



SERVICEO-UM-
FOR INTERNAL USE

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1 Introduction

ServiceO is a web-based vendor Management System (VMS) designed to manage customer-specific requirements. It combines best in class solutions providing you the ability to execute vendor management strategies faster and more profitably, from strategic and tactical planning to execution. It also provides a means for transferring data entered into the System across multiple stages of the supply chain.

The System is capable of meeting customer-specific requirements for reliability, responsiveness, agility and cost. It also features industry-specific functionality allowing you to identify and keep track of customer assets throughout your network of global facilities.

1.1 Purpose

The purpose of this document is to explain the features of the ServiceO, the interface of the System, what the System will do and the constraints under which it must operate. It also contains all available instructions for each module.

This document contains the task-oriented sections describing all modules of the serviceo. It also has informative notes and tips, which help you better understand the entire system.

1.2 Intended Audience

This document is primarily intended for the Internal Users who aim to.....to be updated at later stage with actual information.

The information contained in this manual is intended to be used only by the authorized members with proper rights and privileges.

2 Getting Started

In this section, you will find instructions and other information useful for evaluating the ServiceO and getting to know it when you are starting out.

This section also provides a general walkthrough of each module of the ServiceO from initiation through exit.

To use ServiceO, you need to open serviceo web page (<https://>) and then enter your Email and password at the login screen. This process only takes a few seconds and ensures the privacy and security of your product information.

1. Log on to the ServiceO.

The *login* page is displayed as shown in Figure 2.1.

Figure 2.1: login page



Tip: Select the **Remember me** check box to store your credentials in the cookies and enables you to sign back automatically if you close the site without logout. Click the **Forgot password?** to reset your password. You will be taken to the *Reset* screen where you need to enter your Email and then click **Reset** button. The instructions to reset password will be sent to the entered Email.

2. Type your correct Email in the **Email** field.
3. Type your password in the **Password** field and then click the **LOG IN** button to access home page.

The *PMS* home page is displayed as shown below:

MSP

Home

Program Manager

Service Configurator

Work Order Manager

Service Manager

Delivery Manager

Partner Billing Manager

PMSA

Home

Program Manager

Service Configurator

Work Order Manager

Service Manager

Partner Billing Manager

PMS

Home

Orders

Service Manager

Setup

Programs

Billing

Service Type

ALL

Account

Magiclink Global Services (ITO Partner Demo)

Program

ALL

JobSite

None

Service Catalog (Price List)

ALL

Quotes

ALL

Sales Order

ALL

Programs

View all 15 Programs

Create a New Program

Account	Program #	Program Name	Price Book Name	Program Status	# of Quotes	# of Job Sites	Last Modified Date
Magiclink Global Services (ITO Partner Demo)	PROJ-0011	Magiclink EUC Field Service (Master Project SOP)	MagicLink Customer PriceList	Active	26	303	12/6/17
Magiclink Global Services (ITO Partner Demo)	PROJ-0012	Magiclink Network Field Service (Master Project SOP)	MagicLink Customer PriceList	Active	0	0	12/6/17
Magiclink Global Services (ITO Partner Demo)	PROJ-0013	Magiclink Network Storage Field Service (Master Project SOP)	MagicLink Customer PriceList	Active	1	0	12/6/17
Magiclink Global Services (ITO Partner Demo)	PROJ-0069	MS Break/fix Storage Appliances 8000 (Master Project SOP)- Magiclink	MagicLink Customer PriceList	Planning	0	0	12/6/17
Magiclink Global Services (ITO Partner Demo)	PROJ-0076	MS Break/fix Storage Appliances 7000/5000 (Master Project SOP)- Magiclink	MagicLink Customer PriceList	Planning	0	0	12/6/17

Service Catalog (Price List)

View all 2 Service Catalog (Price List)

Service Catalog (Price List) Name	Status	Is Standard?	Number of Price List Items	Last Modified Date
MagicLink Customer PriceList	Active	false	91	

3 Orders

Here, order represents work to be performed on customers' products. This module allows you to create an incident or work order-based case by selecting and typing appropriate values in the required fields.

The created orders can be used to efficiently track or manage different types of services.

To access the **PMS** menus, the user you log on as must have rights to run the module. If you want access to the **PMS** and the System will not allow you to log on, contact your System Administrator to verify that your user name has been granted appropriate rights.

Here, you can also view progress bar showing the different stages of order completed during the process. The progress bar will run a colored bar showing the complete or incomplete stage. It also provides lots of flexibility for order handling while providing visibility for users to better understand the status.

This module provides key functionalities overview related to new case creation web form section and fields.

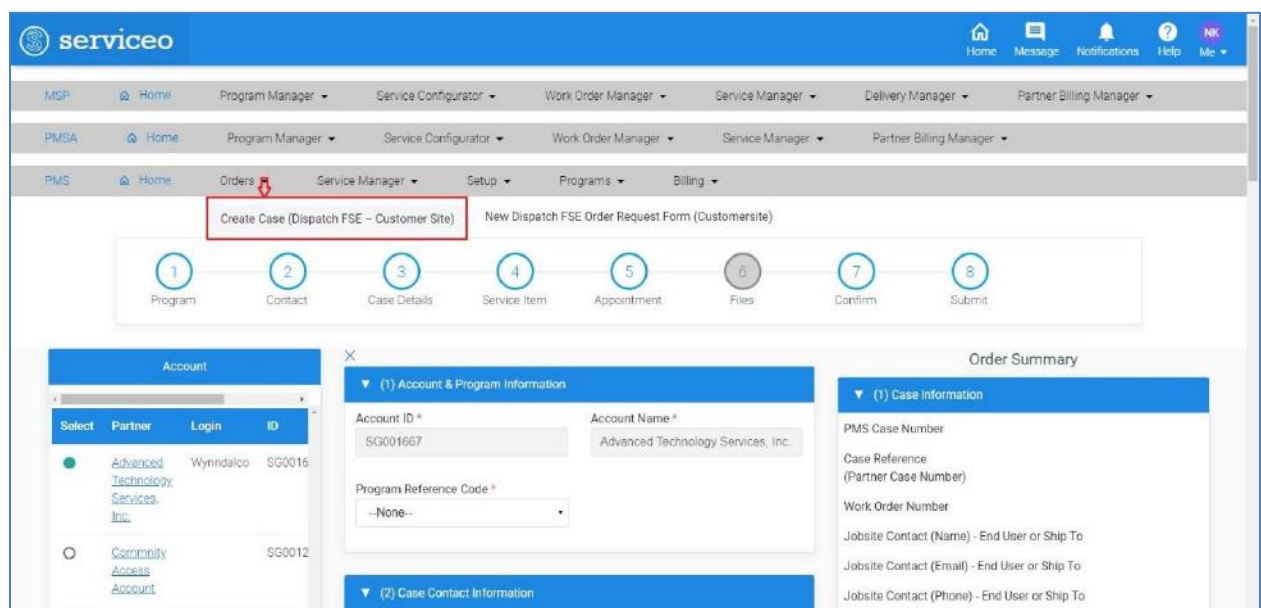
More Information will be added in next version.

To access Create Case (Dispatch FSE – Customer site) screen, perform the following steps:

1. Click the **Orders** next to the **PMS Home** icon and then click the **Create Case (Customer site)** option.

The *Create Case* screen displays as shown in Figure 3.1.

Figure 3.1: The Create screen



The screenshot shows the serviceco web application interface. The top navigation bar includes the serviceco logo and user profile. Below it, a menu bar shows various modules like MSP, PMS, and PMSA. The PMS module is selected, and the 'Orders' option is highlighted. A red box highlights the 'Create Case (Dispatch FSE – Customer Site)' link. Below the menu, a progress bar shows eight steps: 1. Program, 2. Contact, 3. Case Details, 4. Service Item, 5. Appointment, 6. Files, 7. Confirm, and 8. Submit. The main content area is divided into three sections: 'Account' (a table with columns for Select, Partner, Login, and ID), '(1) Account & Program Information' (a form with fields for Account ID, Account Name, and Program Reference Code), and 'Order Summary' (a form with fields for PMS Case Number, Case Reference, Work Order Number, and Jobsite Contact information).

Note: The *Create Case* screen shows progress bar on the top, the **Account** section at the left and the **Order Summary** section at the right side of the screen.

The **Account** section displays a list of partners including their Login, ID and other details.

The **Order Summary** section is composed of six tabs:

- The **Case Information** tab holds case related information.
- The **Program Information** tab displays program details.
- The **Jobsite Information** tab holds jobsite related details.
- The **Standard Service Profile** tab holds standard service profile details selected for case.
- The **Global Program Instructions** tab holds instructions for Service Deliverables.
- The **Pricing: Service Catalog Item Selection** tab holds price details.
- The **IRON (Internal): Program Vendor Routing Summary** tab holds the details of vendor routing summary.

The partner, which was selected when user last logged, is selected by default in the **Account** section.

Tip: Click the *Tab Heading* or down arrow on the tab to minimize or maximize the tab.

2. Click the **Partner** name link in the **Account** section to view account details.

An *Account Detail* pop-up displays as shown below:

Account Details

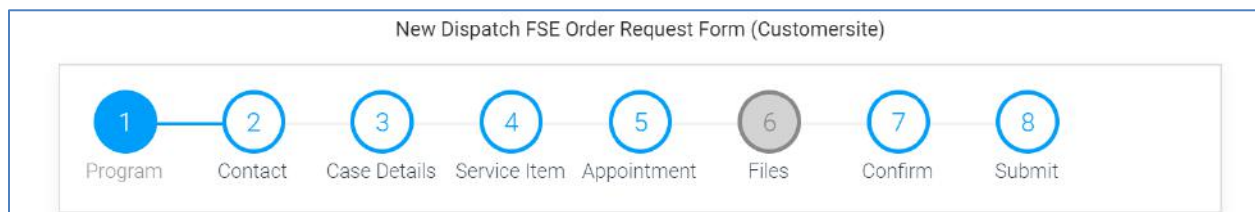
Account Name	Advanced Technology Services, Inc.	AX Account Number	101805
Price Book Name	Wyndalco Customer Pricelist (PROJ-0007)	Master Project	Lenovo Desktop EUC Field Maintenance (Master Project SOP)
Webcase Account Name	Wynndalco	IRON Service Global Account ID	SG001667
Billing Street	8201 N. University	Shipping Street	8201 N. University
Billing City	Peoria	Shipping City	Peoria
Billing State/Province	IL	Shipping State/Province	IL
Billing Country	United States of America	Shipping Country	United States of America
Billing Zip/Postal Code	61615	Shipping Zip/Postal Code	61615
Billing country Code		Shipping country Code	USA

Close

Tip: Click the **Close** button or **X** (cross sign) to close this *Account Details* pop-up.

3.1 Create Case (Dispatch FSE – Customer site)

This option allows you to create case (Dispatch FSE – Customer Site) using appropriate values in the required fields available in case creation web-form sections:



- Account & Program Information
 - a. Account Information
 - b. Program Information
- Case Contact Information
 - a. Jobsite Selection
 - b. Case Contact Information

- Case Details
 - a. Case Information
 - b. Case Additional Instructions (optional)
- Service Catalog Selection: Incident Options
 - a. Standard Incident Type
 - b. Customer Incident Type
- Appointment Setup
- File Upload
- Review/Confirm

The **Account ID** and **Account Name** fields in the **Account & Program Information** tab are prepopulated.

To create case (customer site), perform the following steps:

1. Select the Partner name in the **Account** section. Refer Figure 3.1.

The *Create Case* screen is displayed with seven tabs as shown in the below figure:

MSF

Home

Program Manager

Service Configurator

Work Order Manager

Service Manager

Delivery Manager

Partner Billing Manager

PMISA

Home

Program Manager

Service Configurator

Work Order Manager

Service Manager

Partner Billing Manager

PMS

Home

Orders

Service Manager

Setup

Programs

Billing

New Dispatch FSE Order Request Form (Customersite)

1Program

2Contact

3Case Details

4Service Item

5Appointment

6Files

7Confirm

8Submit

Account

Select	Partner	Login	ID
<input checked="" type="radio"/>	Advanced Technology Services, Inc.	Wyrmbulky	SG0010
<input type="radio"/>	Community Access Account		SG0012
<input type="radio"/>	Iron Systems (Iron)		SG0013
<input type="radio"/>	Iron Systems (Iron Partner)		SG0017
<input type="radio"/>	Megalink Global Services (TLP Partner Demo)		SG0017
<input type="radio"/>	Microsoft		
<input type="radio"/>	Unidac Corporation	Mphuric	SG0035

(1) Account & Program Information

Account ID *
SG001007

Account Name *
Advanced Technology Services, Inc.

Program Reference Code *
--None--

(2) Case Contact Information

Jobsite Location (Select Name) *
--None--

Jobsite Contact (Name) - End User or Ship To *

Jobsite Contact (Email) - End User or Ship To *

Jobsite Contact (Phone) - End User or Ship To *

(3a) Case Details

Case Reference (Partner Case Number)

Case Title (Summary) *
Text Only (60 characters remaining)

Case Description (Details) *
Text Only (5000 characters remaining)

(3b) Case Details - Additional Custom Instructions (optional)

(4) Service Catalog Selection: Incident Options

☒ Standard Incident Service Profile: Use Default Service Item Request

☐ Custom Incident Service Profile: Create Custom Service Item Request

Standard Incident Service Profile: Use Default Service Item Request

Service Type *
Service Engineer (Talent Type) *

Service Engineer (Expertise Level) *
Service Dispatch Priority (SLA Requested) *

Service Coverage Hours Type *

Standard Coverage Plans:
☒ Standard Business Hours Coverage Plan: Monday-Friday, 9 am to 5pm (9HSD)

Extended Coverage Plans (Afterhours, Weekends & Holidays):
☐ Extended Coverage Plan: Standard Business Hours Coverage Plan (24x5, 9HSD), Monday-Friday, 9 am to 5pm
☐ Extended Coverage Plan: After Hours Coverage (24x7x6H Tr), Monday-Friday, 5pm to 10pm
☐ Extended Coverage Plan: Weekend Hours Coverage (24x7, 6HSD)
☐ Extended Coverage Plan: Holiday Hours Coverage (24x7x6H Tr)

Maintenance Event Duration (PPM* Hours) *
2

(5) Appointment Setup

Appointment Schedule:
☐ Customer Appointment Setup Request (Iron Service Global to Call Customer)

☐ Dispatch Now (SLA Priority: SBD)

☒ Pre-Scheduled Appointment (Enter Date/Time (Local Time) below)

Pre-Schedule Customer Appointment Schedule (Start) Date: *

Pre-Schedule Customer Appointment Schedule (Start) Hour: *
00

Pre-Schedule Customer Appointment Schedule (Start) Minute: *
00

(6) File Upload

Review/Confirm

Order Summary

(1) Case Information

PMS Case Number

Case Reference (Partner Case Number)

Work Order Number

Jobsite Contact (Name) - End User or Ship To

Jobsite Contact (Email) - End User or Ship To

Jobsite Contact (Phone) - End User or Ship To

(2) Program Information

Partner: Advanced Technology Services, Inc.

Program:

Program Code:

Number of Jobsites for the program: 0

(3) Jobsite Information

Jobsite Name

Jobsite ID

Jobsite Request Status

Jobsite Approval Status

Jobsite Street

Jobsite City

Jobsite State

Jobsite Country

Standard Service Profile

Service Type

Service Engineer (Talent Type)

Service Engineer (Expertise Level)

Service Dispatch SLA Priority

Service Coverage Hours Type

Standard Coverage Plans:
☐ Standard Business Hours Coverage Plan: Monday-Friday, 9 am to 5pm (9HSD)

Maintenance Event Duration (PPM* Hours)

(4) Global Program Instructions

Global Program Instructions Setup (All Jobsites): Service Deliverable List

Global Program Instructions Setup (All Jobsites): Training Documents

Global Program Instructions Setup (All Jobsites): Required Tools

Global Program Instruction Setup (Local Jobsites)

(5) Pricing: Service Catalog Item Selection

Standard Incident Service Profile

Service Catalog (PriceBook) Name

Service Item Name

Service Item ID

Service Item Description

Hours Requested (PPM Event)

Total Event Price

T&M Price (for Additional Hours, if Event is Extended)

Currency

(6) IRON (Internal): Program Vendor Routing Summary

Vendor Auto Routing: Fail

Description (PMS Comment)
Talent Auto-Priority "Default Match" between standard profile and requested profile, please select vendor manually. (Default: TLP Request, TLP; Custom Incident: FYI, Default Routing vendor: Default, TLP Means: Populate the Standard Talent Type, Service Level and Priority values. Request: TLP Means: Populate the Requested Talent Type, Service Level and Priority values. Default Routing vendor)

Vendor Name

Note: The **Account ID** and **Account Name** fields get updated as you select the **Partner** name.

As you start selecting or entering values in the fields under different tabs, fields in the **Order Summary** section at the right side of the screen get updated based on selection.

Fields marked with an asterisk are mandatory.

2. Complete the following fields in the **(1) Account & Program Information** tab:

Field	Instruction
Account ID	<p>This field is prepopulated.</p> <p>Note: This field displays the Account ID of the Partner. This will remain same for all programs. This information needs to be verified.</p>
Account Name	<p>This field is prepopulated.</p> <p>Note: This field displays the partner name of the company.</p>
Program Reference Code	<ul style="list-style-type: none"> • Select the appropriate program reference code in the Program Reference Code drop-down list. <p>Note: This is a unique code that corresponds to a specific Program as every Program has its own unique Program Code.</p>

3. Complete the fields in the **(2) Case Contact Information** tab:

Field	Instruction
Jobsite Location (Select Name)	<ul style="list-style-type: none"> • Select jobsite location name for dispatch in the Jobsite Location (Select Name) drop-down list. <p>Note: Each Jobsite needs to be registered in the Serviceo prior to creating a new case. The list of registered Jobsites is available as a drop down.</p>
Jobsite Contact (Name) - End User or Ship To	<ul style="list-style-type: none"> • Type the name of End User or Ship-To in this field. <p>Note: This person will be first point of contact with whom IRON Service Global will coordinate arrival.</p>

Jobsite Contact (Email) - End User or Ship To	<ul style="list-style-type: none"> Type the E-Mail ID of End User of Ship-To in this field. <p>Note: This E-Mail ID is used by IRON Service Global to coordinate arrival.</p>
Jobsite Contact (Phone) - End User or Ship To	<ul style="list-style-type: none"> Type phone number of End User or Ship-To in this field. <p>Note: This phone number on which IRON Service Global will reach out to coordinate arrival of engineer.</p>

- Enter reference case number (Client Case Number or Purchase Order Number) in the **Case Reference (Partner Case Number)** field in the **(3a) Case Details** tab.
Note: This number will be used for reporting and billing references.
- Type the short summary related to the case in the **Case Title (Summary)** field in the **(3a) Case Details** tab.
- Type the detailed case description in the **Case Description (Details)** text box in the **(3a) Case Details** tab.
- Type special instruction related to the case, if any, in the **Special Instruction for Service Engineer (Private Message)** text box in the **(3a) Case Details** tab.
Note: Here, users can type instructions for “Field Service Engineer”, which are not part of Custom Work Instructions.
- Choose the next step:

If you want to...	Then...
Create Standard Service Profile (Default)	<ol style="list-style-type: none"> Select the Create Default Incident: Standard Service Profile option. <p>Note: When you select the Create Default Incident: Standard Service Profile, the standard service profile is selected against this case. Stand Service Profile uses preset Program Default.</p>

<p>Create Custom Service Profile</p>	<ol style="list-style-type: none"> 1. Select the Create Custom Incident: Custom Service Profile Request option to create your own “custom service profile” per incident. The <i>Create Case</i> screen updates with Create Custom Incident: Custom Service Profile Request fields allowing you to select Talent Type, Talent Level, and SLA Priority differing from the Program’s Standard Incident Profile and specific for this case. 2. Select the required service type in the Service Type drop-down list. Tip: You can any of the following type of services: <ul style="list-style-type: none"> • Desk-side Support • IMAC • Break/Fix Service 3. Select the relevant talent type in the Service Engineer (Talent Type) drop-down list. Tip: You can select following talent types, subject to availability for a given jobsite location: <ul style="list-style-type: none"> • Field Services EUC Deskside Support • Field Service Server/Storage HW B/F Support • FTE-FEEUC-TEC-MSFT • Field Service Network Support 4. Select the appropriate expertise level of engineer in the Service Engineer (Expertise Level) drop-down list.
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	<p>Tip: You can select the following levels of technical expertise, subject to availability for a given jobsite location:</p> <ul style="list-style-type: none"> • Level 1 (L1) • Level 2 (L2) <p>5. Select the correct SLA in the Service Dispatch Priority (SLA Requested) drop-down list.</p> <p>Tip: You can select the following dispatch priorities, subject to availability for a given jobsite location:</p> <ul style="list-style-type: none"> • P1 (SBD4H), Same Business Day - 4 Hours • P3 (NBD), Next Business Day • P4 (2BD), 2 Business Days • P5 (3BD), 3 Business Days • P6 (5BD), 5 Business Days <p>6. Select the duration of event application for maintenance in the Maintenance Event Duration (PPM* Hours) drop-down list.</p> <p>7. Select the required number of service engineers in the Number of Service Engineers? drop-down list.</p>
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9. Choose the next step:

If you want to...	Then...
Request for Customer Appointment Setup (Call Customer)	<p>Select the Customer Appointment Setup Request (Iron Service Global to Call Customer) option.</p> <p>Note: Here, a request is sent to Iron System to call End-Customer and setup an appointment.</p>

Request for SLA Priority: SBD	<p>Select Dispatch Now (SLA Priority: SBD) option for same business day dispatch. This is a Same Business Day (SBD) premium service contract option.</p> <p>Note: Details will be updated in next version.</p>
Pre-Schedule an Appointment	<p>Select the Pre-Scheduled Appointment (Enter Date/Time (Local Time Zone) below) option if your Service Desk has already setup an appointment with End-Customer.</p> <p>To pre-schedule your appointment, follow the below steps.</p> <ol style="list-style-type: none"> 1. Type or select the Customer Appointment Schedule (Start) Date in the Pre-Schedule Customer Appointment Schedule (Start) Date field. <p>Tip: Click anywhere in the field and then select the date from the calendar that displays.</p> <ol style="list-style-type: none"> 2. Type or select Customer Appointment Schedule Start Hour in the Pre-Schedule Customer Appointment Schedule (Start) Hour field. 3. Type or select Customer Appointment Schedule Start Minute in the Pre-Schedule Customer Appointment Schedule (Start) Minute field.

10. Click the **File Upload** button in the **File Upload** tab to upload any relevant document required in this case.

11. Click the **Review & Confirm** button to review and confirm the details before case creation.

It will take you to the *Review Order Summary Screen* for....

4 Setup

This module allows users to create new jobsite, update existing jobsite location, and view jobsite list. Here, you can create new jobsite location by selecting nearby service zone or by uploading the jobsite list.

Here, you can also view various stages involved to complete a Work Order. The progress bar will run a colored bar showing the progress stage completed during the process.

This progress bar provides lots of flexibility for service handling and fulfilment while providing visibility for users to better understand the status.

4.1 Jobsite Setup (PMS)

Here, you can configure Jobsite Setup, view existing Jobsite Locations, update a Jobsite Location, and create a new Jobsite Location.

In the Serviceo, a new Jobsite can be added to Program location list through the following ways:

- Enter Address and Search for Nearby Service Zone
- Select a preferred Nearby Service Zone to Create a New Jobsite

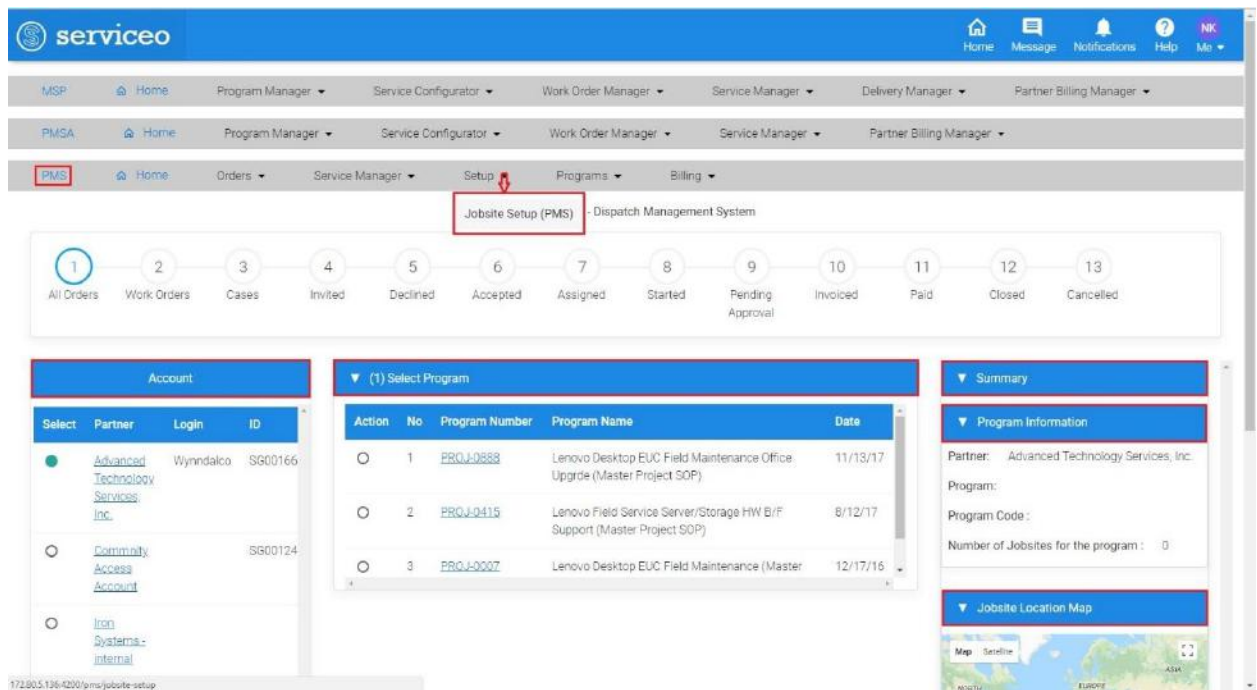
Here, you can also view various stages involved to complete a Work Order. Each Work Order would have predefined stages.

To access Jobsite Setup screen for PMS, perform the following steps:

1. Click the **Setup** next to the **PMS Home** icon and then click the **Jobsite Location (PMS)** option at the top of the *home* page.

The *Jobsite-setup* screen appears as shown in Figure 4.1.

Figure 4.1: Jobsite-setup screen



Note: The *Jobsite-setup* screen shows progress bar at the top and the **Account** section at the left side of the screen. In the right side of the *Jobsite-setup* screen, the **Summary** section is being displayed that contains **Program Information** and **Jobsite Location Map** tabs.

The progress bar enables users to see stages of a specific process/task that are involved to complete a work order.

The **Account** section displays a list of partners including their login, ID and other details. The **Summary** section lists program information for the selected **Partner** along with its **Jobsite Location** details on the Map.

Tip: Click the **Account** name next to the **Select** column in the **Account** section to view Account Details. Click the **Program Number** next to **Action** column in the **(1) Select Program** tab to view the program details.

4.1.1 Viewing Jobsite List

Here, you can view the list of Jobsite Locations associated with **Program** for the selected **Partner** in the **Account** section.

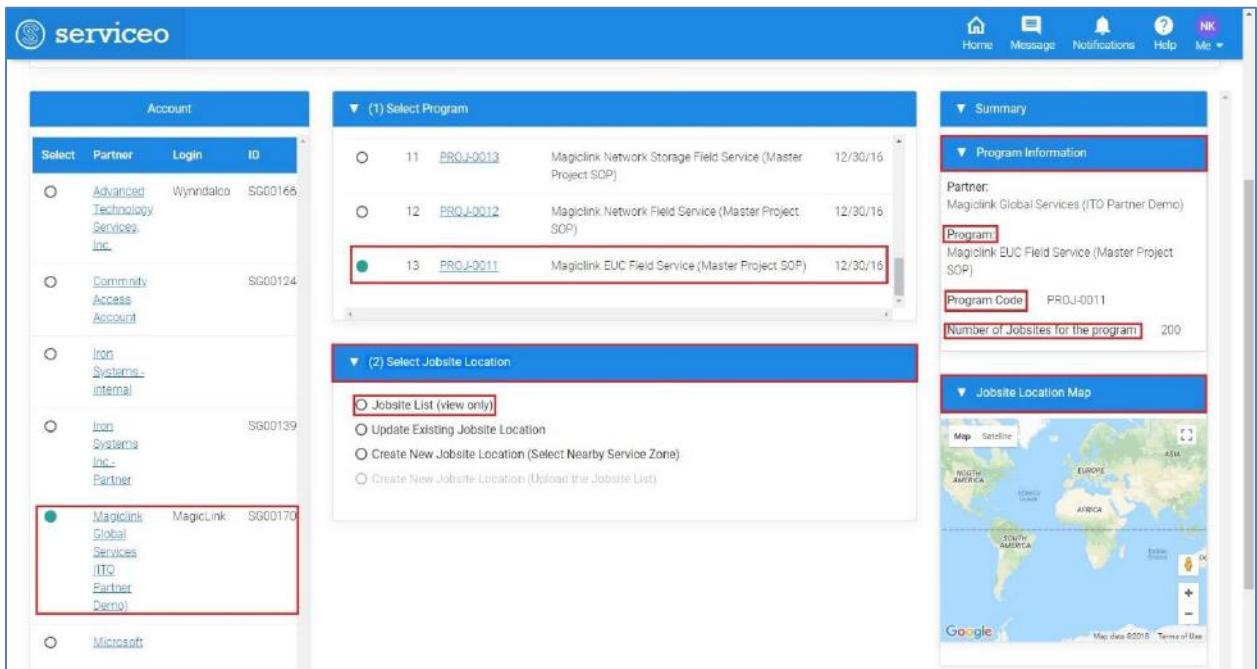
To view a list of Jobsite Location, perform the following steps:

1. Select the partner in the **Account** section to view all listed programs. Refer Figure 4.1.

Tip: As you select Partner in the **Account** section, a list of Programs, which are associated with the selected Partner, get displayed in the **(1) Select Program** tab. The program information of the selected **Partner** is also displayed in the **Program Information** tab in the right side of the *Jobsite-setup* screen.

2. Select the program in the **(1) Select Program** tab for which you want to view Jobsite Locations. The *Jobsite-setup* screen updates with **(2) Select Jobsite Location** tab as shown in Figure 4.2.

Figure 4.2: Jobsite-setup screen - (1) Select Program



The screenshot displays the 'Jobsite-setup' interface. On the left, the 'Account' tab lists various partners, with 'Magiclink Global Services (ITO Partner Demo)' highlighted. The central panel, titled '(1) Select Program', shows a list of programs associated with the selected partner. Program 13, 'PROJ-0011' (Magiclink EUC Field Service), is selected. The right panel, titled 'Summary', provides details for the selected program: 'Program Information' shows the partner as 'Magiclink Global Services (ITO Partner Demo)', the program as 'Magiclink EUC Field Service (Master Project SOP)', the program code as 'PROJ-0011', and the number of jobsites as 200. Below this, the 'Jobsite Location Map' section shows a world map with a red pin indicating the location.

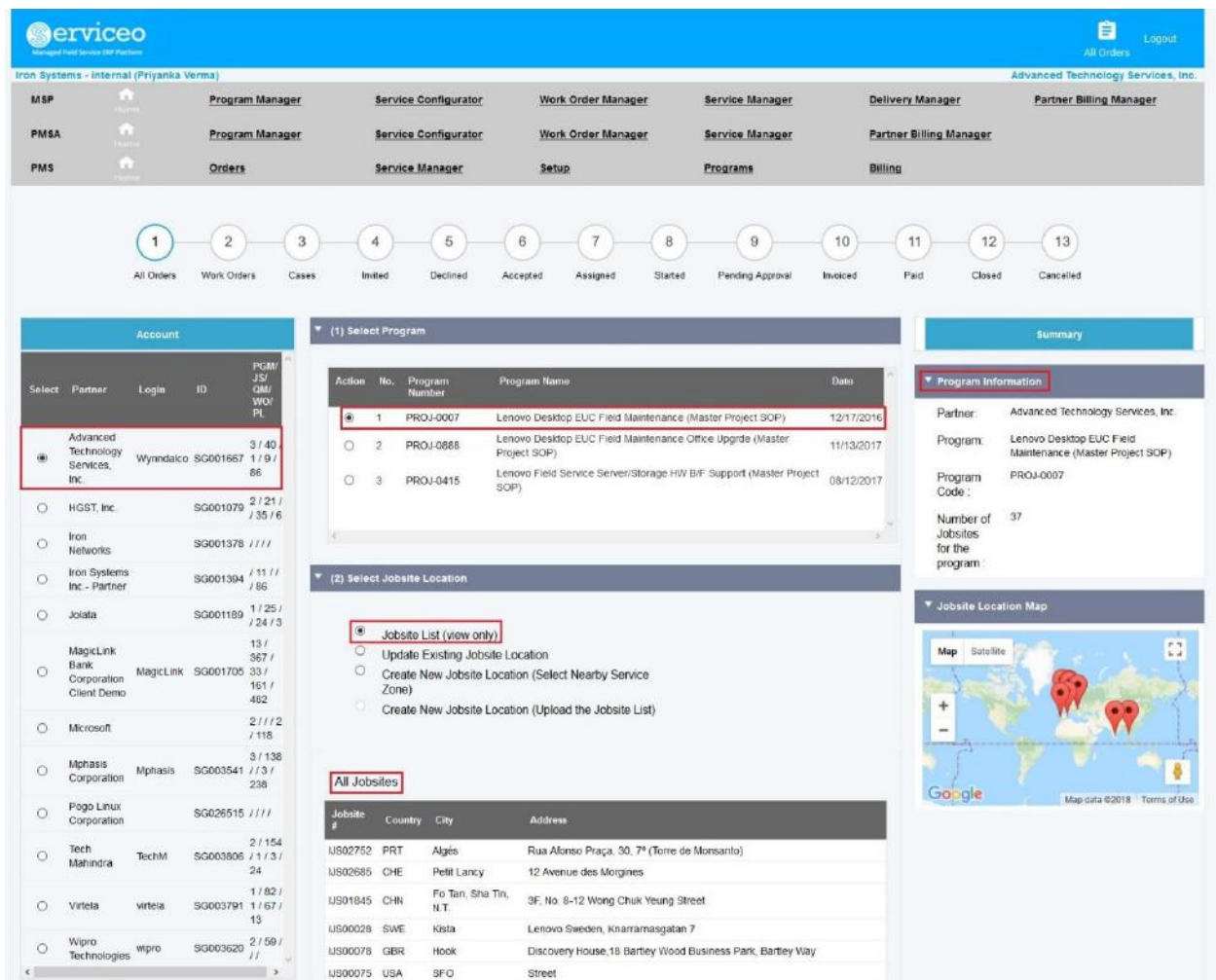
Tip: When you select the Program in the **(1) Select Program** tab, the program details, including **Program**, **Program Code**, and **Number of Jobsites for the program**, get updated in the **Program Information** tab as per **Program** selection.

The **Jobsite Location Map** also gets changed with the selection of **Program** in the **(1) Select Program** tab.

3. Select the **Jobsite List (view only)** in the **(2) Select Jobsite Location** tab. Refer Figure 4.2.

The *Jobsite-setup* screen updates with a list of all Jobsites which are linked with the selected program for the Partner as shown in Figure 4.3.

Figure 4.3: Jobsite-setup screen - All Jobsites



Jobsite #	Country	City	Address
US02752	PRT	Algés	Rua Alfonso Praça. 30, 7ª (Torre de Monsanto)
US02685	CHE	Petit Lancy	12 Avenue des Morgins
US01845	CHN	Fo Tan, Sha Tin, N.T.	3F, No. 8-12 Wong Chuk Yeung Street
US00028	SWE	Kista	Lenovo Sweden, Knarramasgatan 7
US00078	GBR	Hook	Discovery House, 15 Bartley Wood Business Park, Bartley Way
US00075	USA	SFO	Street

Note: Here, you can view the list of all the jobsites that are linked to the selected program and the detailed information about all the jobsites. The jobsite list includes the following fields:

- Jobsite Code
- Country
- City
- Address

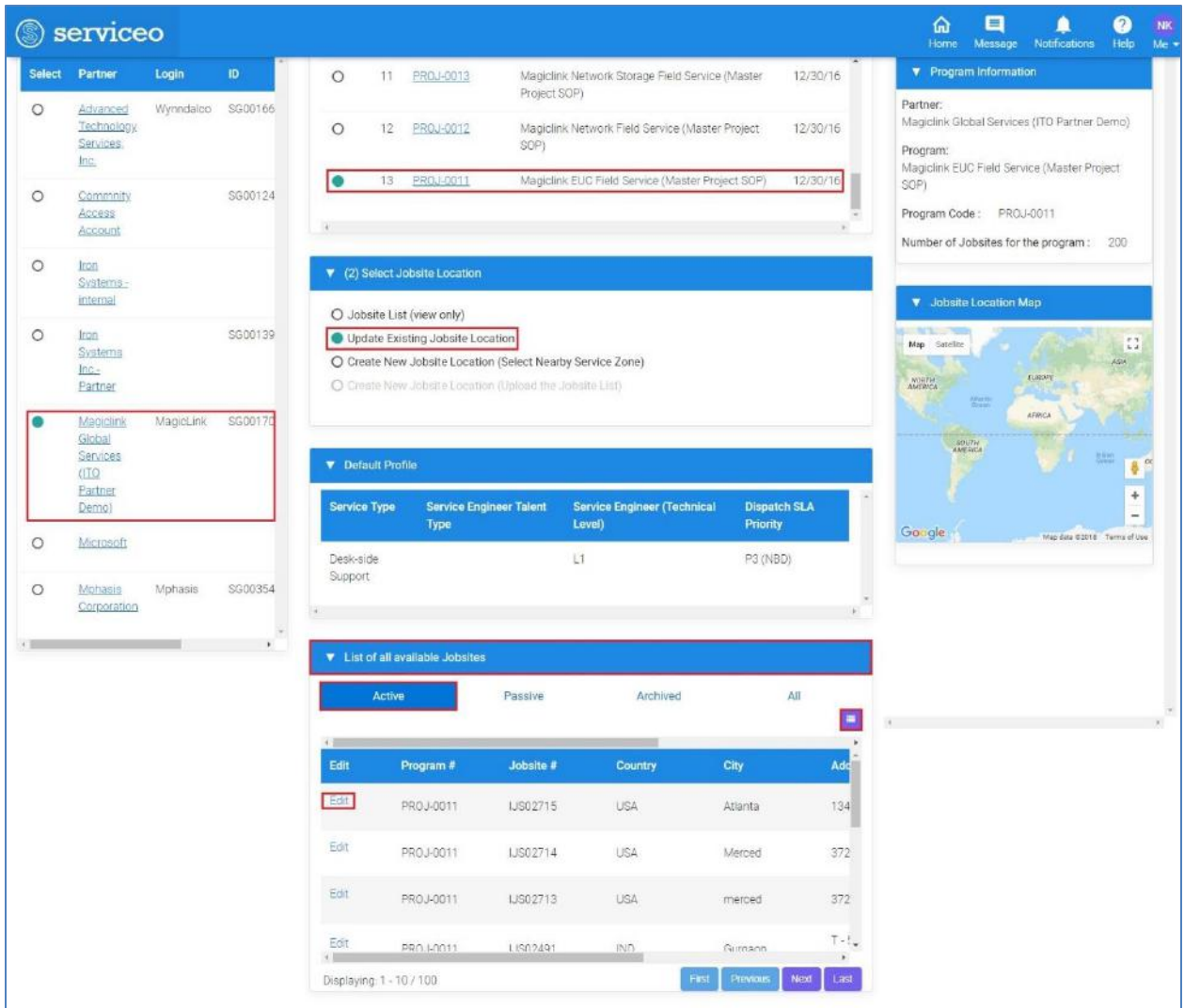
4.1.2 Updating Existing Jobsite Location

Here, users can edit the Contact Information to keep Jobsite detail updated. You can also manage the status of the Jobsite location by assigning Active/Passive/Archived status.

To update or edit existing Jobsite Location details, perform the following steps:

1. Select the program in the **(1) Select Program** tab whose jobsite location you want to update. Refer Figure 4.3.
2. Select the **Update Existing Jobsite Location** option in the **(2) Select Jobsite Location** tab. The **Jobsite-setup** screen updates with the **Default Profile** and **List of all available Jobsites** sections as shown in Figure 4.4.

Figure 4.4: Jobsite-setup screen – Available Jobsites



The screenshot displays the 'Jobsite-setup' screen in the serviceco application. The interface is divided into several sections:

- Select Partner:** A list of partners including Advanced Technology Services, Inc., Community Access Account, Iron Systems - Internal, Iron Systems Inc. - Partner, **MagiLink Global Services (ITO Partner Demo)** (selected), Microsoft, and Mohasis Corporation.
- (2) Select Jobsite Location:** Options include Jobsite List (view only), **Update Existing Jobsite Location** (selected), Create New Jobsite Location (Select Nearby Service Zone), and Create New Jobsite Location (Upload the Jobsite List).
- Default Profile:** A table showing service details:

Service Type	Service Engineer Talent Type	Service Engineer (Technical Level)	Dispatch SLA Priority
Desk-side Support		L1	P3 (NBD)
- List of all available Jobsites:** A table with tabs for Active, Passive, Archived, and All. The 'Active' tab is selected, showing a list of jobsites:

Edit	Program #	Jobsite #	Country	City	Adc
Edit	PROJ-0011	IJS02715	USA	Atlanta	134
Edit	PROJ-0011	IJS02714	USA	Merced	372
Edit	PROJ-0011	IJS02713	USA	merced	372
Edit	PROJ-0011	IJS02491	IND	Gurgaon	T-1
- Program information:** Details for the selected program, including Partner (MagiLink Global Services (ITO Partner Demo)), Program (MagiLink EUC Field Service (Master Project SOP)), Program Code (PROJ-0011), and Number of Jobsites (200).
- Jobsite Location Map:** A map showing the location of the selected jobsite.

Tip: The **List of all available Jobsites** section is composed of four tabs:

- The **Active** tab holds all available jobsites that are in Active state.
- The **Passive** tab holds all available jobsites that are in Passive state.
- The **Archived** tab contains all those jobsites that are less frequently used.
- The **All** tab displays all available jobsites irrespective of their states.

- Click the **Edit** link of the Jobsite to update jobsite location details.

It will take you to the *Manage Jobsite* pop-up to make changes as shown in Figure 4.5.

Figure 4.5: Manage Jobsite pop-up

Manage Jobsite

Jobsite Detail

Jobsite Name

Atlanta (30309) - USA -SG001705-IJS02715

Type

User - Manual Create

Account Name

Magiclink Global Services (ITO Partner Demo)

Jobsite ID

IJS02715

Street

1345 Piedmont Avenue

City

Atlanta

State

Georgia

Country Name

USA

Zip

30309

Jobsite Request Status

Active

Service Zone

ATL003

Jobsite Approval Status

Jobsite Key Contact

Latitude

0.00

Longitude

0.00

Jobsite Key Contact

Customer Site contact (Technical Escalation)

Customer Site (Admin Escalation)

Customer Site (Service Desk)

Name

Phone

Close

- Make the relevant changes in the fields you want to make and then click **Save** button to update the changes.

Tip: Click the **Close** button to discard the changes.

4.1.3 Creating New Jobsite Location by Selecting Nearby Service Zone

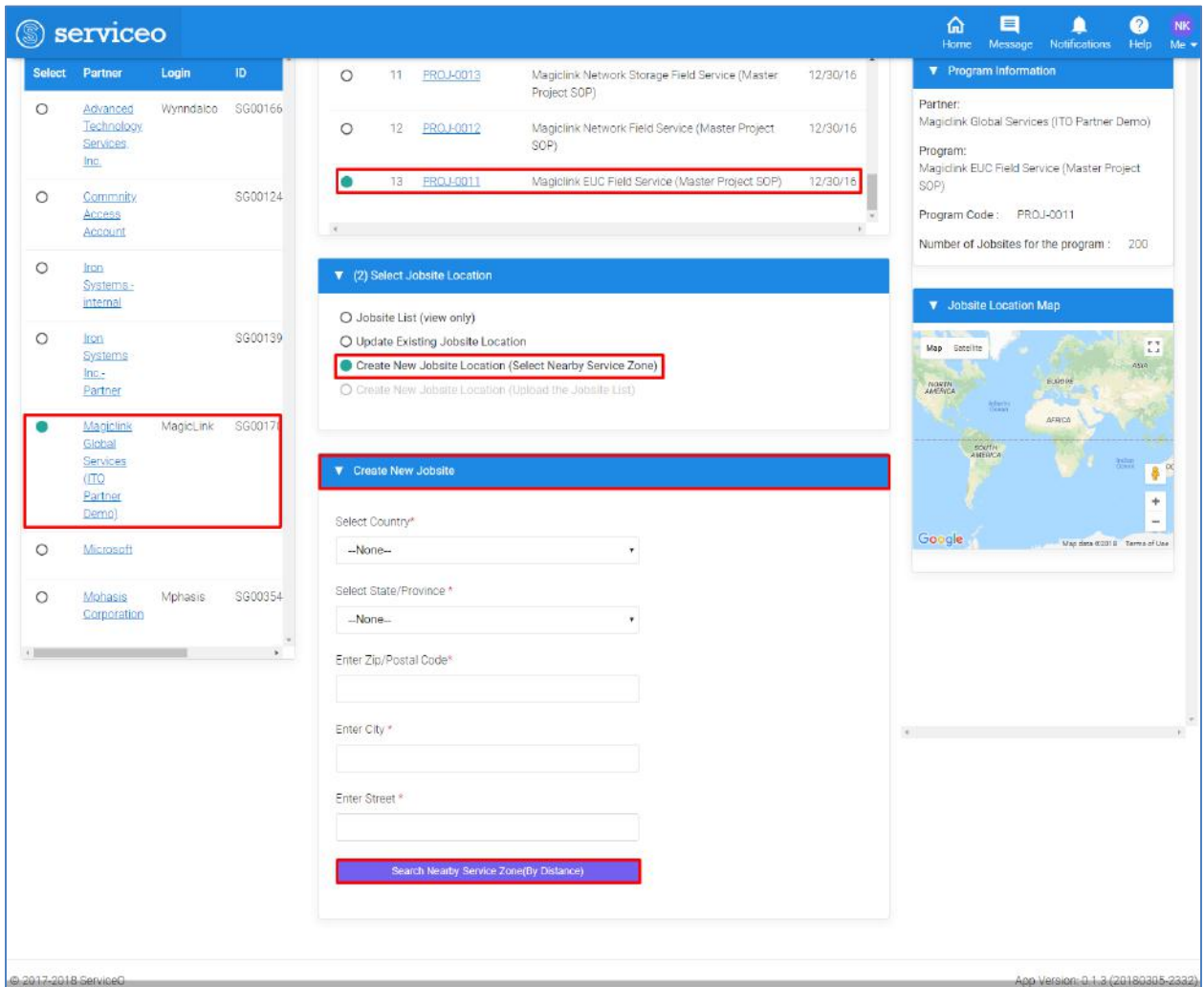
To create new jobsite location, perform the following steps:

- Select the program in the **(1) Select Program** tab for which you want to create new jobsite location by selecting nearby available service zone. Refer Figure 4.2.

2. Select the **Create New Jobsite Location (Select Nearby Service Zone)** option in the **Select Jobsite Location** tab.

The *Jobsite-setup* screen updates with the **Create New Jobsite** tab as displayed in Figure 4.6.

Figure 4.6: Jobsite-setup screen - Create New Jobsite



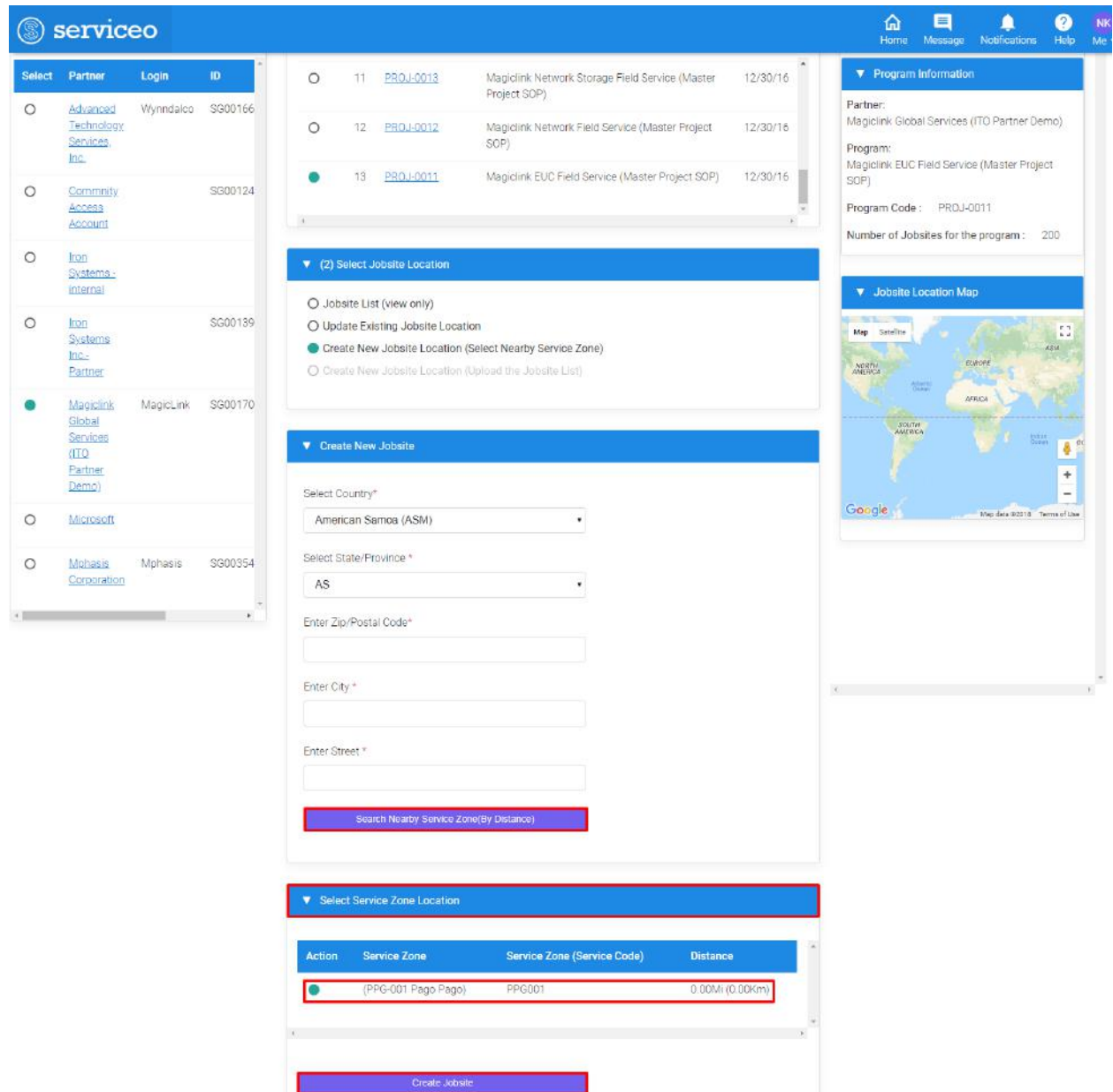
The screenshot displays the Serviceo application interface. On the left, a sidebar lists various partners, with 'MagicLink Global Services (ITD Partner Demo)' selected and highlighted with a red box. The main content area is divided into several sections. At the top, a table lists existing jobsites, with the third entry (PROJ-0011) highlighted by a red box. Below this, a section titled '(2) Select Jobsite Location' contains three radio button options: 'Jobsite List (view only)', 'Update Existing Jobsite Location', and 'Create New Jobsite Location (Select Nearby Service Zone)', with the third option selected and highlighted by a red box. Further down, a section titled 'Create New Jobsite' contains a form with the following fields: 'Select Country*' (a dropdown menu showing '--None--'), 'Select State/Province*' (a dropdown menu showing '--None--'), 'Enter Zip/Postal Code*', 'Enter City*', and 'Enter Street*'. A red box highlights the 'Create New Jobsite' section header and the 'Search Nearby Service Zone(By Distance)' button at the bottom of the form. On the right side of the screen, there is a 'Program information' panel showing details for the selected program, and a 'Jobsite Location Map' panel displaying a world map.

Note: Fields marked with asterisk are mandatory.

3. Select the country name in the **Country** drop-down list.
4. Select the state or province in the **State/Province** drop-down list.
5. Type the postal code of the area in the **Zip/Postal Code** field.
6. Type the name of city in the **City** field.
7. Type the street name in the **Street** field.
8. Click the **Search Nearby Service Zone (By Distance)** button to search the nearest location.

The *Jobsite-setup* screen updates with the **Select Service Zone Location** tab is displayed at the bottom of the screen as displayed in Figure 4.7.

Figure 4.7: Jobsite-setup screen – Service Zone Location



The screenshot displays the serviceo Jobsite-setup screen. The left sidebar shows a list of partners, with 'MagicLink Global Services (ITQ Partner Demo)' selected. The main content area is divided into several sections:

- Program Information:** Shows Partner: MagicLink Global Services (ITQ Partner Demo), Program: MagicLink EUC Field Service (Master Project SOP), Program Code: PROJ-0011, and Number of Jobsites for the program: 200.
- Jobsite Location Map:** A map showing the location of the jobsite.
- (2) Select Jobsite Location:** Includes options for Jobsite List (view only), Update Existing Jobsite Location, Create New Jobsite Location (Select Nearby Service Zone), and Create New Jobsite Location (Upload the Jobsite List).
- Create New Jobsite:** A form with fields for Select Country* (American Samoa (ASM)), Select State/Province* (AS), Enter Zip/Postal Code*, Enter City*, and Enter Street*. A button 'Search Nearby Service Zone(By Distance)' is present.
- Select Service Zone Location:** A table showing the results of the search:

Action	Service Zone	Service Zone (Service Code)	Distance
<input checked="" type="radio"/>	(PPG-001 Pago Pago)	PPG001	0.00Mi (0.00Kms)

A 'Create Jobsite' button is located at the bottom of the 'Select Service Zone Location' section.

9. Select the location which is nearest to the entered location in the **Select Service Zone Location** tab and then click the **Create Jobsite** button to create new jobsite location for the program.

4.1.4 Creating New Jobsite Location by Uploading the Jobsite List

-----This option is not available-----

5 Service Configurator

The Service Configurator is where you can configure services based on your requirements. This unified point of configuration makes it easier to configure services. It allows users to configure existing programs, create new programs, update existing jobsite location and create new jobsite location.

Here, you can also manage Quote for the listed programs or create new quote for the program. You can set process instructions for the listed programs.

To access the Service Configurator module, the user you log on as must have rights to run the module. If you need access to the Service Configurator module and the program will not allow you to log on, contact your System Administrator to verify that your user name has been granted appropriate rights.

5.1 Program Setup

This option allows users to create and manage programs associated with an Account. Here, you can use existing program to configure Program Setup or can create new Program, if required.

5.1.1 Configuring Program Setup

Here, you can configure program setup that will be used as prerequisite for configuring pricing quote.

In order to successfully configure Program Setup, you need to select a program and the selected program must meet the following prerequisites:

- The Program must have Jobsite Location.
- It also contains Jobsite Dispatch Service Profiles, and Provider details.

If there is no program available or associated with an Account, you need to create a new Program with appropriate details.

A new program can be created/added through the following ways in the service:

- Using create new program option in the Serviceo.
- Through....

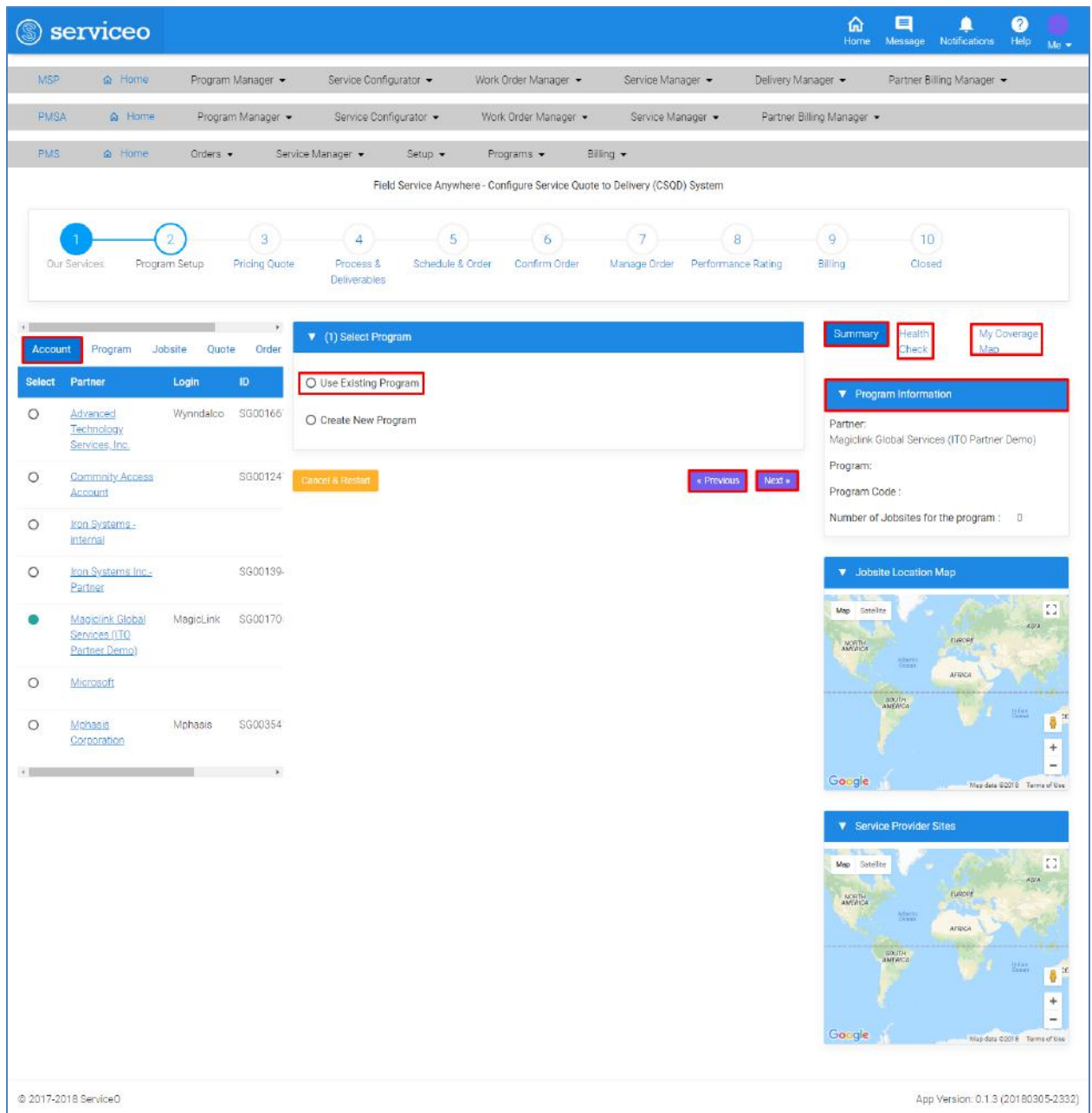
Using existing program option, you can configure Program Setup by selecting the prerequisites.

To configure Program Setup using existing Program, perform the following steps:

1. Click the **Service Configurator** next to the *MSP Home* icon and then click the **Program Setup** option on the home page.

The *Program* screen appears as shown Figure 5.1.

Figure 5.1: Program screen



The screenshot displays the Serviceo web application interface. At the top, there is a navigation bar with the Serviceo logo and user icons. Below this is a secondary navigation bar with tabs for MSP, PMSA, and PMS, each with a 'Home' link and a dropdown menu for various management functions like Program Manager, Service Configurator, Work Order Manager, Service Manager, Delivery Manager, and Partner Billing Manager.

The main content area is titled 'Field Service Anywhere - Configure Service Quote to Delivery (CSQD) System'. It features a progress bar with 10 steps: 1. Our Services, 2. Program Setup (current step), 3. Pricing Quote, 4. Process & Deliverables, 5. Schedule & Order, 6. Confirm Order, 7. Manage Order, 8. Performance Rating, 9. Billing, and 10. Closed.

Below the progress bar, there is a section for '(1) Select Program'. It includes a table with columns for 'Select', 'Partner', 'Login', and 'ID'. The table lists several partners, with 'MagicLink Global Services (ITO Partner Demo)' selected. To the right of the table, there are radio buttons for 'Use Existing Program' and 'Create New Program', and 'Previous' and 'Next' buttons.

On the right side of the screen, there are three tabs: 'Summary' (selected), 'Health Check', and 'My Coverage Map'. The 'Summary' tab displays 'Program Information' including the Partner name, Program name, Program Code, and the Number of Jobsites for the program. Below this, there are two maps: 'Jobsite Location Map' and 'Service Provider Sites', both showing a world map with location markers.

At the bottom of the screen, there is a footer with the copyright notice '© 2017-2018 Serviceo' and the app version 'App Version: 0.1.3 (20180305-2332)'.

Note: The *Program* screen displays with the *Account*, *Program*, *Jobsite*, *Quote*, *Order* and *Price Book* tabs in the left pane of the screen. The *Account* tab displays by default. In the right pane of the *Program* screen, there are three tabs, namely *Summary*, *Health Check*, and *My Coverage Map* tabs appear. Here, the *Summary* tab displays by default.

Here, you can also view various stages involved to complete a service configuration. The progress bar will run a colored bar showing the progress stage completed during the process

This progress bar provides lots of flexibility for service handling while providing visibility for users to better understand the status.

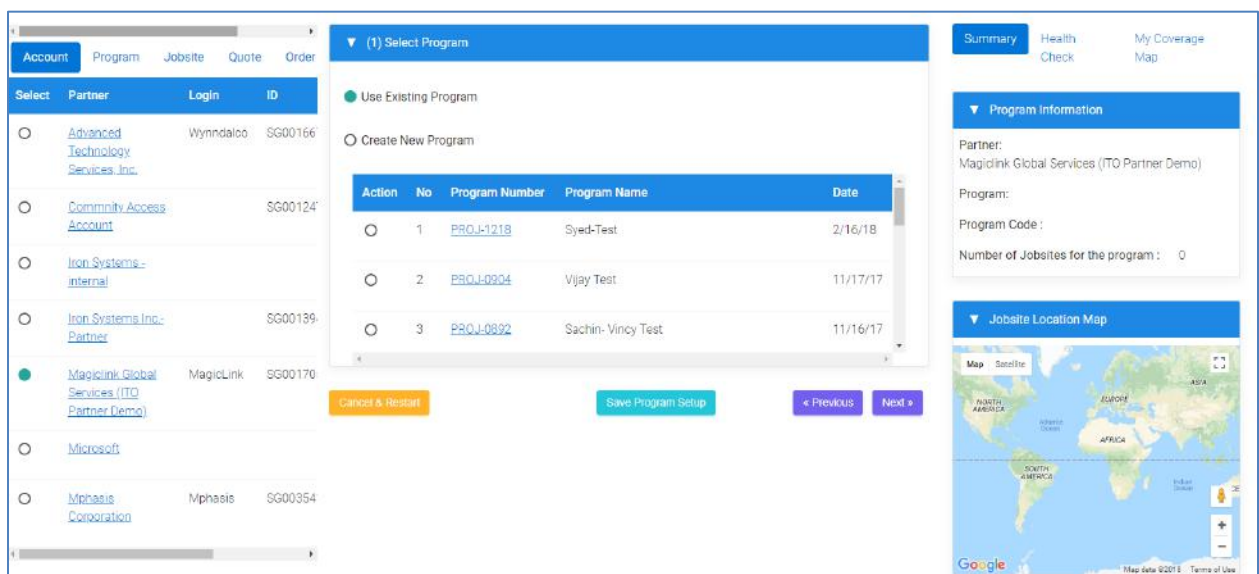
Tip: Click the **Account** Name next to the **Select** column in the **Account** tab to view Account Details. Click the **Program Number** in the **Program** tab next to the **Account** tab to view the program details. Click the **Manage** link in the **Jobsite** tab to view and edit jobsite details. Click the **Quote Number** in the **Quote** tab to view Quote Manager details. Click the **Work Order #** in the **Order** tab to view Work Order Details. Select the **Program** in the **Price Book** tab and then click the **View** link to Price Book Details.

2. Select the account name in the **Account** tab for which you want to configure program setup. Refer Figure 5.1.

Note: As you select the **Account** name in the **Account** tab, the records in the *Summary*, *Health Check*, and *My Coverage Map* tabs in the right side of the screen get updated as per selection.

3. Select the **Use Existing Program** option in the **(1) Select Program** section. Refer Figure 5.1.

The *Program* screen updates with a list of existing programs associated with the selected **Account** as shown in the below figure:



4. Select the program in the **Action** column to configure program setup.

The *Program* screen updates with the *List of all available Jobsites*, *Jobsite Dispatch Service Profiles*, and *Provider Option* tabs for the corresponding “**Program**”, if the selected Program contains all these details, if not, you will not be able to see any records.

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Home Message Notifications Help Me

MSP Home Program Manager Service Configurator Work Order Manager Service Manager Delivery Manager Partner Billing Manager

PMSA Home Program Manager Service Configurator Work Order Manager Service Manager Partner Billing Manager

FMS Home FMS Orders Service Manager Setup Programs Billing

Field Service Anywhere - Configure Service Queue to Delivery (CSD) System

- Our Services
- Program Setup
- Pricing Quote
- Process & Deliverables
- Schedule & Order
- Confirm Order
- Manage Order
- Performance Rating
- Billing
- Closed

Account Program Jobsite Quote Order

Select	Partner	Login	ID
<input type="radio"/>	Advanced Technology Services Inc.	Wyndicko	0000166
<input type="radio"/>	Community Access Account		0000124
<input type="radio"/>	Iron Systems International		
<input type="radio"/>	Iron Systems Inc.- Partner		0000109
<input checked="" type="radio"/>	MagicLink Global Services (To Partner Demo)	MagicLink	0000170
<input type="radio"/>	Microsoft		
<input type="radio"/>	Mathias Corporation	Mathias	0000054

(1) Select Program

Use Existing Program

Create New Program

Action	No	Program Number	Program Name	Date
<input type="radio"/>	1	PRGJ-1218	Dyle Test	2/16/19
<input type="radio"/>	2	PRGJ-0992	Vijay Test	11/12/17
<input checked="" type="radio"/>	3	PRGJ-0892	Sachin-Vinay Test	11/16/17

(2) Select Jobsite Location

Use Existing Jobsite Location

Create New Jobsite Location (Select Nearby Service Zone)

Create New Jobsite Location (Upload the Jobsite List)

List of all available Jobsites

Select	Edit	Program #	Jobsite #	Country	City	Address	Service Zone	Status
<input type="checkbox"/>	Edit	PRGJ-0892	US002549	AUS	syrney	2070 sector 70	SP0000	Active
<input checked="" type="checkbox"/>	Edit	PRGJ-0892	US002534	USA	Union City	33408 Central Avenue	SP0005	Active

Selected Jobsites

Delete	Program #	Jobsite #	Country	City	Address	Service Zone	Status
<input checked="" type="checkbox"/>	PRGJ-0892	US002534	USA	Union City	33408 Central Avenue	SP0005	Active

(3) Create Program Jobsite Dispatch Service Profiles

No.	Add/Remove	Jobsite #	Service Engineer Talent Type	Service Engineer (Technical Level)	Dispatch SLA Priority	Coverage Hours
1		US002534				none

(4) Select Provider Option

Show Provider	No.	Jobsite #	Service Type	Service Engineer Talent Type	Service Engineer (Technical Level)	Dispatch SLA Priority	Coverage Hours
<input checked="" type="radio"/>	1	US002534		Field Service Network Support			

Option A: Select Iron Service Good Auto Router Profile

No.	Select	Project Name	Project #	Service Technical Level	Talent Type	SLA	Service Zone
-----	--------	--------------	-----------	-------------------------	-------------	-----	--------------

Option B: Select Provider of your choice

No.	Select	Match	Vendor Name	Street	City	State	Country	Zip	Service Zone	Service Technical Level
-----	--------	-------	-------------	--------	------	-------	---------	-----	--------------	-------------------------

Summary Health Check My Coverage Map

Program Information

Partner: MagicLink Global Services (To Partner Demo)

Program: Sachin-Vinay Test

Program Code: PRGJ-0892

Number of Jobsites for the program: 2

Jobsite Location Map

Service Provider Status

Cancel & Logout Save Program Steps Previous Next

Tip: Here, you can also add new jobsite to Program location list by:

- Selecting **Create New Jobsite Location (Select Nearby Service Zone)** option in the **(2) Select Jobsite Location** tab if you want to create new jobsite location by selecting nearby service zone.
 - Selecting **Create New Jobsite Location (Upload the Jobsite List)** option in the **(2) Select Jobsite Location** tab if you want to upload jobsite list.
5. Select the jobsite for which you want to configure program setup in the **List of all available Jobsites** tab.

Note: The **List of all available Jobsites** tab lists all the jobsites pre-configured for a given program.

Tip: Click **Edit** link next to the **Select** check box to edit Jobsite details. When you click the **Edit** link, a *Manage Jobsite* pop-up appears where you can edit or modify jobsite details by typing or selecting appropriate values in the respective fields.

You can also deselect the selected Jobsites which appears in the **Selected Jobsites** tab below the **List of all available Jobsites** tab.

6. Select the Jobsite you want to deselect from the selected jobsite list in the **Selected Jobsites** tab.

Tip: Click the **Expanded View** in the upper-right corner of the section to view the selected **Jobsite Location** in pop-up.

Selected Jobsite

×

No	Program #	Jobsite #	Jobsite Name	Country	State	Zip	City	Street	J D
1	PROJ-0892	IJS02534	Union City (94587) - USA - SG001705-IJS02534	USA	California	94587	Union City	33498 Central Avenue	
2	PROJ-0892	IJS02549	sydney (3000) - AUS - SG001705-IJS02549	AUS	New South Wales	3000	sydney	2070 sector 70	

◀

▶

Export

Close

Tip: Click **Export** button to export Jobsite details in Excel format. Click **Close** button or **X** sign in the upper-right corner to close the pop-up.

- Select the program jobsite dispatch service profile in the **(3) Create Program Jobsite Dispatch Service Profiles** tab.

Tip: Here, you can add or remove program jobsite dispatch service profile by clicking + sign.

- Click the + (the plus sign) to add program jobsite dispatch service profile to the list.

The **(3) Create Program Jobsite Dispatch Service Profiles** tab updates with a new row as shown below

▼

(3) Create Program Jobsite Dispatch Service Profiles

Active

Passive

Archived

All

No.	Add/ Remove	Jobsite#	Service Engineer Talent Type	Service Engineer (Technical Level)	Dispatch SLA Priority	Coverage Ho
1	-	IJS02534 ▼	Field Service EUC ▼	L2 ▼	P1 (SBD4H) ▼	Full Day (24:
2	- +	--none-- ▼	--none-- ▼	--none-- ▼	--none-- ▼	--none--

9. Select the appropriate values in the available fields. The added Service Profile details are displayed in the **(4) Select Provider Option** section. Refer the below figure:

▼ (3) Create Program Jobsite Dispatch Service Profiles

Active

Passive

Archived

All

No.	Add/ Remove	Jobsite#	Service Engineer Talent Type	Service Engineer (Technical Level)	Dispatch SLA Priority	Coverage Ho
1	-	IJS02534 ▼	Field Service EUC ▼	L2 ▼	P1 (SBD4H) ▼	Full Day (24:
2	- +	IJS02534 ▼	Field Service EUC ▼	L2 ▼	P1 (SBD4H) ▼	Full Day (24:

▼ (4) Select Provider Option

Expanded View

<input checked="" type="radio"/>	1	IJS02534	Field Service EUC Deskside Support	L2	P1 (SBD4H)	Full Day (24x7- DAY)
<input type="radio"/>	2	IJS02534	Field Service EUC Deskside Support	L2	P1 (SBD4H)	Full Day (24x7- DAY)

10. Select the service provider in the **(4) Select Provider Option** section.

Note: The selected provider is displayed in the **Option: B, Select Provider of your choice** tab.

11. If you want to select the Iron as service provider in the **Option: A, Select Iron Service Global Auto Router Profile** tab.

12. If you want to provider from the added list, select the provider of your choice in the **Option: B, Select Provider of your choice** tab.

13. Click the **Save Program Setup** button to save the newly configured program setup.

Tip: Click **Next** button to move to next page and **Previous** button to go back to previous page.

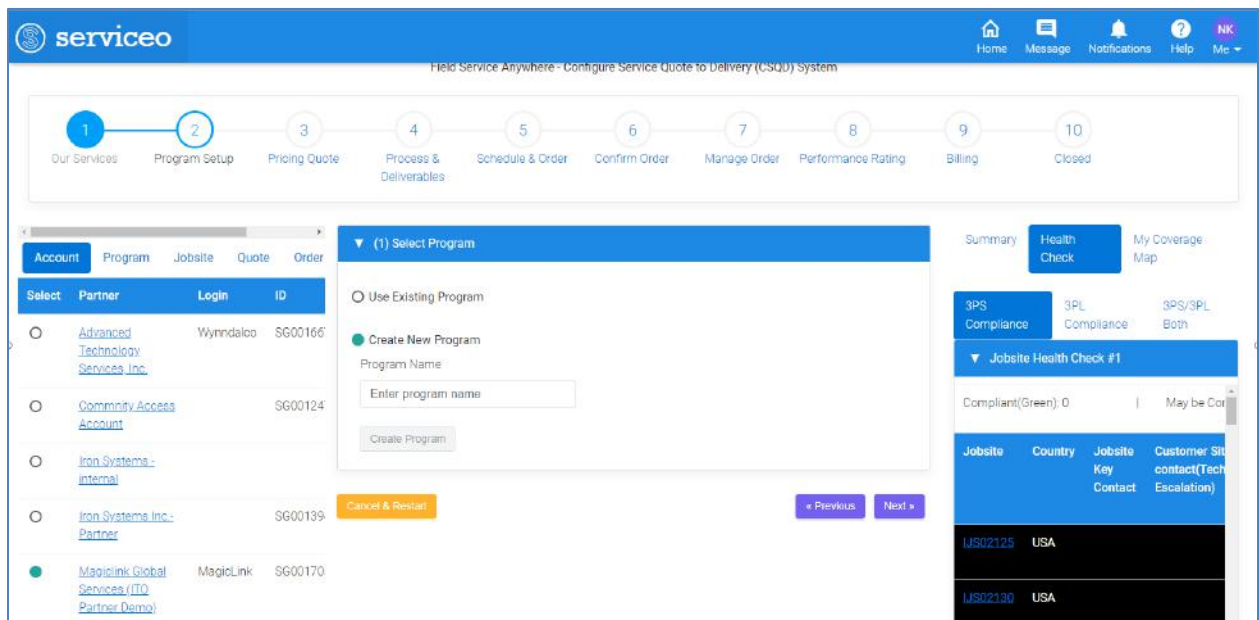
5.1.2 Creating New Program

To create new program, perform the following steps:

1. Select the **Create New Program** option in the **(1) Select Program** section. Refer Figure 5.1.

The *Program* screen updates with Program Name field as shown in Figure 5.2.

Figure 5.2: Program screen – Create New Program



2. Type the appropriate name in the **Program Name** field. Refer Figure 5.2.
3. Click the **Create Program** button to create save newly create program in the database.

Tip: Click **Cancel & Restart** button to cancel program creation. Click the **Next** button to move to the next page and **Previous** button to go back to the previous page.

5.2 Jobsite Setup

Here, you can configure the jobsite setup, view jobsite location, update existing jobsite location, and create new jobsite location

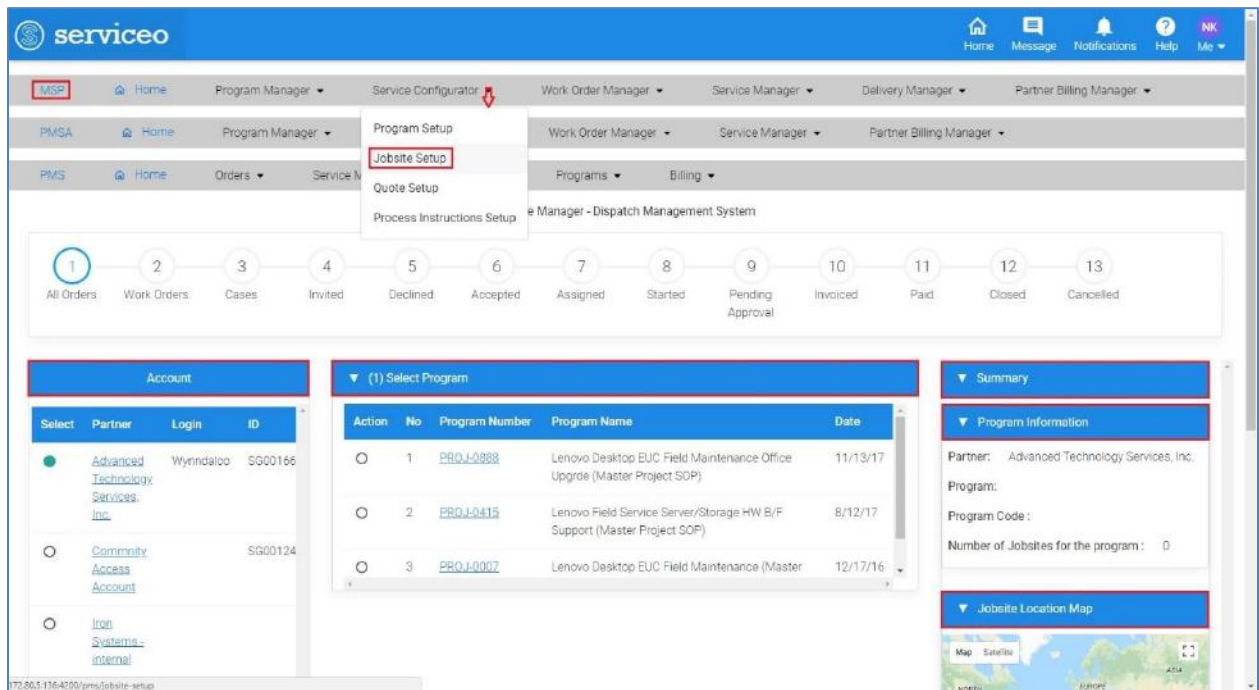
Here, you would be able to see various stages involved to complete a Work Order. These workflow stages provide lots of flexibility for Work Order handling and fulfillment while providing visibility for users to better understand the status of the Work Order.

To access Jobsite Setup screen for MSP, perform the following steps:

1. Click the **Service Configurator** next to the MSP *Home* icon and then click **Jobsite Setup** on the home page.

The *Jobsite-setup* screen displays as shown in Figure 5.3.

Figure 5.3: Jobsite-setup screen



Note: The *Jobsite-setup* screen shows workflow status on the top and the *Account* section at the left side of the screen. The partner, which was selected when user last logged, is selected by default in the *Account* section. In the right side of the *Jobsite-setup* screen, the *Summary* section is being displayed that contains *Program Information* and *Jobsite Location Map* tabs.

The progress bar enables users to see stages of a specific process/task that are involved to complete to a work order.

The *Account* section displays a list of partners including their login, ID and other details. The *Summary* section lists program information for the selected **Partner** along with its **Jobsite Location** details on the Map.

5.2.1 Viewing Jobsite List

Here, you can view the list of Jobsite Locations associated with **Program** for the selected **Partner** in the *Account* section.

For instruction on viewing, updating or creating Jobsite Locations, refer *Section 4.1.1: Viewing Jobsite List*.

5.3 Quote Setup

The Quote Setup option enables you to configure the existing quote. Here, you would also be able to manage jobsite details.

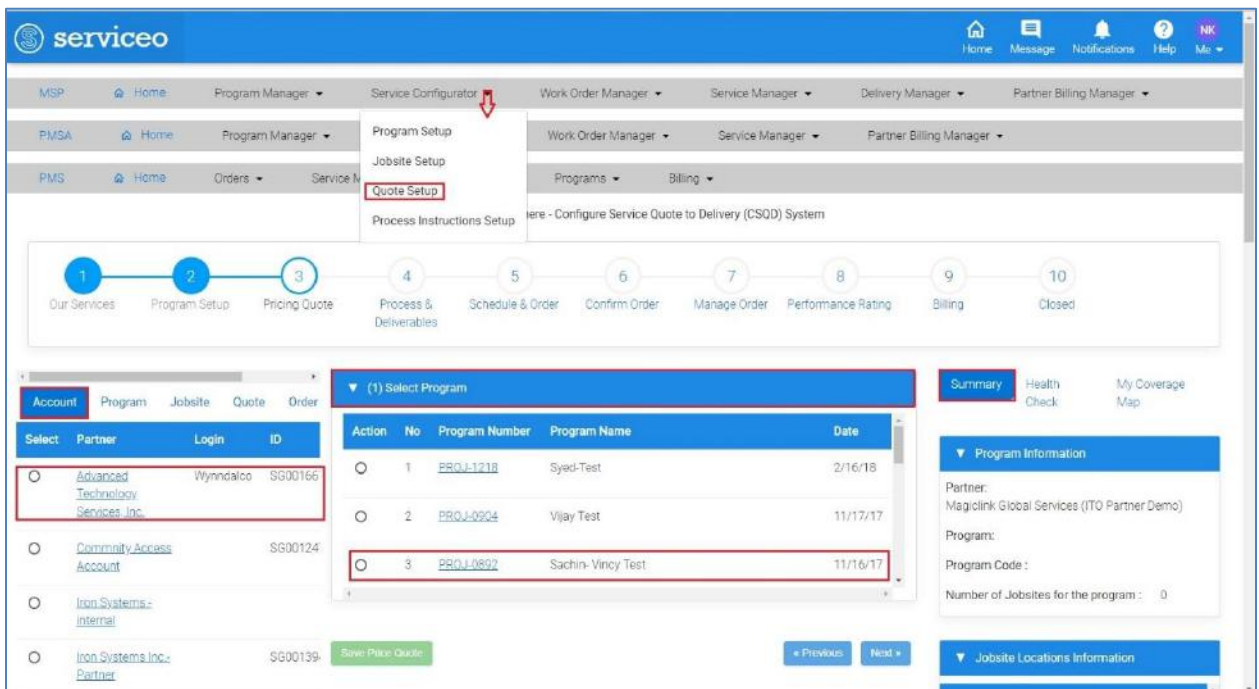
Generally, Pricing Catalogs are pre-loaded inside the system.

To access Pricing screen, perform the following steps:

1. Click the **Service Configurator** next to the MSP *Home* icon and then click **Quote Setup** to access *Pricing* screen.

The *Pricing* screen displays as shown in Figure 5.4.

Figure 5.4: Pricing screen



Note: The *Pricing* screen displays with the *Account*, *Program*, *Jobsite*, *Quote*, *Order* and *Price Book* tabs in the left pane of the screen. The *Account* tab displays by default. In the right pane of the *Program* screen, there are three tabs, namely *Summary*, *Health Check*, and *My Coverage Map* tabs appear. Here, the *Summary* tab displays by default.

Here, you can also view various stages involved to complete a process. The progress bar will run a colored bar showing the progress stage completed during the process. This progress bar provides lots of flexibility for service handling while providing visibility for users for better understanding.

Tip: Click the **Account** name next to the **Select** column in the **Account** tab to view Account Details. Click the **Program Number** in the **Program** tab next to the **Account** tab to view the program details. Click the Manage link in the Jobsite tab to view and edit jobsite details. Click the **Quote Number** in the **Quote** tab to view Quote Manager details. Click the **Work Order #** in the **Order** tab to view Work Order Details. Select the **Program** in the **Price Book** tab and then click the **View** link to Price Book Details.

5.3.1 Configuring Quote Setup

Here, you will find the complete steps to configure the quote setup.

Perform the following steps to configure pricing:

1. Select the account in the **Account** tab for which you want to configure quote. Refer Figure 5.4.

Note: As you select the **Account** name in the **Account** tab, the records in the **(1) Select Program** tab get populated based on selection. The records in the *Summary*, *Health Check*, and *My Coverage Map* tabs in the right side of the screen also get updated as per selection.

2. Select the relevant program in the **(1) Select Program** tab.

The *Pricing* screen updates with Quote and Jobsite details as shown in Figure 5.5.

Figure 5.5: Pricing screen – Quote

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Select	Partner	Login	ID
<input checked="" type="radio"/>	Advanced Technology Services Inc.	Wynndalco	SG00165
<input type="radio"/>	Community Access Account		SG00124
<input type="radio"/>	Iron Systems - Internal		
<input type="radio"/>	Iron Systems Inc. Partner		SG00139
<input type="radio"/>	MagicLink Global Services (ITO Partner Demo)	MagicLink	SG00170
<input type="radio"/>	Microsoft		
<input type="radio"/>	Mphasis Corporation	Mphasis	SG00354

(2) Select Quote Expanded View

Select	Quote No	Rev	Template Name	Description	Default	Status	Set as Default	Date
<input checked="" type="radio"/>	QM-0000174	A	ATS-QT-1	ATS Quote Template 1	<input checked="" type="checkbox"/>	Active	Set as Default	10/19/17

(3) Pre-selected Jobsites

Select	Program#	Jobsite#	Country	City	Address	Service Zone	Status
<input checked="" type="checkbox"/>	PROJ-0007	IJS00005	AUS	Sydney	Level 4, 12 Help St. Chatswood	SYD006	Active

(4) Sales Pricing per Jobsite , Service Provider & Profit Analysis

Pricing
Service Providers
Profit Analysis

(5) Sales Pricing per Jobsite Expanded View

No	Service Profile No	Service ID	Service Description	PPM hours	Price	Price Book
1				2	387	Wyndalco Customer Pricelist (PROJ-0007)
						Grand Total: 387

Save Price Quote

[< Previous](#)
[Next >](#)

Program Information

Partner: Advanced Technology Services Inc.

Program: Lenovo Desktop EUC Field Maintenance (Master Project SOP)

Program Code : PROJ-0007

Number of Jobsites for the program : 35

Jobsite Locations Information

#	Jobsite	Jobsite Project
1	Sydney (2067) - AUS-SG001667-IJS00005 (US00005)	Sydney (2067) - AUS-SG001667-IJS00005 (PROJ-0007)

Quote Header Information

Quote No(Rev): QM-0000174 A

Created Date: 10/19/17

Quote Pricing Information

No	Service ID	Service Description	PPM hours	Price
No record found.				

Jobsite Location Map

Service Provider Sites

Selected Program Jobsite Dispatch Service Profiles

No.	Jobsite #	Service Type	Service Engineer Talent Type	Service Engineer (Tech Level)
1	IJS00005	Field Service Network Support		

Note: As you select the Program in the **(1) Select Program**, the records in the **(2) Select Quote**, **(3) Pre-selected Jobsites**, **(4) Sales Pricing per Jobsite**, **Service Provider & Profit Analysis**, **(5) Sales Pricing per Jobsite** tabs auto-populate.

The **(2) Select Quote** tab displays the default quote selected by default.

3. Select the quote number that you want to configure in the **(2) Select Quote** tab.

Note: All jobsites associated with the selected **Programs** are displayed in the **(3) Pre-selected Jobsites** tab as checked/selected.

4. Select the total hours to complete a job in the **PPM Hours** drop-down list.

Tip: Click the **Expanded View** in the upper-right corner of the section to view the selected **Jobsite Location** in pop-up.

A *Sales pricing per Jobsite* pop-up displays as shown below:

No	Jobsite #	Program #	Service Profile	Service ID	Service Description	PPM hours	Price
1	Sydney (2067) - AUS - SG001667- IJS00005	Lenovo Desktop EUC Field Maintenance (Master Project SOP)				2	387

Export Close

5. Click the **Service Providers** tab to select service provider from the list.

The *Pricing* screen updates with **(6) Select Provider Option** tab as shown in Figure 5.6.

Figure 5.6: Pricing screen – Service Provider tab

serviceco

Pricing
Service Providers
Profit Analysis

▼ (6) Select Provider Option
Expanded View

No.	Select	Project Name	Project #	Service Technical Level	Talent Type	SLA	Service Zone
1	<input checked="" type="radio"/>	IJS00063		Field Service Server/Storage HW B/F Support			
2	<input type="radio"/>	IJS02480		Field Service EUC Desktop Support			
3	<input type="radio"/>	IJS00065		Field Service			

▼ Option: A, Select Iron Service Global Auto Router Profile

No.	Select	Match	Vendor Name	Street	City	State	Country	Zip	Service Zone	Service Technical Level

▼ Option: B, Select Provider of your choice

No.	Select	Match	Vendor Name	Street	City	State	Country	Zip	Service Zone	Service Technical Level

▼ Selected Service Provider's Locations

No.	Vendor Name	Street	City	State	Country	Zip	Service Zone
No record found.							

Save Price Quote

◀ Previous

Next ▶

No Service ID
Service Description
PPM hours
Pri

No record found.

▼ Jobsite Location Map

Map data ©2018 Terms of Use

▼ Service Provider Sites

Map data ©2018 Terms of Use

▼ Selected Program Jobsite Dispatch Service Profiles

No.	Jobsite #	Service Type	Service Engineer Talent Type
1	IJS00063	Field Service Server/Storage HW B/F Support	

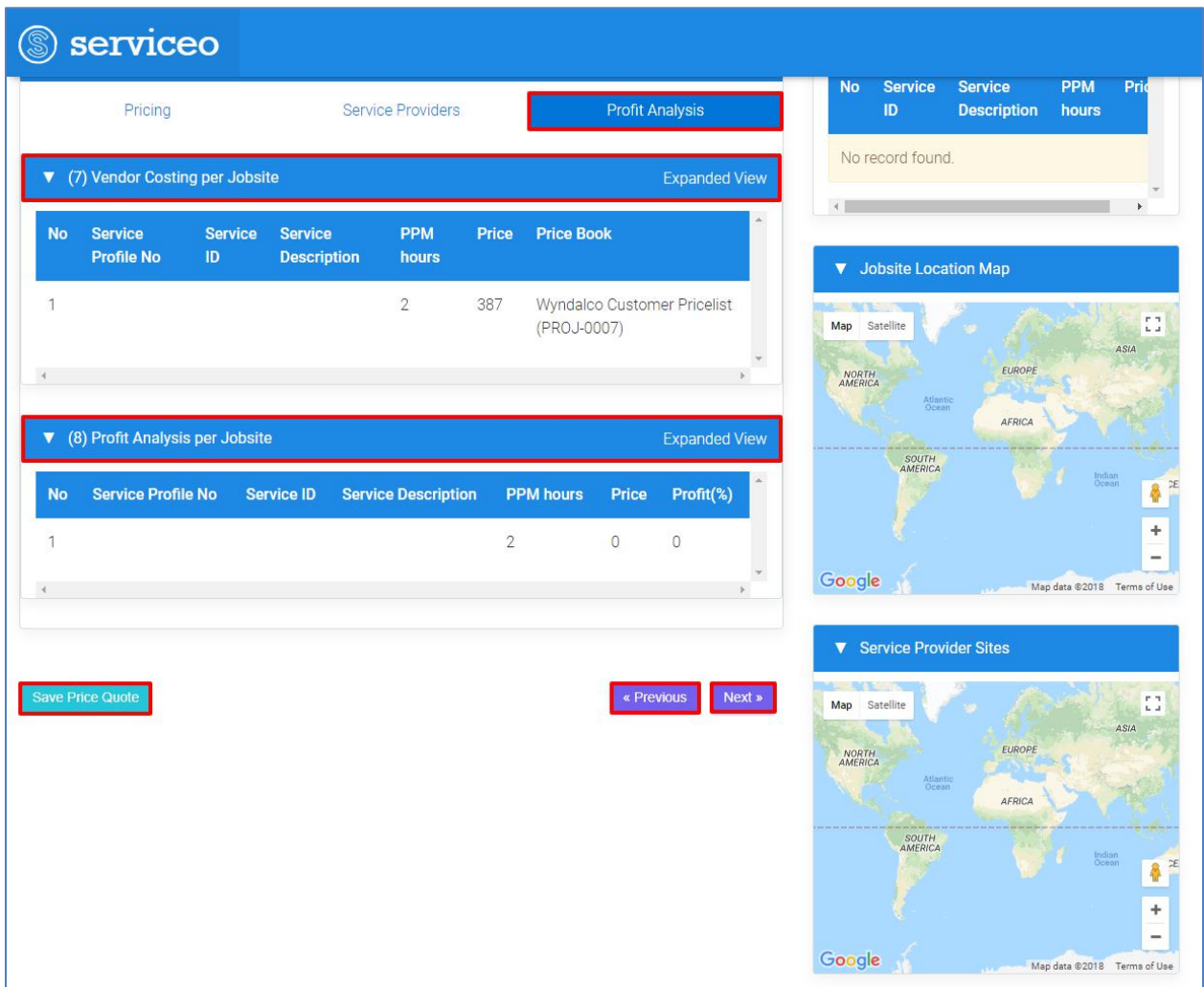
Note: The **Service Providers** tabs is composed of four tabs:

- The **(6) Select Provider Option** tab holds the list of service providers.
- The **Option: A, Select Iron Service Global Auto Router Profile** tab
- The **Option: B, Select Provider of your choice** tab
- The **Selected Service Provider's Locations** tab holds

6. Select the relevant service provider in the **(6) Select Provider Option** tab.
7. Click the **Profit Analysis** tab for cost benefit analysis.

The *Pricing* screen updates with the *(7) Vendor Costing per Jobsite* and *(8) Profit Analysis per Jobsite* tabs as shown in Figure 5.7.

Figure 5.7: Pricing screen – Profit Analysis tab



The screenshot shows the 'serviceco' Pricing screen with the 'Profit Analysis' tab selected. The main content area is divided into two sections, both with 'Expanded View' buttons:

- (7) Vendor Costing per Jobsite:** A table with the following data:

No	Service Profile No	Service ID	Service Description	PPM hours	Price	Price Book
1				2	387	Wyndalco Customer Pricelist (PROJ-0007)
- (8) Profit Analysis per Jobsite:** A table with the following data:

No	Service Profile No	Service ID	Service Description	PPM hours	Price	Profit(%)
1				2	0	0

At the bottom left, there is a 'Save Price Quote' button. At the bottom right, there are '« Previous' and 'Next »' buttons. The right sidebar features two maps: 'Jobsite Location Map' and 'Service Provider Sites', both showing a world map with a location pin in North America.

8. Click the **Expanded View** in the upper right-corner on the **(7) Vendor Costing per Jobsite** tab to view vendor costing per jobsite.

A *Vendor costing per Jobsite* pop-up displays as shown below:

No	Jobsite #	Program #	Service Profile	Service ID	Service Description	PPM hours	Price
1	Sydney (2067) - AUS - SG001667-IJS00005	Lenovo Desktop EUC Field Maintenance (Master Project SOP)				2	387

Export Close

Tip: Click **Export** button to export Vendor costing details in Excel format. Click **Close** button or **X** sign in the upper-right corner to close the pop-up.

- Click the **Expanded View** in the upper right-corner on the **(8) Profit Analysis per Jobsite** tab to view the Profit Analysis per Jobsite.

A *Profit Analysis per Jobsite* pop-up displays as shown below:

No	Jobsite #	Program #	Service Profile	Service ID	Service Description	PPM hours	Price	Profit (%)
1	Sydney (2067) - AUS - SG001667-IJS00005	Lenovo Desktop EUC Field Maintenance (Master Project SOP)				2	0	0.00%

Export Close

Tip: Click **Export** button to export Profit Analysis per Jobsite details in Excel format. Click **Close** button or **X** sign in the upper-right corner to close the pop-up.

- Click the **Save Price Quote** button to save the new configured quote.

5.4 Price Instruction Setup

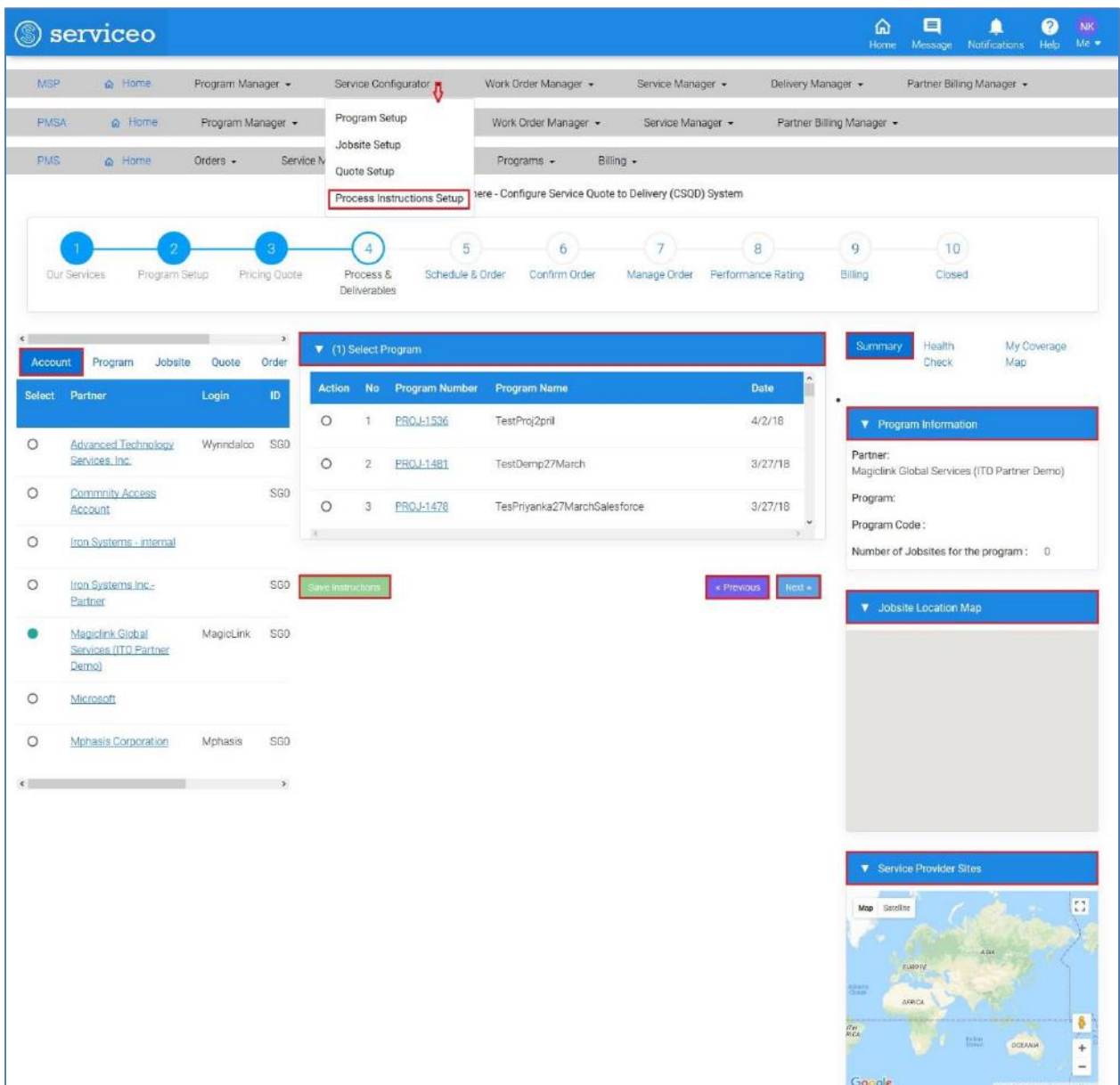
The Price Instruction Setup is the interface where you will configure the process instructions that include detailed instruction to complete a job. Here you will see the list of all service deliverables, training documents and the list of all required tools that are necessary to complete a task.

To configure Price Instruction Setup, perform the following steps:

1. Click the **Service Configurator** next to the MSP *Home* icon and then click Process Instruction Setup option to access *Instruction* screen.

The *Instruction* screen appears as shown in Figure 5.8.

Figure 5.8: Instruction screen



The screenshot displays the Serviceco interface for the 'Process Instructions Setup' screen. The top navigation bar includes links for Home, Message, Notifications, Help, and Me. Below this, a secondary navigation bar shows various management tools like MSP, PMSA, PMS, Program Manager, Service Configurator, Work Order Manager, Service Manager, Delivery Manager, and Partner Billing Manager. The 'Service Configurator' dropdown menu is open, highlighting 'Process Instructions Setup'.

A progress bar at the top indicates the workflow steps: 1. Our Services, 2. Program Setup, 3. Pricing Quote, 4. Process & Deliverables (current step), 5. Schedule & Order, 6. Confirm Order, 7. Manage Order, 8. Performance Rating, 9. Billing, and 10. Closed.

The main content area is divided into several sections:

- Account Selection:** A table with columns for Select, Partner, Login, and ID. It lists various partners like Advanced Technology Services Inc., Community Access Account, Iron Systems - internal, Iron Systems Inc. - Partner, MagicLink Global Services (ITO Partner Demo), Microsoft, and Mphasis Corporation.
- Program Selection:** A table with columns for Action, No, Program Number, Program Name, and Date. It shows three programs: PROJ-1536 (TestProj2prnl), PROJ-1481 (TestDemp27March), and PROJ-1478 (TesPriyanka27MarchSalesforce).
- Summary:** A section on the right with tabs for Summary, Health Check, and My Coverage Map. It displays 'Program Information' including Partner (MagicLink Global Services (ITO Partner Demo)), Program, Program Code, and Number of Jobsites for the program (0).
- Jobsite Location Map:** A map showing the location of the jobsite.
- Service Provider Sites:** A map showing the locations of service provider sites.

Buttons for 'Save Instructions', '< Previous', and 'Next >' are visible at the bottom of the main content area.

Note: The *Instruction* screen displays with the *Account*, *Program*, *Jobsite*, *Quote*, *Order* and *Price Book* tabs in the left pane of the screen. The *Account* tab displays by default. In the right pane of the *Program* screen, there are three tabs, namely *Summary*, *Health Check*, and *My Coverage Map* tabs appear. Here, the *Summary* tab displays by default.

Here, you can also view various stages involved to complete a service configuration. The progress bar will run a colored bar showing the progress stage completed during the process. This progress bar provides lots of flexibility for service handling while providing visibility for users to better understand the status.

Tip: Click the **Account** name next to the **Select** column in the **Account** tab to view Account Details. Click the **Program Number** in the **Program** tab next to the **Account** tab to view the program details. Click the **Manage** link in the **Jobsite** tab to view and edit jobsite details. Click the **Quote Number** in the **Quote** tab to view Quote Manager details. Click the **Work Order #** in the **Order** tab to view Work Order Details. Select the **Program** in the **Price Book** tab and then click the **View** link to Price Book Details.

2. Select the account name in the **Account** tab for which you want to configure Process Instruction.

Note: As you select the **Account** name in the **Account** tab, the records in the *Summary*, *Health Check*, and *My Coverage Map* tabs in the right side of the screen get updated as per selection.

3. Select the relevant program in the **(1) Select Program** tab.

The *Pricing* screen updates with five tabs, namely **(2) Pre-selected Jobsites**, **(3) Jobsite Project**, **(4) Jobsite Contact information**, and **(5) Files** as shown in the below figure:

serviceco

[Home](#)
[Message](#)
[Notifications](#)
[Help](#)
[Me](#)

MSP
[Home](#)
Program Manager ▾
Service Configurator ▾
Work Order Manager ▾
Service Manager ▾
Delivery Manager ▾
Partner Billing Manager ▾

PMSA
[Home](#)
Program Manager ▾
Service Configurator ▾
Work Order Manager ▾
Service Manager ▾
Partner Billing Manager ▾

PMS
[Home](#)
Orders ▾
Service Manager ▾
Setup ▾
Programs ▾
Billing ▾

Field Service Anywhere - Configure Service Quote to Delivery (CSQD) System

Account Program Jobsite Quote Order

Select	Partner	Login	ID
<input type="radio"/>	Advanced Technology Services Inc.	Wynndalco	SG0
<input type="radio"/>	Community Access Account		SG0
<input type="radio"/>	Iron Systems - internal		
<input type="radio"/>	Iron Systems Inc.- Partner		SG0
<input checked="" type="radio"/>	Magicklink Global Services (ITO Partner Demo)	MagicLink	SG0
<input type="radio"/>	Microsoft		
<input type="radio"/>	Mphasix Corporation	Mphasix	SG0

▼ (1) Select Program

<input checked="" type="radio"/>	27	PROJ-0013	Magicklink Network Storage Field Service (Master Project SOP)	12/30/16
<input type="radio"/>	28	PROJ-0012	Magicklink Network Field Service (Master Project SOP)	12/30/16
<input type="radio"/>	29	PROJ-0011	Magicklink (Americanbank) EUC Field Service (Program SOP)	12/30/16

▼ (2) Preselected Jobsites

							Zone
<input checked="" type="checkbox"/>	PROJ-0013	IJS02406	FRA	Floirac	Z.A Des Mondaults, 24 Avenue des Mondaults	800001	Active

Global Program Instructions Setup (All Jobsites)- Service Deliverable List

FE needs to provide details of tasks performed & resolution notes for this job. Also need to share comments on any other issues identified/suggestions while performing the job. Please submit waiting time, check in/out time and Upload all the required documents/notes collected while

Global Program Instructions Setup (All Jobsites)- Training Documents

The Contractor shall provide independent verification and validation for all aspects of systems security as it relates to Government practices, policies, and procedures, such as risk analysis and the development of recommendations and implementations, as well as plans for new procedures

Global Program Instructions Setup (All Jobsites)- Required Tools

- (1) Philips Screwdriver#1
- (2) Philips Screwdriver#2
- (3) Knife cutter

▼ (3) Jobsite Project

Jobsite#	Jobsite Specific Instruction Step
IJS02406	test3

▼ (4) Jobsite Contact Information

No.	Program #	Jobsite #	Jobsite Key Contact	Customer Site Contact(Technical Escalation)	Customer Site (Admin Escalation)	Customer Site (Service Desk)
1	PROJ-0013	IJS02406				

▼ (5) Files

No file selected.

Summary
Health Check
My Coverage Map

▼ Program Information

Partner:
Magicklink Global Services (ITO Partner Demo)

Program:
Magicklink Network Storage Field Service (Master Project SOP)

Program Code: PROJ-0013

Number of Jobsites for the program : 0

▼ Jobsite Location Map

▼ Service Provider Sites

Map Satellite

Google
Map data ©2018 Terms of Use

Save instructions
Previous
Next

© 2017-2018 Serviceco App Version: 0.1.3 (20180203-2052)

The **(2) Pre-selected Jobsites** comprises of three process instructions for the selected jobsite:

- Global Program Instructions Setup (All Jobsites)- Service Deliverable List holds....
- Global Program Instructions Setup (All Jobsites) - Training Documents contains all training documents.
- Global Program Instructions Setup (All Jobsites) - Required Tools contains details of all tools to process a task.

4. Type the jobsite specific instruction steps in the **Jobsite Specific Instruction Step** text field next to the **Jobsite** name.

5. Click the **Browse** button to select the file to be uploaded.

A *File Upload* dialog box appears where you need to provide the local path of the file and then click **Open** button to upload the selected file.

Note: The dialog box may vary depending upon the user's operating system.

6. Click the **Upload** button to upload the document.

7. Click the **Save Instructions** button to save the configured process instruction for the Jobsite.

Tip: Click the **Previous** button to go back to the previous page, and **Next** button to move to the next page.

6 Billing

The Billing module contains billing related information entered by authorized users.

The Billing Dashboard allows you to view and analyze the cumulative data of detailed invoice. It also displays Sales invoice in graphics on a single screen. It pulls relevant information in real time that helps staff to view key information.

This capability allows you to make quick and the spot decision.

The Billing Dashboard also allows to select column name for which you want view data on the dashboard.

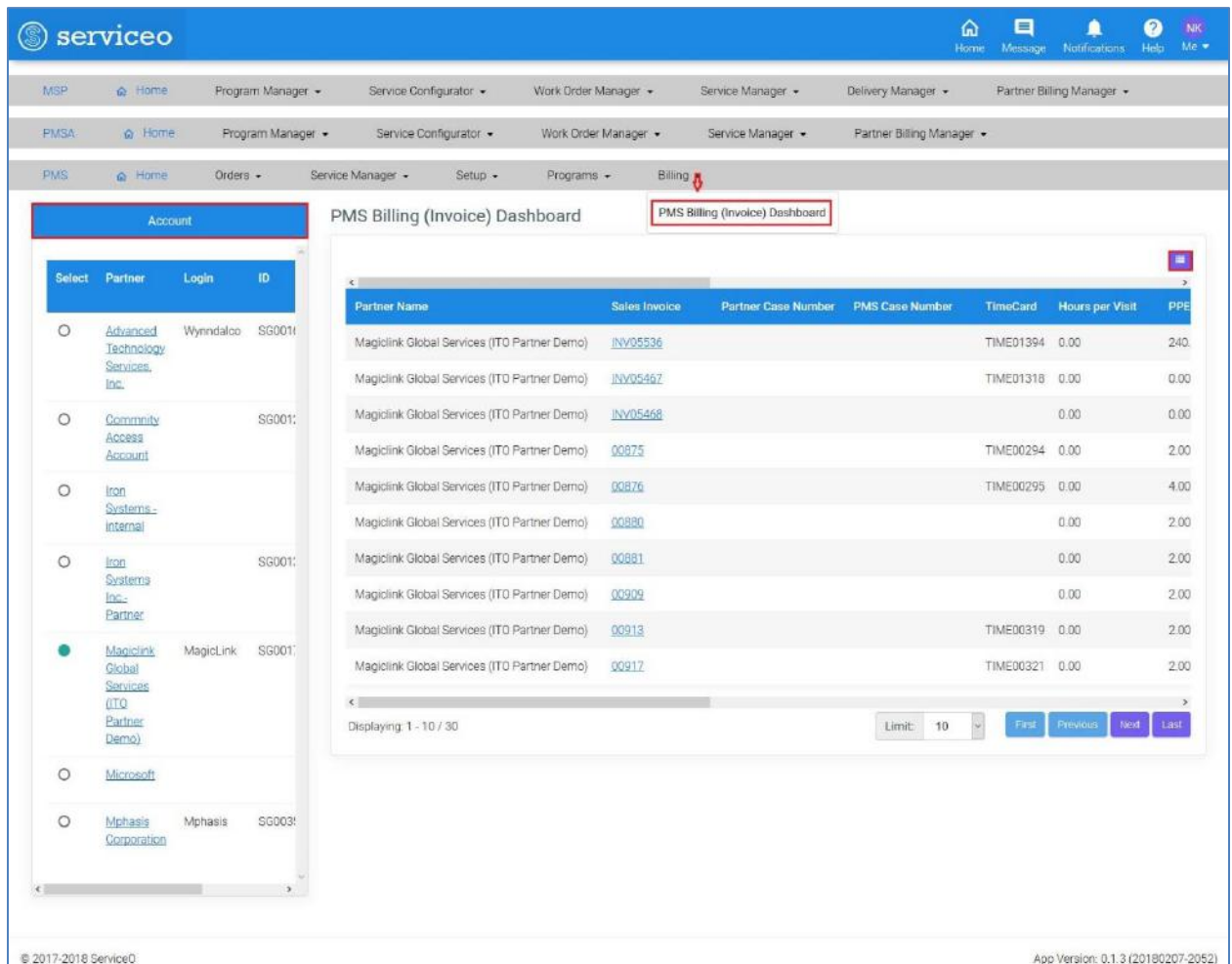
6.1 PMS Billing (Invoice) Dashboard

To access PMS Billing (Invoice) Dashboard, perform the following steps:

1. Click the **Billing** next to the **PMS Home** icon and then click the **PMS Billing (Invoice) Dashboard**.

The *Billing-manager* screen appears as shown in Figure 6.1.

Figure 6.1: Billing-manager screen



The screenshot shows the Serviceo PMS Billing (Invoice) Dashboard. The interface includes a top navigation bar with links for Home, Message, Notifications, Help, and Me. Below this is a secondary navigation bar with links for MSP, PMSA, and PMS, each with a Home link and a dropdown menu for Program Manager, Service Configurator, Work Order Manager, Service Manager, Delivery Manager, and Partner Billing Manager. The main content area is divided into two sections: 'Account' on the left and 'PMS Billing (Invoice) Dashboard' on the right. The 'Account' section contains a table with columns for Select, Partner, Login, and ID. The 'PMS Billing (Invoice) Dashboard' section contains a table with columns for Partner Name, Sales Invoice, Partner Case Number, PMS Case Number, TimeCard, Hours per Visit, and PPE. The table displays several rows of billing records for 'MagicLink Global Services (ITO Partner Demo)'. A red box highlights the 'PMS Billing (Invoice) Dashboard' tab in the top navigation bar.

Partner Name	Sales Invoice	Partner Case Number	PMS Case Number	TimeCard	Hours per Visit	PPE
Magiclink Global Services (ITO Partner Demo)	INV05536			TIME01394	0.00	240
Magiclink Global Services (ITO Partner Demo)	INV05467			TIME01318	0.00	0.00
Magiclink Global Services (ITO Partner Demo)	INV05468				0.00	0.00
Magiclink Global Services (ITO Partner Demo)	00925			TIME00294	0.00	2.00
Magiclink Global Services (ITO Partner Demo)	00876			TIME00295	0.00	4.00
Magiclink Global Services (ITO Partner Demo)	00880				0.00	2.00
Magiclink Global Services (ITO Partner Demo)	00881				0.00	2.00
Magiclink Global Services (ITO Partner Demo)	00909				0.00	2.00
Magiclink Global Services (ITO Partner Demo)	00913			TIME00319	0.00	2.00
Magiclink Global Services (ITO Partner Demo)	00917			TIME00321	0.00	2.00

Note: The partner, which was selected when user last logged, is selected by default in the **Account** section.

Tip: Click the **Partner** name link in the **Account** section to view the account details. Click the



icon in the upper right-corner to select or clear the **Column Name** check boxes as per requirements.

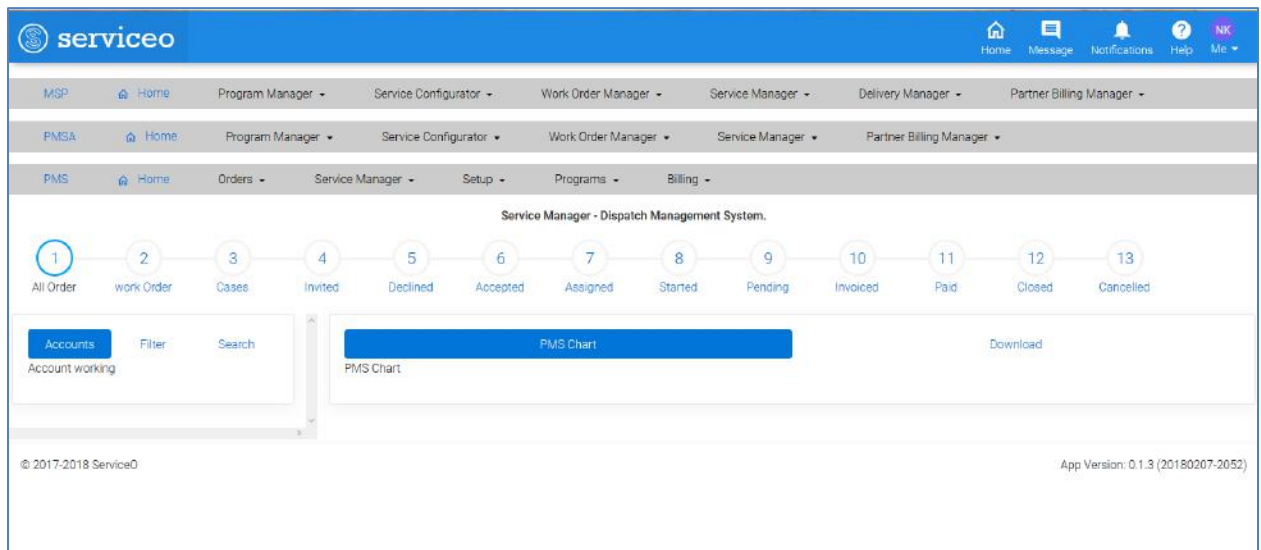
2. Select the partner name in the **Account** section for which you want to view billing dashboard.

Note: As you select the **Partner** name in the **Account** section, the records in the **PMS Billing (Invoice) Dashboard** updates as per selection.

3. Click the **Sales Invoice** link next to the **Partner Name** to view invoice details in graphics.

It will take you to the *Service-manager* screen. The **PMS Chart** tab displays by default. Refer Figure 6.2.

Figure 6.2: Service-manager screen



Note: Here, you can also view progress bar showing the different stages of order completed during the process. The progress bar will run a colored bar showing the complete or incomplete stage. It also provides lots of flexibility for order handling while providing visibility for users to better understand the status.

Tip: The *Service-manager* screen displays three tabs, namely **Accounts**, **Filter**, and **Search** tabs in the left side of the screen.

4. Click the **Download** tab to download the invoice.
5. Click the **Filter** tab in the left side of the *Service-manager* screen to apply filter to narrow down your viewing options.
6. Click the **Search** tab to apply search criteria to get records as per requirements.

7 Programs

The Programs is the place where you will be able to access the detailed view of all listed programs associated with an Account. Here you can also view approved project vendors and project workers.

It primarily provides access to the all listed Service Catalogue (Price List) that have already been brought/stored in the Serviceo.

This module is not designed to enter any records but to only view the records which have been stored in the System.

Here, you can also locate all service providers, which are listed with the Iron Systems.

The **Programs** module comprises three sub-modules, namely **Programs**, **Service Catalog (Price List)**, and **Service Locator (PMS)**.

7.1 Programs

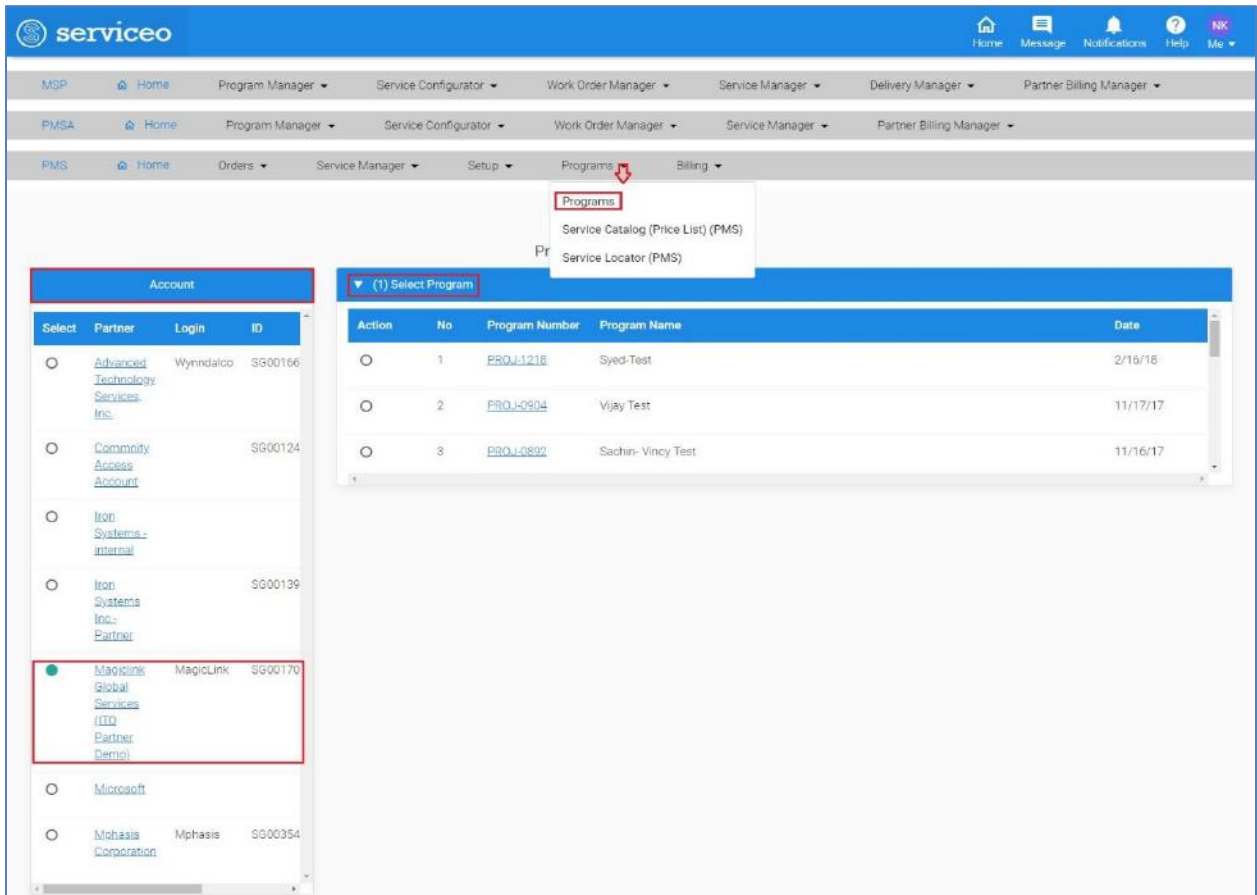
The Programs interface lists the details of Programs, Project Vendors, and Project Workers.

To access the Program Profile, perform the following steps:

1. Click the **Programs** next to the **PMS Home** icon and then click the **Programs** to access the Program Profile.

The *programs* screen displays as shown in Figure 7.1.

Figure 7.1: programs screen



Action	No	Program Number	Program Name	Date
<input type="radio"/>	1	PROJ-1218	Syed-Test	2/16/18
<input type="radio"/>	2	PROJ-0904	Vijay Test	11/17/17
<input type="radio"/>	3	PROJ-0892	Sachin- Vincy Test	11/16/17

Tip: Click the **Partner** name link in the **Account** section to view the Account Details. Click the **Program Number** link in the **(1) Select Program** tab to view Program Details.

2. Select the partner in the **Account** section for which you want to view program list associated with it.

Note: As you select the **Partner** name in the **Account** section, the **(1) Select Program** tab updates with the list of associated Programs. Refer Figure 7.1.

3. Select the Program number in the **(1) Select Program** tab to view detailed program profile.

The *programs* screen updates with tabs, **(2) Program Detail View**, **(3) Approved Project Vendor View**, **(4) Project Worker View** for corresponding “**Program**” as shown in the below figure:

serviceco

[Home](#)
[Message](#)
[Notifications](#)
[Help](#)
[Me](#)

MSP Home Program Manager Service Configurator Work Order Manager Service Manager Delivery Manager Partner Billing Manager

PMSA Home Program Manager Service Configurator Work Order Manager Service Manager Partner Billing Manager

PMS Home Orders Service Manager Setup Programs Billing

Programs: Programs Profile

Account

Select	Partner	Login	ID
<input type="radio"/>	Advanced Technology Services, Inc.	Wynndalco	SG00166
<input type="radio"/>	Community Access Account		SG00124
<input type="radio"/>	Ips Systems - Internal		
<input type="radio"/>	Ips Systems Inc. Partner		SG00139
<input checked="" type="radio"/>	Magicklink Global Services (IT) Partner (Demo)	MagicLink	SG00170
<input type="radio"/>	Microsoft		
<input type="radio"/>	Mphasys Corporation	Mphase	SG00354

(1) Select Program

<input type="radio"/>	11	PROJ-0013	Magicklink Network Storage Field Service (Master Project SOP)	12/30/16
<input type="radio"/>	12	PROJ-0012	Magicklink Network Field Service (Master Project SOP)	12/30/16
<input checked="" type="radio"/>	13	PROJ-0011	Magicklink EUC Field Service (Master Project SOP)	12/30/16

(2) Program Detail View

Program Name	Jobsite Name	Service Dispatch SLA Priority	Talent Type	Service Technical Level
Magicklink EUC Field Service (Master Project SOP) (PROJ-0011)	Yonezawa-shi (992-0021) - JPN - SG001705-US02168			
Magicklink EUC Field Service (Master Project SOP) (PROJ-0011)	Yakima (98902) - USA - SG001705-US02157			
Magicklink EUC Field Service (Master Project SOP) (PROJ-0011)	Xuhui District (200032) - CHN - SG001705-US03066			

Displaying: 1 - 10 / 200

Limit: 10 First Previous Next Last

(3) Approved Project Vendor View

Program Name	Project Name	APVP Vendor Name	Max Priority Ranked APVP
Magicklink EUC Field Service (Master Project SOP) (PROJ-0011)	Magicklink EUC Field Service - New York (SA)	USACA BSB Local Field Service Vendor Demo	
Magicklink EUC Field Service (Master Project SOP) (PROJ-0011)	Magicklink EUC Field Service - New York (SA)	USACA AAA Local Field Service Vendor Demo	
Magicklink EUC Field Service (Master Project SOP) (PROJ-0011)	Lenovo Project Error (Default)	Iron Systems (Vendor & Vendor Sites)-Test	
Magicklink EUC Field Service (Master Project SOP) (PROJ-0011)	Magicklink Desktop EUCField Maintenance, (USA-SF0005)	USACA AAA Local Field Service Vendor Demo	

Displaying: 1 - 9 / 9


Limit: 10 First Previous Next Last

(4) Project Worker View

Program Name	Project Name	Worker Name	Worker Email	Worker Phone
Magicklink EUC Field Service (Master Project SOP) (PROJ-0011)	Carrollton (75006) - USA - SG001705-US02132			
Magicklink EUC Field Service (Master Project SOP) (PROJ-0011)	Montréal (H3J 1R5) - CAN - SG001705-US02063			
Magicklink EUC Field Service (Master Project SOP) (PROJ-0011)	Thunder Bay (P7B 4A8) - CAN - SG001705-US02054			
Magicklink EUC Field Service (Master Project SOP) (PROJ-0011)	London (N5V 1Z5) - CAN - SG001705-US02057			

Displaying: 1 - 10 / 200

Limit: 10 First Previous Next Last

Tip: Click the  icon in the upper right-corner of tabs and then select or clear the **Column Name** check boxes from the list as per requirements.

Select the number you want to view in the **Limit** drop-down list.

Click the **First** button to view records displayed on the first page, **Previous** button to view previous records, **Next** button to move to the next page, and the **Last** button to go to the last page.

7.2 Service Catalogue (Price List) (PMS)

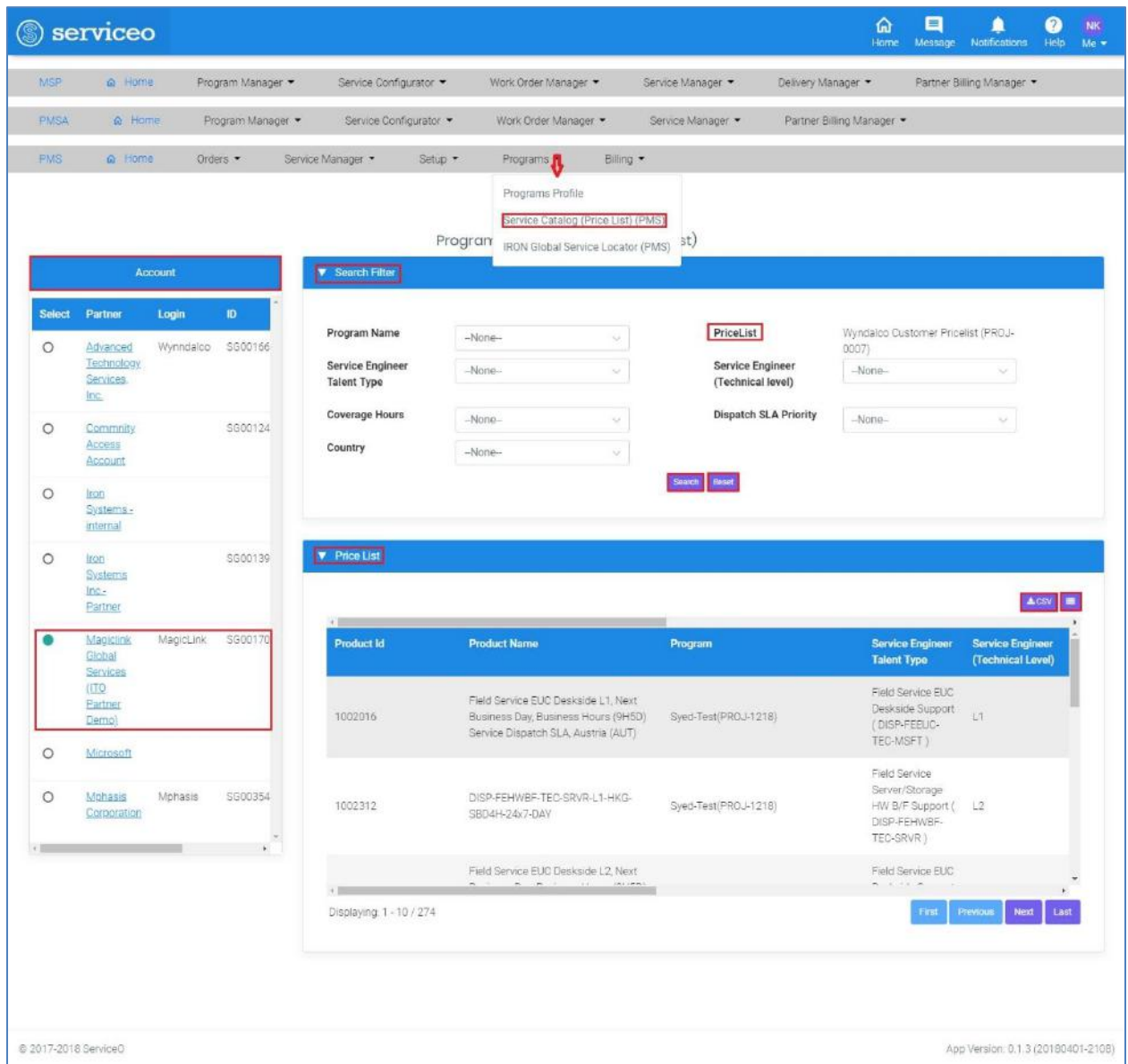
This module allows you to view service catalogue and search the most complex service catalogue (price list) with ease. Here, you will be able to search the price list of services by applying different search criteria.

To view and search the Service Catalogue (Price List), perform the following steps:

1. Click the **Programs** next to the **PMS Home** icon and then click the **Service Catalogue (Price List) (PMS)** option to access pricelist screen.

The *Pricelist* screen appears as shown in Figure 7.2.

Figure 7.2: Pricelist screen





The screenshot displays the Serviceo Pricelist screen. The top navigation bar includes the Serviceo logo and user profile. The main menu bar lists various management tools. The 'Account' section on the left shows a list of partners, with 'MagicLink Global Services (ITQ Partner Demo)' selected. The 'Program' section on the right features search filters for Program Name, Service Engineer Talent Type, Coverage Hours, and Country. Below these filters is the 'Price List' table, which contains the following data:

Product Id	Product Name	Program	Service Engineer Talent Type	Service Engineer (Technical Level)
1002016	Field Service EUC Deskside L1, Next Business Day, Business Hours (9HSD) Service Dispatch SLA, Austria (AUT)	Syed-Test(PROJ-1218)	Field Service EUC Deskside Support (DISP-FEUC-TEC-MSFT)	L1
1002312	DISP-FEHWBF-TEC-SRVR-L1-HKG-SB04H-24/7-DAY	Syed-Test(PROJ-1218)	Field Service Server/Storage HW B/F Support (DISP-FEHWBF-TEC-SRVR)	L2
	Field Service EUC Deskside L2, Next Business Day, Business Hours (9HSD) Service Dispatch SLA, Austria (AUT)		Field Service EUC	

The table also includes a 'CSV' button in the top right corner and pagination controls at the bottom.

Note: The partner, which was selected when user last logged, is selected by default in the **Account** section.

Tip: Click the  button to download the Price List in the **Excel** format. Click the  icon in the upper right-corner of tabs and then select or clear the **Column Name** check boxes from the list as per requirements.

Click the **First** button to view records displayed on the first page, **Previous** button to view previous records, **Next** button to move to the next page, and the **Last** button to go to the last page.

2. Select the Partner name in the **Account** section.

Note: As you select the partner name in the **Account** section, the **PriceList** field and other records get updated as per selection in the **Search Filter** tab.

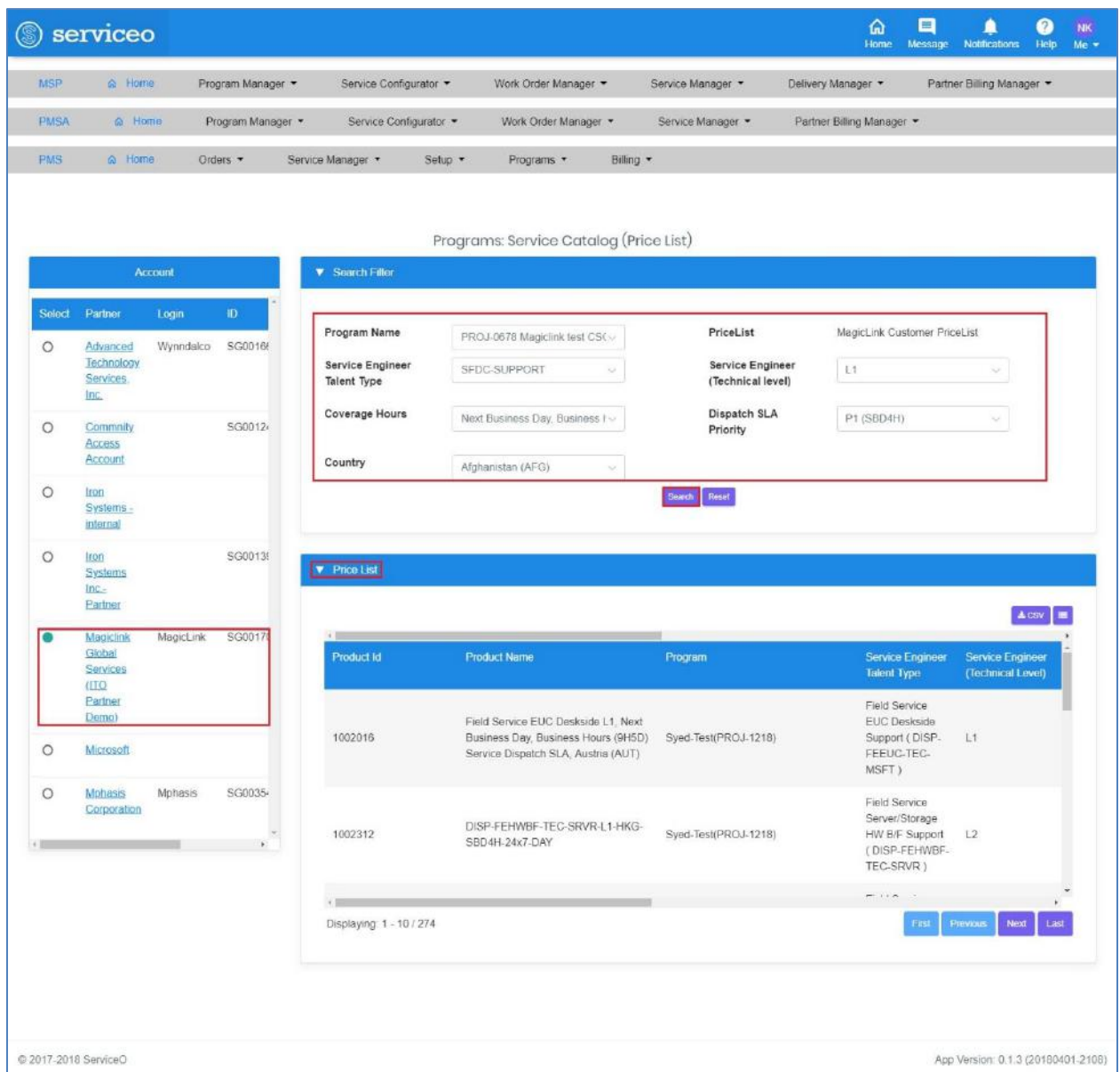
3. Select the program name for which you want to search price list in the **Program Name** drop-down list in the **Search Filter** tab.

Note: As you select the Program Name in the Program Name drop-down select list, the **PriceList** field gets updated.

4. Select the service engineer talent type in the **Service Engineer Talent Type** drop-down list.
5. Select the technical level of selected service engineer in the **Service Engineer (Technical level)** drop-down select list.
6. Select the coverage hours in the **Coverage Hours** drop-down list.
7. Select the SLA priority in the **Dispatch SLA Priority** drop-down list.
8. Select the country in the **Country** drop-down select list.
9. Click the **Search** button to fetch the records based on selected search criteria.

The **Price List** tab on the *pricelist* screen updates with records as shown in Figure 7.3.

Figure 7.3: Pricelist screen – Price List tab



Account

Select	Partner	Login	ID
<input type="radio"/>	Advanced Technology Services, Inc.	Wynndalco	SG0018
<input type="radio"/>	Community Access Account		SG0012
<input type="radio"/>	Iron Systems - Internal		
<input type="radio"/>	Iron Systems Inc. - Partner		SG0013
<input checked="" type="radio"/>	MagicLink Global Services (ITQ Partner Demo)	MagicLink	SG0017
<input type="radio"/>	Microsoft		
<input type="radio"/>	Mphasis Corporation	Mphasis	SG0035

Programs: Service Catalog (Price List)

Search Filter

Program Name	PROJ-0678 MagicLink test CSK	PriceList	MagicLink Customer PriceList
Service Engineer Talent Type	SFDC-SUPPORT	Service Engineer (Technical level)	L1
Coverage Hours	Next Business Day, Business H	Dispatch SLA Priority	P1 (SBD4H)
Country	Afghanistan (AFG)		

Price List

Product Id	Product Name	Program	Service Engineer Talent Type	Service Engineer (Technical Level)
1002016	Field Service EUC Deskside L1, Next Business Day, Business Hours (9H5D) Service Dispatch SLA, Austria (AUT)	Syed-Test(PROJ-1218)	Field Service EUC Deskside Support (DISP- FEEUC-TEC-MSFT)	L1
1002312	DISP-FEHWBF-TEC-SRVR-L1-HKG-SBD4H-24x7-DAY	Syed-Test(PROJ-1218)	Field Service Server/Storage HW B/F Support (DISP-FEHWBF-TEC-SRVR)	L2

Displaying: 1 - 10 / 274

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Tip: Click the **Reset** button in the **Search Filter** tab to reset the search criteria.

7.3 Iron Global Service Locator (PMS)

This module allows you to easily search, identify and connect all available active 3PS and 3PL service providers in any region. You will also be able to detect service providers' location, identify service providers in the vicinity with markers on the map.

Iron Service Global serves various locations globally.

There are two types of service provider available in the serviceco.

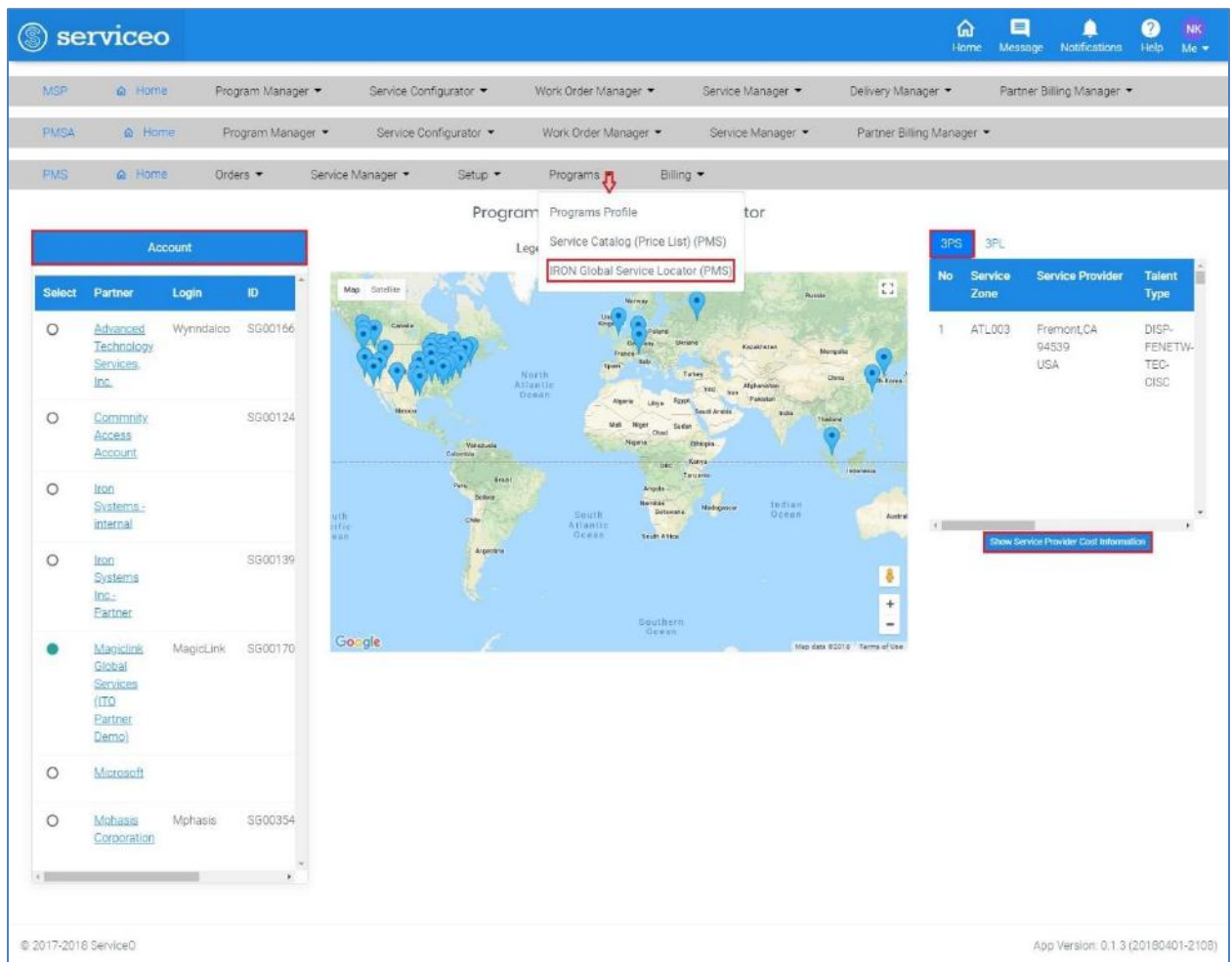
- 3PS –
- 3PL –

To locate global service providers, perform the following steps:

1. Click the **Programs** next to the **PMS Home** icon and then click the **IRON Global Service Locator (PMS)** option to Coverage-map screen.

The *Coverage-map* screen appears as shown in Figure 7.4.

Figure 7.4: Coverage-map screen



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Note: The *Coverage-map* screen displays **Account** section in the left side and **3PS** and **3PL** tabs in the right side of the screen. The **3PS** tab displays by default. Refer Figure 7.4.

The **Account** section displays a list of partners including their login, ID and other details.

The partner, which was selected when user last logged, is selected by default in the **Account** section.

Placing the pointer over the icon on the map displays the location code and complete address of the service providers.

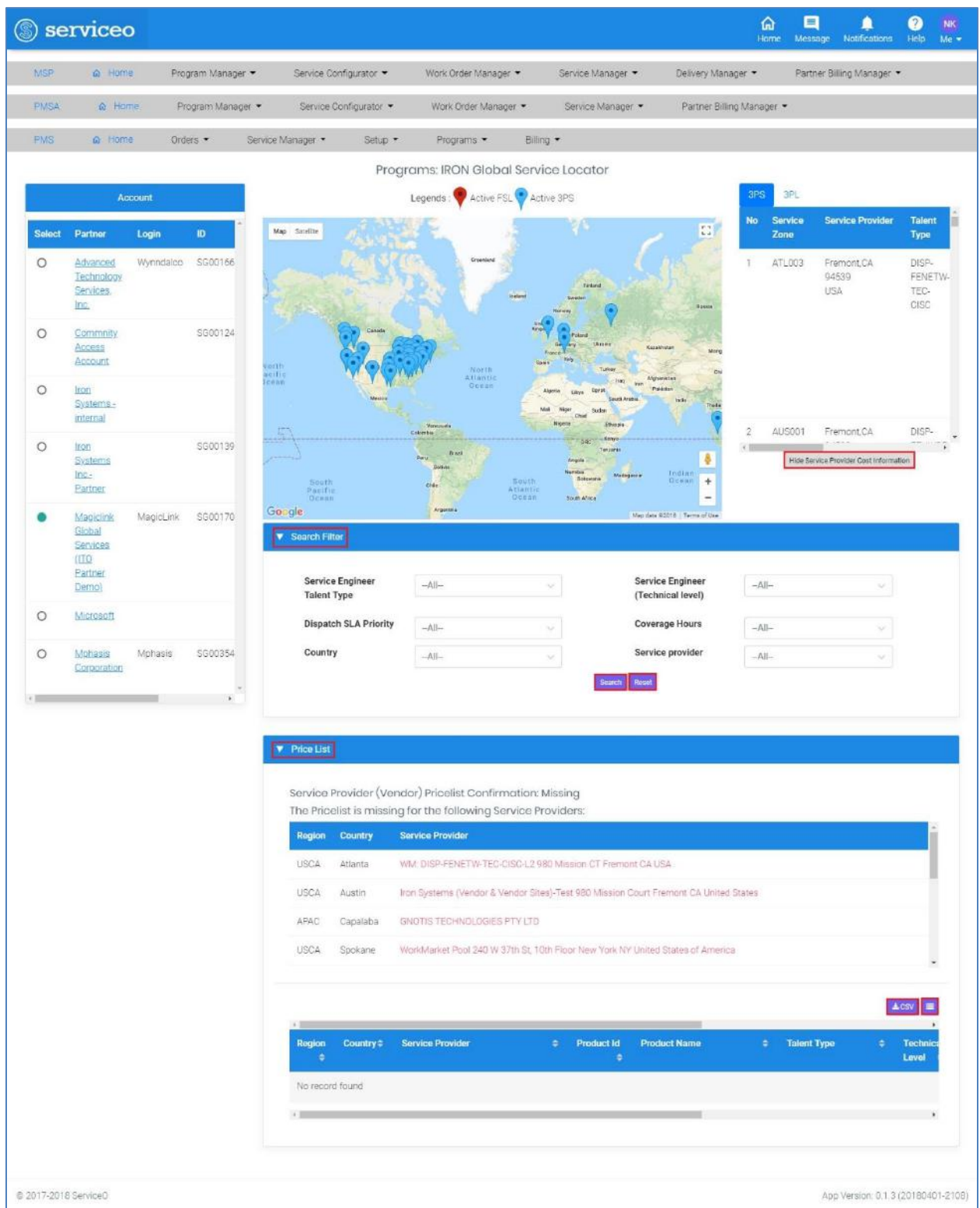
2. Select the partner name in the **Account** section.

Note: As you select the partner name in the **Account** section, the locations on the map and records in the **3PS** and **3PL** tabs get updated.

3. Click the **Show Service Provider Cost Information** button to view price details charged by the Service Provider.

The *Coverage-map* screen updates with the *Search Filter* and *Price List* tabs as shown in Figure 7.5.

Figure 7.5: Coverage-map screen - Service Provider Cost Information



Programs: IRON Global Service Locator

Legends: Active PSL Active 3PS

Map Satellite

Account

Select	Partner	Login	ID
<input type="radio"/>	Advanced Technology Services, Inc.	Wynndalco	SG00166
<input type="radio"/>	Community Access Account		SG00124
<input type="radio"/>	Iron Systems - internal		SG00139
<input type="radio"/>	Iron Systems Inc - Partner		SG00170
<input checked="" type="radio"/>	Magicklink Global Services (ITQ Partner Demo)	MagickLink	SG00170
<input type="radio"/>	Microsoft		
<input type="radio"/>	Mphasis Corporation	Mphasis	SG00354

3PS 3PL

No	Service Zone	Service Provider	Talent Type
1	ATL003	Fremont,CA 94539 USA	DISP-FENETW-TEC-CISC
2	AUS001	Fremont,CA	DISP-

Hide Service Provider Cost Information

Search Filter

Service Engineer Talent Type: --All--

Dispatch SLA Priority: --All--

Country: --All--

Service Engineer (Technical level): --All--

Coverage Hours: --All--

Service provider: --All--

Search Reset

Price List

Service Provider (Vendor) Pricelist Confirmation: Missing

The Pricelist is missing for the following Service Providers:

Region	Country	Service Provider
USCA	Atlanta	WM: DISP-FENETW-TEC-CISC-L2 980 Mission CT Fremont CA USA
USCA	Austin	Iron Systems (Vendor & Vendor Sites)-Test 980 Mission Court Fremont CA United States
APAC	Capalaba	GINOTIS TECHNOLOGIES PTY LTD
USCA	Spokane	WorkMarket Pool 240 W 37th St, 10th Floor New York NY United States of America

CSV

Region	Country	Service Provider	Product Id	Product Name	Talent Type	Technical Level
No record found						

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Tip: Click the **Hide Service Provider Cost Information** button to hide the price details (pricelist) of the service provider.

4. Select the relevant service engineer type you want to view price in the **Service Engineer Talent Type** drop-down select list.
5. Select the technical level of service engineer in the **Service Engineer (Technical level)** drop-down list.
6. Select the appropriate SLA priority in the **Dispatch SLA Priority** drop-down list.
7. Select the coverage hours in the **Coverage Hours** drop-down list.
8. Select the country of the service provider in the **Country** drop-down select list.
9. Select the Service Provider you want to choose for the selected region in the **Service Provider** drop-down list.
10. Click the **Search** button to fetch the records based on selected search criteria.

Tip: Click the **Reset** button to reset the selected search criteria.

The *Coverage-map* screen updates with records in the **Price List** tab as shown below:



Price List

Service Provider (Vendor) Pricelist Confirmation: Missing
The Pricelist is missing for the following Service Providers:

Region	Country	Service Provider
USCA	Atlanta	WM: DISP-FENETW-TEC-CISC-L2 980 Mission CT Fremont CA USA
USCA	Austin	Iron Systems (Vendor & Vendor Sites)-Test 980 Mission Court Fremont CA United States
APAC	Capalaba	GNOTIS TECHNOLOGIES PTY LTD
USCA	Spokane	WorkMarket Pool 240 W 37th St, 10th Floor New York NY United States of America

CSV

Region	Country	Service Provider	Product Id	Product Name	Talent Type	Technical Level
No record found						

Tip: Click the  button to download the Price List details of the service provider in the **Excel** format. Click the  icon in the upper right-corner of tabs and then select or clear the **Column Name** check boxes from the list as per requirements.

8 Service Manager

The purpose of Service Manager is to make the service management easier and efficient. This module of the PMS..... More information will be added at a later stage.

8.1 Service Manager Console (PMS)

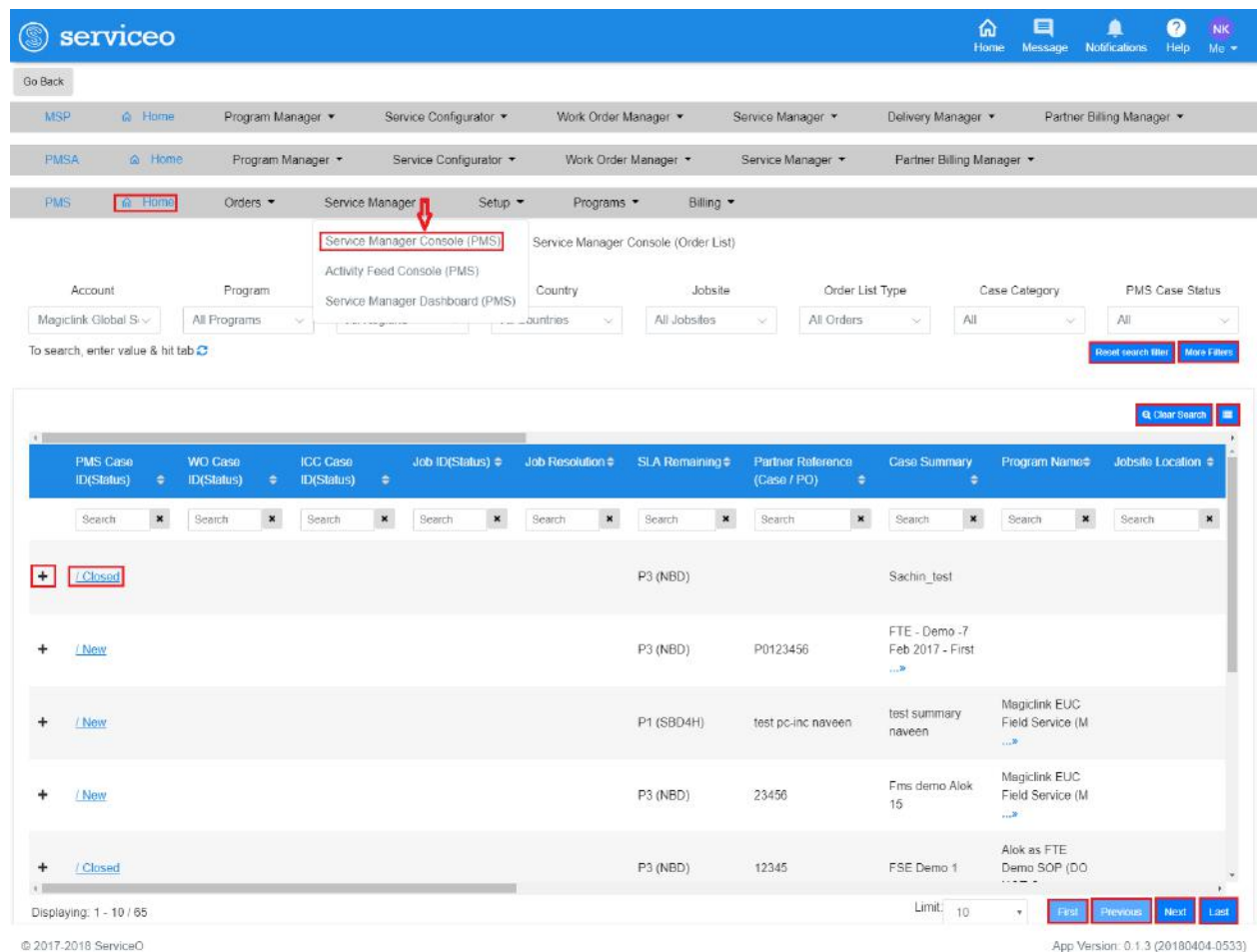
The Service Manager Console logs the consolidated list of orders for all listed partner, which are entered into the Serviceco system. It

To view the Order List (PMS), perform the following steps:

1. Click the **Service Manager** next to the **PMS Home** icon and then click the **Service Manager Console (PMS)** to access the order list.



The *Orders-list* screen appears as shown in Figure 8.1.

Figure 8.1: Orders-list screen



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App Version: 0.1.3 (20180404-0533)

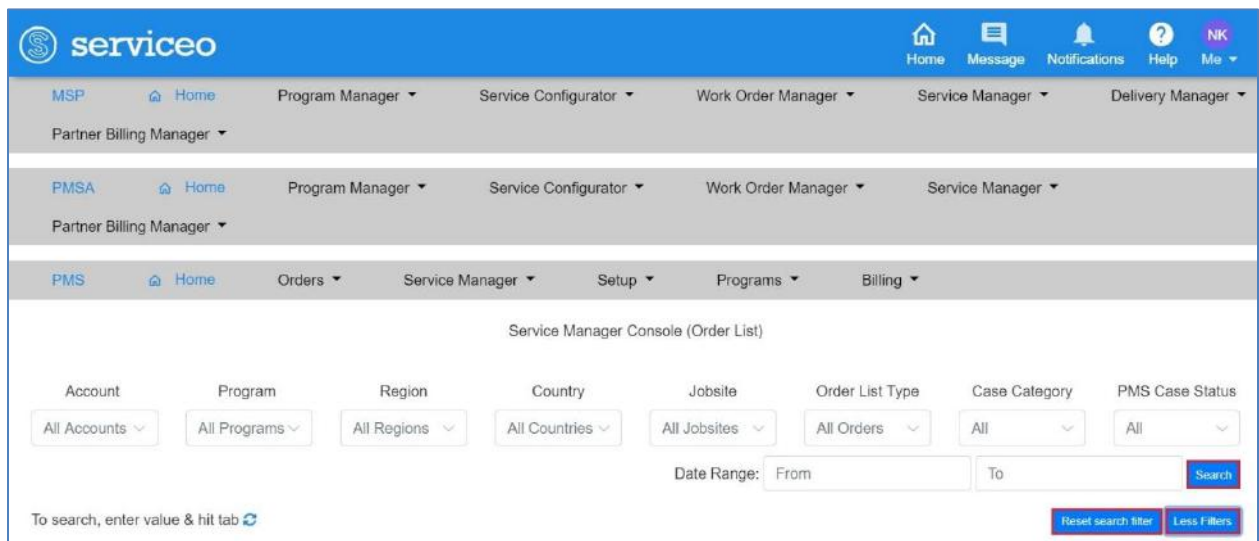
Tip: Click the **Go Back** button in the upper-left corner of the *Orders-list* screen to return to the page you were viewing before this current page. Click the  icon to refresh the *Orders-list* screen. Click the  icon in the upper right-corner to select or clear the **Column Name** check boxes as per requirements.

2. Select the Account name in the **Account** drop-down select list.

Tip: As you select the Account name in the **Account** drop-down list, the order list corresponding to the selected **Account** gets updated on the page.

3. Select the relevant program in the **Program** drop-down list for which you want to view order list. The **Order List** gets updated on the *Orders-list* screen for the corresponding “**Program**” if the selected **Program** has orders.
4. Select the appropriate values in the different search fields to narrow down your search results.
5. To further narrow down your search results and viewing options, click the **More Filters** button.

The *Orders-list* screen updates with more search fields as shown in the below figure:



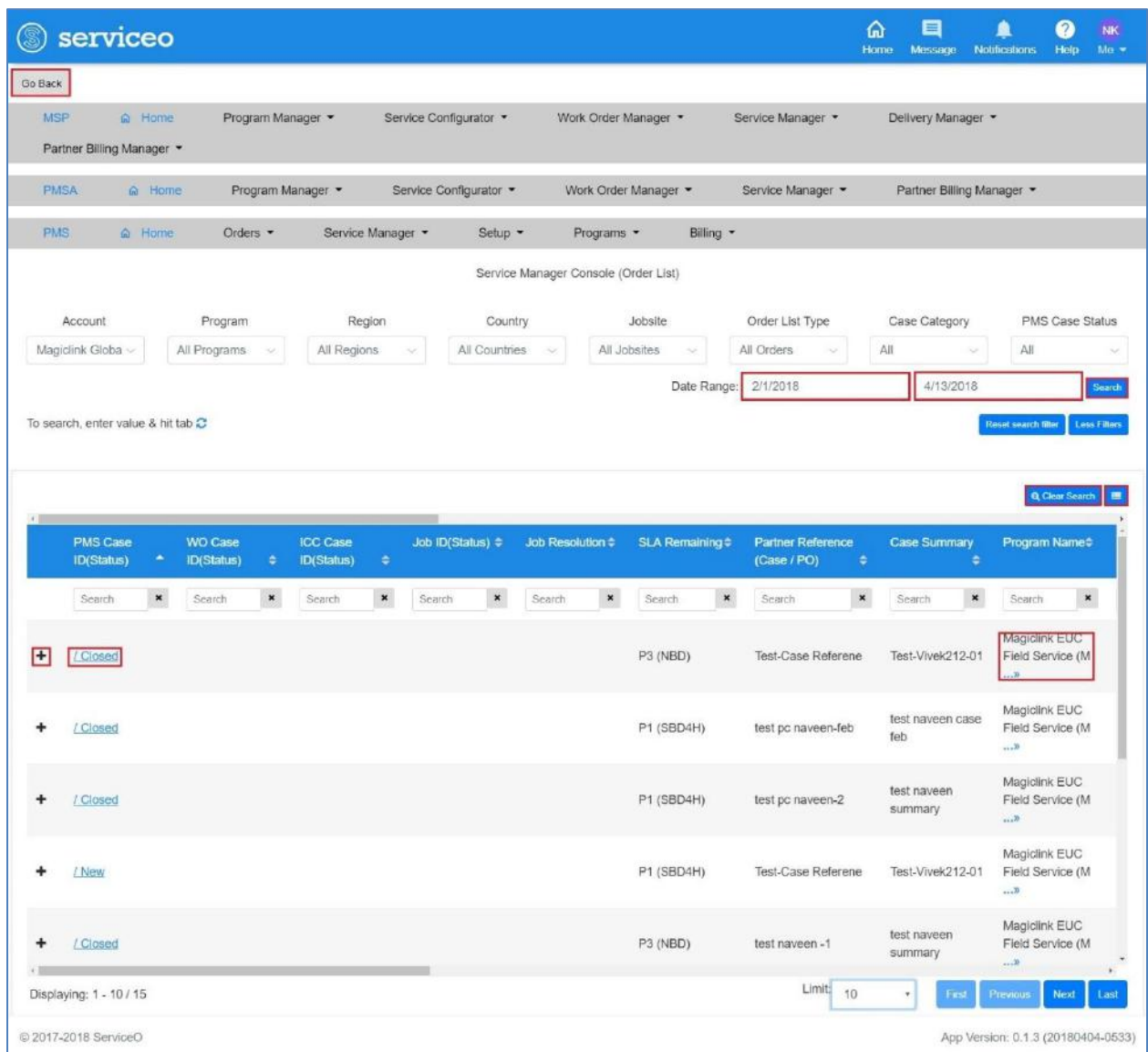
The screenshot shows the Serviceco interface with the 'Orders' tab selected. The 'Service Manager Console (Order List)' section contains several search filters: Account (All Accounts), Program (All Programs), Region (All Regions), Country (All Countries), Jobsite (All Jobsites), Order List Type (All Orders), Case Category (All), and PMS Case Status (All). There is a 'Date Range' section with 'From' and 'To' fields and a 'Search' button. At the bottom, there are links for 'To search, enter value & hit tab', 'Reset search filter', and 'Less Filters'.

6. Select **Date Range** in the **From** and **To** Date fields and then click the **Search** button for viewing orders within the purged date range.

Tip: Click anywhere in the **From** and **To** fields and then select date on the calendar that appears. Click the **Less Filters** to hide extra fields that appear after clicking on the **More Filters** button. If you want to reset search criteria, click the **Reset Search Filter** button.

The *Orders-list* screen updates with records as per selected date range as shown in Figure 8.2.

Figure 8.2: Orders-list screen – Search Results



Go Back

MSP Home Program Manager Service Configurator Work Order Manager Service Manager Delivery Manager Partner Billing Manager

PMSA Home Program Manager Service Configurator Work Order Manager Service Manager Partner Billing Manager

PMS Home Orders Service Manager Setup Programs Billing

Service Manager Console (Order List)

Account: Magilink Globa Program: All Programs Region: All Regions Country: All Countries Jobsite: All Jobsites Order List Type: All Orders Case Category: All PMS Case Status: All

Date Range: 2/1/2018 4/13/2018 Search

To search, enter value & hit tab

Reset search filter Less Filters


Clear Search

PMS Case ID(Status)	WO Case ID(Status)	ICC Case ID(Status)	Job ID(Status)	Job Resolution	SLA Remaining	Partner Reference (Case / PO)	Case Summary	Program Name
+ /Closed			P3 (NBD)	Test-Case Referene	Test-Vivek212-01	Magilink EUC Field Service (M)		
+ /Closed			P1 (SBD4H)	test pc naveen-feb	test naveen case feb	Magilink EUC Field Service (M)		
+ /Closed			P1 (SBD4H)	test pc naveen-2	test naveen summary	Magilink EUC Field Service (M)		
+ /New			P1 (SBD4H)	Test-Case Referene	Test-Vivek212-01	Magilink EUC Field Service (M)		
+ /Closed			P3 (NBD)	test naveen -1	test naveen summary	Magilink EUC Field Service (M)		

Displaying: 1 - 10 / 15 Limit: 10 First Previous Next Last

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Tip: You can search any specific order by typing the relevant values in the different search fields.

Click the **Clear Search** button to reset search criteria. Click the  icon in the upper right-corner to select or clear the **Column Name** check boxes as per requirements.

- Click the + (plus sign) to view order details in expanded form.

The **Order Details** appears in expanded form as shown in the figure below:

/ New		P3 (NBD)	P0123456	FTE - Demo -7 Feb 2017 - First ...
CaseNumber: P0123456	Account Name : Magiclink Global Services (ITO Partner Demo)	Status:	Case Origin:	
Case Summary : FTE - Demo -7 Feb 2017 - First Test	Case Subject : FE Case Request (Created) (P0123456)/EUC L1/P3 (NBD)/MagicLink Bank Branch - San Francisco (USA)/FTE - Demo -7 Feb 2017 - First Test	IRON PMS Case Number : PCFTEC00011415	Program :	
Partner Case Number :	Case RecordType : 3PS/FTE/Customersite/Custom Case (ICC)	WO Summary :	WO Health Status :	
Create Case : N/A	Case Health Status : N/A	Create Job : N/A	Job Health Status : N/A	

Tip: Click the – (minus sign) to close the expanded form.

- Click the **PMS Case ID (Status)** link next to the + (plus sign) to view

8.2 Activity Feed Console (PMS)

The Activity Feed Console logs the consolidated list of all activities/events. It provides centralized view of all cases updates in the PMS System.

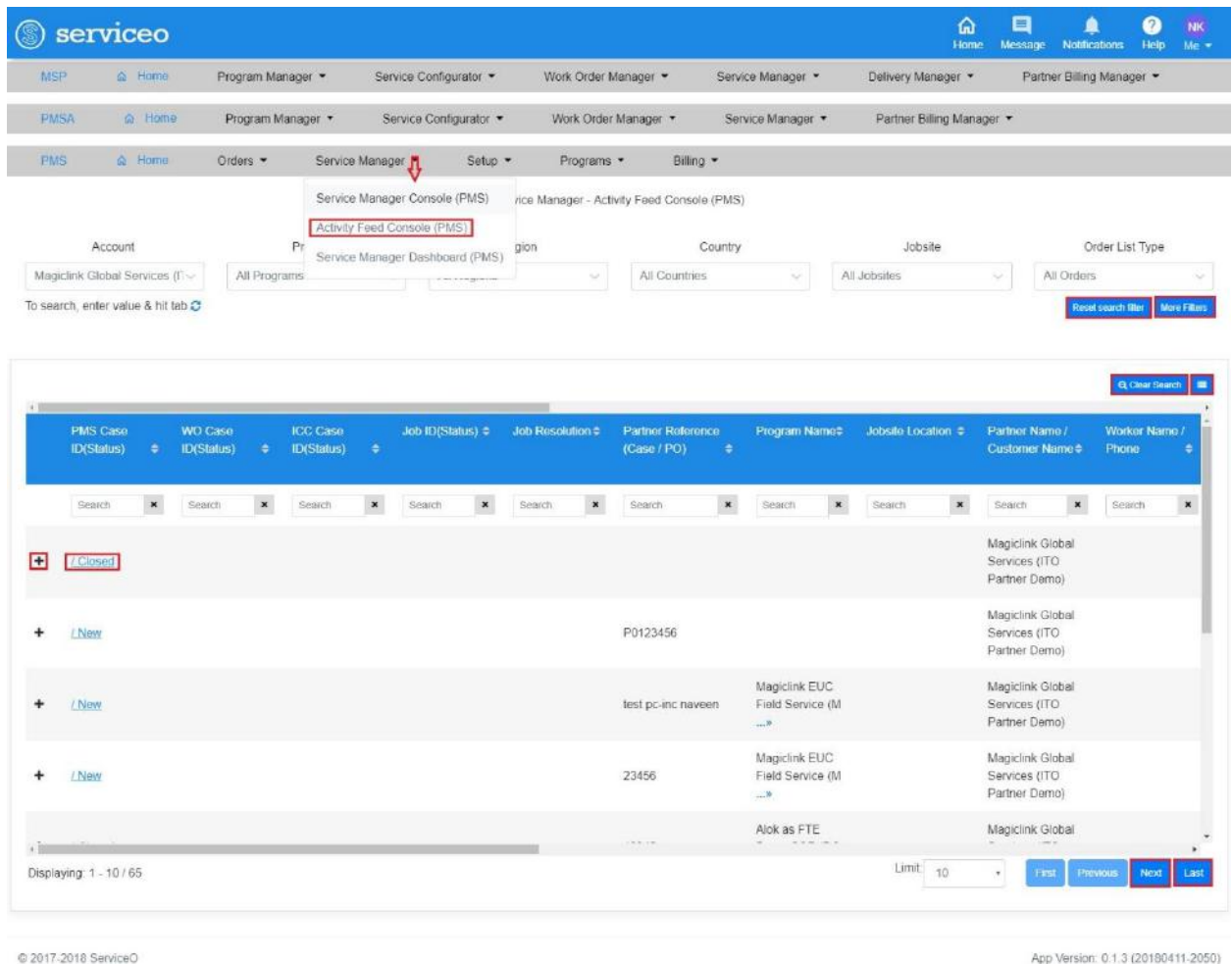
The list of activity includes any updates to PMS case status, case messages, appointment date, worker Contact information.



To view the Activity Feed Console (PMS), perform the following steps:

- Click the **Service Manager** next to the **PMS Home** icon and then click the **Activity Feed Console (PMS)** option to access the Activity Feed.

The *Feeds-list* screen appears with auto-populated Account Name in the **Account** drop-down list as shown in Figure 8.3.

Figure 8.3: Feeds-list screen



Tip: Click the  icon to refresh the *Feeds-list* screen. Click the  icon in the upper right-corner to select or clear the **Column Name** check boxes as per requirements

2. Select the Account name in the **Account** drop-down select list.

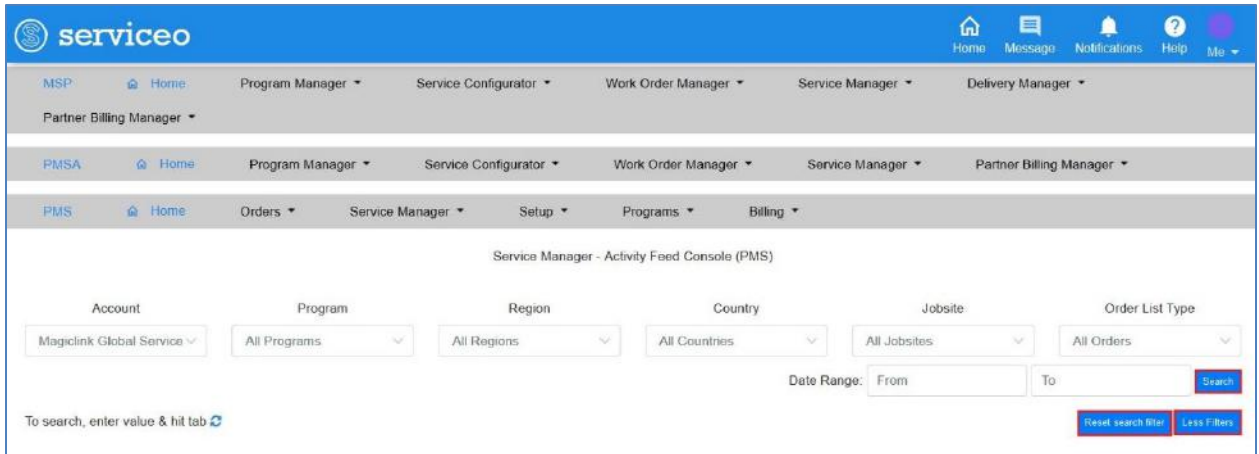
Tip: As you select the **Account** name in the **Account** drop-down list, the Activity Feed corresponding to the selected **Account** gets updated on the page.

3. Select the relevant program in the **Program** drop-down list for which you want to view Activity Feed list.

The **Activity Feed** gets updated on the *Orders-list* screen for the corresponding “**Program**” if the selected **Program** has orders.

4. Select the appropriate values in the different search fields to narrow down your search results.
5. To further narrow down your search results and viewing options, click the **More Filters** button.

The *Feeds-list* screen updates with more search fields as shown in the below figure:

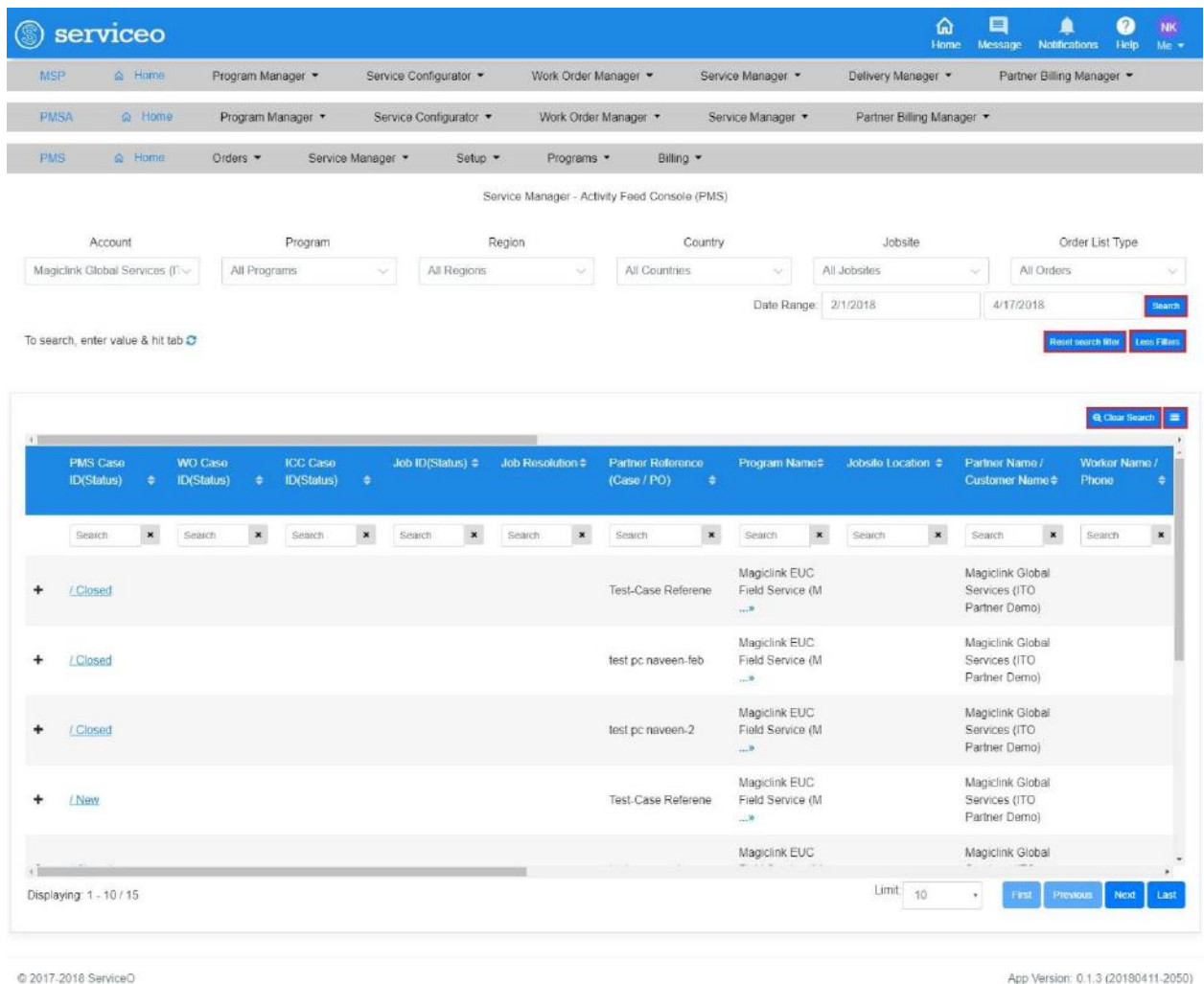


The screenshot shows the serviceco web application interface. At the top, there is a navigation bar with the serviceco logo and user icons (Home, Message, Notifications, Help, Me). Below this is a menu bar with options like MSP, Home, Program Manager, Service Configurator, Work Order Manager, Service Manager, and Delivery Manager. The main content area is titled "Service Manager - Activity Feed Console (PMS)". It contains several dropdown menus for filtering: Account (Magiclink Global Service), Program (All Programs), Region (All Regions), Country (All Countries), Jobsite (All Jobsites), and Order List Type (All Orders). There is also a "Date Range" section with "From" and "To" fields. A "Search" button is located to the right of the "To" field. Below the search fields, there are two buttons: "Reset search filter" and "Less Filters". A hint text at the bottom left says "To search, enter value & hit tab".

6. Select **Date Range** in the **From** and **To** Date fields and then click the **Search** button for viewing Activity within the purged date range.

Tip: Click anywhere in the **From** and **To** fields and then select date on the calendar that appears. Click the **Less Filters** to hide extra fields that appear after clicking on the **More Filters** button. If you want to reset search criteria, click the **Reset Search Filter** button.

The *Feeds-list* screen updates with records as per selected date range as shown in the below figure:



Service Manager - Activity Feed Console (PMS)

Account: Magiclink Global Services (IT) | Program: All Programs | Region: All Regions | Country: All Countries | Jobsite: All Jobsites | Order List Type: All Orders

Date Range: 2/1/2018 to 4/17/2018

To search, enter value & hit tab


Reset Search Box | Load Filter

Clear Search

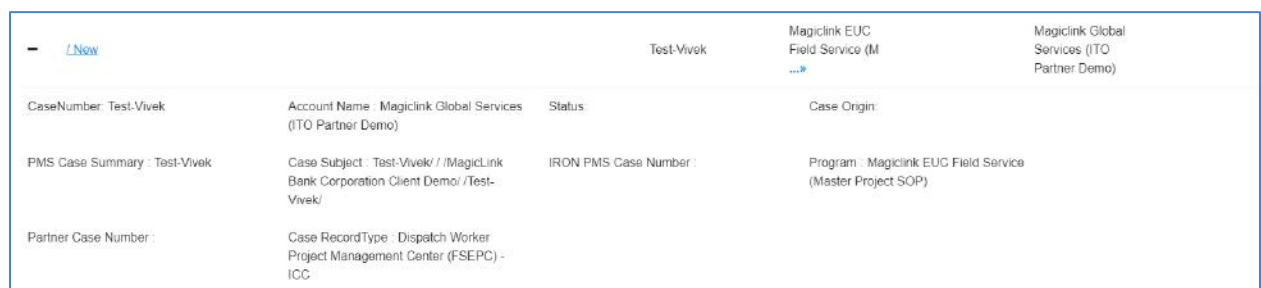
PMS Case ID (Status)	WO Case ID (Status)	ICC Case ID (Status)	Job ID (Status)	Job Resolution	Partner Reference (Case / PO)	Program Name	Jobsite Location	Partner Name / Customer Name	Worker Name / Phone
+ / Closed					Test-Case Reference	Magiclink EUC Field Service (M)		Magiclink Global Services (ITO Partner Demo)	
+ / Closed					test pc naveen-feb	Magiclink EUC Field Service (M)		Magiclink Global Services (ITO Partner Demo)	
+ / Closed					test pc naveen-2	Magiclink EUC Field Service (M)		Magiclink Global Services (ITO Partner Demo)	
+ / New					Test-Case Reference	Magiclink EUC Field Service (M)		Magiclink Global Services (ITO Partner Demo)	
						Magiclink EUC		Magiclink Global	

Displaying: 1 - 10 / 15 | Limit: 10 | First | Previous | Next | Last

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Tip: You can search any specific Activity by typing the relevant values in the different search fields. Click the **Clear Search** button to reset search criteria. Click the  icon in the upper right-corner to select or clear the **Column Name** check boxes as per requirements.

- Click the + (plus sign) to view Activity details in expanded form.



- / New

Test-Vivek

Magiclink EUC Field Service (M)

Magiclink Global Services (ITO Partner Demo)

Case Number: Test-Vivek | Account Name: Magiclink Global Services (ITO Partner Demo) | Status: | Case Origin:

PMS Case Summary: Test-Vivek | Case Subject: Test-Vivek / / MagicLink Bank Corporation Client Demo / Test-Vivek / | IRON PMS Case Number: | Program: Magiclink EUC Field Service (Master Project SOP)

Partner Case Number: | Case Record Type: Dispatch Worker Project Management Center (FSEPC) - ICC

Tip: Click the – (minus sign) to close the expanded form.

- Click the **PMS Case ID (Status)** link next to the + (plus sign) to view.

8.3 Service Manager Dashboard (PMS)

The Service Manager Dashboard (PMS) allows you to view and analyze the cumulative data that provides the status of your Cases and other important details.

The Dashboard also displays status of cases in graphics on a single screen in real time environment. It pulls relevant information in real time that helps you to view key information. This is the place where you get real time status of cases as per Jobsite Country. This capability allows you to make quick analysis.

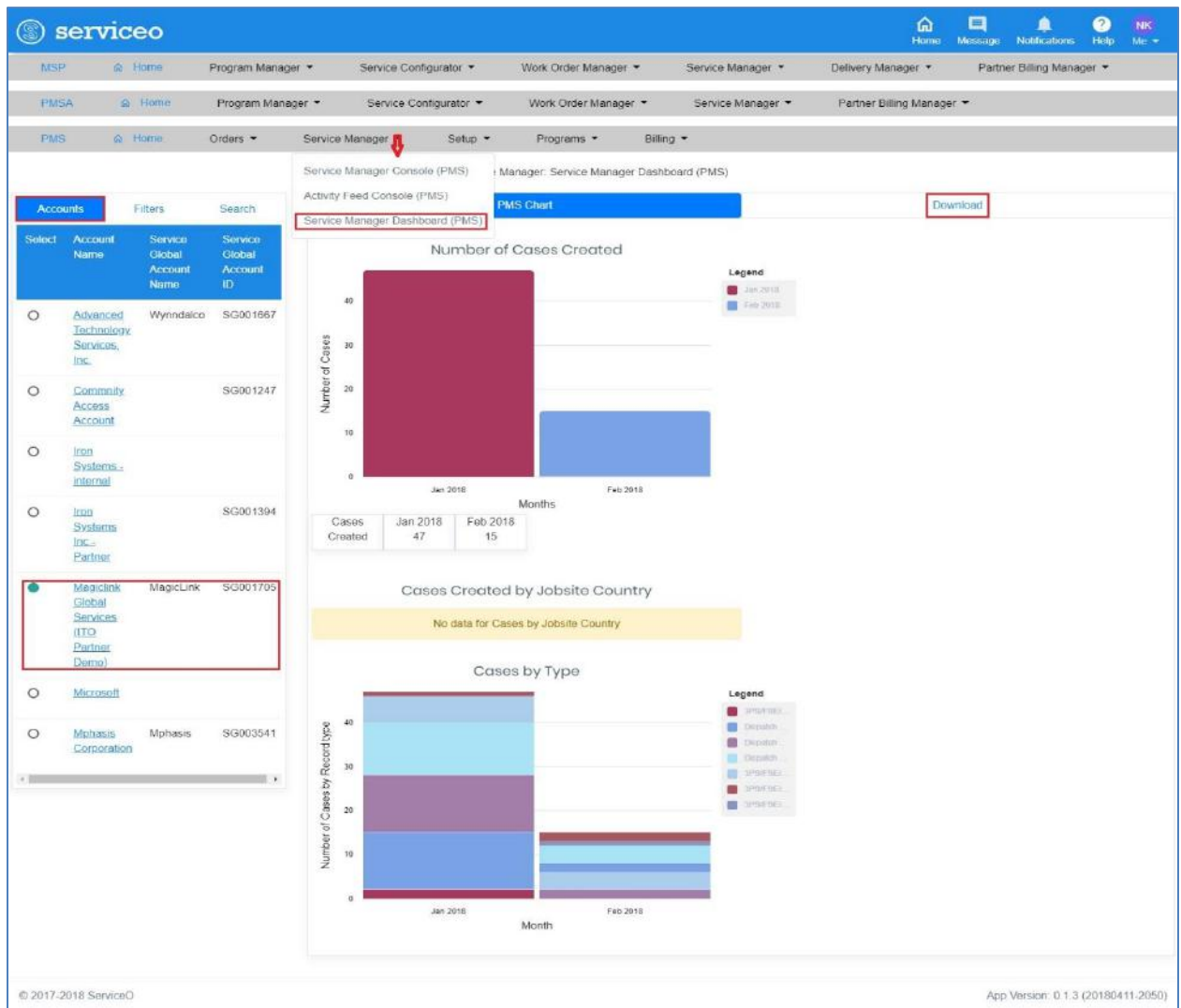
This Dashboard also allows to use filters tab to narrow down your PMS Chart report and viewing option. Here, you can also download entire data in the Excel format.

To access Service Manager Dashboard (PMS). Perform the following steps:

1. Click the **Service Manager** next to the **PMS Home** icon and then click the **Service Manager Dashboard (PMS)** option to view the dashboard.

The *Service-manager* screen appears with the *Accounts*, *Filters*, and *Search* tabs in the left side of the screen and the *PMS Charts* and *Download* tabs in the middle of the screen. Refer Figure 8.4.

Figure 8.4: Service-manager screen



Note: The *Service-manager* screen displays the dashboard for the **Account**, which was selected when user last logged.

The *PMS Chart* tab displays the total number of cases created in the Serviceco system in graphics. It also displays the number of cases by their record type.

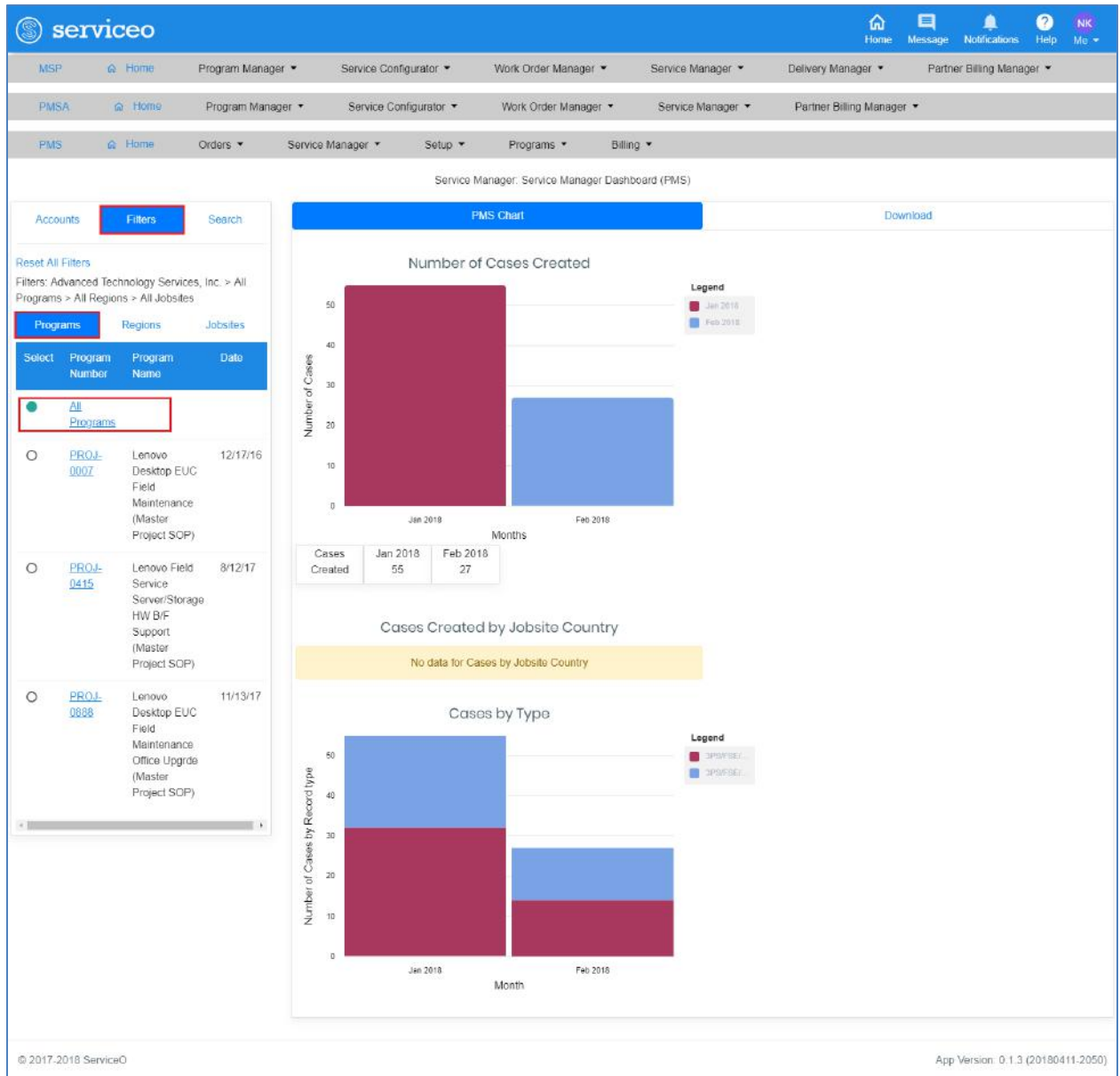
2. Select the Account Name in the *Accounts* tab to view all programs listed with the selected Account.

Tip: As you select the **Account Name** in the *Accounts* tab, the *PMS Chart* tab updates with records corresponding to the selected Account.

3. Click the *Filters* tab to narrow down your viewing option in the left side of the screen. Refer Figure 8.4.

The *Service-manager* screen appears with *Filters* tab options containing the *Programs*, *Regions*, and *Jobsites* tabs. The *Programs* tab displays by default. Refer Figure 8.5.

Figure 8.5: Service-manager screen – Filters tab



Tip: The *Service-manager* screen displays the PMS Chart for all programs, because in the *Programs* tab, All Programs option is auto-selected when you click the *Filters* tab

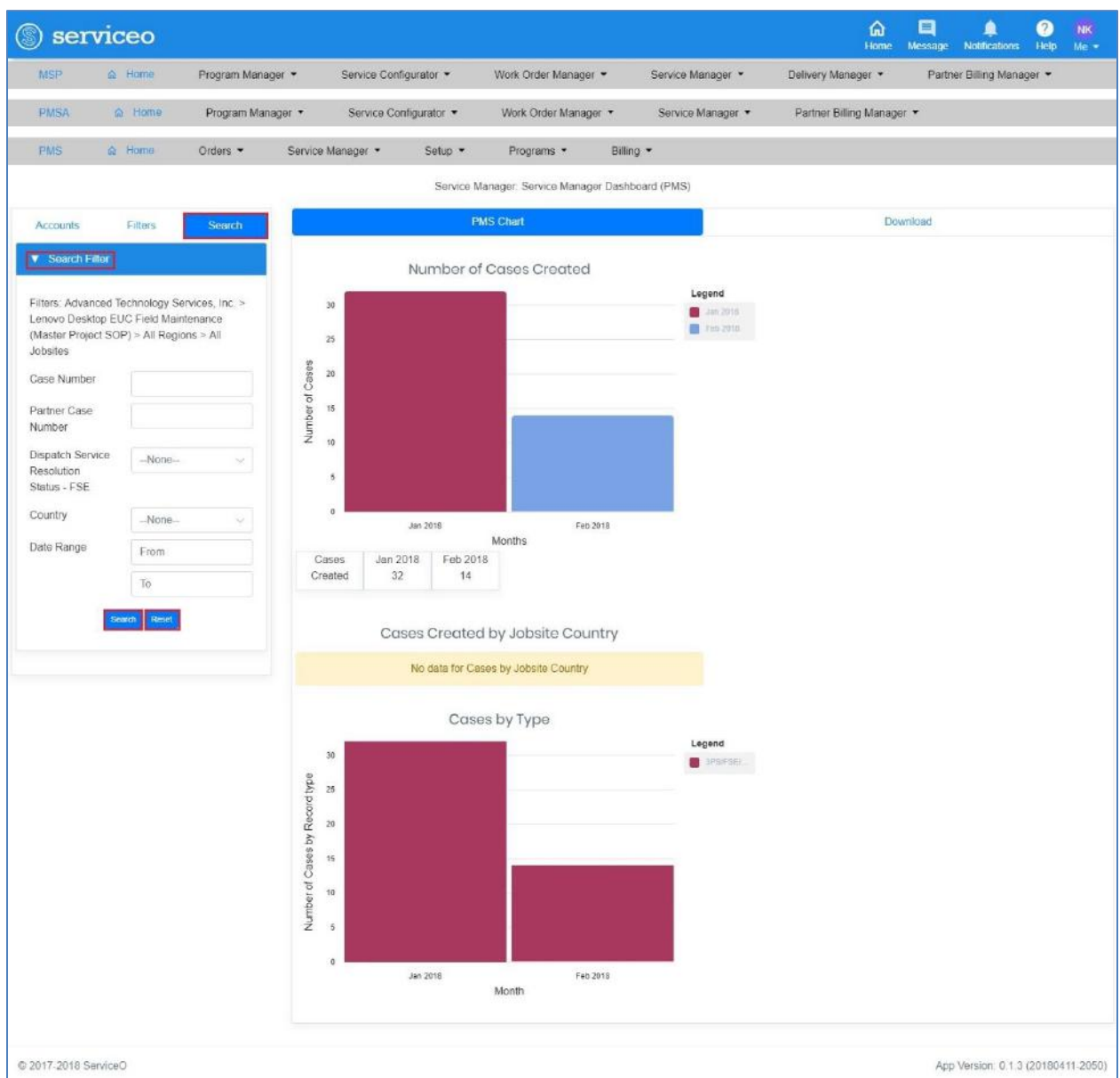
4. Select the **Program Number** for which you want to view PMS Chart in the *Filters* tab.

Tip: As you select the **Program Number** in the *Filters* tab, the *PMS Chart* tab updates with records of the selected Program Number.

5. Click the *Regions* tab and then select the **Region** for which you want to narrow down your viewing option.
 6. Click the *Jobsites* tab and then select the **Jobsites** for which you want to view the chart.
- Tip:** The *Service-manager* screen gets auto-refreshed with each selection.
7. Click the *Search* tab in the left side of the *Service-manager* screen to view Case-specific PMS Chart. Refer Figure 8.4.

The *Service-manager* screen updates with *Search Filters* tab in the left side of the screen as shown Figure 8.6.

Figure 8.6: Service-manager screen – Search tab



8. Type the case number for which you want to view PMC Chart in the **Case Number** field.
9. Type the partner case number in the **Partner Case Number** field.
10. Select the relevant Service Resolution Status in the **Dispatch Service Resolution Status – FSE** drop-down list.

Tip: There are four Dispatch Service Resolution Status states:

- New -
- In-Progress -
- Resolved -
- Closed -

11. Select the country in the Country drop-down list.
12. Select the date range in the **From** and **To** fields and then click the **Search** button to view records.

Tip: Click anywhere in the **From** and **To** fields and then select the dates on the calendar that displays. Click the **Reset** button to reset the search criteria.

13. Click the *Download* tab to download entire data in the Excel format.

9 Work Order Manager

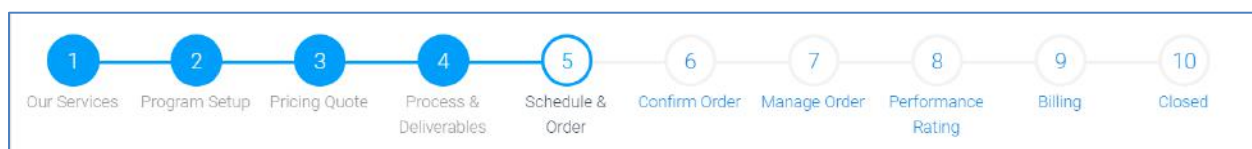
The Work Order Manager module provides key functionalities overview related to new work order creation and new case creation web form section and fields.

The Create Case (Dispatch FSE - Customer Site) sub menu details web-form section and related fields to create a “new case request order” for Field Service Engineer (FSE) Customer site dispatch.

9.1 Create Work Order

The Create Work Order allows to create new work order. It provides web-form section and related fields to create a “new work order”.

The below is the list of web-form sections to create new work order:



- Program Setup
 - a.
- Pricing Quote
- Process & Deliverables
- Schedule & Order
- Confirm Order
- Manager Order
- Performance Rating
- Billing

To create a work order request, perform the following steps:

1. Click the **Work Order Manager** next to the **MSP home** icon and then click the **Create Work Order** option to access the *Schedule* screen.

The *Schedule* screen displays as shown in Figure 9.1.

Figure 9.1: Schedule screen

The screenshot displays the Serviceco application interface, which is divided into several sections:

- Top Navigation Bar:** Includes links for Home, Message, Notifications, Help, and a user profile icon.
- Main Menu:** Contains tabs for MSP, PMSA, and PMS, each with its own set of navigation options like Home, Program Manager, Service Configurator, etc.
- Workflow Diagram:** A horizontal sequence of steps numbered 1 through 10: Our Services, Program Setup, Pricing Quote, Process & Deliverables, Schedule & Order, Confirm Order, Manage Order, Performance Rating, Billing, and Closed. Step 5, "Schedule & Order," is highlighted with a red box and labeled "Create Work Order".
- Account Selection Section:**
 - A table lists various accounts with columns for Select, Partner, Login, and ID. The account "Magelink Global Services (ITQ Partner Demo)" is selected and highlighted with a red box.
 - A dropdown menu titled "(1) Select Program" shows three options: "Syed-Test", "Vijay Test", and "Sachin-Vincy Test".
 - A second dropdown menu titled "(2) Select Quote" shows two quote options: "DM-0000170" and "DM-0000204".
- Quote Header Information Section:** Displays fields for "Quote No(Rev)" and "Created Date".
- Quote Pricing Information Section:** Shows a table with columns for No, Service ID, Service Description, PPM hours, and Price. It currently displays "No record found".
- Jobsite Location Map Section:** Features a map of Africa and Europe with a search bar and a "Map Satellite" button.
- Service Provider Sites Section:** Another map section, similar to the one above, showing global locations.

Note: The *Schedule* screen displays with the *Account*, *Program*, *Jobsite*, *Quote*, *Order* and *Price Book* tabs in the left pane of the screen. The *Account* tab displays by default. In the right pane of the *Schedule* screen, there are three tabs, namely *Summary*, *Health Check*, and *My Coverage Map* tabs appear. Here, the *Summary* tab displays by default.

Here, you can also view various stages involved to create a work order request. The progress bar will run a colored bar showing the progress stage completed during the process. This progress bar provides lots of flexibility for service handling while providing visibility for users to better understand the status.

Tip: Click the **Partner** Name next to the **Select** column in the **Account** tab to view Account Details. Click the **Program Number** link in the **Program** tab next to the **Account** tab to view the program details. Click the **Manage** link in the **Jobsite** tab to view and edit jobsite details. Click the **Quote Number** in the **Quote** tab to view Quote Manager details. Click the **Work Order #** in the **Order** tab to view Work Order Details. Select the **Program** in the **Price Book** tab and then click the **View** link to Price Book Details.

2. Select the partner name in the *Account* tab to create work order request.

Tip: As you select partner in the *Account* tab, the (1) *Select Program* tab gets updated with records (in this case, Program numbers) corresponding to the selected Partner.

3. Select the program number in the (1) *Select Program* tab for which you want to create work order request.

The *Schedule* screen updates with (2) *Select Quote*, (3) *Select Jobsite*, (4) *Pricing and Service Provider*, (5) *Work Order Summary*, (6) *Partner Reference*, and (7) *Appointment Schedule* tabs as shown below:

serviceo

Home Message Notifications Help

Program Manager Service Configurator Work Order Manager Service Manager Delivery Manager Partner Billing Manager

Program Manager Service Configurator Work Order Manager Service Manager Partner Billing Manager

Orders Service Manager Setup Programs Billing

Our service Program setup Pricing Quote Proposal & Quote view Schedule & Order Confirm Order Manage Order Performance Rating Billing Closed

(1) Select Program

Select	Partner	Login	ID
<input type="radio"/>	Advanced Technology Services Inc.	Wynndell	S0001667
<input type="radio"/>	Commerce Access Account		S0001247
<input type="radio"/>	non-Systemic Internal		
<input type="radio"/>	Hill Systems Inc - Denver		S0001354
<input checked="" type="radio"/>	Magicklink Global Services (TTO Partner Service)	MagickLink	S9901101
<input type="radio"/>	Magnacore		
<input type="radio"/>	Muhanna Corporation	Muhanna	S0003541

(2) Select Quote

Quote ID	Quote Name	Quote Date	Status
Q1A-0001019	quote-1	11/14/17	Active
Q1A-0001024		11/13/17	Active
Q1B-0001019		11/13/17	Active
Q1A-0001019		11/13/17	Active

(3) Select JobSite

JobSite ID	Location	Address	City	State	Zip	Status
PROJ-Q011	USX0064	AUS	Ogden	UT	84006	Active
PROJ-Q011	USX0065	RUS	Moscow	OR	97050	Active

(4) Pricing and Service Provider

No.	Service ID	Service Description	PRM	Hours
1			0	0

(5) Work Order Summary

Work Order Summary *

(6) Partner Reference

Partner Code Number *

Partner PO Number *

(7) Appointment Schedule

Appointment Schedule *

☐ Customer Appointment Setup Request (Icon Service Global to Call Customer)

☐ Drop-off Now (SLA Priority: SBD)

☐ Pre-Schedule Appointment (Enter date/Time (Local Time Zone) below)

Pre-Schedule Customer Appointment Schedule (Start) Date:

[Date Picker]

Pre-Schedule Customer Appointment Schedule (Start) Hour:

[Hour Picker]

Pre-Schedule Customer Appointment Schedule (Start) Minute:

[Minute Picker]

Summary

Health Check My Coverage Map

Program Information

Partner: Magicklink Global Services (TTO Partner Service)

Program: Magicklink EUC Field Service (Master Project SGP)

Program Code: PRGJ-0011

Number of Jobsites for the program: 200

Jobsite Locations Information

#	Jobsite	Jobsite Project
1	Park (77002) - FRA (S0001705) USX0065 (USX0065)	Park (77002) - FRA (S0001705) USX0065 (FRAJ-0011)
2	Bull (77015) - DUU (S0001705)	Bull (77015) - DUU (S0001705)

Quote Header Information

Quote No(Raw): QM 0001179

Created Date: 10/27/17

Quote Pricing Information

No.	Service ID	Service Description	PRM	Hours
1			0	0

Jobsite Location Map

Service Provider Sites

4. Select the relevant quote in the (2) *Select Quote tab*, if you want to modify or add new price quote for the selected program.

Note: The (2) *Select Quote tab* lists all quotes pre-configured for a given program.

5. Select the jobsite location in the (3) *Select Jobsite tab*, if you want to modify or add new jobsite location.

Note: The (3) *Select Jobsite tab* lists all jobsites pre-configured for a given program.

6. Select the relevant Service Catalog Item Pricing and Service Provider for the work order request in the (4) *Pricing and Service Provider tab*.

Tip: Click the *Service Providers* tab to select service provider.

7. Type the appropriate summary related to the work order in the **Work Order Summary** text box in the (5) *Work Order Summary tab*.

8. Type the partner case number in the **Partner Case Number** field and Partner PO Number in the **Partner PO Number** field in the (6) *Partner Reference tab*.

9. For appointment scheduling, select the appropriate option as applicable in the (7) *Appointment Schedule tab*.

Note: There are three available appointment scheduling options:

- a) Customer Appointment Setup Request (IRON Service Global to Call Customer):
 - ✓ IRON Service Global Service Desk is requested to call End-Customer and setup an appointment.
- b) Dispatch Now (SLA Priority: SBD):
 - ✓ This is Same Business Day (SBD) premium service contract option.
 - ✓ Field Service Engineer will arrive at Jobsite Location within SLA period.
 - ✓ End-Customer will not be contacted to make an Appointment unless Partner requests this service via “case comment”.
- c) Pre-Scheduled Appointment:
 - ✓ Here, Service Desk has already setup an appointment with End-Customer with date and time.

10. Click the **Next** button to go to the stage (in this case, web-form).

Tip: Click the **Previous** button to go to the previous page.

9.2 Create Case (Dispatch FSE – Customer Site)

Refer *Section 3.1: Create Case (Dispatch FSE – Customer site)* for detailed steps for creating case for Field Service Engineer (FSE) Customer site dispatch.

10 Program Manager

The program manager section provides key functionalities overview related to program configuration/management, service contracts, service catalogue, service locator, notifications, and user management.

10.1 Program Profile

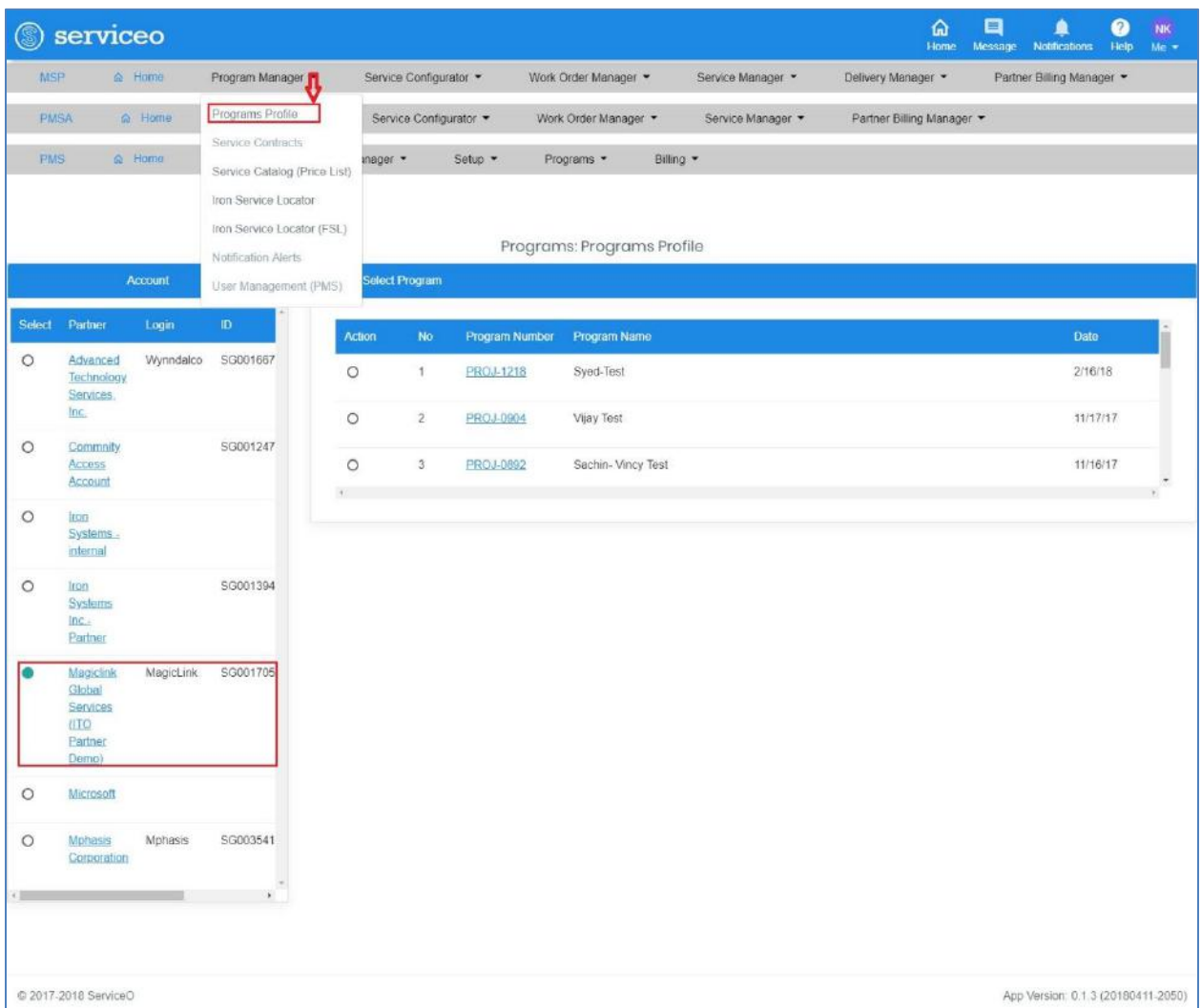
Here, you will get detailed overview of service type, approved project vendor details and project worker view for the listed programs.

To view program profile, perform the following steps:

1. Click the **Program Manager** next to the **MSP Home** icon and then click the **Program Profile** option to access program profile page.

The *Programs* screen appears as shown in Figure 10.1.

Figure 10.1: Programs screen



The screenshot shows the Serviceco web application interface. The top navigation bar includes links for Home, Message, Notifications, Help, and a user profile icon. The main navigation menu on the left includes MSP, PMSA, PMS, and Account. The 'Program Manager' section is expanded, showing options like Programs Profile, Service Contracts, Service Catalog (Price List), Iron Service Locator, Iron Service Locator (FSL), Notification Alerts, and User Management (PMS). The 'Programs Profile' option is highlighted with a red box. The main content area displays a table of programs with columns for Action, No, Program Number, Program Name, and Date. A red box highlights a specific program entry in the table.

Action	No	Program Number	Program Name	Date
<input type="radio"/>	1	PROJ-1218	Syed-Test	2/16/18
<input type="radio"/>	2	PROJ-0904	Vijay Test	11/17/17
<input type="radio"/>	3	PROJ-0892	Sechin- Vincy Test	11/16/17

Note: The *Programs* screen displays with **Account** section at the left and (1) *Select Program* tab at the center of the screen.

The **Account** section displays a list of partners including their login, ID and other details. The (1) *Select Program* tab allows you to select the program to view its detailed profile.

2. Select the partner name in the **Account** section to view its all listed programs.

Tip: As you select Partner in the **Account** section, a list of Programs, which are associated with the selected Partner, get displayed in the (1) *Select Program* tab.

3. Select the program in the (1) *Select Program* tab to view its detailed profile.

The *Programs* screen updates with (2) *Program Details: Jobsite Service Type*, (3) *Approved Project Vendor View*, and (4) *Project Worker View* tabs as shown below:

serviceco
Home Message Notifications Help Me

MSP Home Program Manager Service Configurator Work Order Manager Service Manager Delivery Manager Partner Billing Manager

PMSA Home Program Manager Service Configurator Work Order Manager Service Manager Partner Billing Manager

PMS Home Orders Service Manager Setup Programs Billing

Programs: Programs Profile

Account

Select	Partner	Login	ID	PGR ID
<input type="radio"/>	Advanced Technology Services, Inc.	Wynndaico	SG001667	4/10 8/9/
<input type="radio"/>	Community Access Account		SG001247	0/0/
<input type="radio"/>	Iron Systems - Internal			0/0/
<input type="radio"/>	Iron Systems IS - Partner		SG001394	1/11
<input checked="" type="radio"/>	Magiclink Global Services (New Partner Demo)	MagicLink	SG001705	36/72/
<input type="radio"/>	Microsoft			2/0/
<input type="radio"/>	Mphasis Corporation	Mphasis	SG003541	3/11 1/2/

▼ (1) Select Program

<input type="radio"/>	32	PROJ-0013	Magiclink Network Storage Field Service (Master Project SOP)	12/30/16
<input type="radio"/>	33	PROJ-0012	Magiclink Network Field Service (Master Project SOP)	12/30/16
<input checked="" type="radio"/>	34	PROJ-0011	Magiclink (American Bank) Field Service EUC Deskside Support (Delivery Master)	12/30/16

▼ (2) Program Details: Jobsite Service Type

Program Name	Jobsite Name	Service Dispatch SLA Priority	Talent Type	Service Technical Level	Service Location
Magiclink (American Bank) Field Service EUC Deskside Support (Delivery Master)	Yonezawa-shi (092-0021) - JPH				GAJ005
Magiclink (American Bank) Field Service EUC Deskside Support (Delivery Master) (PROJ-0011)	Yakima (09902) - USA	-SG001705-US02157			YKM003
Magiclink (American Bank) Field Service EUC Deskside Support (Delivery Master)	Xuhui District (200032) - CHN	-SG001705-US00066			SHA008

Displaying: 1 - 10 / 200

Limit:

▼ (3) Approved Project Vendor View

Program Name	Project Name	APVP Vendor Name	Max Priority Ranked APVP
Magiclink (American Bank) Field Service EUC Deskside Support (Delivery Master) (PROJ-0011)	Magiclink EUC Field Service - New York (SA)	USACA BBS Local Field Service Vendor Demo	
Magiclink (American Bank) Field Service EUC Deskside Support (Delivery Master) (PROJ-0011)	Magiclink EUC Field Service - New York (SA)	USACA AAA Local Field Service Vendor Demo	
Magiclink (American Bank) Field Service EUC Deskside Support (Delivery Master) (PROJ-0011)	Lenovo Project Error (Default)	Iron Systems (Vendor & Vendor Sites)-Test	

Displaying: 1 - 9 / 9

Limit:


▼ (4) Project Worker View

Program Name	Project Name	Worker Name	Worker Email	Worker Phone
Magiclink (American Bank) Field Service EUC Deskside Support (Delivery Master) (PROJ-0011)	Floiras (33270) - FRA-SG001705-US02070			
Magiclink (American Bank) Field Service EUC Deskside Support (Delivery Master) (PROJ-0011)	Regina (S4H 5X3) - CAN-SG001705-US02065			
Magiclink (American Bank) Field Service EUC Deskside Support (Delivery Master) (PROJ-0011)	Montreal (H3J 1R5) - CAN-SG001705-US02063			

Displaying: 1 - 10 / 200

Limit:

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App Version: 6.1.3 (20180415-1834)

Tip: Click the  icon in the upper right-corner of tabs and then select or clear the **Column Name** check boxes from the list as per requirements.

Select the number you want to view in the **Limit** drop-down list.

Click the **First** button to view records displayed on the first page, **Previous** button to view previous records, **Next** button to move to the next page, and the **Last** button to go to the last page.

10.2 Service Catalog (Price List)

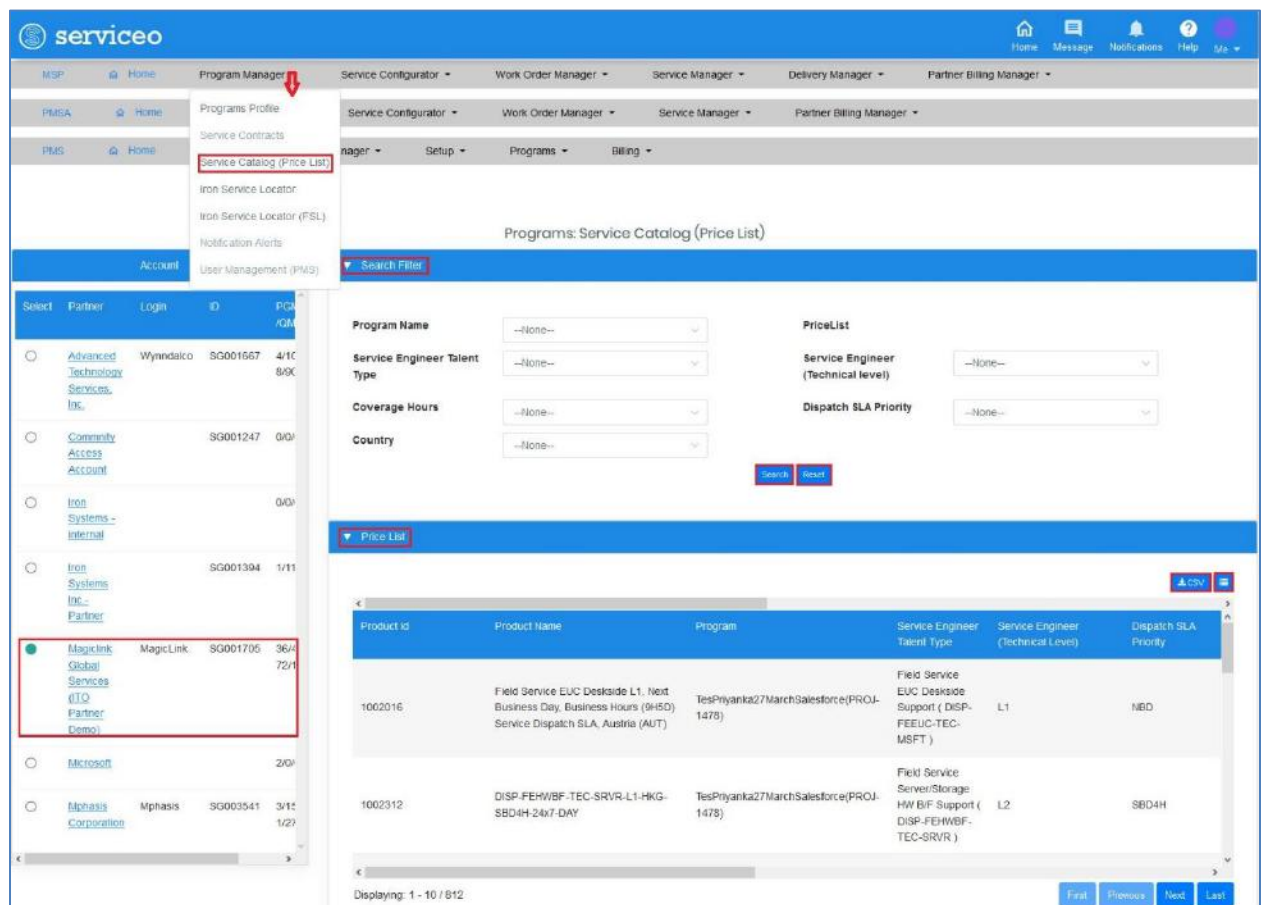
The Service Catalog (Price List) enables users to view Program Price List Catalog, which is entered into the Serviceco. The Program Price List Catalog is available as per Program Pricing term.

To view Service Catalog (Price List), perform the following steps:

1. Click the **Program Manager** next to the **MSP Home** icon and then click the **Service Catalog (Price List)** option to access price list.

The *Pricelist* screen displays as shown in Figure 10.2.

Figure 10.2: Pricelist screen



The screenshot displays the Serviceco Pricelist screen. The interface includes a sidebar with navigation options such as MSP, Home, Program Manager, and Account. The main area is titled "Programs: Service Catalog (Price List)" and features a search filter section with dropdown menus for Program Name, Service Engineer Talent Type, Coverage Hours, Country, PriceList, Service Engineer (Technical Level), and Dispatch SLA Priority. Below the search filters is a table with columns: Product Id, Product Name, Program, Service Engineer Talent Type, Service Engineer (Technical Level), and Dispatch SLA Priority. Two rows are visible in the table. At the bottom, there are pagination controls showing "Displaying: 1 - 10 / 812" and buttons for First, Previous, Next, and Last.

Product Id	Product Name	Program	Service Engineer Talent Type	Service Engineer (Technical Level)	Dispatch SLA Priority
1002016	Field Service EUC Deskside L1, Next Business Day, Business Hours (9H5D) Service Dispatch SLA, Austria (AUT)	TesPnyanka27MarchSalesforce(PROJ-1478)	Field Service EUC Deskside Support (DISP- FEELUC-TEC- MSFT)	L1	NBD
1002312	DISP-FEHWBF-TEC-SRVR-L1-HKG-SBD4H-24x7-DAY	TesPnyanka27MarchSalesforce(PROJ-1478)	Field Service Server/Storage HW B/F Support (DISP-FEHWBF-TEC-SRVR)	L2	SBD4H

Note: The *Programs* screen displays with **Account** section at the left and the *Search Filter* and *Price List* tabs at the center of the screen.

The **Account** section displays a list of partners including their login, ID and other details. The *Search Filter* tab allows you to select the program to view price list.

2. Select the partner name in the **Account** section to view the price list.

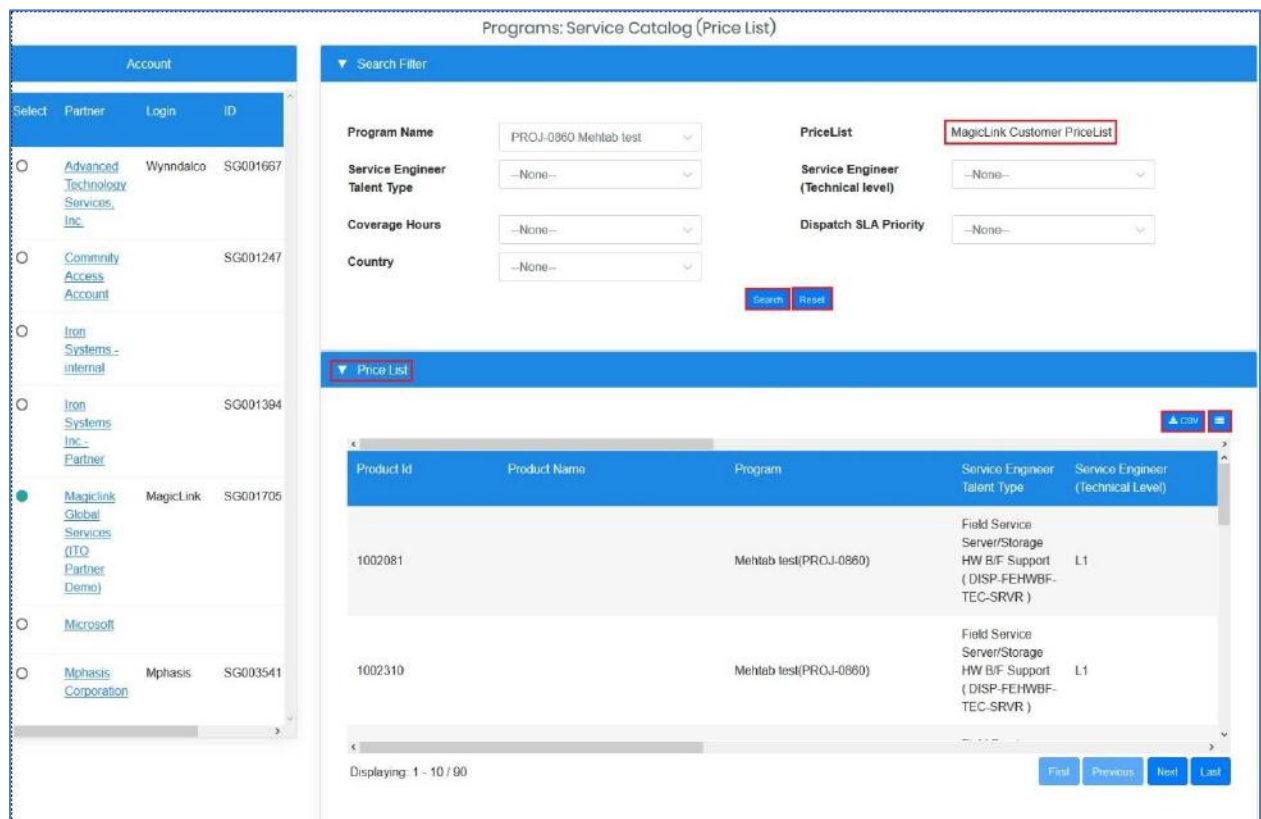
Tip: As you select Partner in the **Account** section, a list of Programs, which are associated with the selected Partner, get displayed in the Program Name drop-down list in the *Search Filter* tab.

3. Select the program name in the **Program Name** drop-down list.

Tip: As you select the program name, the **Price List** name auto-populates next to the PriceList.

4. Select the relevant talent type in the **Service Engineer (Talent Type)** drop-down list.
5. Select the relevant technical expertise in the **Service Engineer (Technical level)** drop-down list.
6. Select the coverage hours in the **Coverage Hours** drop-down list.
7. Select the service contract option in the **Dispatch SLA Priority** drop-down list.
8. Select the location of jobsite in the **Country** drop-down list and then click the **Search** button to fetch the records based on selected search criteria.

The *Pricelist* screen updates with price details in the *PriceList* tab as shown below:





Product Id	Product Name	Program	Service Engineer Talent Type	Service Engineer (Technical Level)
1002081		Mehtab test(PROJ-0860)	Field Service Server/Storage HW B/F Support (DISP-FEHWBF-TEC-SRVR)	L1
1002310		Mehtab test(PROJ-0860)	Field Service Server/Storage HW B/F Support (DISP-FEHWBF-TEC-SRVR)	L1

Displaying: 1 - 10 / 90

First Previous Next Last

Tip: Click the **Reset** button to reset the search criteria.

Click the  button to download the Price List in the **Excel** format. Click the  icon in the upper right-corner of tabs and then select or clear the **Column Name** check boxes from the list as per requirements.

Click the **First** button to view records displayed on the first page, **Previous** button to view previous records, **Next** button to move to the next page, and the **Last** button to go to the last page.

10.3 Iron Service Locator

This module allows you to easily search, identify and connect all available active 3PS and 3PL service providers in any region. You will also be able to detect service providers' location, identify service providers in the vicinity with markers on the map.

Iron Service Global serves various locations globally.

There are two types of service provider available in the serviceo.

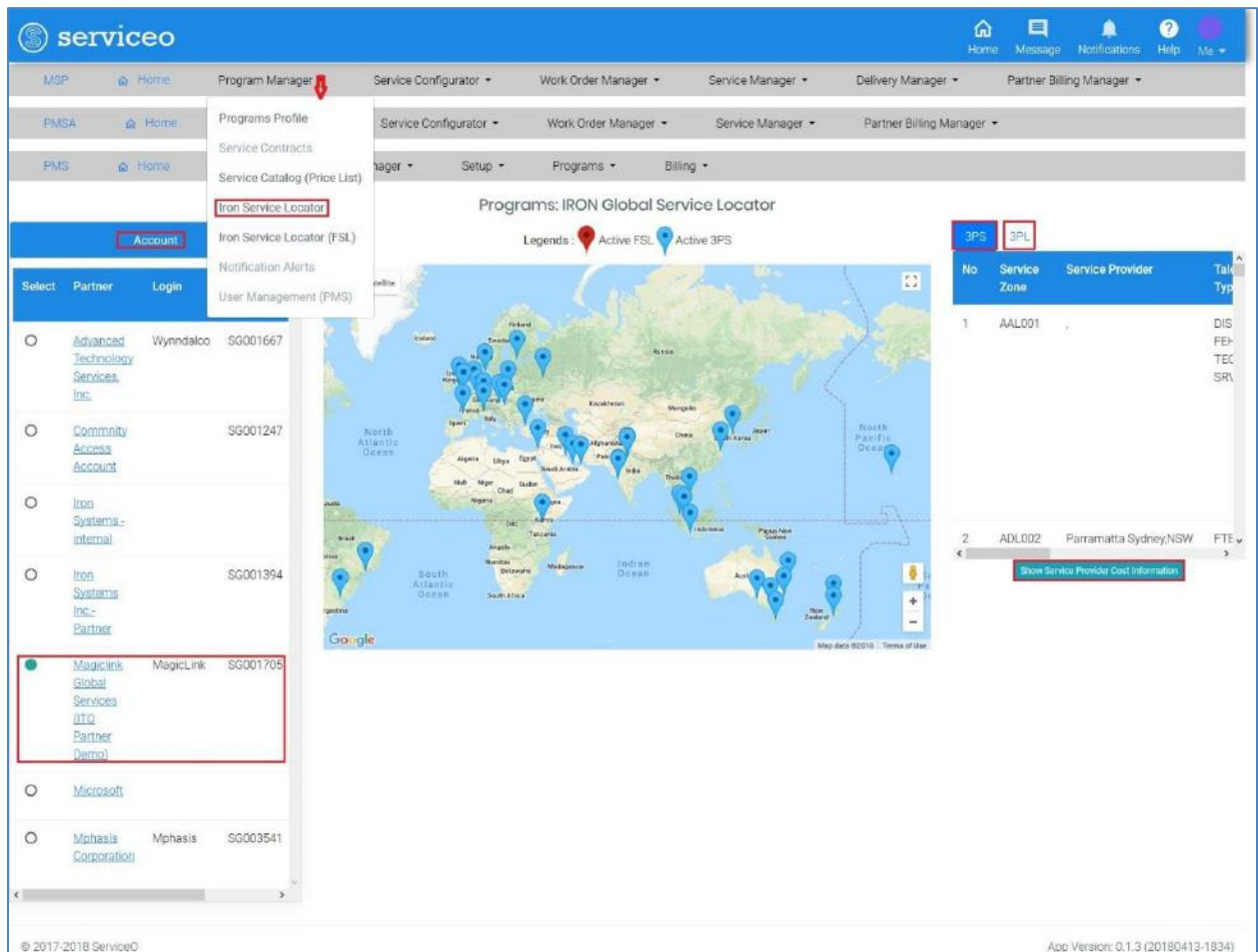
- 3PS –
- 3PL –

To access map for locating global service providers, perform the following steps:

1. Click the **Program Manager** next to the **MSP Home** icon and then click the **Iron Service Locator** option to identify location.

The *Coverage-map* screen appears as shown in Figure 10.3.

Figure 10.3: Coverage-map screen



Note: The *Coverage-map* screen displays **Account** section in the left side and **3PS** and **3PL** tabs in the right side of the screen. The **3PS** tab displays by default. Refer Figure 10.3.

The **Account** section displays a list of partners including their login, ID and other details.

The partner, which was selected when user last logged, is selected by default in the **Account** section.

Placing the pointer over the icon on the map displays the location code and complete address of the service providers.

2. Select the partner name in the **Account** section.

Note: As you select the partner name in the **Account** section, the locations on the map and records in the **3PS** and **3PL** tabs get updated.

3. Click the **Show Service Provider Cost Information** button to view price details charged by the Service Provider.

The *Coverage-map* screen updates with the Search Filter and Price List tabs as shown below:

Home Message Notifications Help Me

MSP Home Program Manager Service Configurator Work Order Manager Service Manager Delivery Manager Partner Billing Manager

PMSA Home Program Manager Service Configurator Work Order Manager Service Manager Partner Billing Manager

PMS Home Orders Service Manager Setup Programs Billing

Account

Select	Partner	Login	ID
<input type="radio"/>	Advanced Technology Services, Inc.	Wynndalco	SG00166
<input type="radio"/>	Community Access Account		SG00124
<input type="radio"/>	Iron Systems - internal		
<input type="radio"/>	Iron Systems Inc - Partner		SG00139
<input checked="" type="radio"/>	MagicLink Global Services (IIQ Partner Demo)	MagicLink	SG00170
<input type="radio"/>	Microsoft		
<input type="radio"/>	Mphasis Corporation	Mphasis	SG00354

Programs: IRON Global Service Locator

Legends:

Active FSL

Active 3PS

Map Satellite

Search Filter

Service Engineer Talent Type

--All--

Dispatch SLA Priority

--All--

Country

--All--

Service Engineer (Technical level)

--All--

Coverage Hours

--All--

Service provider

--All--

Search

Reset

3PS 3PL

No	Service Zone	Service Provider	Talent Type
1	ATL003	Fremont,CA 94539 USA	DISP-FENETW-TEC-CISC
2	AUS001	Fremont,CA	DISP-

Hide Service Provider Cost Information

Price List

Service Provider (Vendor) Pricelist Confirmation: Missing

The Pricelist is missing for the following Service Providers:

Region	Country	Service Provider
USCA	Atlanta	WM: DISP-FENETW-TEC-CISC-L2 980 Mission CT Fremont CA USA
USCA	Austin	Iron Systems (Vendor & Vendor Sites)-Test 980 Mission Court Fremont CA United States
APAC	Capalaba	GNOTIS TECHNOLOGIES PTY LTD
USCA	Spokane	WorkMarket Pool 240 W 37th St, 10th Floor New York NY United States of America

CSV

Region	Country	Service Provider	Product Id	Product Name	Talent Type	Technical Level
No record found						

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Tip: Click the **Hide Service Provider Cost Information** button to hide the price details (pricelist) of the service provider.

4. Select the relevant service engineer type you want to view price in the **Service Engineer Talent Type** drop-down select list.
5. Select the technical level of service engineer in the **Service Engineer (Technical level)** drop-down list.
6. Select the appropriate SLA priority in the **Dispatch SLA Priority** drop-down list.
7. Select the coverage hours in the **Coverage Hours** drop-down list.
8. Select the country of the service provider in the **Country** drop-down select list.
9. Select the Service Provider you want to choose for the selected region in the **Service Provider** drop-down list.
10. Click the **Search** button to fetch the records based on selected search criteria.

Tip: Click the **Reset** button to reset the selected search criteria.

The *Coverage-map* screen updates with records in the **Price List** tab as shown below:



Price List

Service Provider (Vendor) Pricelist Confirmation: Missing
The Pricelist is missing for the following Service Providers:

Region	Country	Service Provider
USCA	Atlanta	WM: DISP-FENETW-TEC-CISC-L2 980 Mission CT Fremont CA USA
USCA	Austin	Iron Systems (Vendor & Vendor Sites)-Test 980 Mission Court Fremont CA United States
APAC	Capalaba	GNOTIS TECHNOLOGIES PTY LTD
USCA	Spokane	WorkMarket Pool 240 W 37th St, 10th Floor New York NY United States of America

CSV

Region	Country	Service Provider	Product Id	Product Name	Talent Type	Technical Level
No record found						

Tip: Click the  button to download the Price List details of the service provider in the **Excel** format. Click the  icon in the upper right-corner of tabs and then select or clear the **Column Name** check boxes from the list as per requirements.

10.4 Iron Service Locator (FSL)

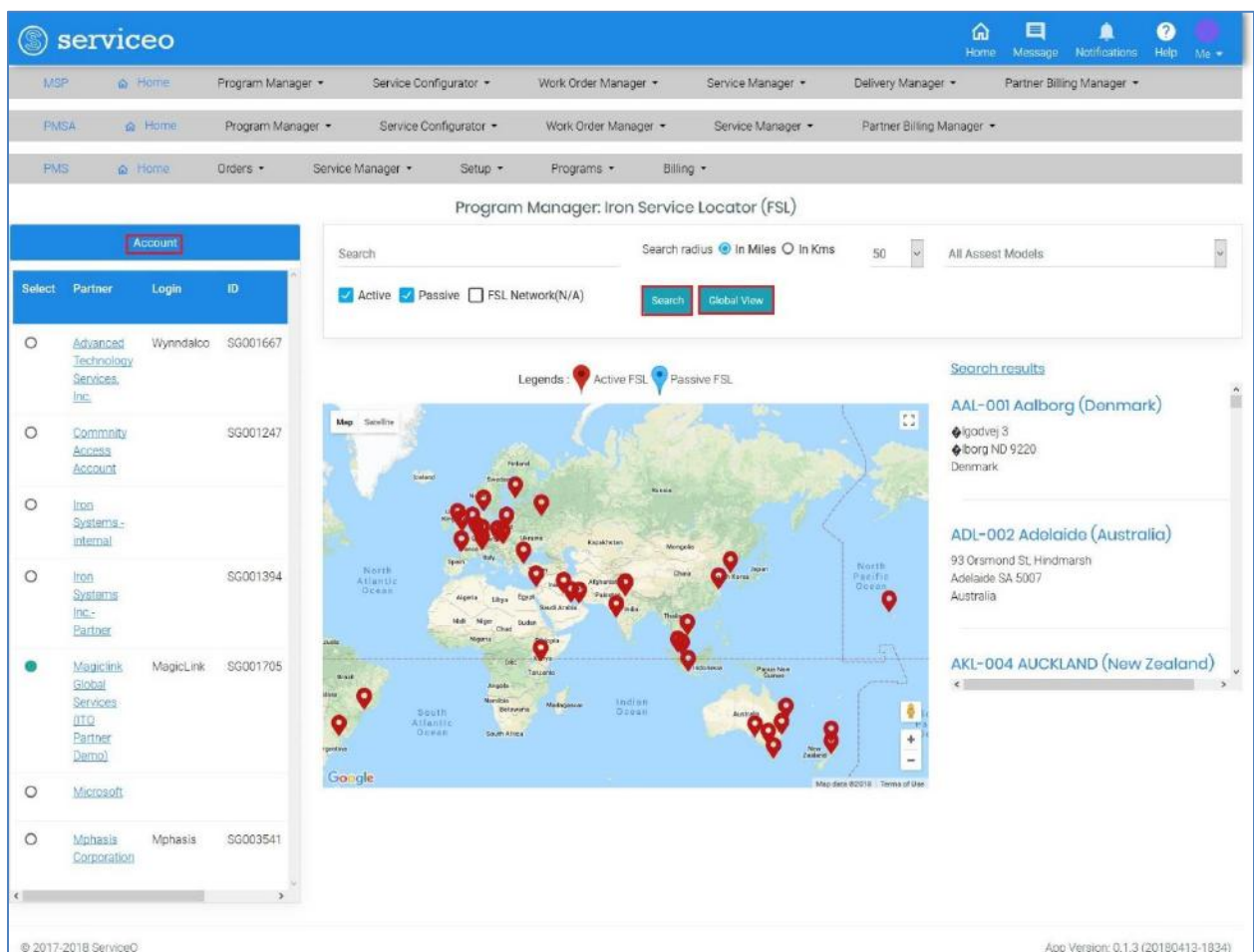
This module allows you to easily search, identify and connect all available Forward Stocking Location Depots (FSL) in any region. The Map provides Global locations reference of most popular Parts Depot Warehouse Locations for Service Parts (FRUs) inventory stocking for Same Business Day (SBD) and Next Business Day (NBD) service delivery options.

To access Map for locating FSL depots, perform the following steps:

1. Click the **Program Manager** next to the **MSP Home** icon and then click the **Iron Service Locator** option to identify location.

The *Iron Service Locator (FSL)* screen displays as shown in Figure 10.4.

Figure 10.4: Iron Service Locator (FSL) screen



The screenshot displays the 'Iron Service Locator (FSL)' interface. On the left, the 'Account' section lists partners with columns for 'Select', 'Partner', 'Login', and 'ID'. The main area includes a search bar, a search radius selector (Miles/Kms), and checkboxes for 'Active' and 'Passive' FSL. A world map shows numerous red pins representing FSL locations. The right sidebar shows search results for 'AAL-001 Aalborg (Denmark)', 'ADL-002 Adelaide (Australia)', and 'AKL-004 AUCKLAND (New Zealand)'. The bottom of the screen indicates '© 2017-2018 Serviceco' and 'App Version: 0.1.3 (20180413-1834)'.

Note: The *Coverage-map* screen displays **Account** section in the left side. The **Account** section displays a list of partners including their login, ID and other details.

The partner, which was selected when user last logged, is selected by default in the **Account** section.

Placing the pointer over the icon on the map displays the location code and complete address of the service providers.

2. Select the partner name in the **Account** section.

Note: As you select the partner name in the **Account** section, the locations on the map get updated.

3. Type the name of any FSL depot location you want to search in the **Search** field.
4. Click either the **In Miles** or **In KMs** and then select the range in the Range drop-down list.
5. Select the Asset model in the **All Asset Models** drop-down list to search only those FSL depots, which store the selected asset model.
6. Select the check boxes that fulfil your requirements.

Tip: There are three check boxes available for selection:

- **Active** – This option is selected for the FSL depots, which are “active” in state.
 - **Passive** – This option is selected for the locations, which are not active.
 - **FSL Network (N/A)** -
7. Click the **Search** button to fetch the records based on selected criteria.
 8. Click the **Global View** button to view all available FSL locations across the globe.

Note: The *Coverage-map* screen updates with the records in the right side of the screen under **Search Results** section.