



CoSaCS

Technical Services Document

Author: IGT PMO • InfoGlobalTech • Version 1.0



REVISION HISTORY

NOTE: The revision history cycle begins once changes or enhancements are requested after the initial version of the Technical Document has been completed.

Date	Version	Description	Author
25/01/2021	1.0	Initial	Kirti Vaishnavi M

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1 TECHNICAL SERVICES MODULE OVERVIEW

The Technical services module is used to create various types of Service Requests after the Sales process in Courts or Non-Courts stores. Under these Services, the business can perform Repairs and Installations for Internal and External customers.

Internal Customers can avoid the Spare and Repair charges if they have a Manufacturer or Extended Warranty. These are recorded in the system. External Customers, however, need to pay upfront to get the Repair or Installation Services.

Apart from Customer Service Requests, the Courts Service team also helps repair the In-Stock products that are stored in the Branch or Warehouse. This cost is borne by the Business.

This document covers the different types of Service Requests raised and their processes.

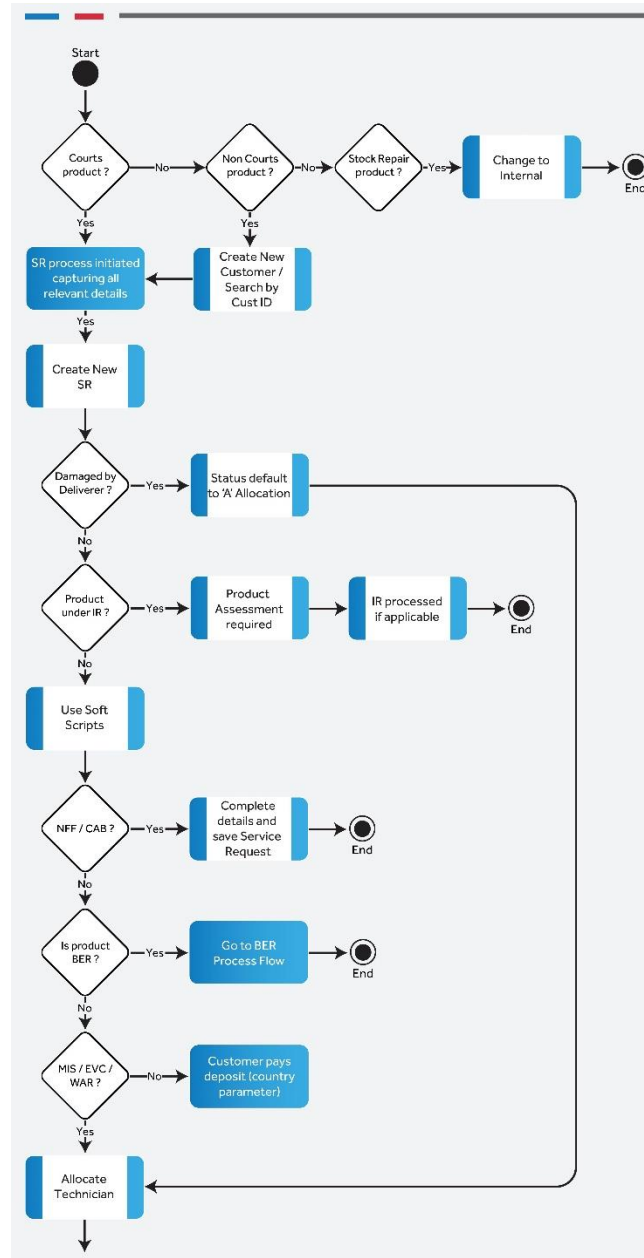
There are five major types of services:

1. Internal Service Request
2. External Service Request
3. Repairs
4. Internal Installation
5. External Installation

1.1 Process flow

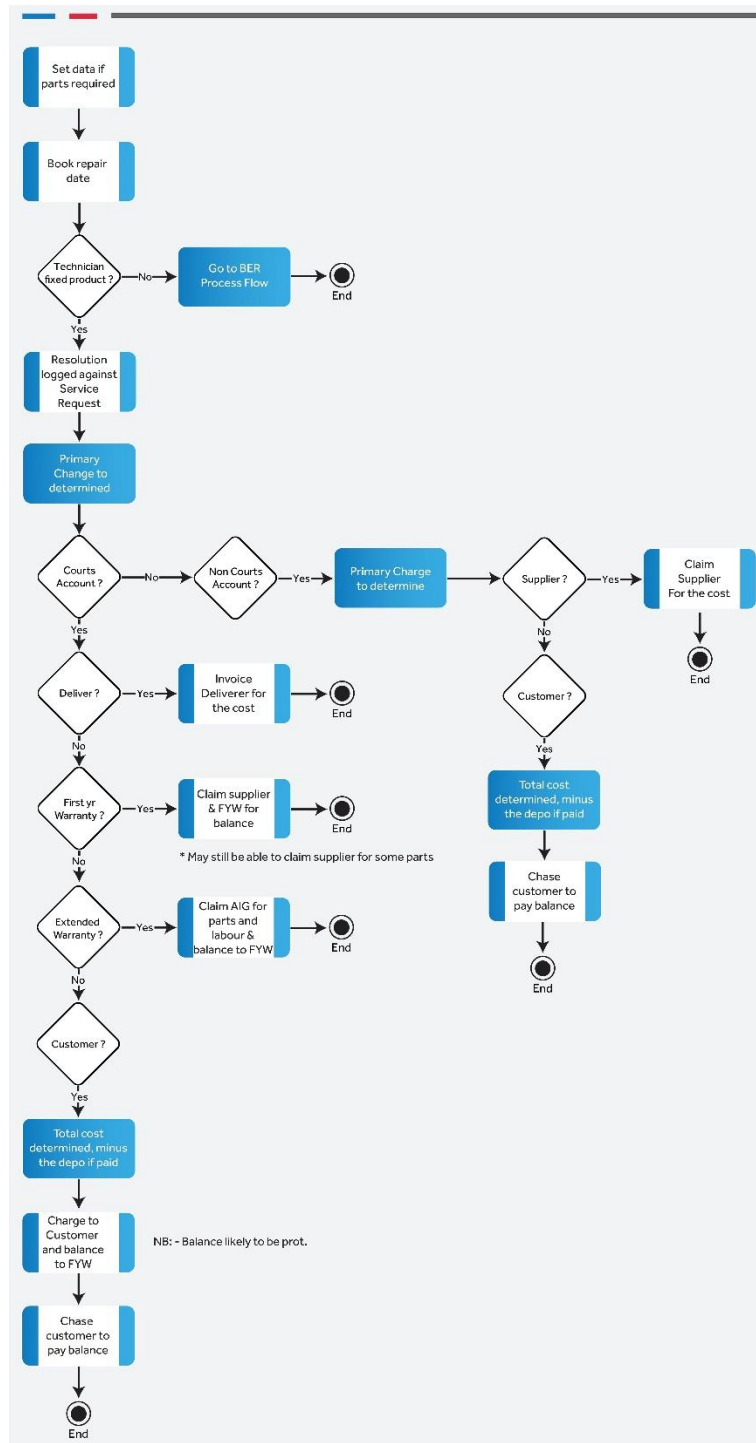
1.1.1 Part One

The below diagram depicts the steps involved when raising a Service Request:



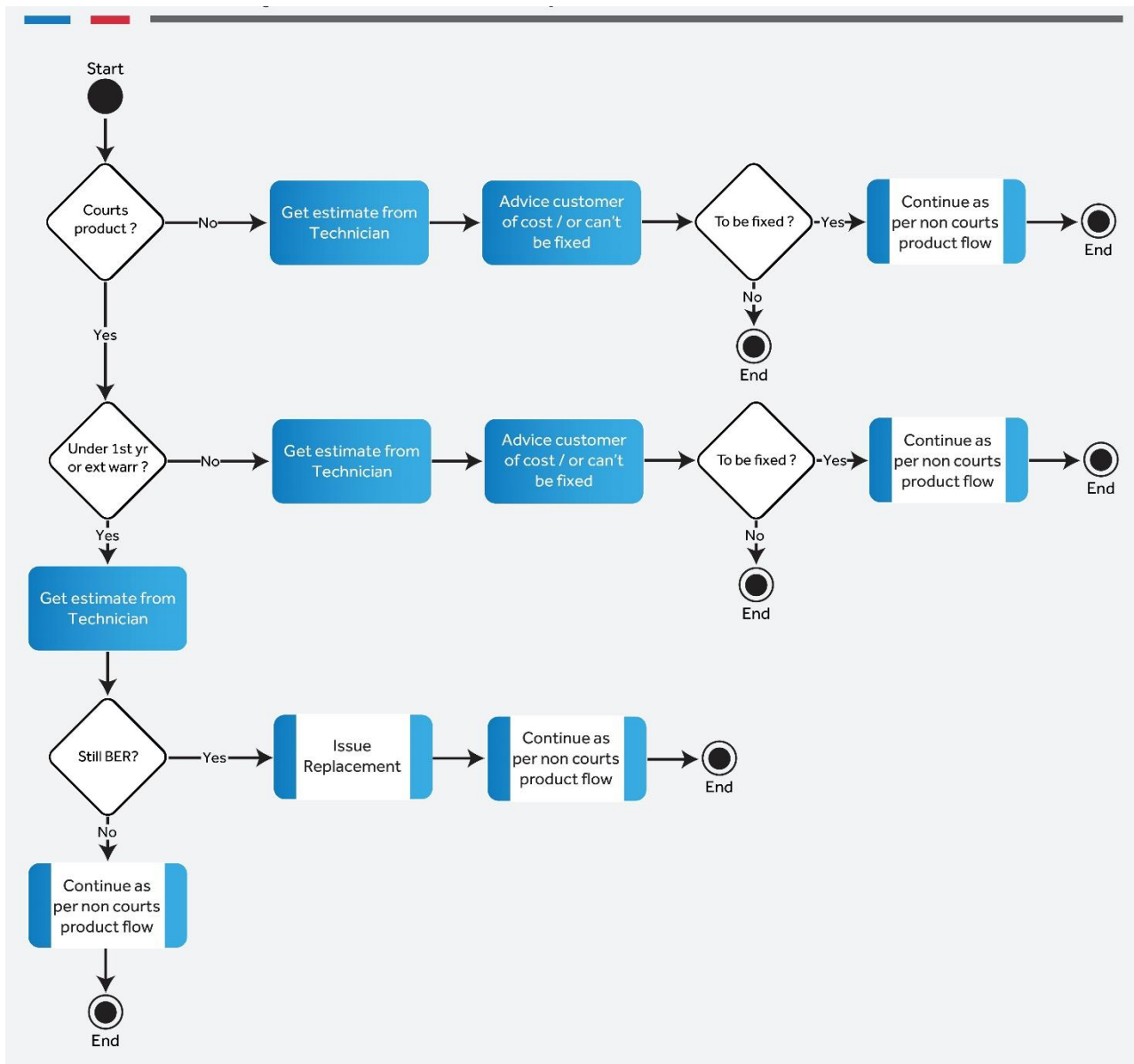
1.1.2 Part two

The below diagram is a continuation of the above:



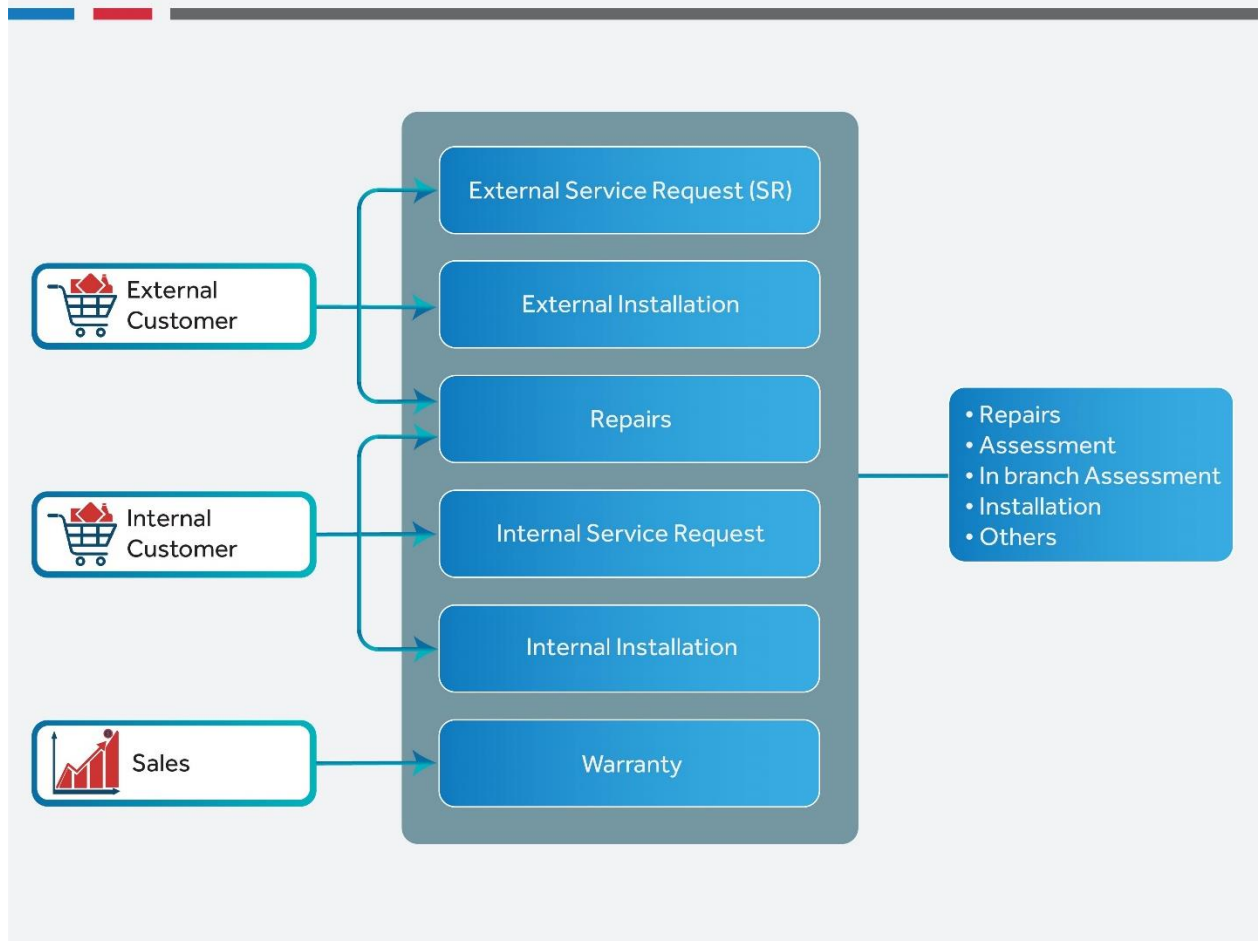
1.1.3 Beyond Economic Repair (BER) Process Flows

The below diagram depicts the steps involved in the BER Service Request:



1.2 Use Case

The below use case illustrates the users and processes involved in the Technical Services module:



1.3 Service Request (SR) for Internal Customer

Internal Service Request is created for customers who have purchased the product from the Courts store. Customers can raise the Service Requests based on the issue found on the products. Service Requests can be raised by calling a CSR, the Customer Service Desk, or personally visiting the store. The respective Service Representative can initiate the SR in CoSaCS.

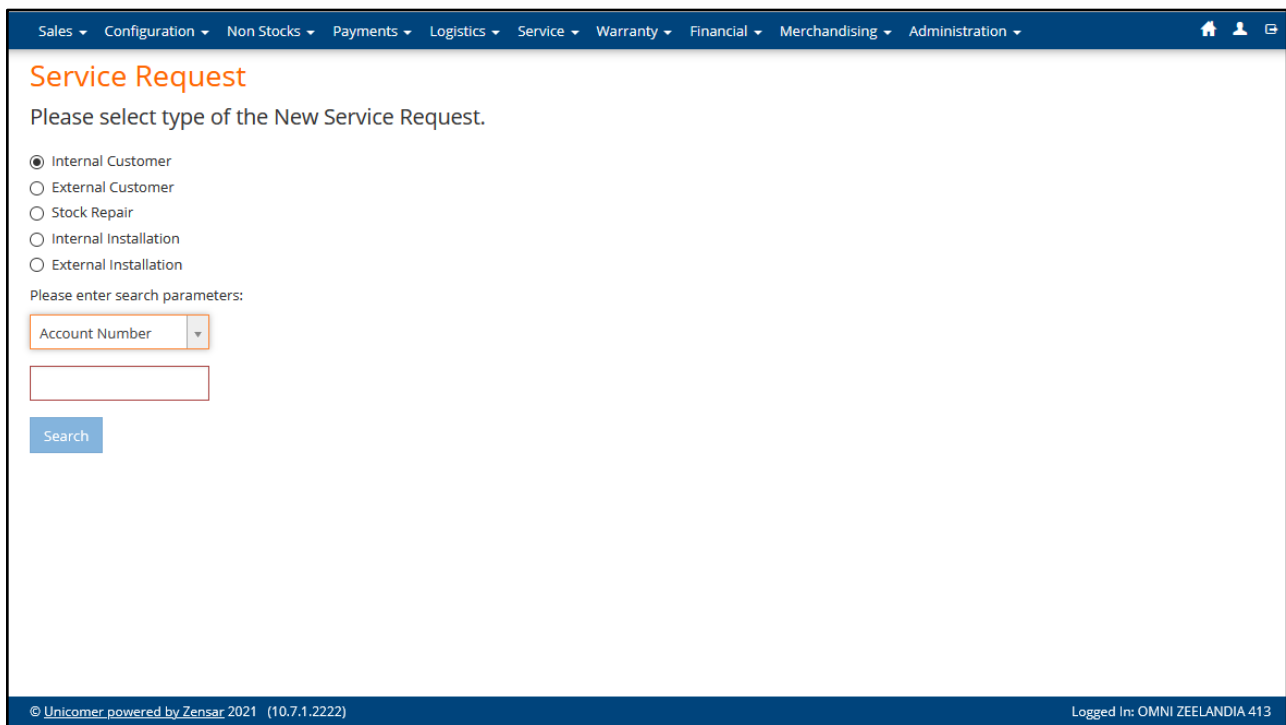


Figure 1 Internal Service Request screen

Below are the steps followed to create an SR for an Internal Customer:

- Go to the Service menu and select 'New Service Request'.
- From the Service Request screen select the 'Internal Customer' radio button.
- To create an Internal SR, the user needs to enter the "Account Number" or "Customer Number" or "Invoice Number" to fetch the Product details.
- After fetching the Product details, the user should click the "Select" button to select the correct Product and raise the SR.
- Once selected, the screen will display details like; "Customer" details (Customer ID, Name, Address, Contact Details, etc.), "Request" Details (SR Logged on Date & Time, SR logged by,

Branch, SR type, etc.), and “Product” details (Item No., Hierarchy details, Delivery Date, Supplier Name, Stock Location, Value, etc.)

- The user needs to enter “Manufacturer Name” and Serial or Model Number if provided by the customer.
- The user can see the Warranty details. Depending on the date, the system will prompt if the Warranty is presently covered by the Manufacturer, Unicomer, or the Customer.
- Once verified, various teams within the Service Department will perform the below steps:

1.3.1 Evaluation:

- During this stage of the Service Request, the Technician would either visit the customer’s place or evaluate the product at the branch (if the customer has brought the product to the branch).
- Based on the Technician’s evaluation, the Job Sheet would be filled.
- The Technician needs to fill out the field “Service Evaluation” with the correct drop-down value. The drop-down values are listed below:
 1. **No Fault Found** – If no difficulties were identified while operating the product, this option can be selected.
 2. **Misuse by the Customer** – If the customer tried something which is not advisable as per the Manual or Set Up Process, and due to this the product is not functioning as expected, the Technician can select this.
 3. **Events or Terms not Covered** – This option would be selected when the Technician finds an issue in the product however, it is not covered in the Warranty.
 4. **Warranty Covered** – If the Technician finds an issue as per SR raised, they can opt for this option.
 5. **Damage on Delivery** – If the Technician finds damage that might have occurred during transportation, this option can be selected.
 6. **Call Abandoned** - If the Technician could not evaluate the product due to the Customer not being at home, this option will be selected.
- After selecting the appropriate “Service Evaluation” value, the Technician should select the “Service Location” where the Service team is attending the SR.

- The Service Location list would be all the Branches/Stores where the Service team is attending to the Customer. Apart from this, there are two locations:
 1. External Repairs – ASC (Authorized Service Center) which handles computer and mobile product repair.
 2. In Field – ‘Customer Home’ which is at the Customer’s home or residence.

Note: The Customer can also take the Product to the nearest Service Branch for evaluation.

- The user selects the “Action Required” field as ‘Send Technician’ to resolve the SR. Other options under the “Action Required” drop-down are ‘Collected’, ‘Item not Collected’ and ‘Item to be Collected’.
- The last field in Evaluation is “Claim for Food Loss” which is only applicable for the ‘Refrigerator’ category.

1.3.2 Deposit:

- If the SR is raised for a product under Manufacturer or Extended Warranty, then the customer is not required to submit a Deposit. The value will automatically appear as ‘0’ under the “Deposit Required” field.
- If the Product Warranty has expired, the customer should pay the Deposit Fees to initiate the Allocation process.

1.3.3 Allocation:

- In the Allocation field, the Service Representative enters the date the item was received on in the “Date” field, “Parts Expected On” and “Date Service Scheduled” as the same date.

Note: If in the “Parts Expected On” field, the user has entered a future date, the Technician cannot be assigned as the ‘Parts’ date is set to a future date.

- The value entered in the “Category” field is dependent on the product type. The Technician drop-down list will get updated accordingly.

Note: The Categories and their respective Technicians are maintained in System Configuration set up.

- Once the user selects the Technician's name from the drop-down list, a calendar diary will appear on the screen. This shows the "Selected Dates", "Hourly Schedule" along with "Types of Services".
- User should select an appropriate "Time Slot" for Technician's Allocation as per the availability.
- The user should "Save" the form for the 'Service Request Number' to be generated.
- The user should enter the 'Complaint' about the product under "Comments" to assist the Technician.
- Now the Service team moves to Resolution Step.

1.3.4 Resolution:

- Enter the 'Serial Number' of the product for which the SR was raised.
- Select the option for "Repair Type" from the below values:
 - **Repairs**- If the Technician has identified any issues and suggests a repair, this option is chosen.
 - **Assessment**- Technician chooses this option if any assessment is required before making the final decision.
 - **In Branch Assessment**- If the Technician wants to check the product in Branch for any assessment, this option is chosen.
 - **Installation**- For Installation SR, this option is valid.
 - **Others**- This option should be selected if any "Repair Type" option mentioned above is not suitable.
- User must select the *Resolution* based on the Product Inspection and needs to choose the correct option from below mentioned values:
 - **Beyond Economic Repair (BER)**- If the Repair Cost is 70% of Cost Price then it is considered as BER. This 70% value is set in the Configuration setting.
 - **Cosmetic Defect**- If the product does not have any "Technical" defect but some minor cosmetic changes are required then the Technician selects this.
 - **Damage on Delivery**- If the damage occurred during transit, the Technician selects this option.
 - **Electrical Defect**- If any "Electrical" defect is found, choose this option.

- **Event or Term Not covered**- If the defect is not under Warranty, this option is applicable.
- **Hardware**- If any hardware issue is found, select this option.
- **Installation of new Product**- This option is for Installation SR.
- **Mechanical Defect**- If any “Mechanical” defect is found, select this option.
- User selects the “Date of Resolution”.
- As per the Product Warranty, the system prepopulates the correct “Primary Charge”.
- Depending on Primary Charges, the user can select the appropriate “Supplier to Charge”.
- Select “Product Category” based on the SR raised for the product.
- If any Spare Part is required as per the “Resolution Type”, the user enters details like, “Part Number”, “Part Type”, “Part Source”, “Quantity”, “Price”, “Description”, “Stock Branch” and “Total”.
- “Labor Cost” will prepopulate based on the “Labor Cost Matrix” set in the backend and various fields filled in the “Resolution” field.
- “Additional Cost” and “Transportation Cost” varies from country to country.
- Enter the details in the “Technical Report” field.
- The next step is Finalize.

1.3.5 Finalize:

- Under this step, the user will update the details based on Resolution steps entered by the Technician.
- The user should enter a “Reason for Failure” which is the same as the “Resolution” drop-down values.
- After selecting the “Return Date”, the user saves the SR.
- Now the SR status is ‘Closed’.

1.3.6 Business Rules:

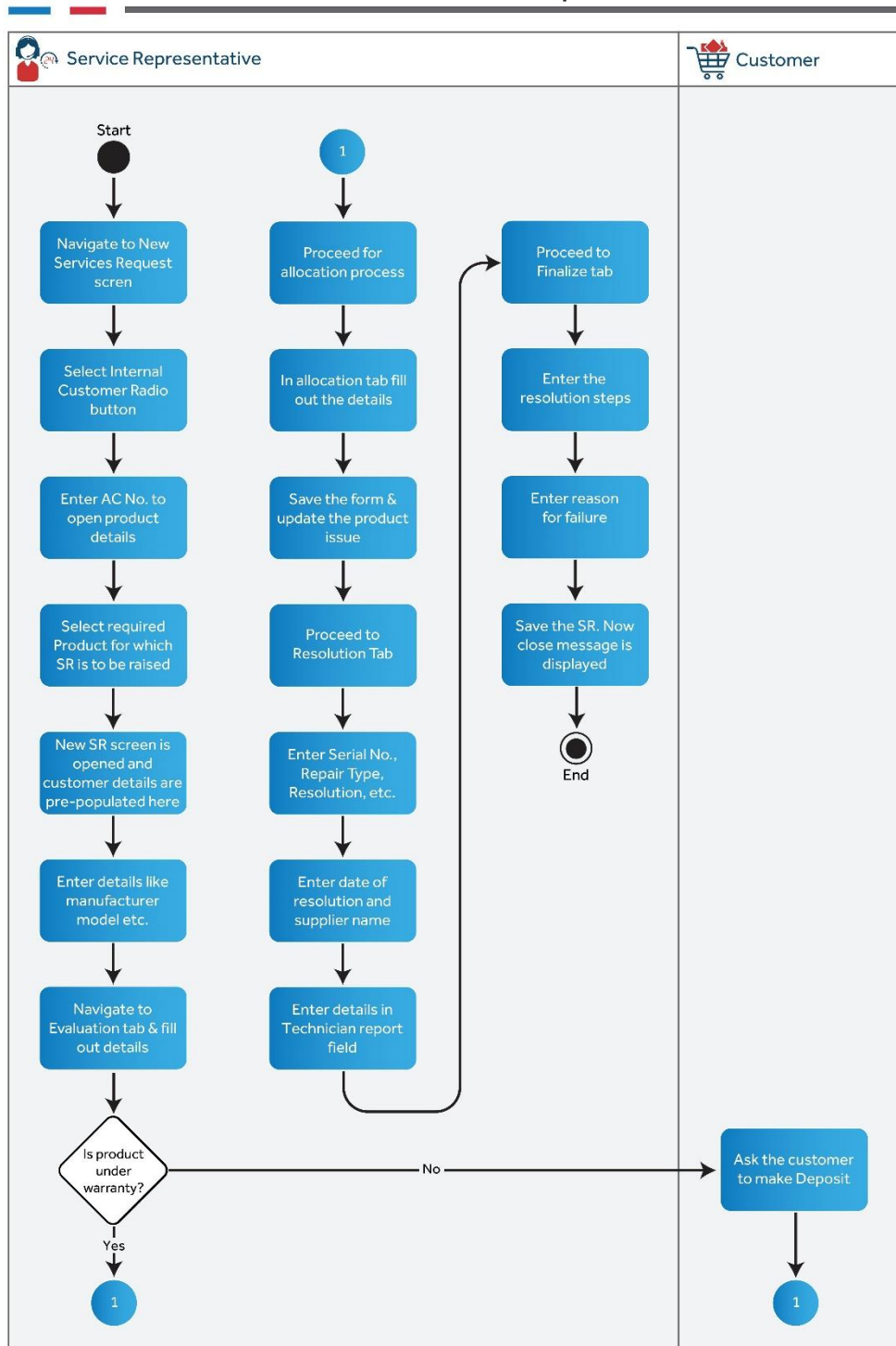
- To open the SR, the user must enter the ‘Account Number’ to open the correct product information.

1.3.7 Exceptional Scenario:

- If the Technician provides the resolution as “Beyond Economic Repair (BER)”, Unicomer needs to replace the product as per rule.
- There are a few cases where Cash and go customers raise an SR for small items or cash and go items. In this case, a ‘Customer Account Number’ is not present. However, Business has the ‘Invoice Number’ for cash and go. Using this they can get more details about the Customer and the Warranty.

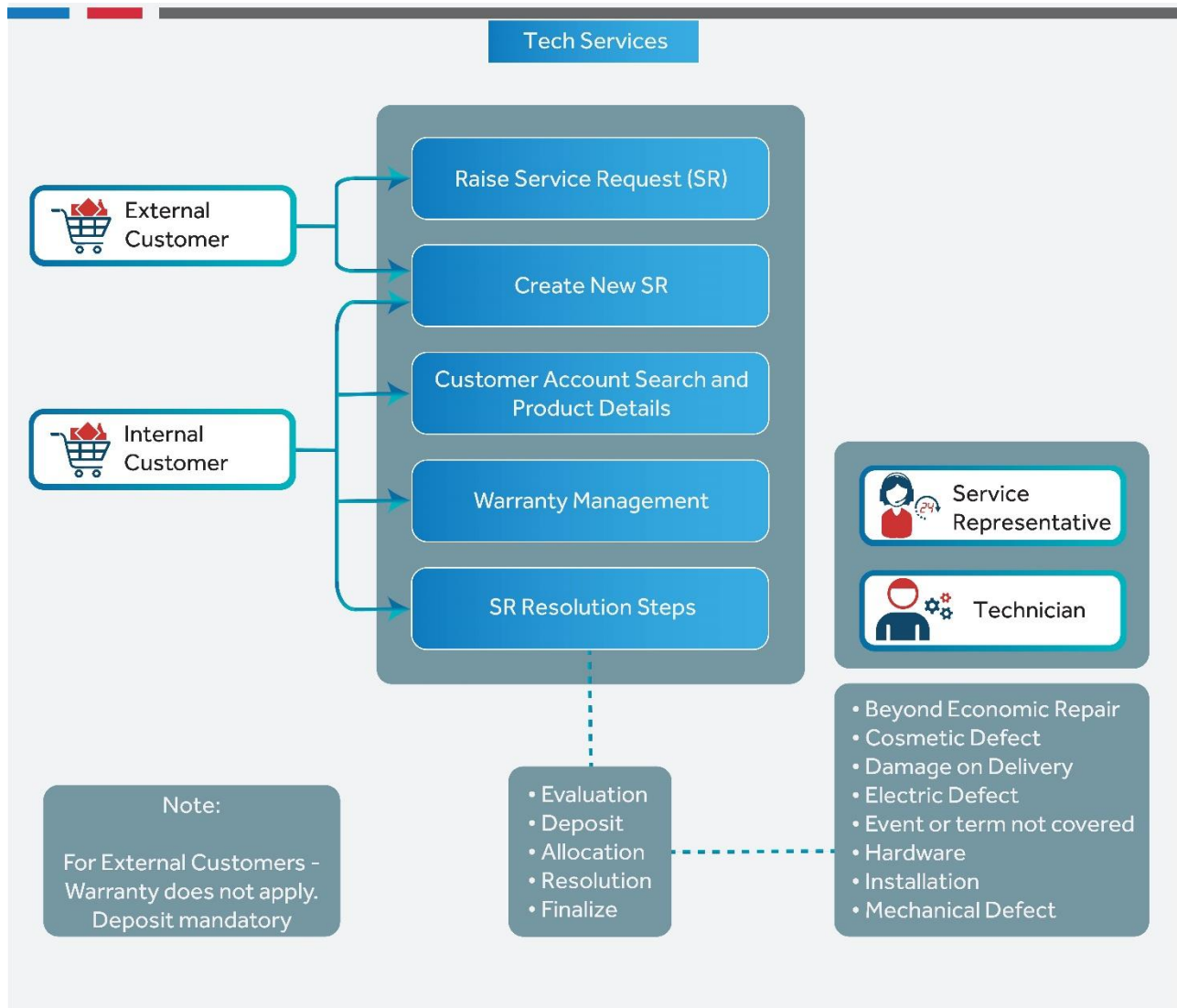
1.3.8 Process flow

The below diagram depicts the steps involved when raising an Internal or External Service Request:



1.3.9 Use Case

The below use case illustrates the users and processes involved during Internal and External SR:



1.4 Service Request (SR) creation –External Customer

An External Service Request is created for customers who have purchased the product from another Retailer. Customers can raise the Service Request depending on issues they found on the products. The Customer can call the Service Desk or personally visit the store to raise a Service Request. The Service Representative can initiate the External SR in CoSaCS.

Below are the steps followed to create an SR for external customers:

- The process starts [like](#) SR for Internal Customer.
- Select 'External Customer'.

The screenshot shows a web application interface for creating a Service Request. At the top, there is a navigation bar with various menu items: Sales, Configuration, Non Stocks, Payments, Logistics, Service, Warranty, Financial, Merchandising, and Administration. Below the navigation bar, the main heading is "Service Request" in orange. Underneath, it says "Please select type of the New Service Request." There are five radio button options: Internal Customer, External Customer (which is selected), Stock Repair, Internal Installation, and External Installation. A blue "Create" button is located below the options. At the bottom of the screen, there is a footer with the text "© Unicomer powered by Zensar 2021 (10.7.1.2222)" on the left and "Logged In: OMNI ZEELANDIA 413" on the right.

Figure 2: Service Request screen - External Customer

- There is no need to enter an "Account Number", "Customer Number" or "Invoice Number". CoSaCS would neither have a record of that Customer nor their Product.
- The user should enter all Customer Details manually ("Customer ID", "Name", "Address", "Contact Details - Mobile/Email", "Notes" etc.), Product Details ("Item No.", "Hierarchy Details" which matches with Courts Product Line, for "Delivery Date" enter present-day).

- The user enters the “Manufacturer Name” as ‘Other’, and “Serial” or “Model Number” if provided by the customer.
- For an External Customer, there will be no Warranty Details populated in the form.
- Once verified, various teams within the service department will perform the below steps.

Figure 3 Service Request screen after selecting the External option.

1.4.1 Deposit:

- For External Customers, the SR is not under Manufacturer or Extended Warranty. Hence, the customer must submit the Deposit amount against the raised SR at any Store/Branch to initiate the process and should be updated under the “Deposit” field.

Note: In Trinidad, external customers can go to separate Cashier Counter for Service Request Deposit payment. However, in other countries, they must wait in a normal Customer Queue.

1.4.2 Allocation:

This step is identical to the [Internal Customer SR](#).

1.4.3 Resolution:

This step is like [Internal Customer SR](#).

Note:

- In case Spare Parts required is not available Internally, it can be outsourced from an External Vendor or Salvage.
- The customer again needs to make the Payment based on the Technician's Resolution and "Additional Spare Parts Cost" along with "Labor and Transportation Cost".

1.4.4 Finalize:

This step is identical to [Internal Customer SR](#).

1.4.5 Business Rules:

- To open the SR for External Customers, no need to enter the "Account number". However, there is a need to fill out the "Customer" and "Product Information".
- For an External SR, the Customer must pay the "Repair Cost" and all the necessary "Deposit" as there is no valid Manufacturer or Extended Warranty.

1.5 Service Request (SR) for Internal Installation

An Internal Installation is when a customer has purchased an “Installation” product from Unicomer. As with Internal Customer SRs, the user will need to select an “Account” on a line item on which to perform the Installation. They will therefore see that many of the details in the new SR have been pre-populated based on data that is saved against that line item. There is no “Warranty” or “Evaluation” section for an Internal Installation SR, and the usual “Primary Charge” will be either “Installation Charge Electrical” or “Installation Charge Furniture”. The Internal Branch Team can raise a Service Request after the Logistics have delivered the item to the customer.

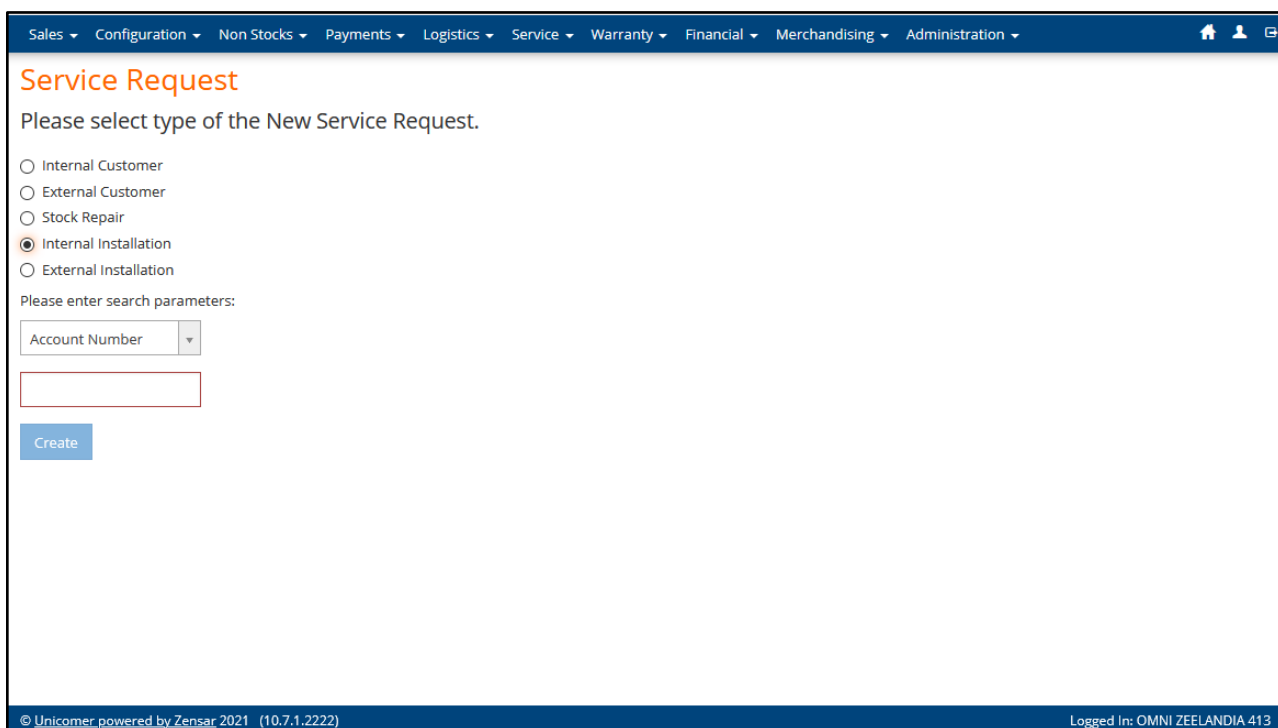


Figure 4: Internal Installation Service Request screen

A Service Representative can then initiate the Repair SR in CoSaCS by following the below steps:

- The steps are similar to [Internal Customer SR](#).
- From the Service Request screen, select the “Internal Installation” radio button.
- For an Internal Customer, there will be no Warranty Details populated for Installation.

1.5.1 Deposit:

- For Internal Installation SR, no need to submit the “Deposit Amount” against the raised Installation SR as the customer has already paid this at the time of purchase in Store/Branch.

1.5.2 Allocation:

This step is identical to [Internal Customer SR](#).

Note: Upon successful save of the details entered the message “Awaiting Installations” will be displayed on top of the screen.

1.5.3 Resolution:

This step is identical to [Internal Customer SR](#).

1.5.4 Finalize:

This step is similar to [Internal Customer SR](#).

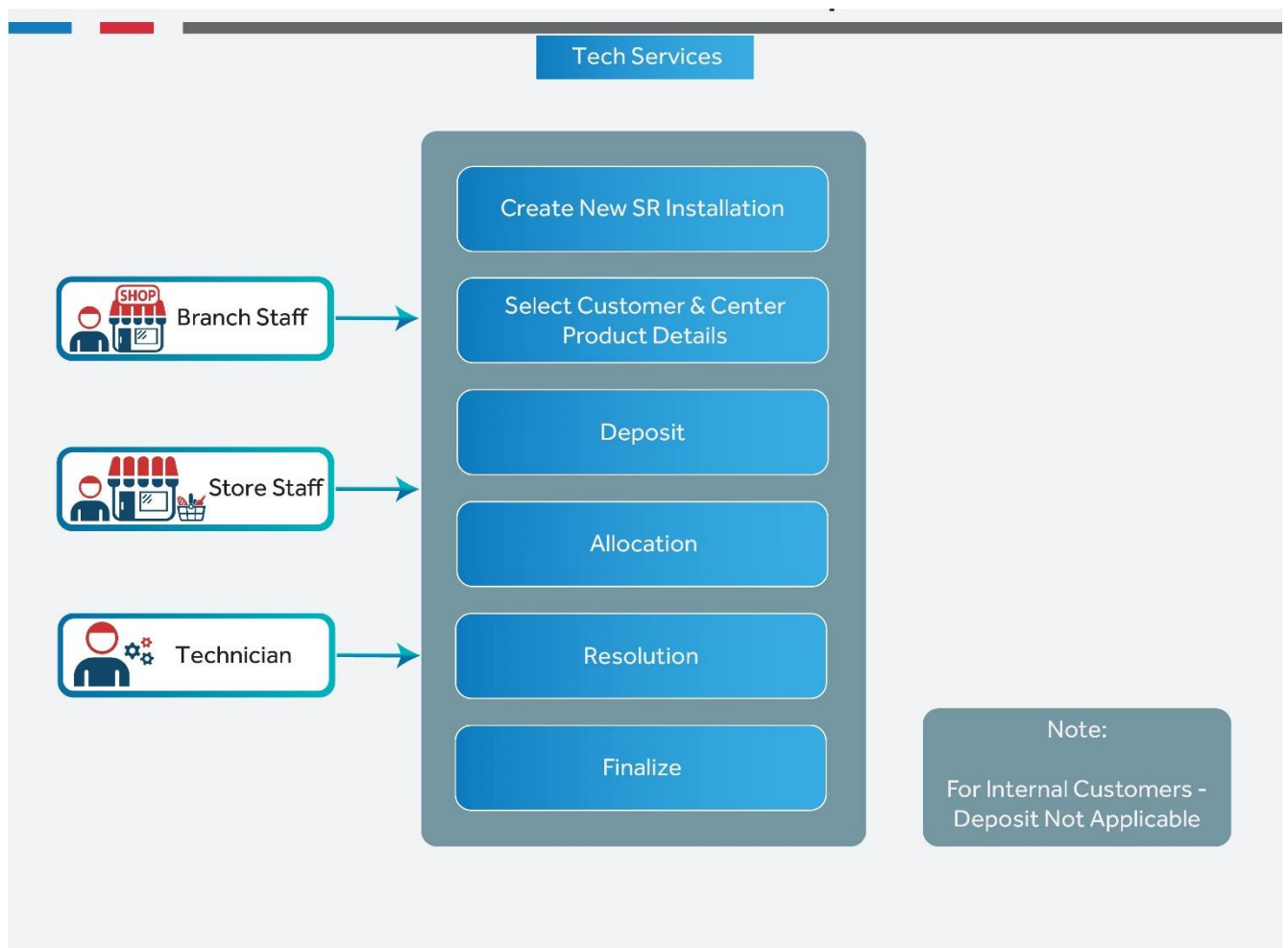
Note: The user selects “Return Date” as “Installation Date”.

1.5.5 Business Rules:

- Internal Installation SR can be initiated by Court’s customer without depositing the deposit amount.

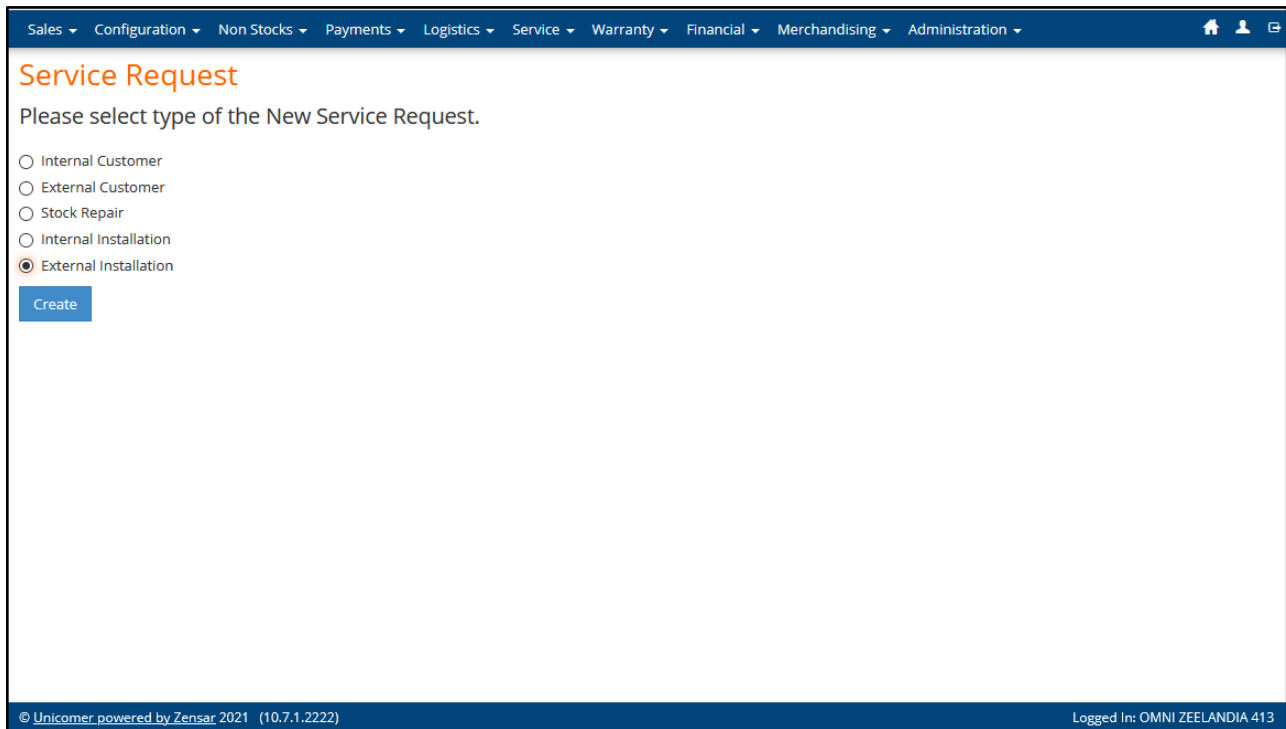
1.5.6 Use case

The below use case illustrates the users and processes involved when Installation SR is raised by Internal or External Customer:



1.6 Service Request (SR) for External Installation

External Installation SR is created for customers who have purchased the product from another Retailer and request an Installation. Customers can call the Service Desk or personally visit the store to raise a Service Request.



The screenshot shows a web application interface for creating a Service Request. At the top, there is a navigation bar with various menu items: Sales, Configuration, Non Stocks, Payments, Logistics, Service, Warranty, Financial, Merchandising, and Administration. Below the navigation bar, the title 'Service Request' is displayed in orange. The main content area contains the text 'Please select type of the New Service Request.' followed by five radio button options: Internal Customer, External Customer, Stock Repair, Internal Installation, and External Installation. The 'External Installation' option is selected, indicated by a filled radio button. Below the options is a blue 'Create' button. At the bottom of the screen, there is a footer with the text '© Unicomer powered by Zensar 2021 (10.7.1.2222)' on the left and 'Logged In: OMNI ZEELANDIA 413' on the right.

Figure 5: External Installation Service Request screen

Below are the steps followed to create SR for the External Customer:

- The steps are similar to [Internal Installation SR](#).
- From the Service Request screen select the “External Installation” radio button.
- The user needs to enter the “Manufacturer Name” as “other” and any serial or model number if any provided by the customer.

1.6.1 Deposit:

This step is identical to [External Customer SR](#).

1.6.2 Allocation:

This step is identical to [Internal Customer Installation SR](#).

1.6.3 Resolution:

This step is similar to [Internal Customer Installation SR](#).

Note: “Primary Charge” in case of External Customer Installation SR would be borne by the Customer.

1.6.4 Finalize:

This step is identical to [Internal Customer SR](#).

1.6.5 Business Rules:

- External Installation SR is initiated by Non-Courts Customer by depositing the deposit amount.
- If the customer did not fill the “Deposit” for Installation, System will not allow the Service Team to proceed with Installation.