR COMPLETION

USAGES: A REMINDER

Completion of a Repair will often result in one or more Usage records being generated:

PART USAGE

Records usage of a Part from Stock

Can be priced from pricing rule or manually

Part line code determines billing rule

Price can be zero (not to be re-billed to customer)


NON-PART USAGE

Indicates time was spent on the Task, and includes:

- Labor
- Miscellaneous Charges
- Expenses
- Freight

Line code determines billing

Time can be booked directly to the Request (field workers) or via Time & Expense screens for office-based staff – separate line items



A Part Usage is what was used performing service on the part. A **part usage** is an indication that a part was used during service. Prices and costs can be applied to part usages via the Part Pricing rules found under the Financials menu. You can also enter a price manually, for example when a pricing rule is not set up or when you want to override the price that is automatically applied. If you enter a price manually, it is never automatically repriced unless a business rule is set up to reprice or you delete the bill price.

Currency conversion is used when amounts are entered in a currency other than corporate currency including costs and prices. Currency conversion occurs any time an item is priced or a cost is calculated. For example, if you derive a price using pricing rules when part usage is entered, the price is converted at that time. Only when the part usage is repriced will the currency conversion be recalculated.

The part line code determines processing information such as how the part is billed. In general, you enter part usage for each part that was used. If the part was obtained using a part need, there is an option to indicate that the part need also indicates part usage. If you use a part need to sell a part, part usage is automatically created when the part is shipped to the customer. If you delete part usage, all related inventory transactions are reversed. You must define the **part pricing** before you enter part usage. If a pricing error occurs when entering usage because the price is out of date or there is an error with the exchange rate, the billing price will be \$0.00.

Part usages can **allow zero sell prices**.

If the technician needs to purchase a part in the field to finish a job, the **“Allow Sell Modify”** function will allow him to enter a cost on the usage.

A **non-part usage** is usually an indication that time was spent performing the service. The line code determines processing information such as how the time is billed. In general, you enter non-part usage for each time block, for example, travel or labor. You can also enter non-part usage for miscellaneous charges, expenses, and freight. Time used is entered in two ways. First, for time spent specifically on requests, the

time is entered as non-part usage on that request. Second, for employees who do not perform work that can be billed on a request, for example your office staff, time is entered using Time and Expenses screens. Each different type of labor is specified on a separate line

REPAIR COMPLETION

QUALITY CODES

Quality Code can be used to record the symptom, problem and resolution associated with a Repair. This is important for quality control and continuous improvement.

Quality Codes can be associated with:

- Model
- Part
- Product Family
- Product Name

Model ID	Symptom	Problem	Resolution
	Dark Copy	Faulty Exposure Lamp Thermo Fuse	Adjusted Exposure

TIP: You'll only see the Quality Codes assigned to the relevant part/model when viewing the item in the Repair Center

Quality codes are used for repair. They are a way of recording the symptom, problem and resolution. Quality codes can be visible depending on the following: Model, Part, Product Family, Product Name. When quality codes are assigned to part/model, etc. then they will be visible when that part/model is in the repair center screen. The selection becomes specific to the part/model/product family/product name.

REPAIR COMPLETION

REPAIR COMPLETION

Transfer Unit/Bin

14426, 4110

Repair Tag 14426

Serial # d917-ma-3792-3

Product ID 118786

Model DP17

Part ID DP17

Description 17" Flat Panel Display

Qty: 1

Unit Status

Days Open 180

RMA ID 3792

Plan Start 3/8/2017 1:24 PM

Task Status

Task ID 4110

Task Status Open

Task Type Break Fix

Owner

Team AVENGERS

Duration 60

Transfer Unit

Transfer Bin

RTV

Apply Warranty

Exchange

Ready To Ship

Swap Unit

Pick Complete

Total Repair Price

Total Repair Cost

Drop

Bad Needs

Quality

Notes

Attachments

Repair History

Purchase Orders

Commitments

Escalations

Events

Component Repair

Quotes

Attributes

Repair Action

Drop Ship

Condition Code NOCONDITION

Condition

Revision

Disposition

Resolution

Failure Returns 1

Max Repairs 2

Not To Exceed

In Warranty

Warranty Coverage ID 8422

Closed

Product Warranty

OEM In Warranty

OEM Warranty Coverage ID

OEM Warranty

Beyond Repair Limit

Beyond Not To Exceed

IFS

There are many functions within repair completion. Depending on your processes, listed are some of the more significant functions:

The most significant field on the Repair Center screen from a procedural perspective is the **task status**. Changing of the task status to a value that completes or closes the repair task cause policy and business rules, based in part upon application parameters, to complete or close the corresponding RMA.

If you have a repair-and-return unit that cannot be repaired, you can choose to swap it instead. By selecting the **Swap Unit** option, a part need is created for a usable unit to be sent to your customer. You can then dispose of the unrepairable unit as usual for your organization.

If you have a repair-and-return unit to be repaired, by selecting the **Ready to Ship** option, a part need is created for the usable unit to be sent to your customer.

Once you have repaired unit and it is ready to ship, the **Transfer Unit/Bin** buttons allows you to transfer the unit to the correct location or bin. This location is then stamped on the part need.

REPAIR COMPLETION

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Completing a Repair properly is important for quality management, customer service and internal auditing.

1

Task Status – important for processing. Changing the status to one that closes the Task invokes policy and business rules to complete/close the associated RMA.

2

Swap Unit – ticking the checkbox creates a Part Need for a usable unit to be sent to the customer if the unit cannot be repaired.

3

Ready to Ship – ticking the checkbox creates a Part Need for a usable unit to be sent to the customer for a Repair & Return.

4

Transfer Unit / Bin – moves the unit to the correct Location or Bin.

The screenshot shows the IFS Repair Center interface. The top navigation bar includes 'Service Manager Lobby', 'Repair Center', 'RMA', 'Parts', 'RMA', and 'Repair Center'. The main area displays a repair task with ID 373, 296. Fields include Repair Tag, Serial #, Product ID, Model, Part ID, Description, Qty, Unit Status, Days Open, RMA ID, RMA Line, Plan Start, Task ID, Task Status, Task Type, Owner, Team, Duration, In Transit, Transfer Unit, Place, Location, ITV, Contract ID, Contract Version, Exchange, Plan End, Failure Returns, Max Repair, Not To Exceed, In Warranty, OEM Warranty Coverage ID, OEM Warranty, Beyond Repair Limit, and Beyond Not To Exceed. Tabs at the bottom include Details, Steps, Part Needs, Part Usage, Labor and Expenses, Quality, Notes, Attachments, Repair History, Purchase Orders, and Commitment. The 'Steps' tab is active, showing 'Ready To Ship', 'Swap Unit', 'Drop Ship', 'Hold Condition', 'Pick Complete', 'Repair Limit', 'Total Repair Price', and 'Total Repair Cost'.

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WRAP-UP



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