



# SERVICE OPERATOR PORTAL (SOP) User guide

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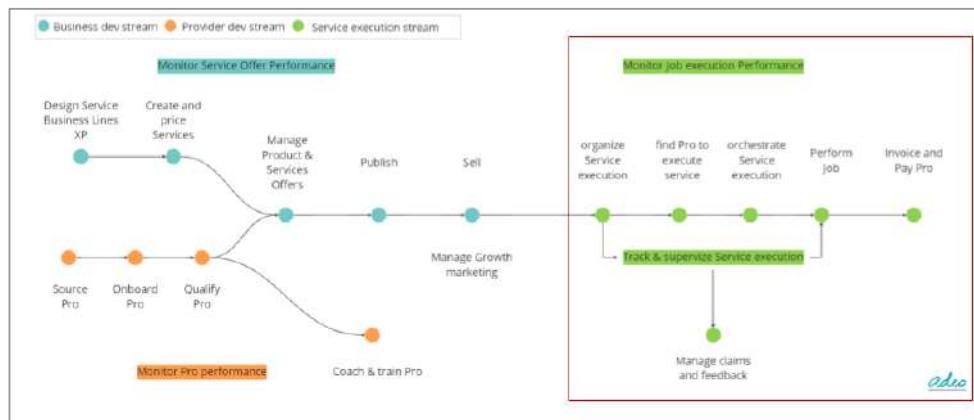
Welcome in the Service Operator Portal User guide

This document helps you to learn how to manage the Service Execution with your brand new Service Operator Portal.

**This first version will be improved thanks to your comments.  
Feel free to share your feedback through this dedicated [Form](#)**

# Service Execution Stream

## Service execution stream on the AHS end to end value chain



## What is the Service Execution Stream role ?

Service execution is composed of 7 critical business capabilities to deliver the Services bought by our customers.

- [1. Organize Service Execution](#)
- [2. Find Pro to execute the Service](#)
- [3. Orchestrate Service Execution](#)
- [4. Perform the Job](#)
- [5. Track & supervise Service Execution](#)
- [6. Manage claims & feedback](#)
- [7. Invoice & Pay](#)

# Preliminary information

In this section you can find all relevant information, regarding the main concepts of the service execution stream. You can find the most important business terms, all the status of service execution that defines the life cycle of the service and the main business processes to better understand the whole workflow.

## 1. Service Execution Business terms to master

To understand better the design of AHS and ease the implementation in your BU, it is very important to understand all the following business terms.

**Service Provider** (*Pro or Contractor or Craftsman*): external entity with whom ADEO Group (one or several Business units) is collaborating.

**Worker** (*Workteam*): It represents the employees of the Service Provider. They can fulfill a job to execute the services or any administrative work related to the service provider.

**Project execution (Px)**: A project execution is a specific type of solution that integrates one or several Service executions at a given address (unicity of place) for a client.

Rules to group services inside a Px :

1. Check if the customer already has a Px (match is the fiscal/tax number of customer)
2. Check if Px is the same ZIP code as the new Sx
3. Check if the Px status is "ongoing"

**Service execution (Sx)** (*Service order or Job*): A service order that can combine several services for the same profession and specialty.

**Schedule Service** (*Service date or Installation date*): Activity in which a seller or an operator plans a service installation date. 1 date by service order.

**Service contract** (*Installation Contract*): Legal terms and conditions signed by the customers to rule the installation conditions. Customers receive the contract by email or can scan a QRcode.

**Work Closing form** (*WCF*): Legal document triggered at the checkout stage that commits both Pro (confirm service is done) and customer (accept the service done). Customers on that occasion can raise reserves. Reserves are treated as tasks triggered to an operator. The work closing form triggers the invoice generation (and therefore the payment) for the pro = no check out done no payment. Please note that there is no work closing form for Technical visit / Quotation flow.

**Pro allocation** (*Pro assignment or Pro Distribution*): Activity in which we identify providers that are likely to be able to perform the job under 3 criteria:

- theoretical availability (declared unavailability),
- profession and specialties of the Pro,
- intervention zone of the Pro.

This activity is triggered manually or automatically according to the business workflow and the stages of the service order.

**Automatic Assignment** (old Smart Picking): method of pro assignment which consists in an automated booking. First pro that matches conditions is automatically assigned to the job.

Commented [1]: @richie.permal@adeo.com , on parle ici d'un tax nbr uniquement ? LMPL m'a dit mardi que tous les clients polonais n'avaient pas de tax nbr et s'inquiètent donc sur cette règle de "px Grouping"...  
On a déjà eu le cas avec d'autres BUs ?  
\_Assigned to richie.permal@adeo.com\_

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? <https://app.gitbook.com/o/0gRIAkSocTvnN36NTnDZ/s/oKvIlnxLGVE1aAjtEXaj/business-process/px-grouping-rules>

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For the random assignment, if we have no answer from the provider (no matches or answers), we will make a second random assignment to find the pro before doing the manual assignment. We could make two to five new automatic assignments.

**Bid** (Job offer or proposal) : Method of pro assignment which consists in an automated bidding. First pro that matches conditions receives a job proposition he can accept or refuse.

**PRO Check in** : Activity in which the provider declares to start a job. PRO is using the mobile app (SMA) or the portal (SPP) to do this activity.

**PRO Check out** : Activity in which the provider declares to close a job. PRO is using the mobile app (SMA) or the portal (SPP) to do this activity.

**PYXIS Order** : order created in Pyxis. The Pyxis adapter allows the transfer of the order in the SOP portal. The date of the service is defined as Date of the Pyxis order + 48h. This buffer is free hand for BU's, for example the duration of the buffer is 48h in Spain, but 72h in Portugal. [BUFFER documentation](#)

**ZENDESK** : this tool is dedicated to manage tasks automatically generated by the system and helps the team to focus on the actions to manage by priority and topic. This tool also helps to manage the ticketing for Provider who are filling the support form and transfer from Care team or Sellers linked to Customer requests.

[Here](#) is the overview of the task management list

## 2. Status description

In this section we define all the different statuses and their description in order to properly describe the life cycle of a Project Execution (PX) or a service Execution (SX).

Those statuses are very important to master in order to understand properly how the different actions are triggered and linked.

### **statuses of PROJECT Execution :**

**Important to know !** The statuses of the project execution are purely informative, as they are not triggering any business rules within the MVP version.

#### **1. Business rule of PX (Project Execution) :**

A project execution (PX) is created automatically based on the following criteria :

- > Same customer
- > Same address
- > Within a frametime of 3 months (3 is a parameter set up by BU)

Following that context :

- All Orders containing a Service are grouped into the same PX
- Whatever the type of Product

*Please note that :*

It is not possible for the MVP to create manually a PX, it is not possible to move

Service order from a PX to another one

(In average we have identified with data that 80% of PX are composed by maximum 2 Service orders)

#### **2. Statuses of PX (Project Execution)**

Status	Description	Business rules
New	a new Project Execution (PX) has been created.	<ul style="list-style-type: none"><li>• All Service Execution (SX) are in status "Pre scheduled"</li><li>• Once one of Service Execution (SX) moves to scheduled then status of PX moves to Ongoing</li></ul>
Ongoing	Project Execution is ongoing (it means that at least one of the Service Execution is scheduled)	<ul style="list-style-type: none"><li>• at least one of the Service Execution (SX) is in Scheduled status</li></ul>
Canceled	Project Execution is canceled	<ul style="list-style-type: none"><li>• All Service Execution (SX) are in status Canceled</li></ul>
On hold	All Service executions are closed but the time parameter of integration of a new Service in the same Pex is not reached	<ul style="list-style-type: none"><li>• The Pex stays open 90 days after the closure of the last Sx in case of new service added with the same context (parameter)</li></ul>

 <b>Closed</b> Closed	Project Execution is closed	<ul style="list-style-type: none"> <li>• All Service Execution (SX) are in status Closed</li> <li>• The Pex is closed when the Sx are all closed and time parameter reached : 3 months</li> </ul>
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#### **Statuses of SERVICE Execution :**

The statuses of the Service execution are triggering some business rules and actions.  
Those Statuses are the backbone of AHS Services lifecycle

It is not possible to manage manually the status of the SX. All statuses change according to the business rules and process below.

Status	Description	Business rules
 <b>Pre-scheduled</b> Pre-scheduled	<p><b>Service Order has been automatically created</b> (integration of PYXIS order)</p> <p>Conditions to move to next Status :</p> <ul style="list-style-type: none"> <li>• <b>Contract must be signed by the customer</b></li> </ul>	<ul style="list-style-type: none"> <li>• Status is active once PYXIS order has been created (with PYXIS adaptor) whatever the status of payment</li> <li>• Update of PYXIS order before order is PAID triggers automatically the update of the Service order</li> <li>• Update of PYXIS order after order is PAID triggers automatically the update of the Service order until In Progress status</li> <li>• Date is set up automatically based on PYXIS date but can be changed using <a href="#">[Schedule Service date - after order is created]</a> feature</li> <li>• Installation Date in SEE = PYXIS Product delivery date + 48H (buffer PYXIS) + X days (buffer SEE X is a parameter by BU)</li> <li>• Contract is generated manually or triggered automatically after 1 hour after Order</li> </ul>

		<p>creation if not generated yet (I is a parameter)</p> <ul style="list-style-type: none"> <li>When Service is generated and sent by email, Service order is waiting for contract signature from customer</li> <li>Reminders for contract signature are sent automatically</li> <li>Task "Contract Not Signed" is created after expiration of reminders : Adobe reminders to the customer daily and task opened in Zendesk after 72h</li> <li>As an execution admin, I can cancel a SX via Service Management button. By clicking on the <i>Cancel</i> action, I open a confirmation modal asking me if I'm sure I want to cancel the order. If I want to confirm I need to add a justification (required). If I click on confirm, the Sx should change status to <i>Canceled</i>. The justification must appear on the history log.</li> </ul>
<b>Scheduled</b> Scheduled	<b>Contract has been signed by customer</b>  Conditions to move to next Status : <ul style="list-style-type: none"> <li><b>Pro must be identified</b> (must match to the context)</li> </ul>	<ul style="list-style-type: none"> <li>triggers the Automatic Assignment feature to identify an available PRO</li> </ul> <p>Based on the following criterias :</p> <ul style="list-style-type: none"> <li>&gt; Professions &amp; Specialties</li> <li>&gt; Intervention Zone</li> <li>&gt; Theoretical Availability for the date</li> <li>&gt; Not already booked for the</li> </ul>

		<p>date + Declared unavailabilities  &gt; Available for the duration of the Service(s)</p> <ul style="list-style-type: none"> <li>• if no Pro found &gt; task is created to manage Pro allocation manually using <a href="#">[Assign a Pro manually]</a> feature</li> <li>• As an execution admin, I can cancel a SX via Service Management button. By clicking on the <i>Cancel</i> action, I open a confirmation modal asking me if I'm sure I want to cancel the order. If I want to confirm I need to add a justification (required). If I click on confirm, the Sx should change status to <i>Canceled</i>. The justification must appear on the history log.</li> </ul>
<b>Distributed</b> Distributed	<p><b>Pro has been identified and Job has been proposed to him</b></p> <p>Conditions to move to next Status : che</p> <p>2 methods to assign a Pro :</p> <ul style="list-style-type: none"> <li>• <b>Bid</b> &gt; Job is proposed to the identified PRO. he can accept or refuse</li> <li>• <b>Direct Assignment</b> &gt; Job is booked automatically to the identified PRO.</li> </ul>	<ul style="list-style-type: none"> <li>• Assign Pro methods can be setup @ BU level as parameters</li> <li>• Bid &gt; Timeout of the job offer. Once timeout is reached, assignment is triggered again with another Pro</li> <li>• Bid &gt; Pro can refuse the job. In this case Service goes back to <b>Scheduled</b> status</li> <li>• Direct assignment &gt; Pro cannot refuse the Job status pass automatically in <b>Confirmed</b></li> <li>• for both method : Assigned Pro must select a worker by his</li> </ul>

		<p>own</p> <ul style="list-style-type: none"> <li>As an execution admin, I can cancel a SX via Service Management button. By clicking on the <i>Cancel</i> action, I open a confirmation modal asking me if I'm sure I want to cancel the order. If I want to confirm I need to add a justification (required). If I click on confirm, the Sx should change status to <i>Canceled</i>. The justification must appear on the history log.</li> </ul>
<span style="background-color: #90EE90; border: 1px solid black; padding: 2px;">Confirmed</span> Confirmed	<b>Pro has accepted the Job (bid mode) or Pro is booked automatically (direct assignment)</b>  Conditions to move to next Status : <ul style="list-style-type: none"> <li><b>Pro must perform the check in</b></li> </ul>	<ul style="list-style-type: none"> <li>Provider must accept Job in SMA if bid</li> <li>Provider has accepted automatically if direct assignment</li> <li>in both case Provider must assign a Worker</li> <li>As an execution admin, I can cancel a SX via Service Management button. By clicking on the <i>Cancel</i> action, I open a confirmation modal asking me if I'm sure I want to cancel the order. If I want to confirm I need to add a justification (required). If I click on confirm, the Sx should change status to <i>Canceled</i>. The justification must appear on the history log.</li> </ul>
<span style="background-color: #ADD8E6; border: 1px solid black; padding: 2px;">In progress</span> In progress	<b>Pro starts the job once he is in customer worksite address by doing the check-in</b>  Conditions to move to next Status :	<ul style="list-style-type: none"> <li>PRO check-in is mandatory in the app</li> <li>it is possible for the Pro not do the check-in</li> </ul>

	<ul style="list-style-type: none"> <li><b>Pro must perform the Check out to close the Job and get paid</b></li> </ul>	<p>when he starts the job but it is mandatory to make the check-in to be able to make the check-out</p> <ul style="list-style-type: none"> <li>As an execution admin, I can cancel a SX via Service Management button By clicking on the <i>Cancel</i> action, I open a confirmation modal asking me if I'm sure I want to cancel the order. If I want to confirm I need to add a justification (required). If I click on confirm, the Sx should change status to <i>Canceled</i>. The justification must appear on the history log.</li> </ul>
<b>Waiting for WCF</b> Waiting for WCF	<p><b>Pro makes the check out</b></p> <p>Conditions to move to next Status:</p> <ul style="list-style-type: none"> <li><b>Customer must sign WCF</b> (can be with or without reserves)</li> </ul>	<ul style="list-style-type: none"> <li>PRO Check-out is mandatory in the app</li> <li>it is mandatory to make the check-in to be able to make the check-out</li> <li>Pro Check out triggers automatically work closing form. WCF is sent automatically to the customer by email. Customer must sign it</li> <li>Customers can formalize reserves in the WCF directly. When Reserves are formalized, it automatically creates task management in Zendesk.</li> <li>Customers can also decide not to sign. After Adobe reminders</li> </ul>

		<p>48h, a task is automatically created in Zendesk</p> <ul style="list-style-type: none"> <li>Reminder for Work closing form signature is sent automatically to the customer. Once timeouted, task is created for the operator</li> <li>there is no check-out action for the Technical visit / Quotation flow. This step is triggered by the upload of the technical report.</li> <li>No check-out by the Pro means no payment</li> <li>Payment is triggered based on check-out of the Provider, not linked to the Work closing form signature by the customer</li> <li>Not possible to add extra cost anymore when "Waiting for WCF"</li> </ul>
<span style="background-color: #90EE90; border: 1px solid black; padding: 2px 5px;">Done</span> Done	<b>Customer has signed the WCF signature</b> (does not matter if there are reserves)  Conditions to move to next Status : <ul style="list-style-type: none"> <li><b>Customer answers the Survey or automatic closure after timeout</b></li> </ul>	<ul style="list-style-type: none"> <li>Signature of WCF is mandatory for the customer</li> <li>If a customer does not sign, the timeout to move to closed status is set up at 30 days.</li> <li>Payment is triggered based on check-out of the Provider, not linked to the Work closing form signature by the customer</li> <li>Operator can trigger</li> </ul>

		Rework operation (New service Order is created automatically with same PRO no need to sign contract)
<b>Closed</b> Closed	<b>Customer has fulfilled the Survey</b> (or system time out)	<ul style="list-style-type: none"> <li>• Job is completely closed. Cannot be reopened</li> <li>• Payment of the Pro is active in parallel</li> <li>• Operator can trigger Rework operation (New service Order is created automatically with same PRO no need to sign contract)</li> </ul>
<b>Cancelled</b> Cancelled	<p><b>Service Order has been canceled</b></p> <p><b>PYXIS is the master of customer order. To cancel a Service Order, PYXIS order must be canceled first.</b></p> <p><b>Cancel PYXIS order will automatically cancel service Order</b></p>	<ul style="list-style-type: none"> <li>• If PYXIS order is canceled then Service Order is automatically canceled (whatever if order is paid or not)</li> <li>• based on PYXIS rules of the BU (order can be canceled if not paid after some time) or PYXIS Order can be canceled by an operator (seller, cluster ...)</li> <li>• The cancellation status is definitive. Once the order is canceled, a new order must be created to reopen a Service order</li> </ul>
<b>Non compliant</b> Not compliant	<b>A claim flow (rework) is needed</b>	<ul style="list-style-type: none"> <li>• The service is not compliant if following a customer's claim a rework flow is started by the operator as the identified mean to resolve the claim itself.</li> </ul>

### 3. Activities mapping by status

Status	Available actions	Business rules
<b>Pre-scheduled</b>  Service Order has been automatically created (integration of PYXIS order)  Conditions to move to next Statut :  • Contract must be signed by the customer	<b>. Update PYXIS order</b> (change Product OR Service)	<ul style="list-style-type: none"> <li>Update of PYXIS order triggers automatically the update of the Service order</li> </ul>
	<b>. Cancel PYXIS order</b> (change Product OR Service)	<ul style="list-style-type: none"> <li>If PYXIS order is canceled then Service Order is automatically canceled</li> <li>Notification must be sent to the PRO and the Customer</li> </ul>
	<b>. Reschedule date</b> (Pro not allocated)	<ul style="list-style-type: none"> <li>By default Installation Date in SEE = PYXIS Product delivery date + 48H (buffer PYXIS) + X days (buffer SEE X is a parameter by BU)</li> <li>Installation date can be rescheduled</li> </ul>
	<b>. Change address</b> (Pro not allocated)	<ul style="list-style-type: none"> <li>Address can be changed in PYXIS after order is created and before order is paid. In this case address is updated automatically into the Service Order</li> <li>Once Service Order is created, address can be changed in SOP using <a href="#">[Change worksite address before PRO allocated]</a>. In this case no update of the Customer referential nor PYXIS</li> </ul>
	<b>. Change customer contact</b>	<ul style="list-style-type: none"> <li>Contact can be changed in PYXIS after order is created and before order is paid. In this case contact is updated automatically into the Service Order</li> <li>Once Service Order is created, contact can be changed in SOP using the <a href="#">[Update customer contact]</a> feature . In this case no update of the Customer referential nor PYXIS</li> </ul>
	<b>. Generate &amp; send Contract</b>	<ul style="list-style-type: none"> <li>Contract is generated manually or triggered automatically after 1 hour after Service Order creation (1 is a parameter)</li> <li>every update of PYXIS order must lead to new version of contract, new version must be generated and sent to customer</li> </ul>

		using <a href="#">[Generate contract and send it to customer]</a> feature
<b>Scheduled</b>  <b>Contract has been signed by customer</b>  Conditions to move to next Status :  • <b>Pro must be identified</b> (must match to the context)	<b>. Update PYXIS order</b> (change Product OR Service)  <b>. Cancel PYXIS order</b> (change Product OR Service)  <b>. Reschedule date</b> (Pro not allocated)  <b>. Change address</b> (Pro not allocated)  <b>. Change customer contact</b>  <b>. Assign manually the Pro</b> (distribute)	<ul style="list-style-type: none"> <li>Update of PYXIS order triggers automatically the update of the Service order</li> </ul> <ul style="list-style-type: none"> <li>If PYXIS order is canceled then Service Order is automatically canceled</li> <li>Notification must be sent to the PRO and the Customer</li> </ul> <ul style="list-style-type: none"> <li>By default Installation Date in SEE = PYXIS Product delivery date + 48H (buffer PYXIS) + X days (buffer SEE X is a parameter by BU)</li> <li>Installation date can be rescheduled to any date chosen the operator (but must be consistent with Product delivery date)</li> </ul> <ul style="list-style-type: none"> <li>Address can be changed in PYXIS after order is created and before order is paid. In this case address is updated automatically into the Service Order</li> <li>Once Service Order is created, address can be changed in SOP using <a href="#">[Change worksite address before PRO allocated]</a>. In this case no update of the Customer referential nor PYXIS</li> </ul> <ul style="list-style-type: none"> <li>Contact can be changed in PYXIS after order is created and before order is paid. In this case contact is updated automatically into the Service Order</li> <li>Once Service Order is created, contact can be changed in SOP using <a href="#">[Update customer contact]</a> feature . In this case no update of the Customer referential nor PYXIS</li> </ul> <ul style="list-style-type: none"> <li>using the <a href="#">[Assign a Pro manually]</a> feature <ul style="list-style-type: none"> <li>Based on following criteria : <ul style="list-style-type: none"> <li>&gt; Professions &amp; Specialties</li> <li>&gt; Intervention Zone</li> <li>&gt; Theoretical Availability for the date</li> </ul> </li> </ul> </li> </ul>

		> Not already booked for the date + Declared unavailabilities > Available for the duration of the Service(s)
<b>Distributed</b>  <b>Pro has been identified and Job has been proposed to him</b>  Conditions to move to next Statuts :  2 methods to assign a Pro : <ul style="list-style-type: none"> <li>• <b>Bid</b> &gt; Job is proposed to the identified PRO. he can accept or refuse</li> <li>• <b>Direct Assignment</b> &gt; Job is booked automatically to the identified PRO.</li> </ul>	<ul style="list-style-type: none"> <li>. <b>Update PYXIS order</b> (change Product OR Service)</li> <li>. <b>Cancel PYXIS order</b> (change Product OR Service)</li> <li>. <b>Reschedule date</b> (Pro allocated)</li> <li>. <b>Assign to new Pro</b> (distribute)</li> <li>. <b>Change address</b> (Pro allocated)</li> <li>. <b>Change customer contact</b></li> </ul>	<ul style="list-style-type: none"> <li>• Update of PYXIS order triggers automatically the update of the Service order</li> <li>• If PYXIS order is canceled then Service Order is automatically canceled</li> <li>• Notification must be sent to the PRO and the Customer</li> <li>• Installation date can be rescheduled to any date chosen by the operator (but must be consistent with Product delivery date)</li> <li>• PRO is notified by SMA</li> <li>• When rescheduling done, status goes back to <b>Scheduled</b> to get Pro acceptance or refusal (<a href="#">see scheduled Status</a>)</li> <li>• Service can be assigned to a new Pro (Pro refuses, not available and cannot be rescheduled, No Show, ...)</li> <li>• When <a href="#">[Assign a Pro manually]</a> is done, status goes back to <b>Scheduled</b> to get Pro acceptance or refusal (<a href="#">see scheduled Status</a>)</li> <li>• When Service Order is created, and Pro assigned address can be changed in SOP using <a href="#">[Change worksite address after PRO allocated]</a>. In this case no update of the Customer referential nor PYXIS</li> <li>• Contact can be changed in PYXIS after order is created and before order is paid. In this case contact is updated automatically into the Service Order</li> <li>• Once Service Order is created,</li> </ul>

		contact can be changed in SOP using <a href="#">[Update customer contact]</a> feature . In this case no update of the Customer referential nor PYXIS
<b>Confirmed</b>	. <b>Update PYXIS order</b> (change Product OR Service)	<ul style="list-style-type: none"> <li>Update of PYXIS order triggers automatically the update of the Service order</li> </ul>
	. <b>Cancel PYXIS order</b> (change Product OR Service)	<ul style="list-style-type: none"> <li>If PYXIS order is canceled then Service Order is automatically canceled</li> <li>Notification must be sent to the PRO and the Customer</li> </ul>
	. <b>Reschedule date</b> (Pro allocated)	<ul style="list-style-type: none"> <li>Installation date can be rescheduled to any date chosen by the operator (but must be consistent with Product delivery date)</li> <li>PRO is notified by SMA</li> <li>When rescheduling done, status goes back to <b>Scheduled</b> to get Pro acceptance or refusal (<a href="#">see scheduled Status</a>)</li> </ul>
	. <b>Assign to new Pro</b> (distribute)	<ul style="list-style-type: none"> <li>Service can be assigned to a new Pro (Pro refuses, not available and cannot be rescheduled, No Show, ...)</li> <li>When <a href="#">[Assign a Pro manually]</a> is done, status goes back to <b>Scheduled</b> to get Pro acceptance or refusal (<a href="#">see scheduled Status</a>)</li> </ul>
	. <b>Change address</b> (Pro allocated)	<ul style="list-style-type: none"> <li>When Service Order is created, and Pro assigned address can be changed in SOP using <a href="#">[Change worksite address after PRO allocated]</a>. In this case no update of the Customer referential nor PYXIS</li> </ul>
	. <b>Change customer contact</b>	<ul style="list-style-type: none"> <li>Contact can be changed in PYXIS after order is created and before order is paid. In this case contact is updated automatically into the Service Order</li> </ul>

		<ul style="list-style-type: none"> <li>Once Service Order is created, contact can be changed in SOP using <a href="#">[Update customer contact]</a> feature . In this case no update of the Customer referential nor PYXIS</li> </ul>
	<b>. Request Extra cost</b>	<ul style="list-style-type: none"> <li>Pro can request extra payment to perform the service using the <a href="#">[Manage extra cost request]</a> feature.</li> <li>Extra cost can be requested from <b>Confirmed</b> to <b>Closed</b> status excluded (Waiting for WCF included)</li> </ul>
<b>In progress</b>	<b>. Update PYXIS order</b> (change Product OR Service)	<ul style="list-style-type: none"> <li>Update of PYXIS order triggers automatically the update of the Service order</li> </ul>
	<b>. Cancel PYXIS order</b> (change Product OR Service)	<ul style="list-style-type: none"> <li>If PYXIS order is canceled then Service Order is automatically canceled</li> <li>Notification must be sent to the PRO and the Customer</li> </ul>
	<b>. Reschedule date</b> (Pro allocated)	<ul style="list-style-type: none"> <li>Installation date can be rescheduled to any date chosen the operator (but must be consistent with Product delivery date)</li> <li>PRO is notified by SMA</li> <li>When rescheduling done, status goes back to <b>Scheduled</b> to get Pro acceptance or refusal (<a href="#">see scheduled Status</a>)</li> </ul>
	<b>. Assign to new Pro</b> (distribute)	<ul style="list-style-type: none"> <li>Service can be assigned to a new Pro (Pro refuses, not available and cannot be rescheduled, No Show, ...)</li> <li>When <a href="#">[Assign a Pro manually]</a> is done, status goes back to <b>Scheduled</b> to get Pro acceptance or refusal (<a href="#">see scheduled Status</a>)</li> </ul>
	<b>. Change address</b> (Pro allocated)	<ul style="list-style-type: none"> <li>When Service Order is created, and Pro assigned address can be changed in SOP using <a href="#">[Change</a></li> </ul>

		<a href="#">worksite address after PRO allocated</a> . In this case no update of the Customer referential nor PYXIS
	<b>. Change customer contact</b>	<ul style="list-style-type: none"> <li>Contact can be changed in PYXIS after order is created and before order is paid. In this case contact is updated automatically into the Service Order</li> <li>Once Service Order is created, contact can be changed in SOP using <a href="#">[Update customer contact]</a> feature . In this case no update of the Customer referential nor PYXIS</li> </ul>
	<b>. Request Extra cost</b>	<ul style="list-style-type: none"> <li>Pro can request extra payment to perform the service using the <a href="#">[Manage extra cost request]</a> feature.</li> <li>Extra cost can be requested from <a href="#">Confirmed</a> to <a href="#">Closed</a> status</li> </ul>
<a href="#">Waiting for WCF</a>	<b>. Rework Service Order</b>	<ul style="list-style-type: none"> <li>The provider is invoiced</li> </ul>
<a href="#">Closed</a>	<b>. Receive the survey</b>	
<a href="#">Cancelled</a>	<b>. no action anymore on the Service</b>	<ul style="list-style-type: none"> <li>There is no way back. Not possible to reopen a canceled Service Execution.</li> </ul>
<a href="#">Non compliant</a>	<b>. Status achieved once claim (rework) Service Order is started</b>	<ul style="list-style-type: none"> <li>Service execution team can start claim service to start claim flow and pay the resolution of the claim according to the responsibility and extra costs needed</li> </ul>

## 4. Tags

In this section, you will find a description of the tags that appears on the service execution screen :



Those tags are automatically generated by the system according to the new information linked to the service execution. They give additional information about the Service in one sight. You can filter in the Project lists on the tags to have a consolidated overview of the services by tags.

Tags	Business name	Trigger	Tag Desactivation
MANUAL_DISTRIBUTED	No Pro found	Appears when the automatic assignment did not succeed, the allocation is manual	-
ACCEPTANCE_SALES_CONDITIONS	Waiting for Terms & Conditions signature	Appears when the contract is sent to the customer and waiting for his signature	When the contract is signed
TECHNICAL_REPORT_SENT	Technical report sent - invoiced	Appears when the technical report is sent and available in SOP	-
Additional TAGS linked to Budget flow - Portugal			
QUOTATION_APPROVED	Budget approved	Appears when the operator indicates that the quotation is approved	-
QUOTATION_REFUSED	Budget refused	Appears when the operator indicates that the quotation is refused	-

## 5. General Process flow

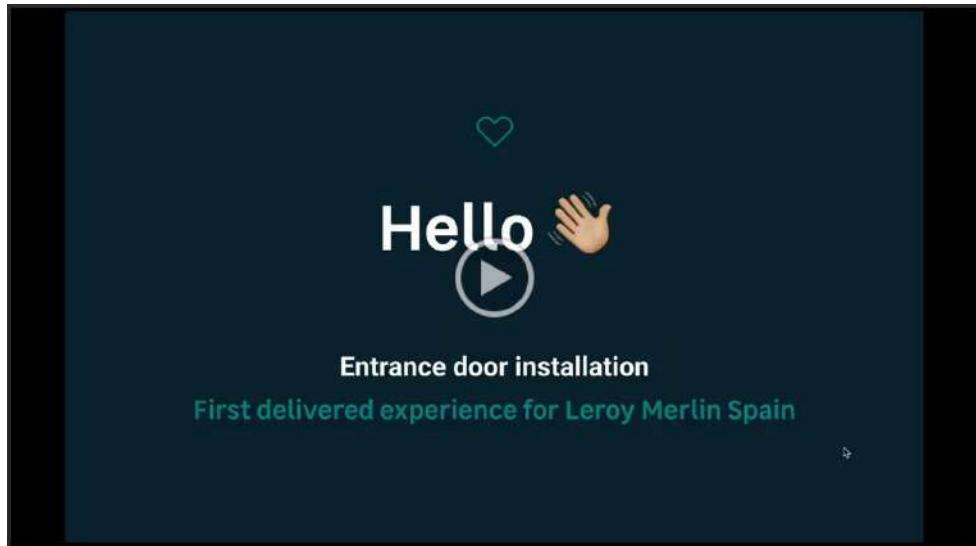
AHS platform is covering, for the MVP experience, two main Service Lines :

1. Product installation : simple installation, customers purchase Product and installation at the same time
2. Simple room remodeling : complete refurbishment of a room (especially bathroom) done by a Single Provider

Both experiences are available with or without Technical visit / Quotation flow.

To understand better those experiences you can find below the full Execution processes available in video.

Room remodeling or Product installation with Technical visit / Quotation flow



## **6. Services Execution Roles**

Based on the AHS - Features map, you need to set up the role in your Business Unit for the teams in store, in cluster and at national level.

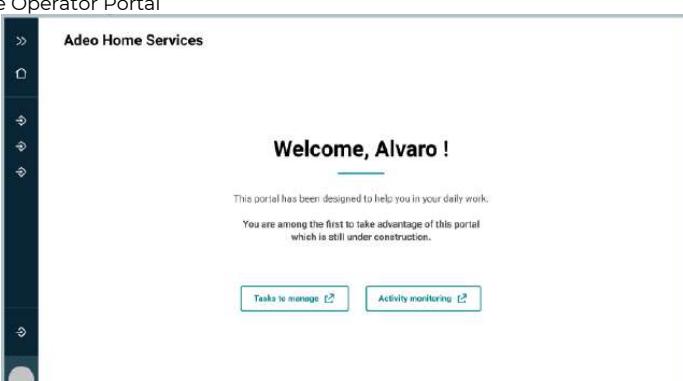
You can find the description of the roles in the following documents : [SOP - Global presentation - March 25](#)  
[AHS - Features Map](#)

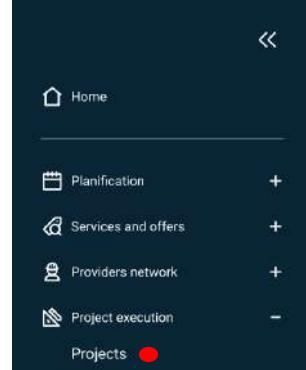
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# 1. Organize Service Execution

Stream	Service Execution
Business Capability	1-Organize service execution
Business activity	1.1-Plan service execution
Business task	<b>Open a customer Project and related Service order</b>
Operator Role	ALL users
<b>What - As an Services Sales operator, I want to ...</b>	
> Open Service Operator Portal > Open the Project list functions > Search for a customer Project > Get all the information about a Service Order	
<b>How to - Process flow</b>	
1. Open Service Operator Portal 	
2. Open Planification menu > "Project Execution" > "Projects" menu	



3. Search for a Project execution you can use :

- the search bar : search by customer name, Fiscal Id and phone number of the customer
- the filter menu : type, status, service, provider, planned date, creation date (by default, "canceled" projects are filtered-out)
- the store menu (if you are in a Cluster and you want to filter all service of a store)

PROJECT	STATUS	SERVICE	PRICE	DATES	CLIENT
138	To plan	Installation - Bombas de c...	150,00 €	Planned : 21/03/2023 PM Last action : 19/03/2023	Henrique CRUZ 06.0453.34.15
143	Planned	Multiservices	450,00 €	Planned : 21/03/2023 PM Last action : 19/03/2023	Henrique CRUZ 06.0453.34.15
136	Planned	Multiservices	150,00 €	Planned : 21/03/2023 PM Last action : 19/03/2023	Henrique CRUZ 06.0453.34.15
140	Planned	Multiservices	150,00 €	Planned : 21/03/2023 PM Last action : 19/03/2023	Henrique CRUZ 06.0453.34.15
218	Canceled	Multiservices	150,00 €	Planned : 21/03/2023 PM Last action : 19/03/2023	Henrique CRUZ 06.0453.34.15
135	Closed	Installation - Kitchen	150,00 €	Planned : 21/03/2023 PM Last action : 19/03/2023	Henrique CRUZ 06.0453.34.15
144	Closed	Multiservices	150,00 €	Planned : 21/03/2023 PM Last action : 19/03/2023	Henrique CRUZ 06.0453.34.15

4. Click on the concerned Project to see all Service order related and click on a service order to open it

Projects						
Project	Status	Service	Time	Price	Date	Client
138	To plan	Installation: Bureaux de vente	1h00h	€ 150,00	Planned: 21/03/2025 P.M. Last action: 03/03/2023	Henrique CRUZ WU4653411
143	Pending	Multiservice	4h00h	€ 450,00	Planned: 21/03/2025 P.M. Last action: 03/03/2023	Henrique CRUZ WU4653411
IX 56850	In progress	Dépose de camionnage initial...	Last order	€ 150,00	Checkout: July 27, 2023	
IX 57756	Scheduled	Poser du nouveau camionnage	Manual distrib...	€ 150,00	Starting date: July 22, 2023	
IX 56949	Scheduled	Finitions de camionnage	Last order	€ 150,00	Starting date: July 24, 2023	
136	Pending	Multiservice	1h00h	€ 150,00	Planned: 21/03/2025 P.M. Last action: 03/03/2023	Henrique CRUZ WU4653411
146	Pending	Multiservice	1h00h	€ 150,00	Planned: 21/03/2025 P.M. Last action: 03/03/2023	Henrique CRUZ WU4653411

## 5. Different Service Execution exist :

### a. Technical visit / Quotation flow Service execution

Pré programme Visite Technique - Exécution de services 86572

**Visite technique préalable** 31 min 45,00 € 40,00 €

Vendu par: THIBAULT MASSE  
Magasin: Lesquin  
En attente signature

Commande Pyxis BV: BV-323099 □  
Gestion du service

Date de planification initiale: 07/10/2024  
Date prévue: 07/10/2024  
Date de fin prévue: 07/10/2024

Dernière mise à jour: 03/10/2024  
Date de création: 03/10/2024

### b. Installation Service execution

Pré programme Installation - Exécution de services 115410

**Fft pose chauff eau elec 200l max tvared** 2 h 0,00 € 0,00 €

Vendu par: -  
Magasin: -  
En attente signature

Système de vente à vida: 4656191 □  
Gestion du service

Date de planification initiale: 30/04/2025  
Date prévue: 30/04/2025  
Date de fin prévue: 30/04/2025

Dernière mise à jour: 08/04/2025  
Date de création: 08/04/2025

49407365 - FFT POSE CHAUFF EAU ELEC 200L MAX TVARED - Quantité : 1

Note(s) 0 Document(s) 0 Image(s) 0 Historique 2 Produits 0

### c. Technical visit / Quotation flow linked to pre-estimation

Pré programme Visite Technique - Exécution de services 1160 (HSE: 25041744631576289 - v0)

**Visite technique pour pose de cuisine** 1 h 99,09 € 1,23 €

Vendu par: Sara SENTOUH  
Magasin: Agen  
En attente signature

Commande Pyxis BV: BV-463252 □  
Gestion du service

Date de planification initiale: 14/04/2025  
Date prévue: 14/04/2025  
Date de fin prévue: 14/04/2025

Dernière mise à jour: 14/04/2025  
Date de création: 14/04/2025

### d. Pending Installation linked to to a pre-estimation

**Cod oap rt obl fenetre tva std robson**

En attente de la visite technique Visite Technique - Execution de services 1159 (HSE: 25041744378944773 - v0)

4h 30 min | 373.00 € | 30.00 €

Réalisé par: Sera SENTOUH  
Vendu par: Sera SENTOUH  
Magasin: Agen

Commande Pyxis: 836416 | Gestion du service | Date de planification initiale: 02/07/2025 | Date prévue: 03/07/2025 | Dernière mise à jour: 11/04/2025 | Date de création: 11/04/2025

#### e. Installation linked to a pre-estimation

**Depose cuisine red**

Prévu Installation - Execution de services 11592 (HSE: 25041744377856942 - v1)

7h 48 min | 550.00 € | 0.00 €

Vendu par: Sera SENTOUH  
Magasin: Agen

Commande Pyxis: 836414 | Gestion du service | Date de planification initiale: 16/04/2025 | Date prévue: 16/04/2025 | Date de fin prévue: 16/04/2025 | Dernière mise à jour: 11/04/2025 | Date de création: 11/04/2025

#### f. Rework service execution

**Visite technique wc**

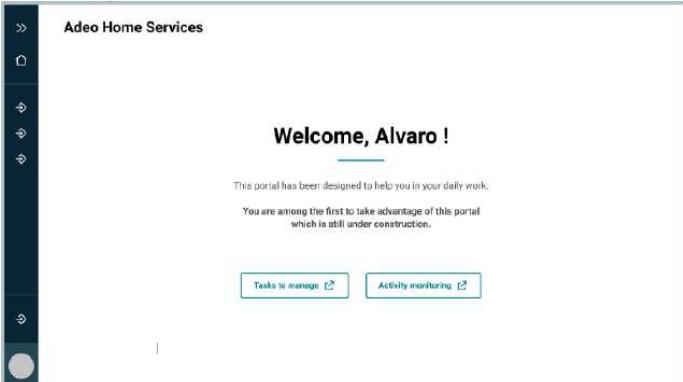
En cours Travailleur - Execution de services 113395

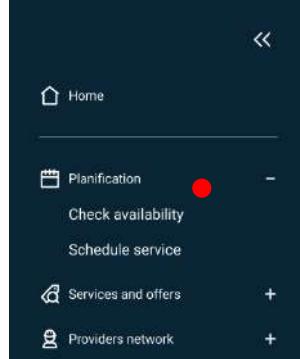
1h 30 min (estim.) | 0.00 € | 0.00 €

Réalisé par: 887 - Test DTS Plombier (354 - DTS Plombier)  
Vendu par: Thomas HAUDIGUERT  
Magasin: Agen

Commande Pyxis: 835013 | Gestion du service | Date de planification initiale: 20/03/2025 | Date prévue: 20/03/2025 (Enregistrement: 20/03/2025) | Date de fin prévue: 20/03/2025 | Dernière mise à jour: 08/04/2025 | Date de création: 20/03/2025

Status	Status of the project is associated
important business rules	<ul style="list-style-type: none"> <li>Project list is dedicated to access Service orders in order to perform some actions or access further information</li> <li>The main function of Project list is not to monitor Service Execution. To monitor service please refer to <a href="#">[Monitor Service Execution]</a> feature</li> <li>After the Pyxis order creation, the Service execution order is scheduled 48h (excluded saturday and sunday) after the Pyxis order installation date</li> <li>A service order execution may contain different 49 codes with different specialties. The behavior of the Automatic assignment is described in the Automatic assignment documentation</li> <li>The service execution order is created once the Pyxis order is created. There is no link with the payment.</li> </ul>
Event	No event associated
Notification	The customer receives a confirmation of order after the creation (not the payment as the order would be canceled if not paid)

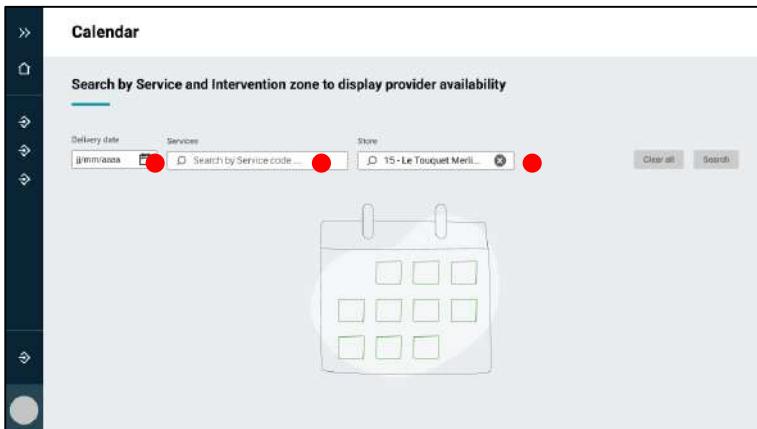
Stream	Service Execution
Business Capability	1-Organize service execution
Business activity	1.1-Plan service execution
Business task	<b>Check availability (BEFORE order is created)</b>
Operator Role	Service Sales operator
<b>What - As an Services Sales operator, I want to ...</b>	
<p>&gt; inform the Customer on when the service could be done          &gt; Seller opens Service Operator Portal (SOP) and checks availability using the agenda view          &gt; Seller can :</p> <ul style="list-style-type: none"> <li>- fill one or several 49 codes,</li> <li>- the postcode of the customer</li> <li>- select a desired date</li> </ul> <p>&gt; He can precise then the available dates to the customer before creating the order</p>	
<b>How to - Process flow</b>	
<p>1. Open SOP</p>  <p>2. Open Planification menu &gt; "Check availability" menu</p>	



3. The "check availability" is an informative view using the Agenda feature

**Important :**

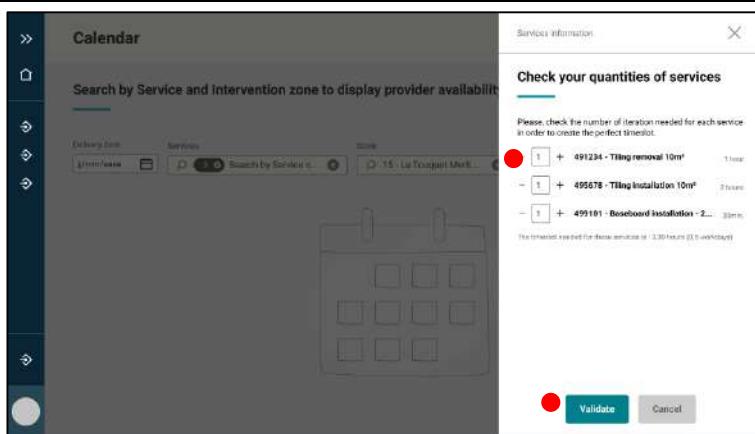
- This "check availability" view is informative, it is used when an Order is not yet created to give a possible available date to the customer before order is placed.
- It is not contextualized with the information of an order that's why the Seller must fill information to be able to access the available date.
- If you want to schedule a date on a Service order already created please use the [\[Schedule Service date after order created\]](#) feature.



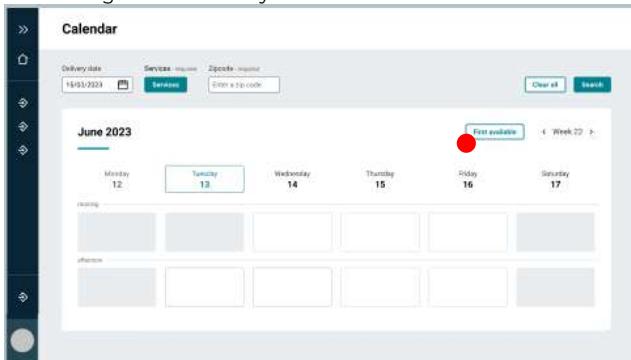
4. To access calendar availability you must fill :

- date (based of the estimated date of delivery of the product you can check in PYXIS)
  - 49 codes (you can add several 49 codes)
  - A store or the customer ZIP code (evolution in progression from Store to intervention zone)
- And then click on Search

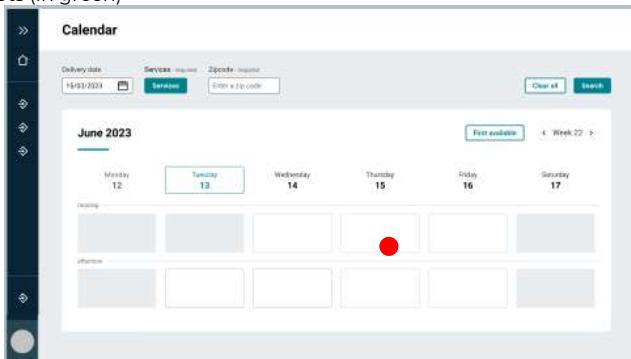
5. Adjust the Service to fit to the customer project and Project duration and then validate



- Then you access the agenda view and you can check the available slots



If you do not see any available slots you can click directly on "First available" to access directly available slots (in green)

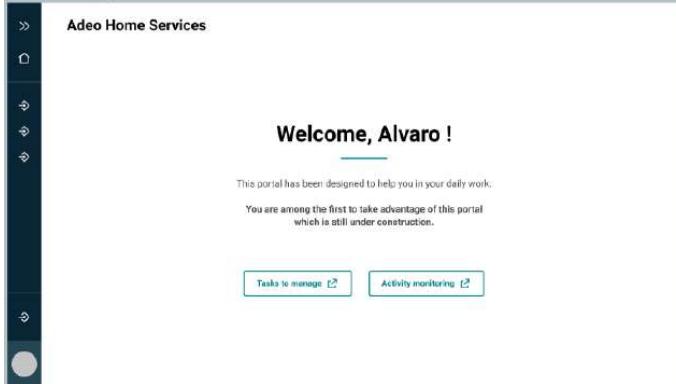


Congratulations ! You know how to propose to the customer available installation dates.  
**You can now suggest dates to your customer, create the order in PYXIS and then [\[schedule\]](#)**

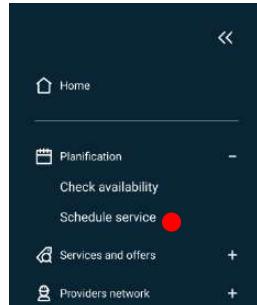
**[service date after order is created](#) based on the date you have agreed with the customer**

Status	No status associated (because Service order is not yet created)
important business rules	<p>The proposed date(s) are not linked to a specific provider, but consider all the eligible providers for the Service(s) and chosen date</p> <p>No specific view for the worker : the combination of the worker availabilities allows to define the provider availability View is dedicated to service execution not the project</p> <p>The availability in the agenda for a Provider considers :</p> <ul style="list-style-type: none"> <li>- The unavailability declared in SMA</li> <li>- The authorization to receive job activated in SPO (SOP) by the Provider Success Manager (PSM)</li> </ul> <p>The availability of the pro is linked to the duration of the service + a buffer set by BU for transportation</p>
Event	No event associated
Notification	No notification associated

Stream	Service Execution
Business Capability	1-Organize service execution
Business activity	1.1-Plan service execution
Business task	<b>Schedule service date (AFTER order is created)</b>
Operator Role	Service Sales operator
<b>What - As an Services Sales operator, I want to ...</b>	
<ul style="list-style-type: none"> <li>&gt; Open the Service I have just created to select an available date with the customer</li> <li>&gt; Open the agenda view to identify possible date &amp; slots</li> <li>&gt; Propose the slots to the customer</li> <li>&gt; Validate the date of installation selected with the customer</li> <li>&gt; Manage the case of 2 TV with the same specialty for the same service (different behaviour depending on BU)</li> </ul>	
<b>How to - Process flow</b>	
<ol style="list-style-type: none"> <li>1. Open SOP</li> </ol>	



2. Open Planification menu > "Schedule Service" menu



3. Identify the concerned Project just created

- Info : Once you open the project list page, it is already sorted by creation date. (On top = Most recent)
- You can filter also on customer name / Customer fiscal Id and phone number to identify the Order
- If Project contains several Services, just click on the Project line to show all Services orders

PROJECT	STATUS	TITLE	PRICE	PLANNED	CUSTOMER
138	To plan	installation - Bonitas ORC...	150,00	Planned 21/03/2023 PM	Henrique CRUZ 85145383-16
143	Planned	Multiservices	450,00	Planned 21/03/2023 PM	Henrique CRUZ 85145383-16
139	Planned	Multiservices	150,00 €	Planned 21/03/2023 PM	Henrique CRUZ 85145383-16
146	Planned	Multiservices	150,00	Planned 21/03/2023 PM	Henrique CRUZ 85145383-16
218	Canceled	Multiservices	150,00	Planned 21/03/2023 PM	Henrique CRUZ 85145383-16
135	Closed	installation - kitemon	150,00	Planned 21/03/2023 PM	Henrique CRUZ 85145383-16
244	Closed	Multiservices	150,00 €	Planned 21/03/2023 PM	Henrique CRUZ 85145383-16

4. Click on the concerned Service order to open it

Project	Status	Owner	Task	Phase	Partner	Planned
138	To plan	Installation - Bouteille de C...		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 16/04/2023 16:16
142	Planned	Multiservices		450,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 16/04/2023 16:16
139	Planned	Multiservices		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 16/04/2023 16:16
146	Planned	Multiservices		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 16/04/2023 16:16
218	Canceled	Multiservices		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 16/04/2023 16:16
135	Closed	Installation - Kitchen		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 16/04/2023 16:16
244	Closed	Multiservices		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 16/04/2023 16:16

5. Once it is opened, select "Service Management" and then Reschedule

← Project execution 56813

Scheduled Technical visit - Service Execution 301523

Client name: Elisabeth GANOOTE Phone: +33 06 04 53 34 12 Mail: elisabeth.shs@yopmail.com Store: 11 - Alsace

Services Documents History Chat

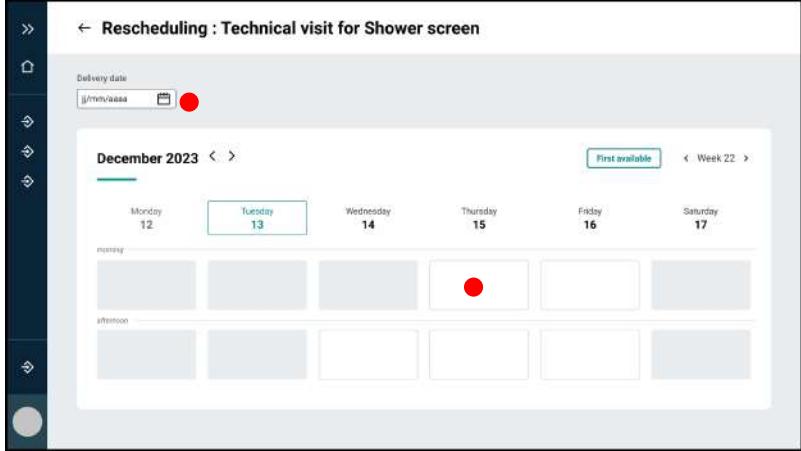
Service management ▾

Reschedule (highlighted with red circle)

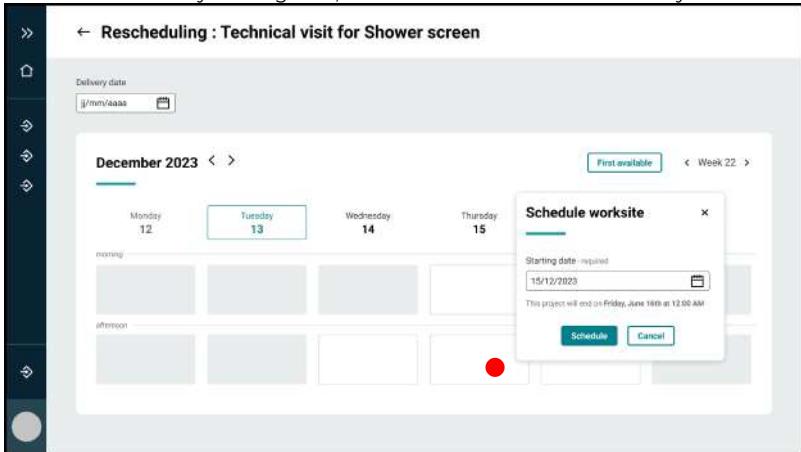
Distribute Add extra-cost Send contract See contract code Cancel

Notes 0 Documents 1 Pictures 0 History

6. Agenda view for this specific service is opened, you can set up a specific date (if you have checked availability before placing the order or based on the expected Product Delivery date), then identify the available slots (in white) and propose them to the customer



7. Select the desired slot by clicking on it, Validate the selected date in the layer



8. Congratulations ! The installation date is now validated.

9. Now You must generate the contract to send it to the Customer.

**Specific Case :** To manage **specific case of 2 TV with the same specialty for the same service** (different behaviour depending on BU parameter) :

- For BUs blocking seller(LMES+LMIT) : as a seller, when this parameter is TRU and 2 pros with the same specialty do 2 TV in the same Px, Then I am blocked during Preschedule status for the Sx (no access to Sx Management button) and I cannot send/print/qr code the contract to the customer. I have an orange alert box. Only Operator will be able to proceed with contract signature, and distribute the job.

<b>Pre scheduled</b>	Installation - Service Execution 97676
<b>Instalación split 2x1 b</b>	( 5 hours )
 <b>This service will be organized by the cluster team</b> Don't worry, nothing is required from your side !	
<b>Sold by:</b> SYSTEME SYSTEME <b>Store:</b> Alcalá de Henares  Waiting contract signature	
<ul style="list-style-type: none"> <li>For BUs not blocking seller (LMPT + LMFR), as a seller, when this parameter is FALSE and 2 pros with the same specialty do 2 TV in the same Px, Then I am not blocked during Preschedule status for the Sx and I can send/print/qr code the contract to the customer as normally and allow Sx to advance into Distribution process</li> </ul>	
Status	The status of the Service is <b>Pre-scheduled</b> : Service order is created, waiting for contract signature from customer
important business rules	<ul style="list-style-type: none"> <li>It is not possible to book a date by anticipation (date before date given by PYXIS)</li> <li>If Project contains several orders services you must perform a reschedule by service execution</li> <li>The available day for booking is a setting by BU</li> </ul>
Event	No task management
Notification	

Stream	Service Execution
Business Capability	1-Organize service execution
Business activity	1.1-Plan service execution
Business task	<b>Generate contract, send it to the customer, paper flow, (LMES only) skip the contract stage</b>
Operator Role	Service Sales operator
<b>What - As an Services Sales operator, I want to ...</b>	
> generate the contract for the customer > send it automatically by email > or use a QRCode to display it directly on my device > use a paper flow signature in case is needed > upload a contract signed in paper	

> skip the contract signature stage

## How to - Process flow

Entry point : to manage that operation you must be able to :

- Open Project list > select a Service execution > Open the concerned Service order
1. Once Service order is opened, the Contract can be sent by email, displayed with QRcode or managed in paper version. Before generating a contract to email, please check customer email. Click on the button to check the customer information



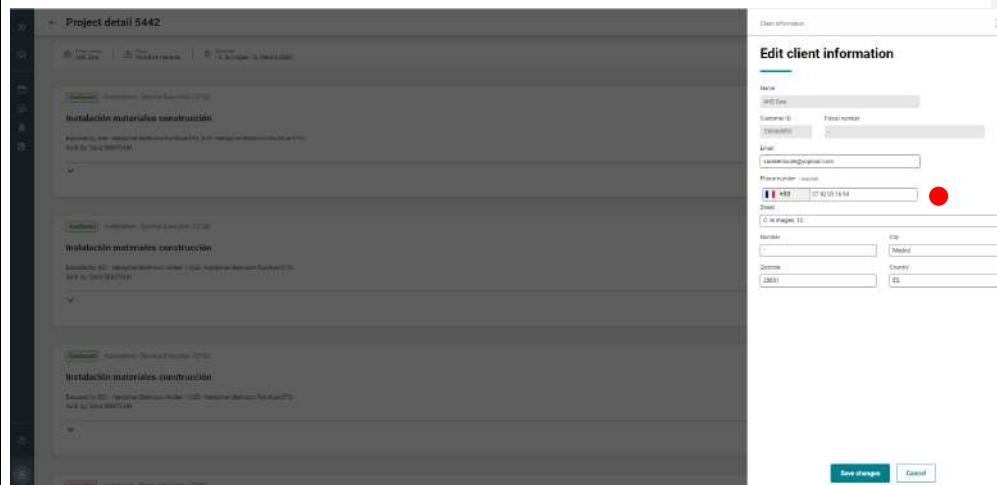
Project detail 5442

Client name: AHS-Saas | Stage: Alcalá de Henares | Location: C. la Imagen, 12, Madrid 28801

Service Management

- Reschedule 24 (AM)
- Add extra cost
- Send contract 05/2024
- Print contract
- Cancel

2. If customer email is not correct please update it and save changes



Project detail 5442

Edit client information

Name: JFJ Test

Email: louiselouis@gmail.com

Phone number: 07 82 05 18 14

Address: Calle la Imagen, 12

Number: 07

Dorms: 0001

Country: ES

Save changes Cancel

3. After email has been confirmed, please select "Service Management" and then
  - **"Send contract"** if you want to manage email sending to the customer or ability to generate the QR code
  - **"Print contract"** if you want to manage the contract in paper version

#### Project detail 5442

Generar | PDF | Scáner de imágenes | Imprimir | Cargar | Descargar | Imagen: 12. Mayo 2023

Precios: Instalación - Servicio Ejecución 72700

Instalación materiales construcción

Servicio: Sera SENTOUH

Confirm: Instalación - Servicio Ejecución 72700

Instalación materiales construcción

Execto: 001 - Baño en Baño Hotel I (002 - Perímetro Baño en Baño Fase 2)

Servicio: Sera SENTOUH

Service Order: 132701

Service Management

Recepción: 24 (AM)

Administración

Send Service

Print contract

Print

Thumbnails

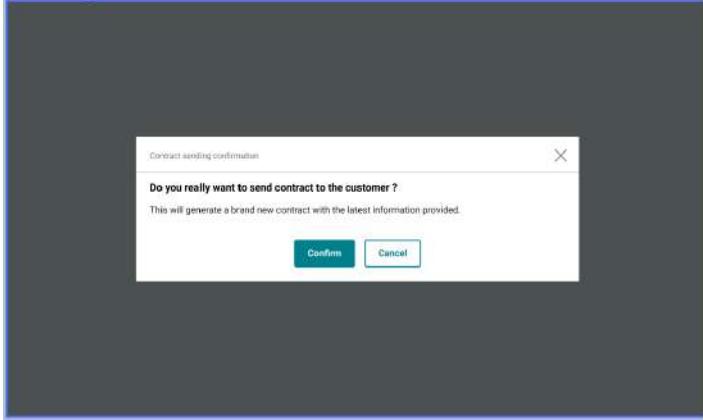
Service Management

Starting date: 22/05/2024 (AM)

Last update: 28/05/2024

Creation date: 28/05/2024

4. Confirm the contract generation in the layer : it will send the contract by email



**IMPORTANT :** Every time a contract is sent it generates a new contract and the existing version of the contract is canceled automatically. That's why it must be generated as least as possible.

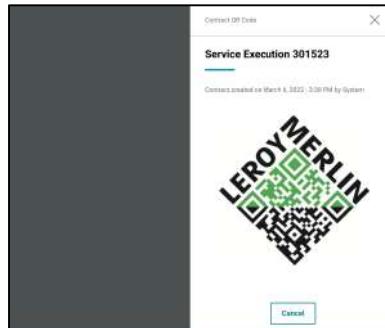
Check the email of the customer before generating contract

Congratulations ! Contract has been sent by email to the customer

**Important : You must make the contract signed as soon as possible to book definitively the Pro. Indeed the allocation of the Pro is done only once the contract is signed.  
That's why you should ask the customer to open his email and sign the contract before he goes to the check out and gets out of the store.**

AND IF NEEDED

5. **Show QRcode :** display on screen a QRcode to access the contract using the smartphone of the customer or the one of the seller.



- Once code is displayed you can ask the customer to scan it with his device to access contract or scan with your device and make the customer signed

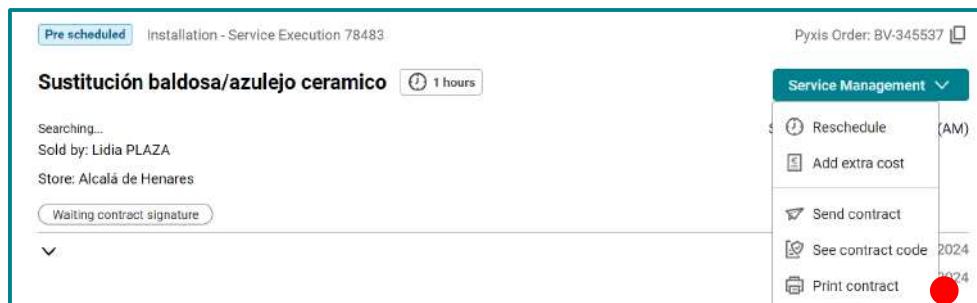
If you have sent by email but you want to make it signed directly

- You can come back to the Service order, display the QRcode using "see contract code" function



This function is available only if Contract has been already generated (either by contract or by QRcode)

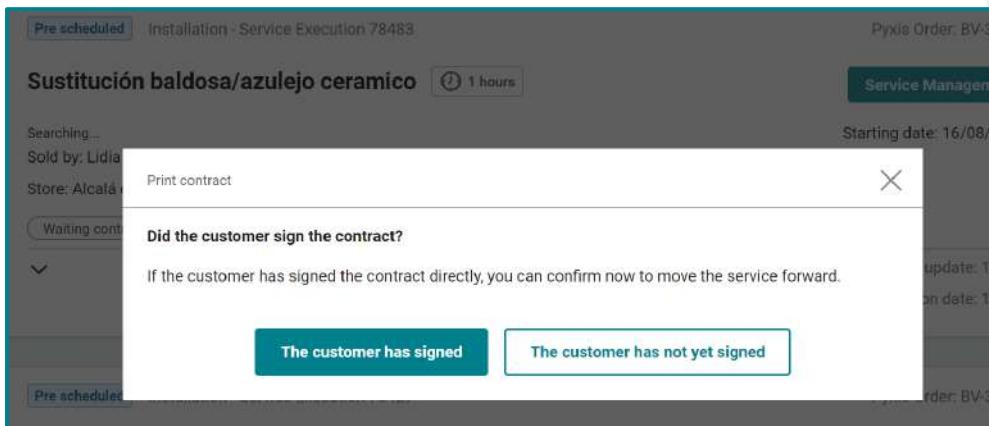
- If the Customer has no email address or want to get the paper version of the contract for signature, click on "**Print contract**" button



- The contract is then generated and you can print it:



10. The following screen will appear, to remind the operator to confirm if the contract has actually been signed by the customer in its paper version.

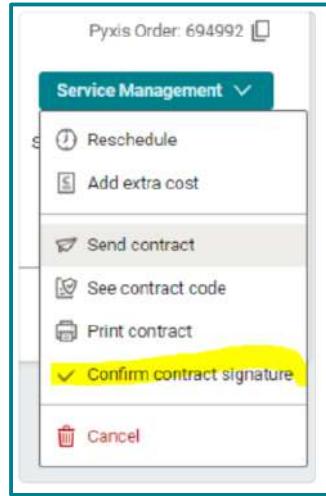


11. If the operator confirms, then the status of the SX will move to "scheduled". If the operator declares that the customer has not yet signed, the status will remain "pre-scheduled". A tag will appear to indicate that the customer's signature is pending.



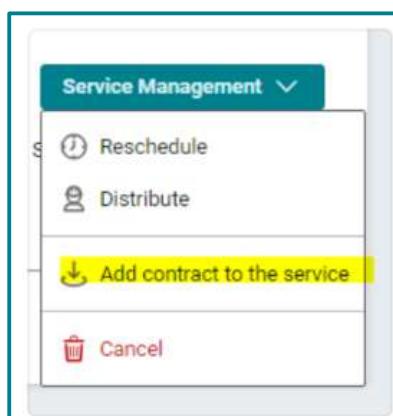
12. If the paper contract is signed at a later stage, the operator will be able to confirm this step in order for the status to progress to "scheduled" and for the execution flow to continue. In order to do so, the operator will have to click on "Service Management" and then on "Confirm Contract".

Signature". Once confirmed, the status will change to **Schedule**, the tag "Waiting contract signature" will disappear and the event 127 CONTRACT\_SIGNATURE\_IN\_PAPER will be added to the SX.



13. A new CTA will then appear in the Service Management drop-down menu to upload the contract: "**Add contract to the service**". All roles will have permission to upload the contract. By clicking on it, the user will be able to attach the document and save the action. The contract can be uploaded from the schedule status until closed and the document will be saved in the documents tab. Once the document is inserted, the event 128 CONTRACT\_MANUALLY\_UPLOADED will be logged and the CTA "Add contract to the service" will no longer appear in service management.

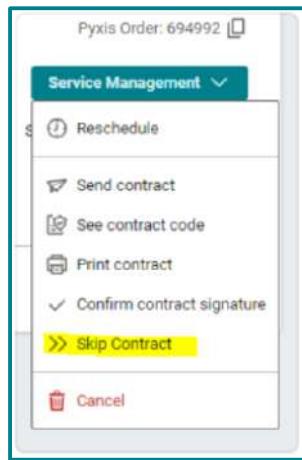
NB: Failure to enter the contract **does NOT** block any Sx flow.



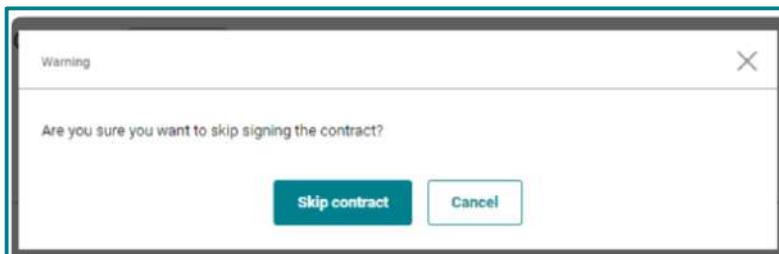
14. [LMES only] An experienced operator (admin) may decide that in a specific situation the contract signature step will have to be skipped. To this purpose, a CTA in Service Management called "Skip contract" will only be available **ADMIN ROLE** when the SX is in **pre-scheduled** status.

Commented [4]: and lmit?

Commented [5]: Le bouton est lié à un paramétrage, possible pour tout le monde



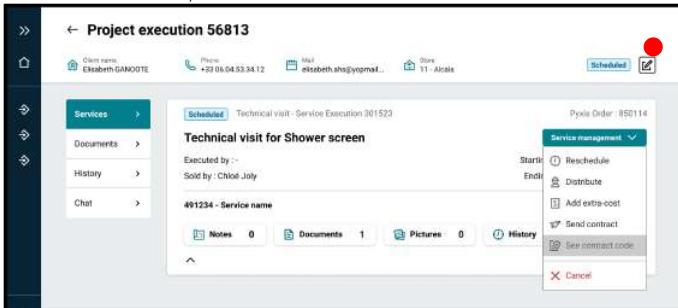
15. When clicking the button, a new pop-up will appear where the user must confirm the skip the contract signing step. After confirming the action, event 142 SKIP\_CONTRACT will be logged. This will update the status to Schedule , the button will disappear from the service management and the Sx flow will continue normally.



Status	In this operation, once the operator confirms that the paper contract has been signed by the customer, the status of the Service will move from <b>Pre-Scheduled</b> to <b>Scheduled</b> : Contract is signed by Customer. The date is confirmed.  A new version of the contract may be generated until <b>In progress</b> status (PRO's check-in).
Important business rules	The contract sending is triggered by the service execution ordered scheduling.  The allocation of the Pro is triggered only when the Contract has been signed by the Customer. So it is very important to make the customer sign directly. > Display contract with QRCode > Ask the customer to open his email and sign the contract  If customer has not signed the contract he will receive

	<p>automatically reminders by email : Adobe reminder 1X / day</p> <p>The contract allows to cover the risk of non payment by the customer, as payment is not a blocking milestone in the process</p> <p>1 contract per Sx (service execution order)</p> <p><b>Important point :</b> if the contract is not sent manually, it is sent automatically after 1 hour. The contract is sent each hour between 7h to 23h from monday to friday. Parameter by BU</p>
Event ?	<p>Event created in Zendesk when the customer did not sign the contract after 7 days</p> <p>Follow up through PowerBI accessible from the Homepage of SOP : <a href="#">[Monitor contract signature]</a></p>
Notification	<p>The customer receives the edited contract for signature by email</p> <p>The customer receives the signed contract by email</p> <p>The customer can consult the contract in his My Account space</p>

**Commented [6]:** parameter by BU. In LMPT, replaced by autosending by Camunda after 2(?) minutes for stores of Oeiras Cluster (waiting, for deployment to all stores)

Stream	Service Execution
Business Capability	1-Organize service execution
Business activity	1.1-Plan service execution
Business task	<b>Update customer contact</b>
Operator Role	Service Sales operator or Service execution operator
<b>What - As an operator, I want to ...</b>	
> Update the customer contact email or mobile after the Service order is created	
<b>How to - Process flow</b>	
<p><b>Prerequisite :</b> Customer contact is inherited from PYXIS order so customer contact should be confirmed before order is placed. It is very important to check the customer email because communication is sent by email.</p> <p>Entry point of this operations : you must be able to :</p> <ul style="list-style-type: none"> <li>• Open Project list &gt; select a Service order &gt; Open the concerned Service order</li> </ul> <ol style="list-style-type: none"> <li>1. If customer contact needs to be updated (email or Mobile), after Service Order is placed, open the concerned Service Order, then click on "Edit customer info"</li> </ol>  <ol style="list-style-type: none"> <li>2. Update email or mobile and save changes</li> </ol>	

The dialog box displays the following client information:

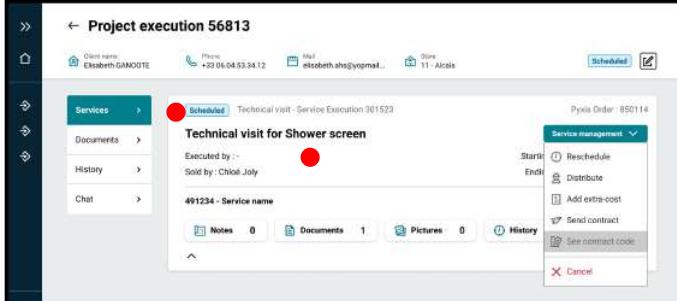
- Name: Henrique
- Surname: CRUZ DA SILVA
- Identifier: 12345678910
- Email: Henriquecruz@gmail.com
- Phone number: +33 06 04 53 25 15
- Address: 10, R Arthur Lobao Peixoto, VILA NOVA...

Buttons at the bottom: Save changes (grayed out), Cancel.

Congratulations ! You have updated successfully the customer contact. If you want to update Customer address please check the [Change customer address] function

Status	This operation has no impact on the status of the Service
Important business rules	Email and tel MUST be confirmed before Service order is placed
Event	No event associated
Notification	No notification associated

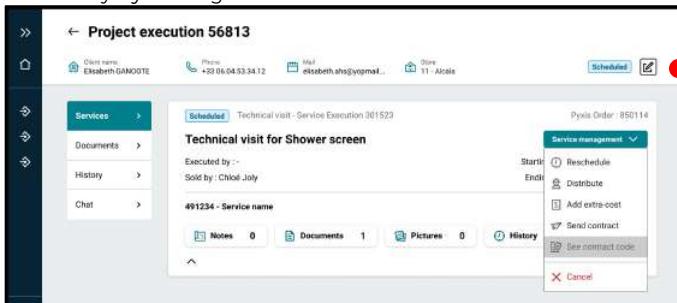
Stream	Service Execution
Business Capability	1-Organize service execution
Business activity	1.1-Plan service execution
Business task	<p><b>Change worksite address (<u>BEFORE Pro allocated</u>)</b></p> <div style="background-color: #f08080; padding: 10px; text-align: center;">UNDER MODIFICATION</div>
Operator Role	Service Sales operator or Service execution operator
<b>What - As an operator, I want to ...</b>	
> Update the customer address after the Service order is created but <u>BEFORE Pro is allocated</u>	
<b>How to - Process flow</b>	
<p><b>Prerequisite :</b> Customer address is inherited from PYXIS order so customer address should be confirmed before order is placed.</p> <p>It is very important to check the customer address because allocation of the Pro depends on the ZIP code of the Customer !</p> <p>Change the address may have several impact :</p> <ul style="list-style-type: none"> <li>- Updated address belongs to same ZIP code = No impacts</li> <li>- Updated address does not belong to same ZIP code = Major impact (see business rules)</li> </ul> <p>Entry point of this operations : you must be able to :</p> <ul style="list-style-type: none"> <li>• Open Project list &gt; select a Service order &gt; Open the concerned Service order</li> </ul> <ol style="list-style-type: none"> <li>1. Before changing address of the worksite you must identify if Pro is already allocated or not <ul style="list-style-type: none"> <li>• Prescheduled or Scheduled status = Service <b>has not been allocated</b> to a Pro yet</li> <li>• Executed by : <u>Empty</u> = Service has not been allocated to a Pro</li> </ul> </li> </ol>	



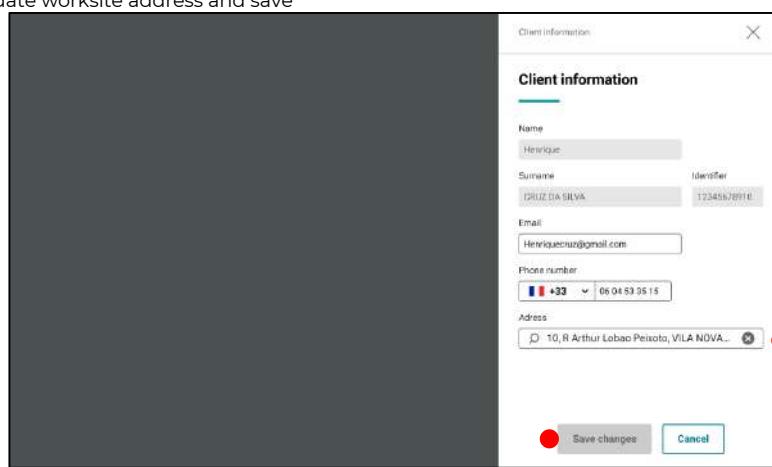
⇒ Pro is NOT already allocated

You can update the worksite address without impacts

2. Update address only by clicking on "Edit customer info"



3. Update worksite address and save



<p>a. You should update contract &gt; please refer to <a href="#">[Generate contract &amp; send it to the customer]</a></p>	
Status	This operation has no impact on the status of the Service. The Service remains on the same status
important business rules	<p>It is very important to check the customer address before Service order is placed because allocation of the Pro depends on the ZIP code of the Customer !</p> <p>Updating an address may have several important impact :</p> <p>Is Pro already allocated = YES</p> <ul style="list-style-type: none"> <li>• If same ZIP code ⇒ No impact</li> <li>• If updated address has different ZIP code ⇒ Major impacts :           <ol style="list-style-type: none"> <li>1. Pro allocated may not cover the new address</li> <li>2. Extra KM may be necessary to incentive Pro to manage the job</li> <li>3. Reallocation of a Pro should be necessary</li> </ol> </li> </ul>
Event	No event associated
Notification	No notification associated

Stream	Service Execution
Business Capability	1-Organize service execution
Business activity	1.1-Plan service execution
Business task	<p><b>Change worksite address (AFTER Pro allocated)</b></p> <div style="background-color: #f08080; padding: 10px; text-align: center;">UNDER MODIFICATION</div>
Operator Role	Service Sales operator or Service execution operator
<b>What - As an operator, I want to ...</b>	
> Update the customer address after the Service order is created but <u>AFTER Pro is allocated</u>	
<b>How to - Process flow</b>	
<p><b>Prerequisite :</b> Customer address is inherited from PYXIS order so customer address should be confirmed before order is placed.</p> <p>It is very important to check the customer address because allocation of the Pro depends on the ZIP code of the Customer !</p> <p>Change the address may have several impact :</p> <ul style="list-style-type: none"> <li>- Updated address belongs to same ZIP code = No impacts</li> <li>- Updated address does not belong to same ZIP code = Major impact (see business rules)</li> </ul>	
<p>Entry point of this operations : you must be able to :</p> <ul style="list-style-type: none"> <li>• Open Project list &gt; select a Service order &gt; Open the concerned Service order</li> </ul>	
<ol style="list-style-type: none"> <li>1. Before changing address of the worksite you must identify if Pro is already allocated or not <ul style="list-style-type: none"> <li>• <b>Distributed</b> or <b>Confirmed</b> or in <b>Progress</b> status = Service <u>has been allocated to a Pro</u></li> <li>• Executed by : {Name of the Provider} = Service <u>has been allocated to a Pro</u></li> </ul> </li> </ol>	

**Project execution 143**

Client name: Henrique CRUZ DA SILV... Phone: +33 06 04 53 34 12 Mail: Henriquecruz@gmail.com Store: 15 - Le Touquet - Merlimont Scheduled Edit

**Services** > Documents > History > Chat >

**Executed** Installation - Service Execution 56888  
Dépose de carrelage existant  
Executed by: Johnny Cadillac (SARL Jerem Elec)  
Sold by: Randal Kolo-Muanı  
Last update: July 10, 2023

**Scheduled** Installation - Service Execution 57756  
Pose du nouveau carrelage  
Executed by: Johnny Cadillac (SARL Jerem Elec)  
Sold by: Randal Kolo-Muanı  
Last update: July 10, 2023

## 2. Pro is already allocated,

you must check if ZIPcode of the updated address is the same or not to manage properly the situation

- o ZIPcode is the same = you can proceed to the address update only
- o ZIPcode is different = you can proceed to the address only + you must solve the issue

## 3. Click on "Edit customer info"

**Project execution 143**

Client name: Henrique CRUZ DA SILV... Phone: +33 06 04 53 34 12 Mail: Henriquecruz@gmail.com Store: 15 - Le Touquet - Merlimont Scheduled Edit

**Services** > Documents > History > Chat >

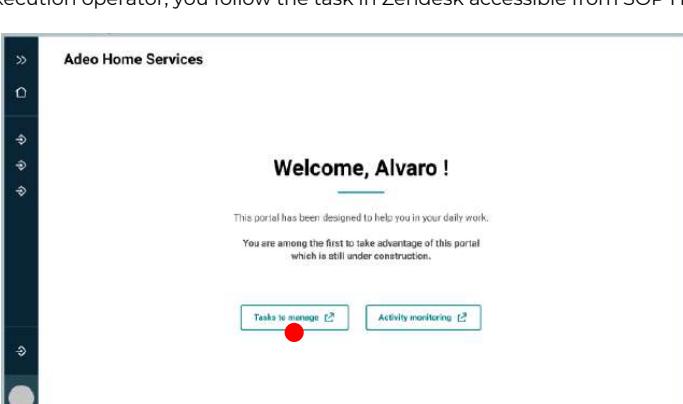
**Distributed** Installation - Service Execution 56888  
Dépose de carrelage existant  
Executed by: Johnny Cadillac (SARL Jerem Elec)  
Sold by: Randal Kolo-Muanı  
Last update: July 10, 2023

**Scheduled** Installation - Service Execution 57756  
Pose du nouveau carrelage  
Executed by: Johnny Cadillac (SARL Jerem Elec)  
Sold by: Randal Kolo-Muanı  
Last update: July 10, 2023

## 4. Update customer address and save

5. You should update contract > please refer to [\[Generate contract & send it to the customer\]](#)
6. According to the situation and the evaluation of the Service Execution Operator you may have several solutions to solve the issue :
  - o You can check Intervention zone of the PRO to evaluate impact
  - o Contact PRO (address is within the Intervention Zone of the PRO)
  - o Propose the Pro EXTRA KM to secure his commitment using [\[Manage Extra Cost\]](#) feature
  - o Reassign manually a Pro if PRO KO after contact using [\[Reassign Manually a Pro\]](#) feature
  - o Cancel a Service [\[Cancel a Service\]](#) feature

Status	This operation has no impact on the status of the Service The Service remains on the same status
important business rules	<p>It is very important to check the customer address before Service order is placed because allocation of the Pro depends on the ZIP code of the Customer !</p> <p>Updating an address may have several important impact :</p> <p>If Pro already allocated = YES If updated address has same ZIP code =&gt; No impact If updated address has different ZIP code =&gt; Major impacts</p> <ol style="list-style-type: none"> <li>1. Pro allocated does not cover the new address</li> <li>2. Extra KM could be necessary to incentive Pro to manage the job</li> <li>3. Reallocation of a Pro should be necessary</li> </ol>
Event ?	No event associated
Notification	No notification associated

Stream	Service Execution
Business Capability	1-Organize service execution
Business activity	1.2-Supervise and monitor service execution
Business task	<b>Solve Service organization issues</b>
Operator Role	Service Execution Operator
<b>What - As an operator, I want to ...</b>	
<ul style="list-style-type: none"> <li>&gt; perform all actions required to solve the service organization issues.</li> <li>&gt; avoid a service execution process to be stuck at one stage of the execution.</li> <li>&gt; ensure continuity of the service execution and comply with the terms and conditions of the service sold to the customer</li> </ul>	
<b>How to - Process flow</b>	
<ol style="list-style-type: none"> <li>1. At this step of the orchestration you can face several organization issues <ul style="list-style-type: none"> <li>- Cancellation asking</li> <li>- Rescheduling asking</li> <li>- Update of the worksite address</li> </ul> <p>The Customer can :</p> <ul style="list-style-type: none"> <li>- contacts the Care team L1 ⇒ through selfcare the customer is sent back to My account (cancel/reschedule/modify the address) or the ticket is transferred to L2 Service Execution Operator</li> <li>- act from his space (cancel/reschedule/modify the address) My account ⇒ sent to L2 Service Execution Operator</li> <li>- Go to the store and ask to the sales team ⇒ email sent to L2 Service Execution Operator</li> </ul> </li> <li>2. As Service Execution operator, you follow the task in Zendesk accessible from SOP Homepage</li> </ol> 	

3. Check the ticket sent and click on the ticket you want to manage

The screenshot shows the 'Unclassified requests' list in ServiceNow. There are 7 tickets listed:

Subject	Requester	Requested
Cancellation asking	Riclie Ferrial	2 minutes ago
Test	Celine Moreau	Thursday 03:36
I need rescheduling for order n°986987	Celine Moreau	Monday 02:49
Change installation date	Celine Moreau	Monday 02:22
Request for rescheduling ORDER 0970932 Customer FERN...	Celine Moreau	Sunday 22:49
Document an open ticket from a client	Celine Moreau	01:20

4. You can see the details of the asking

The screenshot shows the detailed view of the ticket titled 'Cancellation asking'. The ticket information includes:

- Requester:** Riclie Ferrial
- Assigned To:** Adeo Home Service (Global)
- Followers:** Celine Moreau
- Comments:**
  - Riclie Ferrial (14 minutes ago) - The customer informed me that he wants to cancel the service order. Can you pls proceed to the cancellation of the service.
  - Customer: Hervéigine Cruz Da Silva (14 minutes ago) - Pyxis Order 850114

5. According to the information available : Customer information, Pyxis order number, service order number, go in SOP to manage the action :

- [\[Cancellation\]](#)
- [\[Reschedule\]](#)
- [\[Update Customer contact\]](#)
- [\[Change Worksite address\]](#)

6. Write your answer and close the ticket with the appropriate status for the ticket

The screenshot shows a ServiceNow ticket creation page for a 'Cancellation asking' ticket. The ticket number is #02. The 'Review Permit' tab is selected. The ticket details include:

- Requester:** Police Permit
- Assignee:** Auto Home Service Global
- Followers:** None
- Form:** Service Provider Support Form
- Tags:** None
- Provider's Name (Provider):** None
- Company Name (Provider):** None
- Country:** None
- Correct Reason (Provider):** None

The ticket body contains a message from 'Police Permit' stating: 'Hello, The customer informed me that he wants to cancel the service order. Can you please proceed to the cancellation of the service.' Below this is a note from 'Customer - Harrys Car Wash': 'Customer - Harrys Car Wash'.

In the bottom right corner of the action bar, there is a red circle around the 'Submit as New' button. Other buttons in the bar include 'Submit as Open', 'Submit as Pending', and 'Submit as Solved'.

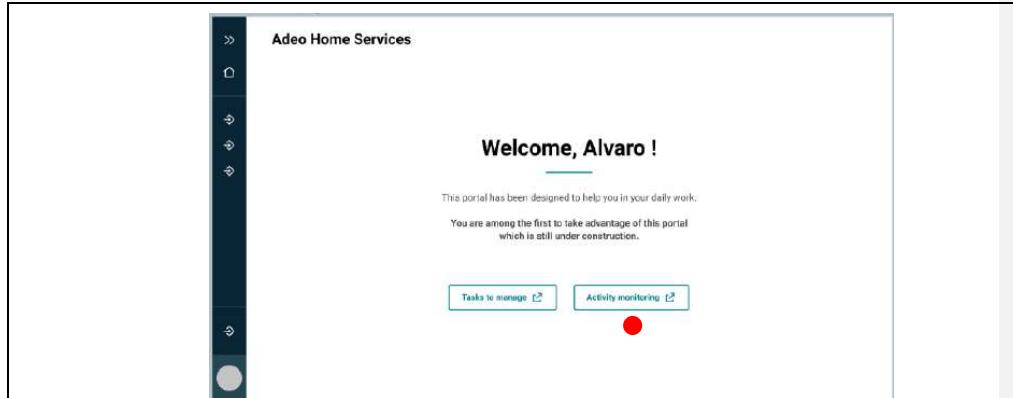
Status	The status of the service is <b>Pre Scheduled</b> or <b>scheduled</b>
important business rules	The cancellation is definitive, you cannot come back on the status
Event	The task management allows to solve the service organization issues
Notification	The customer is notified in his account

## 2. Find Pro to execute the Service

Resource : [Automatic Assignment description](#) : description of the feature that allow to assign automatically a provider according to the context of the service (Service, profession and specialties, location and date)

**P1/P2** : description of the feature that allow to define a main profession for the provider and a second profession operated only if the service includes a service of the first one

Stream	Service Execution
Business Capability	<b>2-Find Pro to execute the service</b>
Business activity	<b>2.2-Supervise and Monitor Matching</b>
Business task	<b>Solve Provider matching issues</b>
Operator Role	Service Execution Operator
<b>What - As an Services Execution Operator, I want to ...</b>	
> perform all actions required to solve the issues related to the Find Pro to execute the service process. > avoid a service execution process to be stuck at one stage of the execution. > ensure continuity of the service execution and comply with the terms and conditions of the service sold to the customer and Service Providers > be sure that when distributing a new Sx into a PEx, that are many providers who performed a service with the same specialty in this PEx we avoid automatic distribution to mismatch a provider with previous intervention in this PEx	
<b>How to - Process flow</b>	
<ol style="list-style-type: none"><li>1. You can monitor the matching / biding of provider issues due to :<ul style="list-style-type: none"><li>- No matching result for the defined schedule</li><li>- the matched Provider refused the job</li></ul></li><li>2. You can follow those issues in two different ways :<ol style="list-style-type: none"><li>a. Go on SOP homepage and click on Activity Monitoring (Power BI <b>for LMPT start</b>)</li></ol></li></ol>	

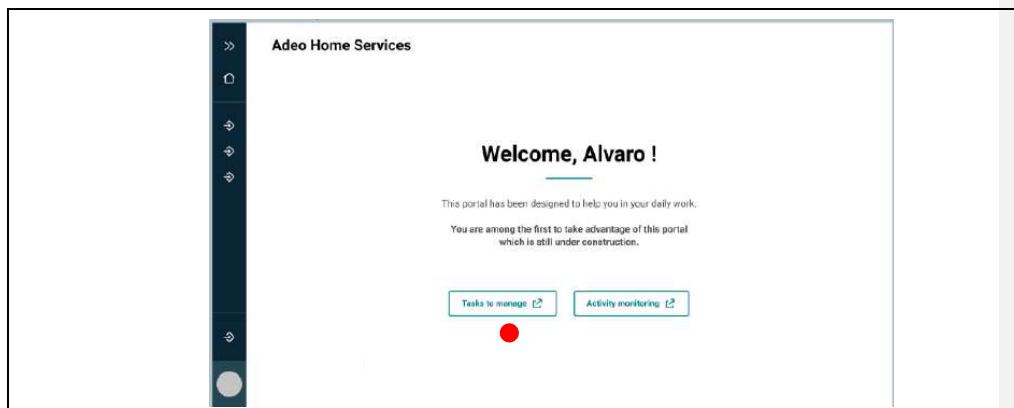


You can see all the execution to assign by clicking on Execution to assign

ID	Alert description	Creation Date	Store	Type	Status	Resolution	Scheduled date	Specifics
AHSS-00001	To assign execution to customer	11/17/2023	AHS001A	Service item	Pending		11/18/2023	Temporary
AHSS-00002	To assign execution to customer	11/18/2023	AHS001B	Service item	Pending		11/19/2023	Temporary
AHSS-00003	To assign execution to customer	11/21/2023	AHS001C	Service item	Pending		11/22/2023	Long term
AHSS-00004	To assign execution to customer	11/22/2023	T00001-00004	Service item	Pending		11/23/2023	Temporary
AHSS-00005	To assign execution to customer	11/23/2023	AHS002C	Service item	Pending		11/24/2023	Project
AHSS-00006	To assign execution to customer	11/23/2023	T00002-00006	Service item	Pending		11/24/2023	Temporary
AHSS-00007	To assign execution to customer	11/26/2023	AHS001A	Service item	Pending		11/27/2023	Temporary
AHSS-00008	To assign execution to customer	11/26/2023	AHS001B	Service item	Pending		11/27/2023	Temporary
AHSS-00009	To assign execution to customer	11/26/2023	T00001-00009	Service item	Pending		11/27/2023	Temporary
AHSS-00010	To assign execution to customer	11/26/2023	T00002-00010	Service item	Pending		11/27/2023	Temporary

OR

- Go on SOP homepage and click on task to manage

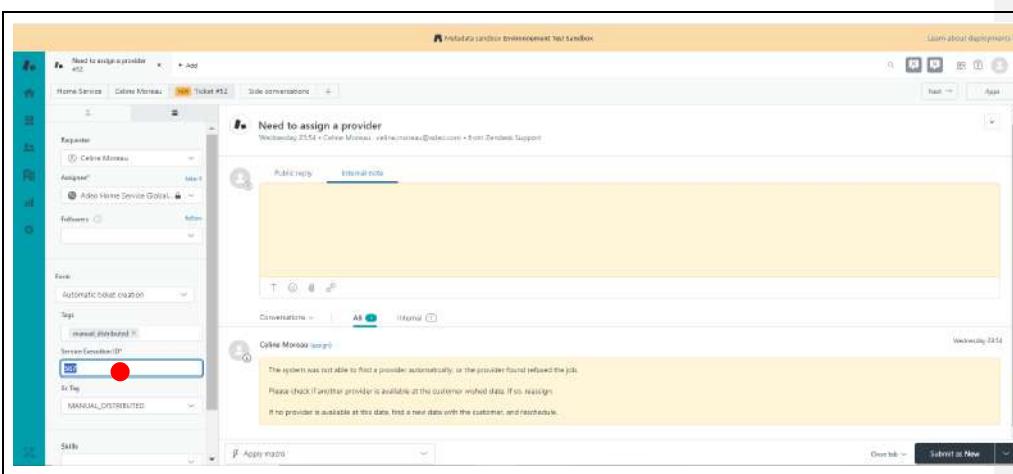


You can see all the execution to assign by with the tickets open in Zendesk by clicking on Need to assign provider

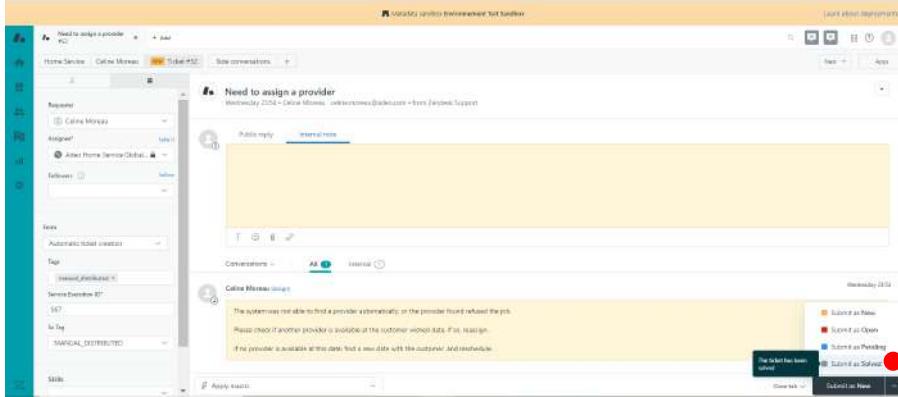
The screenshot shows a Zendesk ticket list titled "Need to assign a provider". The left sidebar shows various ticket categories like "Unclassified requests", "Billing", "Payment and invoices", etc. The main list shows four tickets:

Subject	Service Execution ID	Requested
Need to assign a provider	967	Wednesday 25/11
Need to assign a provider	967	Wednesday 25/11
Need to assign a provider	9709	Tuesday 04/12
Need to assign a provider	987	Monday 03/12

Click on the ticket to open it and check the order number



3. Open SOP to access to the service order concerned : [\[Open a customer Project and related Service order\]](#)
4. Allocate a provider to the service : [\[Solve automatic assignment issue\]](#)
5. Close the ticket in Zendesk



When distributing a new Sx into a PEx, there are many providers who perform a service with the same specialty in this PEx. We don't know which is the right one to send this Sx, thus we must send the Sx for manual distribution.

description = "There are multiple providers committed to customers PEx that are eligible to get this Sx."

Service Execution Operator needs to select the right one.

Congratulations, you have solved the matching issues

A tag will appear on the service execution page :

 Installation - Exécution de services 71566		Commande Pyxis: 300502 
<b>Montagem abrigo metal ate 3m2</b>		Gestion du service 
Recherche en cours ...		Date de début: 22/03/2024 (M)
Vendu par: Pierre Arnaud DROUARD		Dernière mise à jour: 05/03/2024 Date de création: 05/03/2024
<input type="button" value="Distribution manuelle"/> 		
Status	The status will move from <b>Distributed</b> to <b>Scheduled</b> if the provider canceled The status stays as <b>Scheduled</b> in case of no matching	
important business rules	It is important to close the ticket after solving the matching issue SOP: it is possible to assign the SX not only to the Provider level, but also to the worker level.	
Event ?	The Provider has an action that creates a ticket in Zendesk	
Notification	Notification sent to the customer if the provider has changed Notification sent to the provider if the date has changed Notification sent to the new provider if he has changed	

## **Assignment for Online service sale for LMPT**

Here is a link to explain the actual behavior in Portugal for the assignment for online service.

[Enregistrement 2024-06-24 154655.mp4](#)

### **To sum up**

The customer chooses a commodity, adds it to the basket and pays for it.

The operation is full manual with no automatisation and needs an operator to assign the service.

### **Steps**

1/ The order is done online by the customer

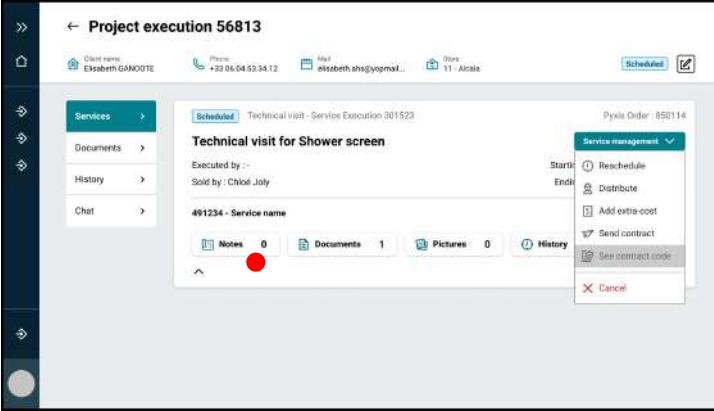
2/ The order arrives in SOP, 10 minutes after (in Portugal) the contract will be sent to the customer with a date calculated automatically by the systeme, it will today + the buffer duration, (in Portugal 72 hours). So it may not correspond to the installation date the customer would like.

3/ The operator (after checking the PBI) will call the customer and ask him the date he wants for the order. They will define together the best date and the operator could change it and send the contract to the customer with the date chosen together.

4/ The customer could sign the contract.

⚠️ Keep in mind that, if the customer has already signed the contract (the one send after 10 minutes in SOP), it will be impossible to send a new contract with the date defined with the operator

## 3. Orchestrate Service Execution

Stream	Service Execution
Business Capability	3-Orchestrate Service Execution
Business activity	3.1 Prepare Job execution
Business task	<b>Add notes about the job</b>
Operator Role	Service execution operator
<b>What - As an operator, I want to ...</b>	
<ul style="list-style-type: none"> <li>&gt; add internal execution notes available for the internal teams regarding the service</li> <li>&gt; read notes dedicated to the provider from Pyxis</li> <li>&gt; receive notes from the provider filled in SMA</li> <li>&gt; communicate informations that are communicated through direct contact in store or phone</li> <li>&gt; cancel a previously planned SX</li> <li>&gt; select whether to share a note with providers</li> </ul>	
<b>How to - Process flow</b>	
<ol style="list-style-type: none"> <li>1. Consult the service on which you want to leave a note. You can find the detail on <a href="#">[Open a customer Project and related Service order]</a></li> <li>2. Click on Notes field</li> </ol> 	

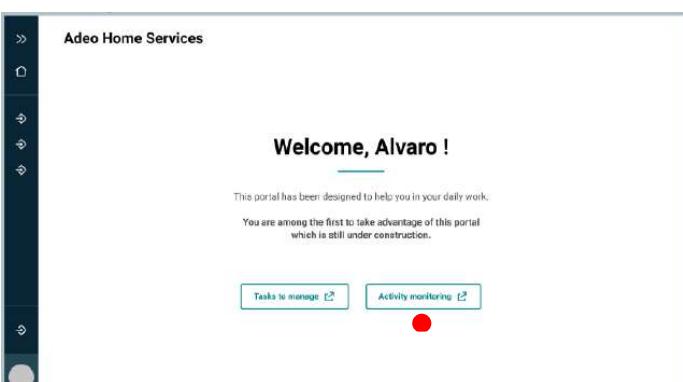
3. Fill your text in the text box then click on Leave Note

The screenshot shows a project detail page for task 12274. On the left, there's a sidebar with 'Client name: test calendar', 'Store: ALMADA', and 'Worksite: R Padre João A...'. The main area displays a service entry for 'Inst. esquentador gás' with a duration of 0 hours. Below this, there's a search bar, 'Sold by: Sara SENTOUH', and 'Store: ALMADA'. A product line item '49910469 - INST. ESQUENTADOR GÁS - Quantity: 1' is listed. At the bottom, there are buttons for 'Note(s) 0', 'Document(s) 0', and 'Pic...'. On the right, a 'Notes' section titled 'Last notes' is shown. It includes a checkbox for 'Forward this note to the pro', a 'Description' field with a note about respecting personal data, and a text input field for 'Insert your description here'. The 'Leave a note' button at the bottom is highlighted with a red circle.

4. You can read a note coming from :
- internal execution team available for the internal teams regarding the service
  - provider filled in SMA
  - Sales team filled in Pyxis and also displayed in SMA (49 comments - not dedicated for this use normally)
  - You can share the note for the pro if needed

Status	This task has no impact on the status
important business rules	You can also put the ticket number from Zendesk if you need to give tracking to execution member for the follow up
Event	No event linked to the task
Notification	No notification linked to this task

Stream	Service Execution
Business Capability	3-Orchestrate Service Execution
Business activity	3.X
Business task	<b>Update Product and/or Service Order</b>
Operator Role	Service execution operator
<b>What - As an operator, I want to ...</b>	
> To follow in SOP the update in Pyxis of the Product order (only product) by the seller	
<b>How to - Process flow</b>	
<ol style="list-style-type: none"> <li>1. The sales team can add or remove one or several products in Pyxis until the "In Progress" status (included)</li> <li>2. You can see the details of the update in SOP on the Service execution details and in SMA for the provider</li> </ol>	
Status	<p>The modification can be done until the "In Progress" status included</p> <p>This Parameter is set up by BU :</p> <ul style="list-style-type: none"> <li>- Spain : in progress included for Product or Service update</li> <li>- Portugal : in progress included for Product update / and "In progress" excluded for Service</li> </ul>
important business rules	<p>The product list is available in <b>Service execution details in SOP</b> and in <b>SMA</b> for the provider.</p> <p><a href="#">Service Execution - UPDATE ORDER</a></p>
Event	No event linked to this task
Notification	No notification linked to this task

Stream	Service Execution
Business Capability	3-Orchestrate Service Execution
Business activity	<b>3.2-Monitor Synchronization Product / Service</b>
Business task	<b>Monitor Product Order status</b>
Operator Role	Service execution operator
<b>What - As an operator, I want to ...</b>	
<p>&gt; Monitor (in real time) all the Services transactions ongoing thanks to a dedicated console and trigger all actions that must be performed to execute the service.</p> <p>&gt; At this stage we monitor the [Synchronization Product / Service] activity (see related tasks)</p>	
<b>How to - Process flow</b>	
<ol style="list-style-type: none"> <li>1. To monitor the activities, click on the activity monitoring button on the SOP Homepage. You will access in the data visualization tool Power BI</li> </ol>  <ol style="list-style-type: none"> <li>2. Monitor the Last expected (product) delivery date compared to the (installation) scheduled date. Identify the product where the delivery date will be late compared to the installation date. ⇒ you can see thanks to the Power BI the product that are late and you can see at the bottom of the screen the details of the supply chain status.</li> </ol> <p>Click on the Id of the project, you will be directed to the SOP tool on the associated project page.</p>	

The screenshot shows the AHD activity monitoring interface. On the left, there's a sidebar with various navigation links like Home, Activity Overview, Operational Overview, Service Executors, Alerts, Contacts to be signed, Pending Quotes, Decisions to assign, Previous Delivery, Moving check out, Monitoring, Unsuccessful TV, To be executed, Rescheduled TV, Delivery Systems, and Could not be completed. The main area has a search bar at the top. Below it, there are several sections: 'Alerts' (Delivery status: Shipment = 30, Not delivered yet), 'Monitoring' (Time to scheduled date: Less than 48h, Delivered: Less than 48h, Delivered: More than 48h, Delivered: More than 72h), and a table titled 'Alerts' with columns: M, Alert, Creation Date, Store, Type, Status, Provider, Scheduled date, Latest Expected delivery date, and Spec. The table lists five alerts with details like Order ID, Alert description, Date, Dept., Delivery type, Delivered, Cancelled, Product number, and Product/Service label.

3. You can now [\[reschedule\]](#) the service according to the delivery date

Status	The status of the service is <b>confirmed</b>
important business rules	The product delivery date information are delivered by the SCDP official Adeo data. A date is defined in Pyxis for the service and SOP is taking a buffer of 24h for the installation scheduling slot.
Event	No event linked to this step
Notification	No notification at this step

Stream	Service Execution
Business Capability	3-Orchestrate Service Execution
Business activity	<b>3.3-Manage event before Job</b>
Business task	<b>Monitor Pyxis order cancellation</b>
Operator Role	Service execution operator
<b>What - As an operator, I want to ...</b>	
> See the Pyxis order cancellation in SOP	
<b>How to - Process flow</b>	
<ol style="list-style-type: none"> <li>1. The Pyxis order can be canceled before or after payment of the customer</li> <li>2. The cancellation is displayed in SOP portal on the Service execution <u>status</u></li> <li>3. If one line of the Pyxis order is canceled, the line is canceled on the Service execution view on SOP <u>portal</u></li> </ol>	
Status	The status of the service is from <b>pre-scheduled</b> to <b>Confirmed</b>
important business rules	<p>The sales team must not cancel a service that is <b>in progress</b> in SOP. It will not modify the status if the Service reached In progress status</p> <p><b>The Pyxis order / Sales note is canceled after 24H if the payment is not done</b></p> <p><b>If the provider cancels :</b> it will generate a new matching</p>
Event	No automatic event linked to this step
Notification	No notification at this step

Commented [7]: Add view

Commented [8]: Add view

Stream	Service Execution
Business Capability	3-Orchestrate Service Execution
Business activity	<b>3.3-Manage event before Job</b>
Business task	<b>Modify the duration of an Sx</b>
Operator Role	Service execution operator / Seller

### What - As an operator and a seller, I want to ...

> modify the duration of a SX.

### How to - Process flow

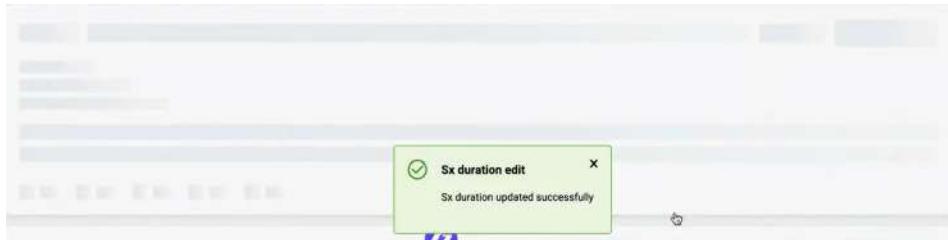
1. On the Sx description, you have now the time estimation given from 49 code(s)

Confirmed Budget - Service Execution 77527  
**Orçamento para instalação esquentador** 1h01 33.00 € 13.00 €  
 Executed by: 422 - Test Today (184 - Teste Fernando)  
 Sold by: -  
 Store: PONTA DELGADA  
 49010473 - Orçamento para instalação Esquentador - Quantity: 1  
 49013440 - Km serviço extra onsite - Quantity: 1  
 49013121 - Produto fornecido p Inst onsite - Quantity: 1  
 49013122 - Serviço Extra Onsite - Quantity: 1  
 Budget Note(s) 0 Document(s) 2 Pictures 0 History 30 Products 0  
 Last update: 09/01/2025  
 Creation date: 07/01/2025

2. You can, passing the mouse over it and clicking on the “pen modification”, modify the estimated duration manually.

← Project detail 6241  
 Project detail 6241  
 Store: PONTA DELGADA  
 Service Management  
 Budget - Service Execution 77527  
**Orçamento para instalação esquentador** 1h01 33.00 €  
 Executed by: 422 - Test Today (184 - Teste Fernando)  
 Sold by: -  
 Store: PONTA DELGADA  
 49010473 - Orçamento para instalação Esquentador - Quantity: 1  
 49013440 - Km serviço extra onsite - Quantity: 1  
 49013121 - Produto fornecido p Inst onsite - Quantity: 1  
 49013122 - Serviço Extra Onsite - Quantity: 1  
 Budget Note(s) 0 Document(s) 2 Pictures 0  
 Change Sx duration  
 Day(s) Hour(s) Minute(s)  
 Previous duration: 1h01  
 Save change Cancel

3. You click on "save change", the new duration is then edited.

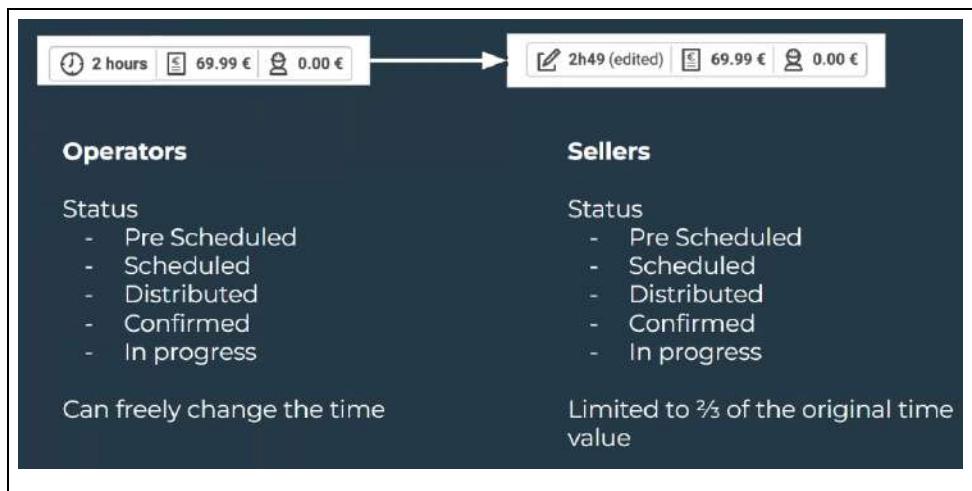


4. On the SX, you can now see the new duration, (2 days, 1 hour, **It was**, 1 hour, 1 minute). When a duration is edited, you can see in parentheses, the information "edited".

A screenshot of the Service Execution (SX) screen. At the top, there is a header with "Confirmed" and "Budget - Service Execution 77527". Below the header, the title "Orçamento para instalação esquentador" is displayed. A red circle highlights the duration field, which shows "2 days 1 hour (edited)". To the right of the duration, there are two price fields: "33.00 €" and "13.00 €". Further down, there is a list of items with their quantities: "49010473 - Orçamento para instalação Esquentador - Quantity : 1", "49013440 - Km serviço extra onsite - Quantity : 1", "49013121 - Produto fornecido p inst onsite - Quantity : 1", and "49013122 - Serviço Extra Onsite - Quantity : 1". At the bottom of the screen, there are various status indicators and a timestamp: "Last update: 26/02/2025" and "Creation date: 07/01/2025".

5. Congrats, you just change the duration manually.

Rules :



Status	The status of the service is from <b>Pre-Scheduled</b> to <b>In Progress</b>
important business rules	The seller can only change to ⅔ of the original value of the Sx. The operator can modify the duration freely.
Event	No automatic event linked to this step
Notification	No notification at this step

Stream	Service Execution
Business Capability	3-Orchestrate Service Execution
Business activity	<b>3.3-Manage event before Job</b>
Business task	<b>Monitor Pyxis order modification</b>
Operator Role	Service execution operator

## What - As an operator, I want to ...

> See the Pyxis order modification in SOP

## How to - Process flow

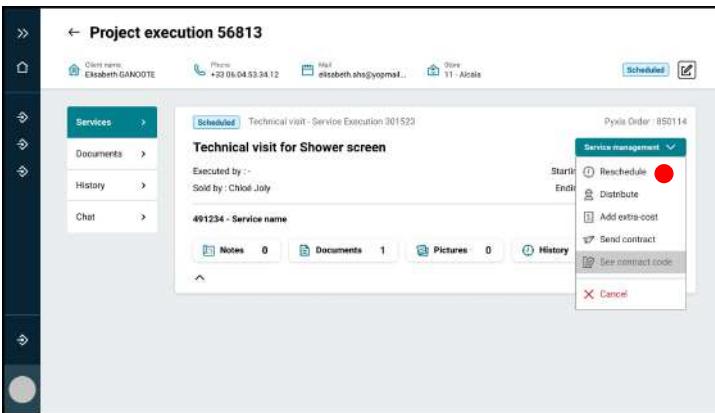
4. The Pyxis order can be modified before or after payment of the customer
5. The cancellation is displayed in SOP portal on the Service execution status
6. If one line of the Pyxis order is canceled, the line is canceled on the Service execution view on SOP portal

Commented [9]: Add view

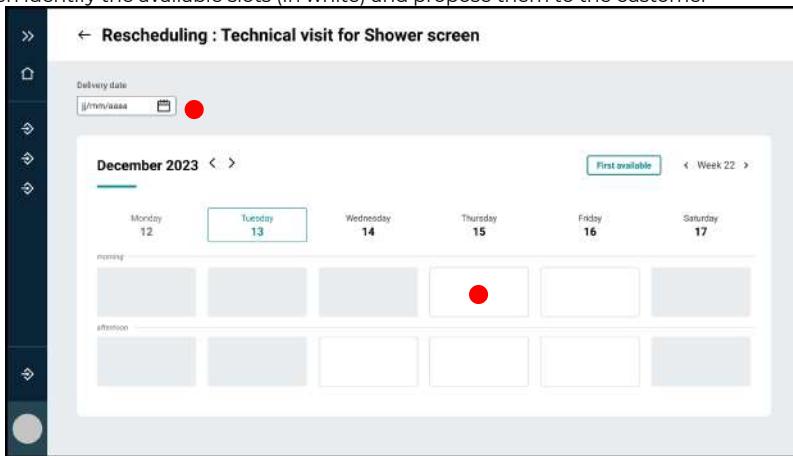
Commented [10]: Add view

Status	The status of the service is from <b>pre-scheduled</b> to <b>Confirmed</b>
important business rules	The sales team must not cancel a service that is <b>in progress</b> <b>The Pyxis order is canceled after 24H if the payment is not done</b>
Event	No automatic event linked to this step
Notification	No notification at this step

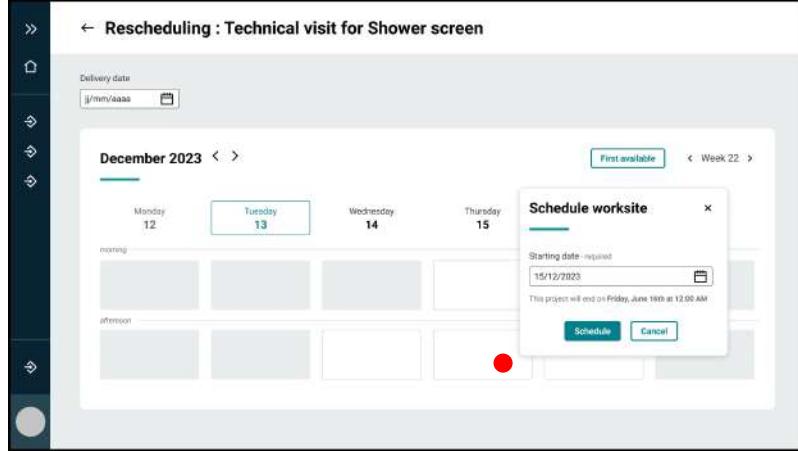
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Business activity	<b>3.3-Manage event before Job</b>																																																							
Business task	<b>Reschedule due to Product delay</b>																																																							
Operator Role	Service execution operator																																																							
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<b>How to - Process flow</b>																																																								
<p>7. <a href="#">[Monitor the Product order status]</a></p> <p>8. If the date of reception of the product is later than the date of the job execution, you can reschedule the service.</p> <p>By clicking on the project in Power BI, you are directed on the project page</p>																																																								
<table border="1"> <thead> <tr> <th>PROJECT</th> <th>STATUS</th> <th>service</th> <th>TASK</th> <th>PRICE</th> <th>DATE</th> <th>OWNER</th> </tr> </thead> <tbody> <tr> <td>138</td> <td>To plan</td> <td>Installation - Bimitas osc...</td> <td></td> <td>150,00 €</td> <td>Planned : 21/03/2023 1PM Last action : 19/03/2023</td> <td>Henrique CRUZ 16.04.2023 10:15</td> </tr> <tr> <td>143</td> <td>Planned</td> <td>Multi-services</td> <td></td> <td>450,00 €</td> <td>Planned : 21/03/2023 1PM Last action : 19/03/2023</td> <td>Henrique CRUZ 16.04.2023 10:15</td> </tr> <tr> <td>128</td> <td>Planned</td> <td>Multi-services</td> <td></td> <td>150,00 €</td> <td>Planned : 21/03/2023 1PM Last action : 19/03/2023</td> <td>Henrique CRUZ 16.04.2023 10:15</td> </tr> <tr> <td>146</td> <td>Planned</td> <td>Multi-services</td> <td></td> <td>150,00 €</td> <td>Planned : 21/03/2023 1PM Last action : 19/03/2023</td> <td>Henrique CRUZ 16.04.2023 10:15</td> </tr> <tr> <td>218</td> <td>Canceled</td> <td>Multi-services</td> <td></td> <td>150,00 €</td> <td>Planned : 20/03/2023 1PM Last action : 18/03/2023</td> <td>Henrique CRUZ 16.04.2023 10:15</td> </tr> <tr> <td>135</td> <td>Closed</td> <td>Installation - kleinen</td> <td></td> <td>150,00 €</td> <td>Planned : 21/03/2023 1PM Last action : 19/03/2023</td> <td>Henrique CRUZ 16.04.2023 10:15</td> </tr> <tr> <td>244</td> <td>Closed</td> <td>Multi-services</td> <td></td> <td>150,00 €</td> <td>Planned : 21/03/2023 1PM Last action : 19/03/2023</td> <td>Henrique CRUZ 16.04.2023 10:15</td> </tr> </tbody> </table>	PROJECT	STATUS	service	TASK	PRICE	DATE	OWNER	138	To plan	Installation - Bimitas osc...		150,00 €	Planned : 21/03/2023 1PM Last action : 19/03/2023	Henrique CRUZ 16.04.2023 10:15	143	Planned	Multi-services		450,00 €	Planned : 21/03/2023 1PM Last action : 19/03/2023	Henrique CRUZ 16.04.2023 10:15	128	Planned	Multi-services		150,00 €	Planned : 21/03/2023 1PM Last action : 19/03/2023	Henrique CRUZ 16.04.2023 10:15	146	Planned	Multi-services		150,00 €	Planned : 21/03/2023 1PM Last action : 19/03/2023	Henrique CRUZ 16.04.2023 10:15	218	Canceled	Multi-services		150,00 €	Planned : 20/03/2023 1PM Last action : 18/03/2023	Henrique CRUZ 16.04.2023 10:15	135	Closed	Installation - kleinen		150,00 €	Planned : 21/03/2023 1PM Last action : 19/03/2023	Henrique CRUZ 16.04.2023 10:15	244	Closed	Multi-services		150,00 €	Planned : 21/03/2023 1PM Last action : 19/03/2023	Henrique CRUZ 16.04.2023 10:15
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<p>9. Once it is opened, select "Service Management" and then Reschedule</p>																																																								



10. Agenda view for this specific service is opened, you can set up a specific date (if you have checked availability before placing the order or based on the expected Product Delivery date), then identify the available slots (in white) and propose them to the customer

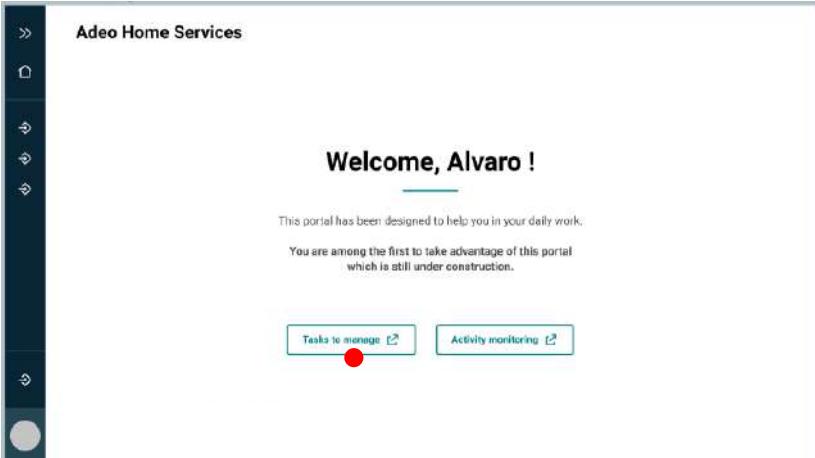


10. Select the desired slot by clicking on it, Validate the selected date in the layer



11. Congratulations ! The new installation date is now validated. You must now generate the contract to send it to the Customer.

Status	The status of the service is <b>Distributed</b> by waiting the acceptance by the Provider ⇒ Then <b>Confirmed</b> after acceptance
important business rules	You need to resend the new contract for signature to the customer You can reschedule for the same date
Event	No automatic event linked to this step. A Task management can be open manually from inbound asking
Notification	No notification at this step. If a task is opened, an email can be sent from Zendesk

Stream	Service Execution
Business Capability	3-Orchestrate Service Execution
Business activity	<b>3.3-Manage event before Job</b>
Business task	<b>Reschedule - Pro request</b>
Operator Role	Service execution operator
<b>What - As an operator, I want to ...</b>	
> Reschedule the service due to asking from the Provider	
<b>How to - Process flow</b>	
<p>There are 2 ways for a Provider to ask or directly reschedule the service.</p> <ul style="list-style-type: none"> <li>a. The Provider can use SMA application to make a reschedule by himself after having contacted the customer and defined the new date. <i>See in SMA documentation how "Reschedule Button" triggers a direct reschedule in SOP (no Zendesk ticket)</i></li> <li>b. The Provider contact the generic email address for support or call directly the store/operator (inbound contact)</li> </ul>	
<p>The case of inbound contact (case "b") is described below :</p> <ol style="list-style-type: none"> <li>As Service Execution operator, you follow the task in Zendesk accessible from SOP Homepage</li> </ol>	
	

- You receive in Zendesk a task to reschedule

The screenshot shows the Zendesk interface with the 'Unclassified requests' view selected. A red circle highlights the first item in the list, which is a ticket titled 'Request for rescheduling ORDER#007090 Customer FERNANDO'. The ticket preview shows the subject, requester (Celine Mousset), request date (Saturday 01/12), and assignee (Celine Mousset). The ticket body contains a message from the customer asking for rescheduling.

- Open the ticket to copy the information regarding the order number

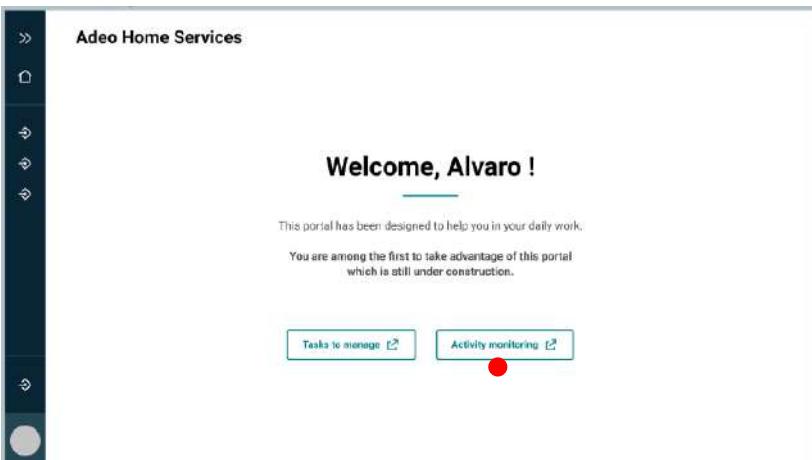
The screenshot shows the Zendesk ticket detail page for the same ticket. A red circle highlights the subject line 'Request for rescheduling ORDER#007090 Customer FERNANDO'. The ticket body contains the customer's message and some internal Zendesk metadata.

- Go in SOP to contact the customer and reschedule the service : **[Schedule service date (after order created)]**
- Close the ticket

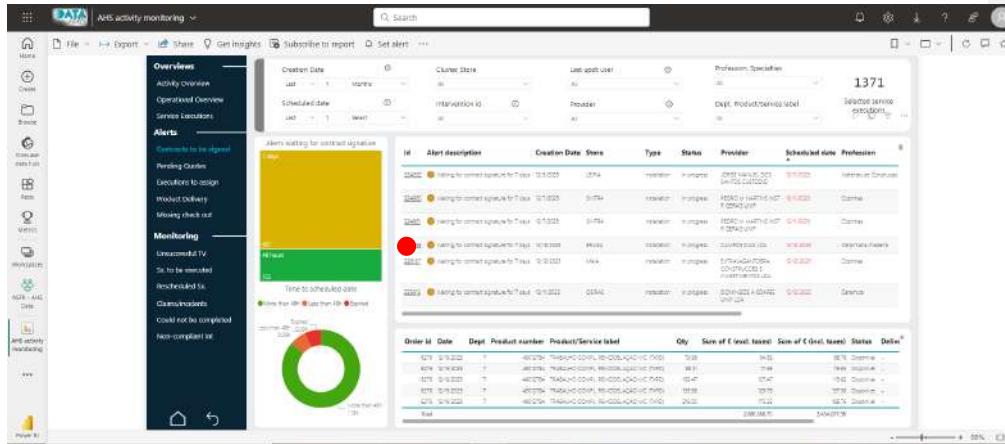
The screenshot shows a Zendesk ticket interface. The ticket title is "Request for requesting ORDER 0970932 Customer FERNANDO". The requester is listed as "Sales Manager" and the assignee is also "Sales Manager". The subject of the ticket is "Date is module". At the bottom right of the ticket view, there is a button labeled "Submit as New" which is highlighted with a red circle.

Status	The status of the service is <b>Confirmed</b>
important business rules	The provider must contact and align with the customer out of the tool
Event	If the Provider uses the generic email address, a ticket is created and a task has to be managed in Zendesk
Notification	The customer is notified with the new date of intervention from Zendesk

Stream	Service Execution
Business Capability	3-Orchestrate Service Execution
Business activity	<b>3.3-Manage event before Job</b>
Business task	<b>Reschedule - Customer request</b>
Operator Role	Service execution operator
<b>What - As an operator, I want to ...</b>	
> reschedule the service after asking from the customer	
<b>How to - Process flow</b>	
<p>There are 2 ways for a Customer to ask for a reschedule of the service.</p> <ul style="list-style-type: none"> <li>a. The Customer can use his My Account space and click on reschedule button ⇒ it will create directly a task to manage in Zendesk</li> <li>b. The Customer can contact the seller or the Care to ask for the reschedule. The Care creates a task to manage in Zendesk</li> </ul>	
Follow the step describe in the <a href="#">[Reschedule]</a> sheet	
Status	The status of the service is <b>Confirmed</b>
important business rules	You need to contact the customer to know the expected job date if you did not get the information from the ticket or if the wish of the customer is not available
Event	A task management is created in Zendesk
Notification	<p>The customer is notified with the new date of intervention by email from Zendesk</p> <p>Before the acceptation of the provider : he received a notification of update of the proposal After the acceptation of the provider : he receives a new proposal and he has to accept</p>

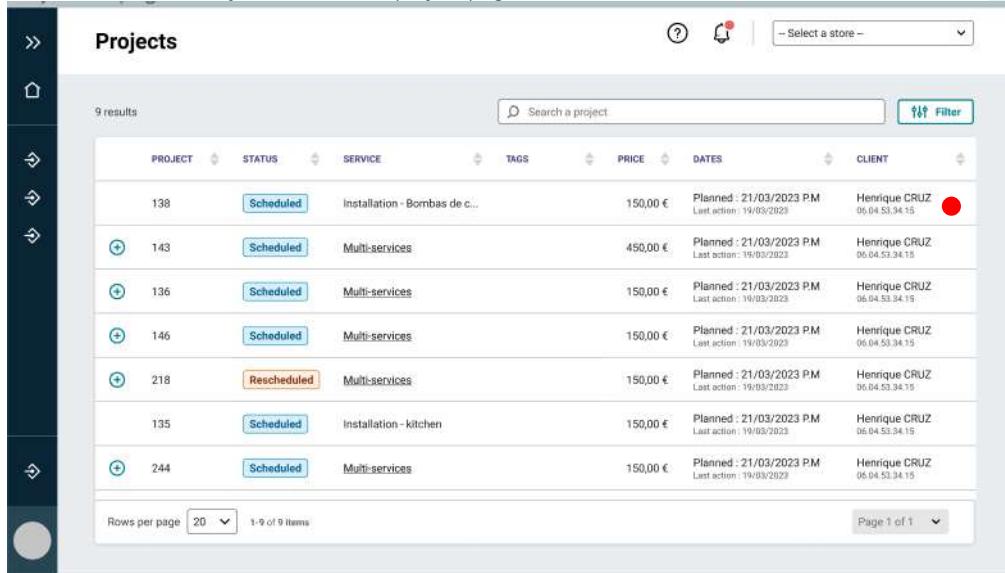
Stream	Service Execution
Business Capability	3-Orchestrate Service Execution
Business activity	<b>3.3-Manage event before Job</b>
Business task	<b>Monitor Contract signature &amp; make contract signed by Customer</b>
Operator Role	Service execution operator
<b>What - As an operator, I want to ...</b>	
<p>&gt; Monitor (real time) all the Services transactions ongoing thanks to a dedicated console and trigger all actions that must be performed to execute the service.</p> <p>At this stage we monitor the [Synchronization Product / Service] activity (see related tasks) :</p> <ul style="list-style-type: none"> <li>- the contract signature</li> </ul>	
<b>How to - Process flow</b>	
<p>The Monitoring of the contract signature can be done in 2 different ways :</p> <ul style="list-style-type: none"> <li>- Through the data visualisation in Power BI</li> <li>- Through the Task management (from February 2024) as a task will be created in Zendesk once a contract is not signed</li> </ul>	
<p><b><u>DATAVISUALISATION in POWER BI</u></b></p> <ol style="list-style-type: none"> <li>1. As Service Execution operator, you follow the activity monitoring in the dashboard Power BI from the Home Page</li> </ol> 	

2. On the dashboard, click on Monitor the contract signature  
 Click on the Id of the project to go to SOP tool on the associated project page.



The screenshot shows the ANS activity monitoring interface. On the left, there's a sidebar with various navigation options like 'Dashboard', 'Alerts', 'Monitoring', and 'SOP tool'. The main area has a search bar at the top. Below it, there are several sections: 'Overviews' (Activity Overview, Operational Overview, Service Locations), 'Alerts' (Contracts to be signed, Pending Orders, Executions to design, Scheduled Delivery, Missing check out, Monitoring), and 'Monitoring' (Incomplete TV, Go to be executed, Rescheduled TV, Completed tasks, Could not be completed, Non-compliant TV). A central part displays a chart titled 'Time to scheduled date' with a green bar indicating 'All result' and a red circle highlighting 'More than 48h'. To the right, there's a table of alerts with columns: ID, Alert description, Creation Date, Store, Type, Status, Provider, Scheduled date, and Profession. The table lists multiple entries for 'Waiting for correct signature for Task' with IDs ranging from 1371 to 1382. At the bottom, there's a table for 'Order ID', 'Date', 'Dept', 'Product number', 'Product/Service label', 'Qty', 'Sum of E (excl. taxes)', 'Sum of C (incl. taxes)', 'Status', and 'Deliv?'. The total sum is shown as 288,388.11.

3. In the SOP tool, you arrive on the project page. You can see the customer contact data.

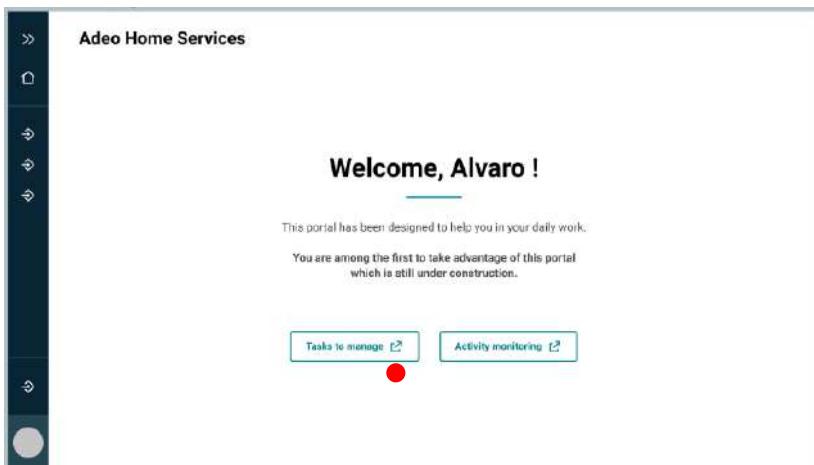


The screenshot shows the SOP tool's 'Projects' page. On the left, there's a sidebar with icons for 'Dashboard', 'Alerts', 'Monitoring', 'SOP tool', and 'Help'. The main area has a search bar and a 'Filter' button. Below is a table of projects with columns: PROJECT, STATUS, SERVICE, TAGS, PRICE, DATES, and CLIENT. The table lists nine projects, all marked as 'Scheduled'. The last column, 'CLIENT', shows 'Henrique CRUZ' with a red circle. At the bottom, there are buttons for 'Rows per page' (set to 20) and 'Page 1 of 1'.

4. [Generate contract & send it to the customer]

## **TASK MANAGEMENT IN ZENDESK**

1. As Service Execution operator, you follow the Task management from the Home Page



2. Open the ticket of the task Contract to sign
3. Open the ticket to copy the information regarding the order number
4. Go in SOP to [\[Generate contract & send it to the customer\]](#)

Status	The status of the service is <b>pre-scheduled</b> until the contract signature
important business rules	The assignment cannot be done before contract signature The service cannot be performed until the contract is signed
Event	Ticket is opened in Zendesk if the contract is not signed after 72h
Notification	The customer receives Adobe notification 1 time per day until the contract is signed

Stream	Service Execution
Business Capability	3-Orchestrate Service Execution
Business activity	<b>3.3-Manage event before Job</b>
Business task	<b>Access to service information : budget, documents, pictures, history</b>
Operator Role	Service execution operator
<b>What - As an operator, I want to ...</b>	
> Access to the resources available linked to a service : <ul style="list-style-type: none"> <li>- budget,</li> <li>- Understand categories of documents</li> <li>- documents (integrating Technical visit / Quotation flow report)</li> <li>- Multi Upload</li> <li>- pictures,</li> <li>- history</li> </ul>	
<b>How to - Process flow</b>	
<ol style="list-style-type: none"> <li>1. You are now able to <a href="#">[Open a customer Project and related Service]</a></li> <li>2. Whenever a document is added to a Sx, it will be categorized differently. Here is the categorization: <ul style="list-style-type: none"> <li>- <b>Legal documents</b> : Contract, Contract - audit trail and WCF</li> <li>- <b>Provider photos</b> : All photos concerning the start, end (checkin and checkout) and during execution</li> <li>- <b>Providers/workers documents</b> : all documents that are inserted by the provider through the SMA or SPP (not being budgets or photos of check in, out and during execution)</li> <li>- <b>Budget</b> : All budget documents (Cotazo, CraftsMen, shared agenda)</li> <li>- <b>Other</b> : Any document entered by SOP (except legal ones)</li> </ul> </li> </ol>	

3 Documents X

Search for a document here...

Legal documents Others

Legal documents - Uploaded on 18 December 2024 - 10:58  
documents/98261/1734519538119\_Condizioni specifiche di acc... Download Edit Delete

Legal documents - Uploaded on 18 December 2024 - 10:58  
documents/98261/1734519539073\_Condizioni specifiche di acc... Download Edit Delete

Others - Uploaded on 18 December 2024 - 10:58  
OTOS/98261/1734519499454\_[DEMO USE ONLY] Contrato de ser... Download Edit Delete

Upload new files Cancel

3. Click on the service to open the detail view of the service and click on the arrow to see the different sections

← Project execution 143

Owner: Henrique CRUZ DA SILVA - Phone: +33 06 04 51 34 12 - Mail: Henriquecrus@gmail.com - Date: 15 - Le Touquet - Merlimont - Planned

Services Documents History Chat

In progress Installation - Service Execution 56/8818 Service management Pyxis Order : 850114

Dépose de carrelage existant Service management Starting date : July 23, 2023 Ending date : July 27, 2023

Executed by : Johnny Cadillac (SARL Jerem Elec) Last update : July 10, 2023

Sold by : Randal Koto Muani

Late order Manual distribution

Scheduled Installation - Service Execution 57/886 Service management Pyxis Order : 850114

Pose du nouveau carrelage Service management Starting date : July 23, 2023 Ending date : July 27, 2023

Executed by : Johnny Cadillac (SARL Jerem Elec) Last update : July 10, 2023

Sold by : Randal Koto Muani

Late order Manual distribution

491234 - Service name Budget 1 Notes 2 Documents 4 Pictures 8 History 2

Late order Manual distribution

Scheduled Installation - Service Execution 58/889 Service management Pyxis Order : 850114

Finitions de carrelage Service management Starting date : July 23, 2023 Ending date : July 27, 2023

Executed by : Johnny Cadillac (SARL Jerem Elec) Last update : July 10, 2023

Sold by : Randal Koto Muani

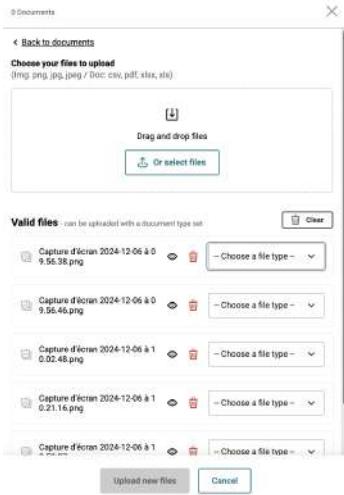
Late order Manual distribution

4. Multi upload  
Users are able to upload multiple documents at the same time either using the button on SOP or by dragging and dropping the files from their devices.

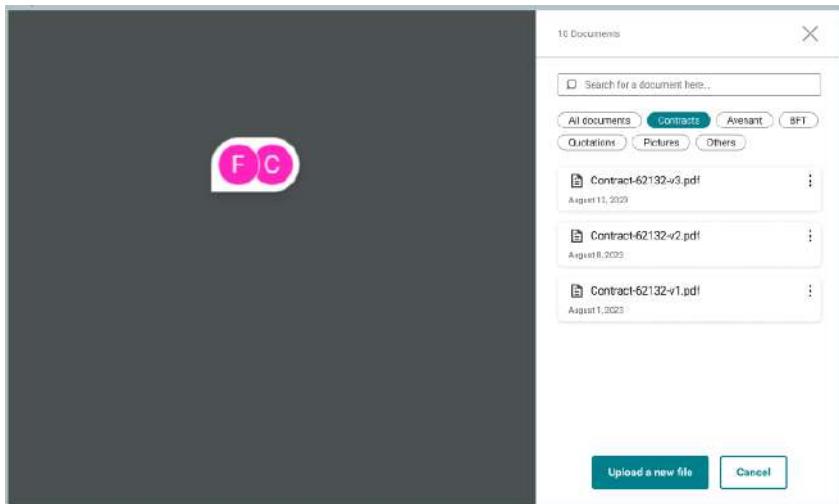
**accepted file types :**

Images: png, jpg, jpeg  
Documents : csv, pdf, xlsx, xls

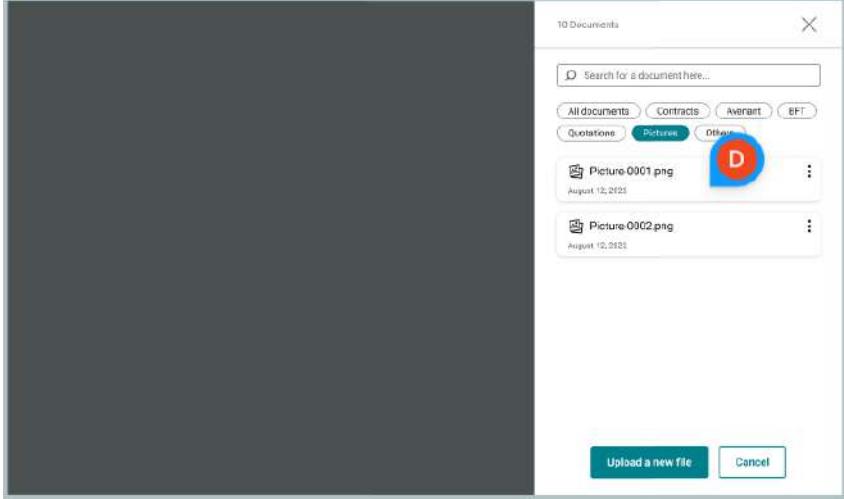
Users can use the "Clear" button to remove all uploading documents at once or do it one by one.



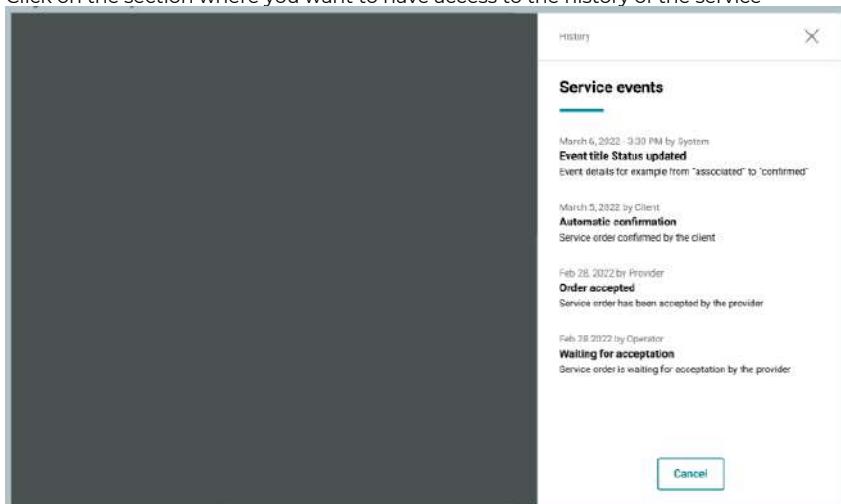
5. Click on the section where you want to have access or upload to the document



6. Click on the section where you want to have access or upload to the picture

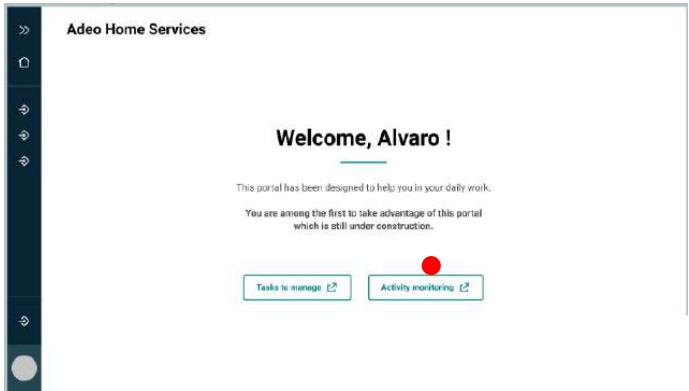


7. Click on the section where you want to have access to the history of the service

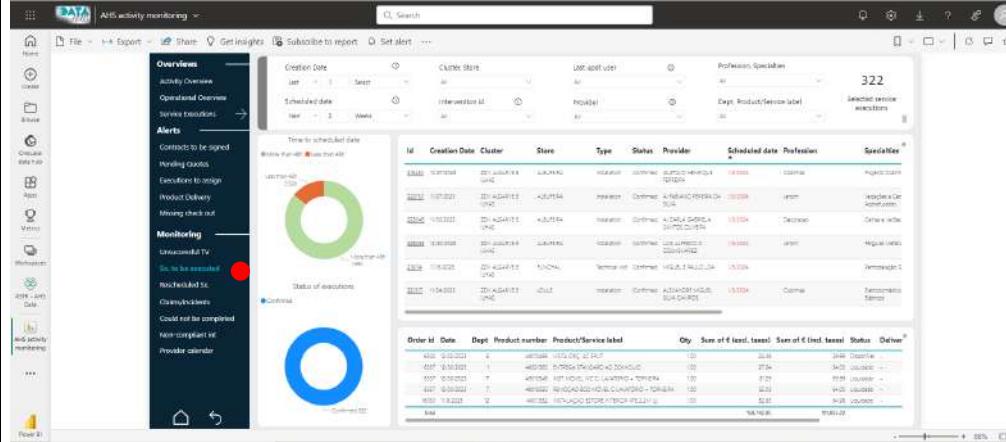


Status	The resources are available whatever the status
important business rules	Visibility and accessibility of the documents are only internal. They are not available for the customers and the providers
Event	No event linked to this task
Notification	No notification linked to this task

## 4. Perform the Job

Stream	Service Execution
Business Capability	4-Perform the Job
Business activity	<b>4.2-Supervise Start the job</b>
Business task	<b>Monitor job starting</b>
Operator Role	Service execution operator
<b>What - As an operator, I want to ...</b>	
> Monitor real time all transactions and evaluate the one who will need treatment at the job starting.	
All events the day of the Service are VERY URGENT events that require a very high level of proactivity and very short SLA to manage them ⇒ This activity is critical.	
This activity must be highly automatized (to empower the team manage the added value situation) and must trigger call to actions when situation needs a Service execution operator to manage	
<b>How to - Process flow</b>	
1. In the SOP portal menu, click on Data and dashboard menu	
	

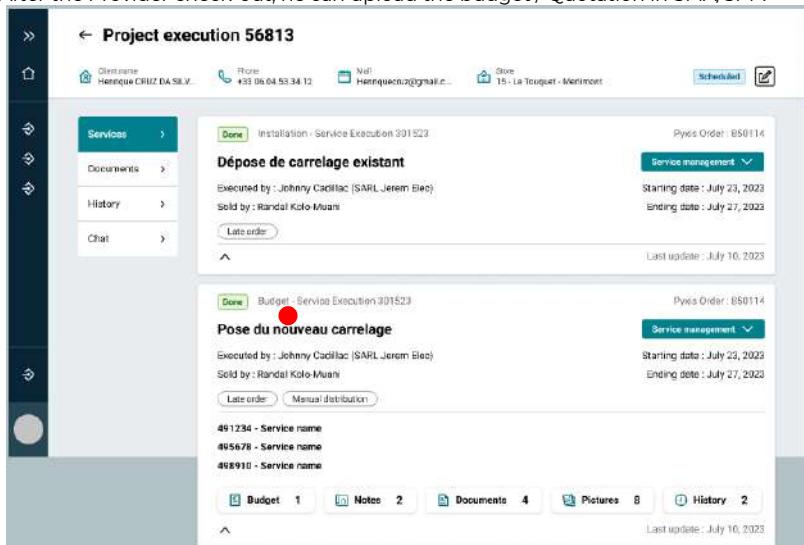
## 2. Access to the view of the execution to do :



3. According to the monitoring of the data, you can take action according to the situation

Pls refer to the section [\[3. Orchestrate Service Execution\]](#), according to the action you want to perform

Status	<b>All status</b> are concerned
important business rules	Business rules are defined in each sheet according to the action you need to perform
Event	No event for this task
Notification	No notification associated

Stream	Service Execution
Business Capability	4-Perform the Job
Business activity	4.X
Business task	<b>Budget Flow / Quotation Flow</b>
Operator Role	Service execution operator
<b>What - As an operator, I want to ...</b>	
> Follow the result of the budget flow / Quotation flow	
> follow the reception of the provider quotation/report (Budget flow / Quotation flow report & quotation)	
> introduce the quotation to the customer	
> register the result of the quotation approval	
Video of the Quotation flow available <a href="#">here</a>	
<b>How to - Process flow</b>	
1. <a href="#">[Open the project and the relative service order]</a>	
2. Click on the service line to open the service execution details. You can see the budget description of the service :	
After the Provider check-out, he can upload the budget / Quotation in SMA/SPP.	

- Click on the Budget button to access to the Budget document

The screenshot shows the 'Project execution 56813' interface. On the left, there's a sidebar with 'Services', 'Documents', 'History', and 'Chat'. The main area displays two service entries:

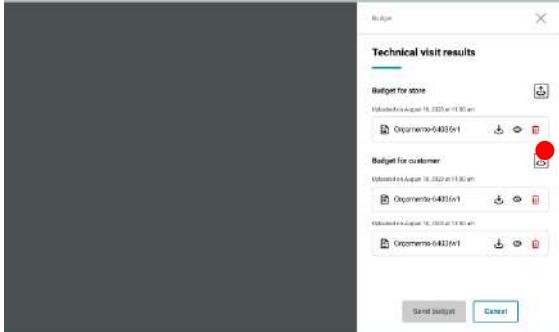
- Dépose de carrelage existant**: Pyxis Order: ES0114. Executed by: Johnny Cadillac (SARL Jerem Elec). Started at: July 23, 2023. Ended at: July 27, 2023.
- Posé du nouveau carrelage**: Pyxis Order: ES0114. Executed by: Johnny Cadillac (SARL Jerem Elec). Started at: July 23, 2023. Ended at: July 27, 2023.

At the bottom, there are tabs for 'Budget' (1), 'Notes' (2), 'Documents' (4), 'Pictures' (8), and 'History' (2).

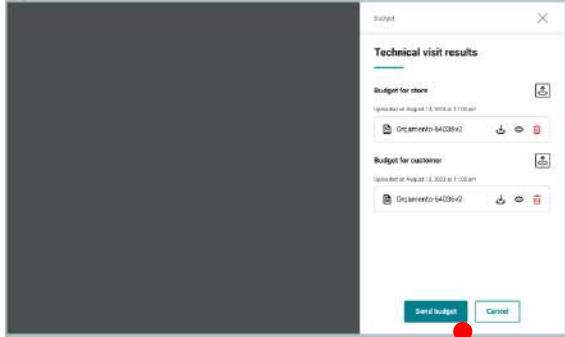
The tracking of the Technical Visit report upload can be done through the Power BI. You can refer to the part [\[monitor pending quote\]](#) to see the Alerting.

- On the budget screen, you can download, visualize, or remove the document. You can also upload a document for the Provider.

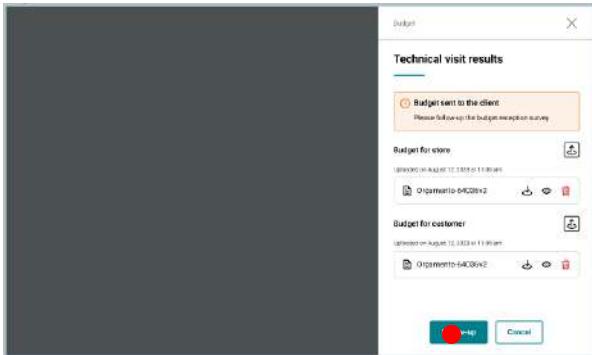
This is possible only before clicking on the button to inform that budget has been sent



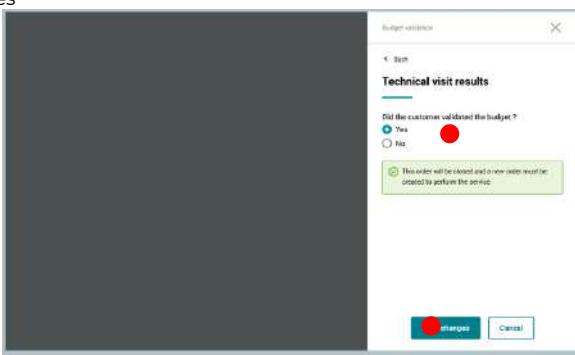
- You can select a document and click to inform that you have sent/introduced the budget to the customer



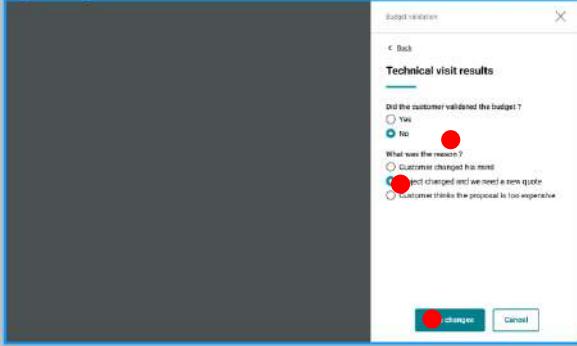
6. You can manage the follow up of the quotation's validation by clicking on the Follow up button



7. You can indicate the result of the validation of the budget by the customer, then click on Save changes



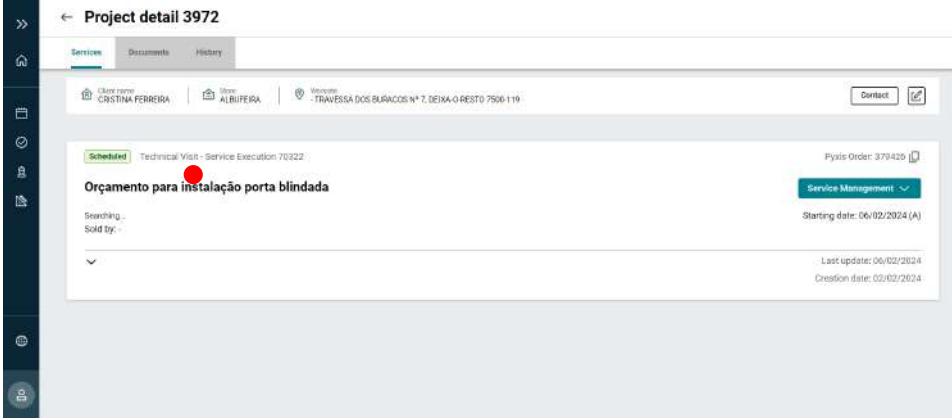
8. If the quotation has not been validated, click on "No", give the reason by clicking on it and save changes



Status	The budget flow status is <b>Done</b>
important business rules	<p>The reminder to the provider or customer are done out of the tool.</p> <p>To <a href="#">[monitor pending quote]</a>, use the Power BI</p> <p>In case of validation, a new customer order will be created, and a new service order of installation will be created in SOP, the order will be integrated in the same Px (Project execution) and the provider chosen will be the same according to his availability.</p>
Event	No specific event for this task.
Notification	The customer is notified by SMS when the budget/report is uploaded by the Customer No SMS for LMIT

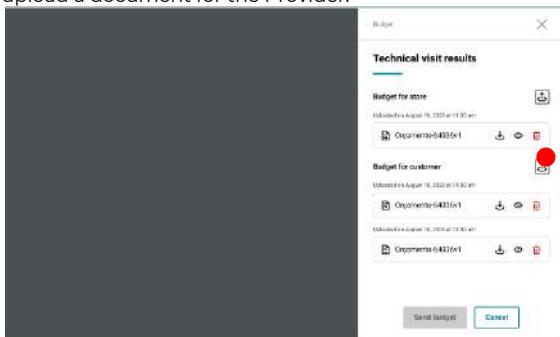
Commented [11]: @btorres@leroymerlin.com.br , for the Portuguese "Budget Flow" for technical visits, can you precise me the end of the workflow :  
=> status "In progress" to "Done" is triggered by Pro check-out  
= How do we pass from "Done" to "closed" ? Cotazo update ?  
Assigned to btorres@leroymerlin.com.br

Commented [12]: +1 (this is linked also to the request of Spain to extend the time of closure of the TV)

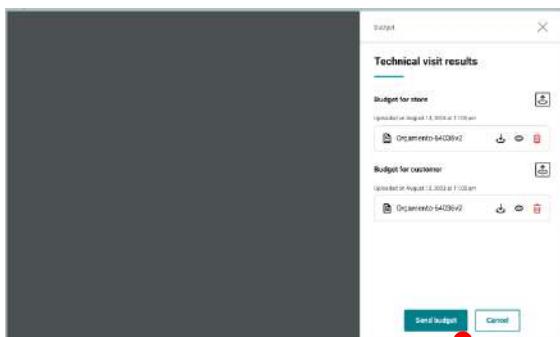
Stream	Service Execution
Business Capability	4-Perform the Job
Business activity	
Business task	
Operator Role	
<b>What - As an operator, I</b>	<b>TO BE REMOVED AFTER QUOTATION FLOW IMPLEMENTATION</b>
> Follow the Technical visit / Quotation flow execution	
> Access to the deliverable of the Technical visit / Quotation flow	
<b>How to - Process flow</b>	
<p>1. <a href="#">[Open the project and the relative service order]</a></p> <p>2. Click on the service line to open the service execution details. You can see the Technical visit / Quotation flow status of the service</p> 	
<p>3. Once the Technical visit / Quotation flow is confirmed with date and provider, the Provider will execute the Technical visit / Quotation flow</p>	

The screenshot shows the 'Project execution' interface for project 56813. It displays two tasks: 'Dépose de carrelage existant' and 'Pose du nouveau carrelage'. Each task has its own detailed view with fields for status (Done), service name, executor (Johnny Cadillac), provider (Sarl Jerome Blec), and provider contact (Randal Kolo Muani). The tasks also show their respective Pyxis Order numbers (B50114) and execution dates (July 23, 2023 to July 27, 2023). The bottom of the screen shows navigation tabs for Budget (1), Notes (2), Documents (4), Pictures (8), and History (2).

9. On the budget screen, you can download, visualize, or remove the document. You can also upload a document for the Provider.

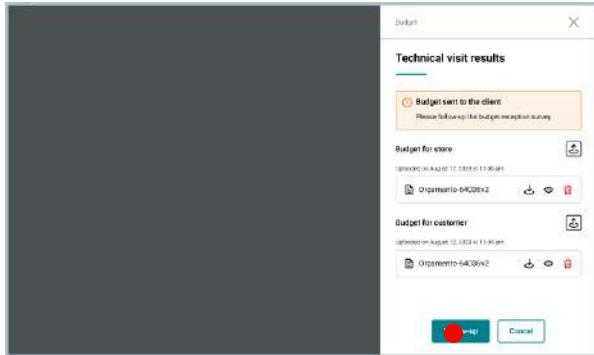


10. You can select a document and send the information of availability of the budget to the customer

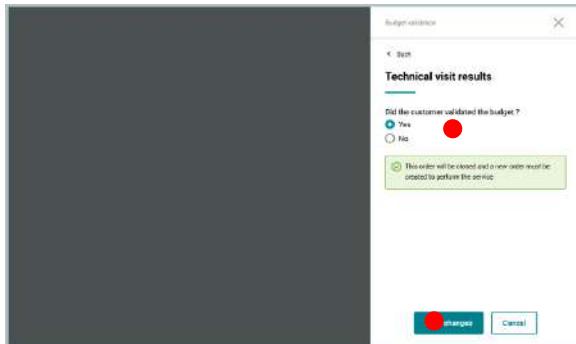


11. You can manage the follow up of the quotation's validation by clicking on the Follow up

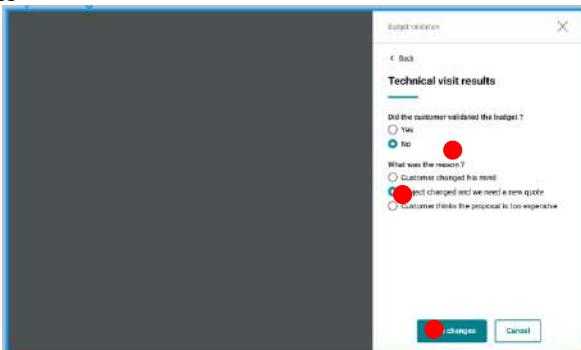
button



12. You can indicate the result of the validation of the budget by the customer, then click on Save changes

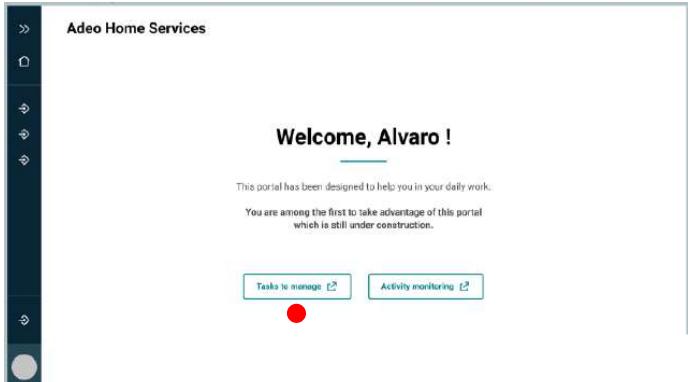


13. If the quotation has not been validated, click on "No", give the reason by clicking on it and save changes



Status	The budget flow status is <b>Done</b>
important business rules	The reminder to provider or customer are done out of the tool. To <a href="#">[monitor pending quote]</a> , use the Power BI

	<p>The quote appears in PBI when the status of the Technical visit / Quotation flow is In progress  The quote disappears when the status is Done</p> <p>In case of validation, a new customer order will be created, and a new service order of installation will be created in SOP, the order will be integrated in the same Px (Project execution) and the provider chosen will be the same according to his availability.</p>
Event	No specific event for this task.
Notification	The customer is notified by email when the budget is available

Stream	Service Execution
Business Capability	4-Perform the Job
Business activity	<b>4.2-Supervise Start the job</b>
Business task	<b>Solve job starting issues (Customer &amp; Pro)</b>
Operator Role	Service execution operator
<b>What - As an operator, I want to ...</b>	
> solve all the critical situation where the service is supposed to start but he has not started yet	
<b>How to - Process flow</b>	
<p>1. In the SOP portal menu, click on Data and dashboard menu</p> 	
<p>2. You receive an extra cost request in Zendesk</p>	

The screenshot shows a Zendesk dashboard titled 'Request for recipiecle'. The left sidebar lists various request categories with their counts: Unclassified requests (27), Closing (9), Payment and invoices (8), Extra Costs (3), Tech issues (5), Account Management (3), During installation (5), Logistique (3), Incident (3), Before installation (3), Need to arrange a provider (4), Suspended tickets (0), Deleted tickets (0), and Management (0). A red circle highlights the 'Extra Costs' category.

4. Open the task to manage to to check the information :
  - Pro requested an extra cost => [\[see Manage extra cost\]](#)
  - Product is partially delivered or damaged (Missing product / Broken product)
  - Customer is not here
  - Worksite is not accessible
5. Solve the issue or [\[cancel the service\]](#)
6. Close the ticket in Zendesk

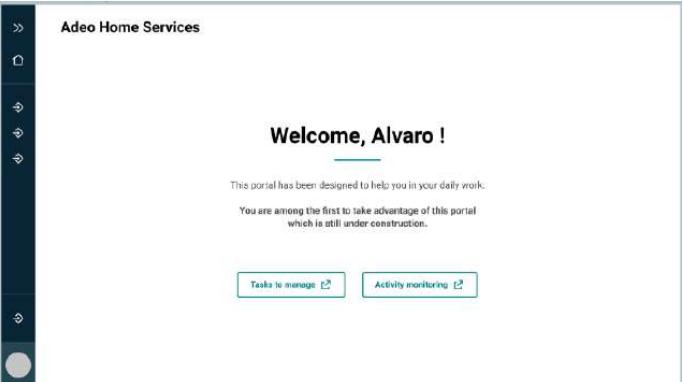
The screenshot shows a Zendesk ticket view for 'Ticket #50'. The ticket subject is 'Extra Cost needed - Extra Products'. The ticket details pane shows a message from Deborah Pro: 'Wednesday 23/06 • Deborah Pro • deborahpro@gmail.com via Céline Messia • from Zendesk Support'. Below the message is a yellow box containing the text 'Extra Cost needed - Extra Products'. At the bottom right of the ticket details, there is a button labeled 'Submit as New' with a red circle around it.

Status	The status of the job is <b>in progress</b> after the check in of the provider or <b>cancel</b>
important business rules	<p>It is very important to follow the Task management in zendesk in real time at the starting point.</p> <p>For extra costs that must be paid by the customers, a Pyxis order must be created. Then the extra cost is managed with</p>

	the provider according to the process above
Event	Tasks are created in Zendesk
Notification	The provider and the customer are notified in case of cancellation

## 5. Track & supervise Service Execution

Stream	Service Execution
Business Capability	5-Track & Supervise Service execution
Business activity	5.X
Business task	<b>Monitor Contract signature &amp; make contract signed by Customer after automatic reminders</b>
Operator Role	Service execution operator
<b>What - As an operator, I want to ...</b>	
> Monitor the contract signature by the customer > Have an action to the customer to make him sign the contract	
<b>How to - Process flow</b>	
Pls check the link to go on the actions to perform : <a href="#">[Monitor contract signature &amp; make contract signed by Customer after automatic reminders]</a>	
Status	The status is <b>pre-scheduled</b> until the contract signature
important business rules	Close the task in Zendesk when the contract is signed The contract must be signed before the job starts.
Event	If the contract is not signed a task is created in Zendesk
Notification	Adobe sends reminder everyday until the contract is signed

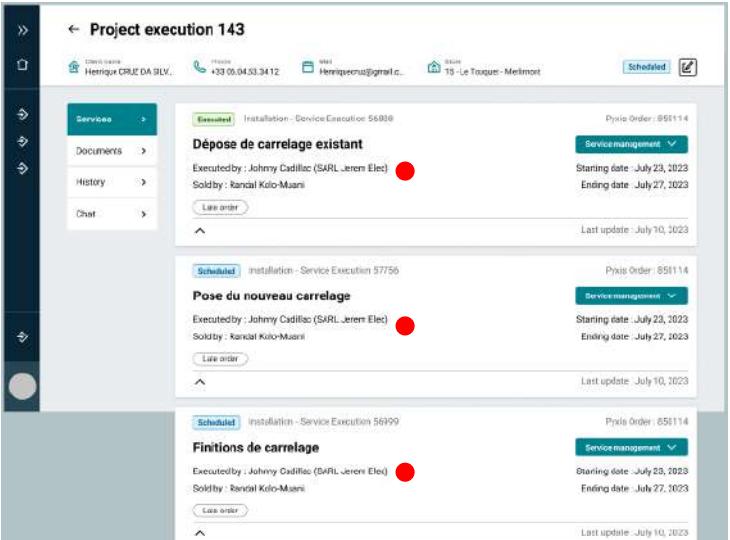
Stream	Service Execution
Business Capability	5-Track & Supervise Service execution
Business activity	5.X
Business task	<b>Monitor Pro automatic assignment</b>
Operator Role	Service execution operator
<b>What - As an operator, I want to ...</b>	
> Monitor by project, by service the provider assigned automatically to the job	
<b>How to - Process flow</b>	
1. Open SOP	
2. Identify the concerned Project just created	<ul style="list-style-type: none"> <li>Info : Once you open the project list page, it is already sorted by creation date. (On top = Most recent)</li> <li>You can filter also on customer name / Customer Fiscal Id to identify the Order</li> <li>If Project contains several Projects, just click on the Project line to show all Services orders</li> </ul>

Projects							
PROJECT	STATUS	SERVICE	TAGS	PRICE	DATES	CLIENT	
135	Scheduled	Installation - Berribia du c...		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 06.04.23 24.15	
143	Scheduled	Multi-services		450,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 06.04.23 24.15	
186	Scheduled	Technical Visit - Shower screen		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Elizabeth GANOOTE 06.04.23 24.15	
201	Scheduled	Multi-services		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 06.04.23 24.15	
198	Rescheduled	Multi-services		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 06.04.23 24.15	
144	Scheduled	Installation - kitchen		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 06.04.23 24.15	
164	Scheduled	Multi-services		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 06.04.23 24.15	

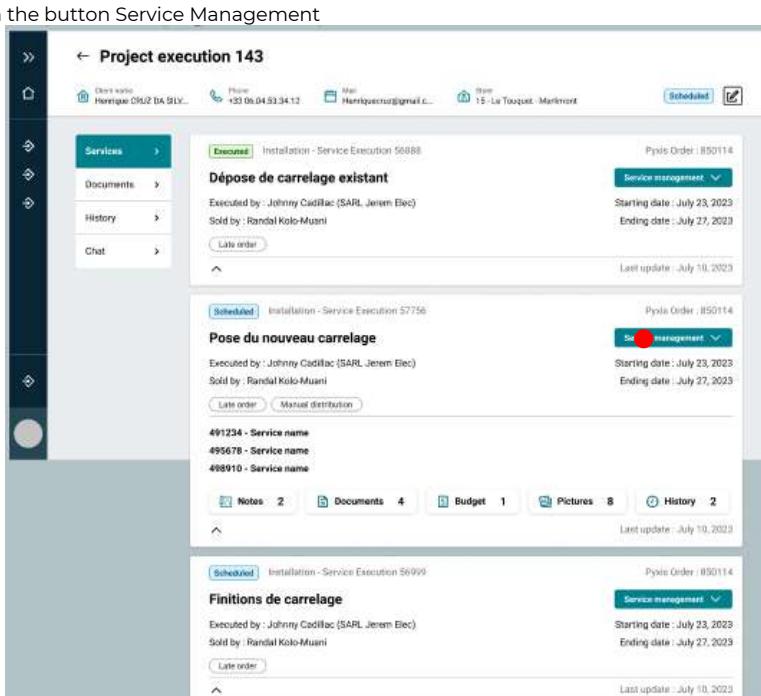
3. Click on the concerned Service order to open it

Projects							
PROJECT	STATUS	SERVICE	TAGS	PRICE	DATES	CLIENT	
135	Scheduled	Installation - Berribia du c...		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 06.04.23 24.15	
143	Scheduled	Multi-services		450,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 06.04.23 24.15	
186	Scheduled	Technical Visit - Shower screen		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Elizabeth GANOOTE 06.04.23 24.15	
201	Scheduled	Multi-services		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 06.04.23 24.15	
198	Rescheduled	Multi-services		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 06.04.23 24.15	
144	Scheduled	Installation - kitchen		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 06.04.23 24.15	
164	Scheduled	Multi-services		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 06.04.23 24.15	

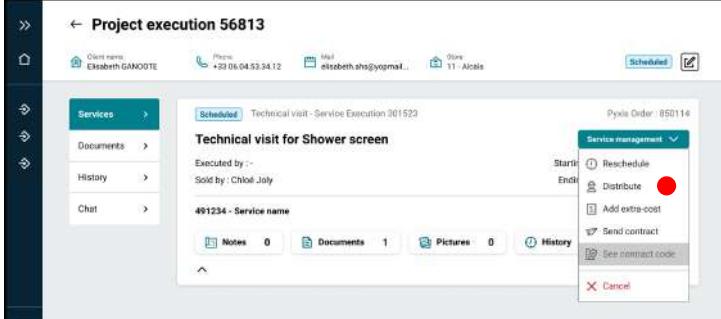
4. You can see all the services with the assigned provider



Status	The status is <b>distributed</b> at this stage
important business rules	No business rule
Event	No event linked
Notification	No notification

Stream	Service Execution
Business Capability	5-Track & Supervise Service execution
Business activity	5.X
Business task	<b>Solve automatic assignment issues</b>
Operator Role	Service execution operator
<b>What - As an operator, I want to ...</b>	
<ul style="list-style-type: none"> <li>&gt; perform all actions required to solve the issues related to the Find Pro to execute the service process.</li> <li>&gt; avoid a service execution process to be stuck at one stage of the execution.</li> <li>&gt; ensure continuity of the service execution and comply with the terms and conditions of the service sold to the customer and Service Providers</li> <li>&gt; select a provider who is not available in the list</li> </ul>	
<b>How to - Process flow</b>	
<ol style="list-style-type: none"> <li>1. Look for the Service that you want to manage : you can find the way to proceed by going to the tutorial <a href="#">[Open a customer Project and related Service order]</a></li> <li>2. Click on the button Service Management</li> </ol> 	

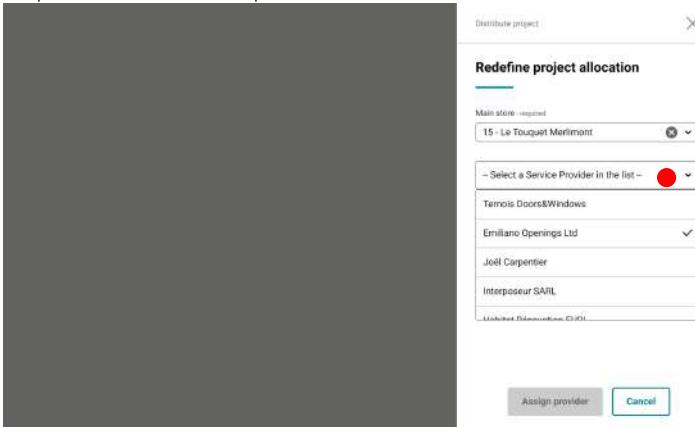
3. Click on Distribute



4. Select the main store

The screenshot shows a software interface for project management. At the top, there's a header with client information: Client name: Lar Lameir Gamarra, Phone: +22 06 04 53 34 12, Mail: lar.lameir.gamarra@porta-de-gata.pt, Store: 11 - Alcâle. Below the header, there's a sidebar with links for Services, Documents, History, and Chat. The main content area is titled 'Project detail 5973' and shows a service entry for 'Inst. esquentador gás'. A modal window titled 'Distribute project' is open, with the 'Main store' field set to 'Larz Martin Porta De Gata' (highlighted with a red circle). The 'Service provider' dropdown is set to 'Select a Service Provider in the list'. A dropdown menu shows several service providers: Teste Fernando, Teste Fernando 21 09, Saa Evologi, Fernando Fernando4444, and SGP. At the bottom of the modal are 'Assign provider' and 'Cancel' buttons.

1. Select the provider in the service provider list



2. Select the worker in the worker list and click on assign provider

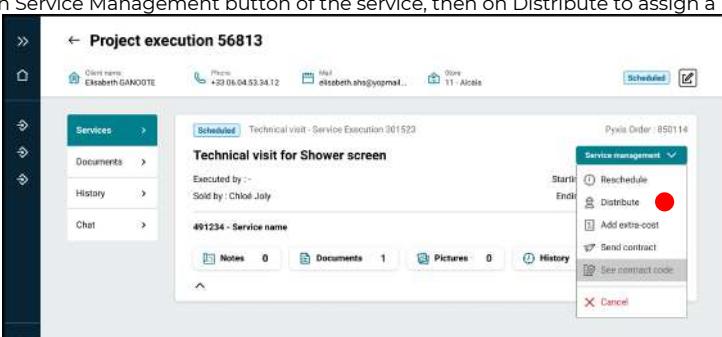
3. You can also as a service execution operator select a provider who is not available by clicking on the button "show unavailable providers in the list"

Congratulations ! You have assigned a new Provider for the job.

Status	The status of the service is <b>Scheduled</b>
important business rules	No specific business rule
Event	No event linked to this step
Notification	A notification is sent to the provider assigned

Commented [13]: @anne-lise.becousse@ext.adeo.com  
tu as plus d'infos ici sur le "show unavailable providers in the list"  
Assigned to anne-lise.becousse@ext.adeo.com

Commented [14]: je me fais un cas en UAT et je contact Dinu, le tout aujourd'hui

Stream	Service Execution
Business Capability	5-Track & Supervise Service execution
Business activity	5.X
Business task	<b>Assign a Pro Manually</b>
Operator Role	Service execution operator
<b>What - As an operator, I want to ...</b>	
<ul style="list-style-type: none"> <li>&gt; perform all actions required to solve the issues related to the Find Pro to execute the service process.</li> <li>&gt; avoid a service execution process to be stuck at one stage of the execution.</li> <li>&gt; ensure continuity of the service execution and comply with the terms and conditions of the service sold to the customer and Service Providers</li> </ul>	
<b>How to - Process flow</b>	
<ol style="list-style-type: none"> <li>1. Look for the Service that you want to cancel : you can find the way to proceed by going to the tutorial <a href="#">[Open a customer Project and related Service order]</a></li> <li>2. Click on Service Management button of the service, then on Distribute to assign a new provider</li> </ol> 	
<p>4. Select the main store</p>	



5. Select the provider in the service provider list

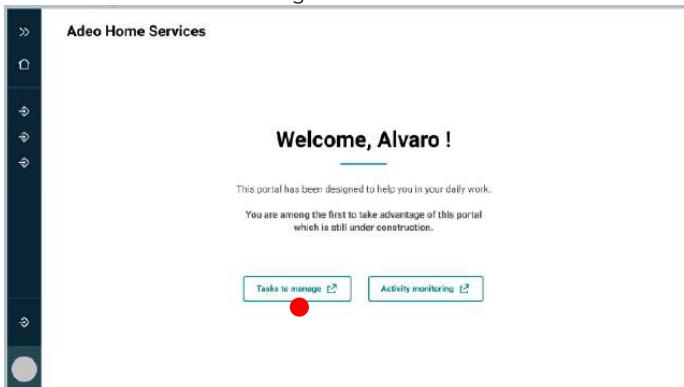


6. Select the worker in the worker list and click on assign provider



Status	The status will move from <b>Distributed</b> to <b>Scheduled</b> if the provider canceled
--------	---

	The status stays as <b>Scheduled</b> in case of no matching
important business rules	It is important to close the ticket after solving the matching issue
Event	The Provider has an action that creates a ticket in Zendesk
Notification	Notification sent to the customer if the provider has changed Notification sent to the provider if the date has changed Notification sent to the new provider if he has changed

Stream	Service Execution
Business Capability	5-Track & Supervise Service execution
Business activity	5.X
Business task	<b>Manage PRO No Show / is late</b>
Operator Role	Service execution operator
<b>What - As an operator, I want to ...</b>	
> Investigate the status of the service after a No Show information from the customer > Find a solution to the issue raised by the customer	
<b>How to - Process flow</b>	
1. Open SOP and follow the task to manage 	
2. Look for the concerned ticket in Zendesk	

All unsolved tickets

Provider contact start	Provider contact end	Provider name	Requester	Requested	Updated	Type	Provider's Name (Provider)
Elizabeth	Elizabeth	Elizabeth	Monsu	Thursday 00:01	Thursday 00:05	Ticket	
			Monsu	Wednesday 23:54	Wednesday 23:54	Ticket	
			Monsu	Wednesday 23:53	Wednesday 23:53	Ticket	
			In Pro	Wednesday 23:40	Wednesday 23:40	Ticket	DEFORAM
			Monsu	Wednesday 23:01	Wednesday 23:01	Ticket	
			In Progress	Wednesday 23:01	Wednesday 23:01	Ticket	
			Monsu	Wednesday 04:13	Wednesday 04:13	Ticket	
			Elizabeth	Wednesday 05:40	Wednesday 23:40	Ticket	
			Celine	12 Dec	Wednesday 23:31	Incident	posto
			Celine	11 Dec	11 Dec	Ticket	

- Open the ticket to check the issue. You can find the service Id

Provider no show

Elizabeth (operator) Elizabeth.Garcia - Garcia@posto.com.br Celine.Morais - from Deform Support

Requester: Elizabeth.Garcia

Assignee: Elizabeth.Garcia

Priority: None

Form: Request from Operator

Subject: [deform] - Deform.Carsone - garcia@posto.com.br Celine.Morais - from Deform Support

Service Id: 78555

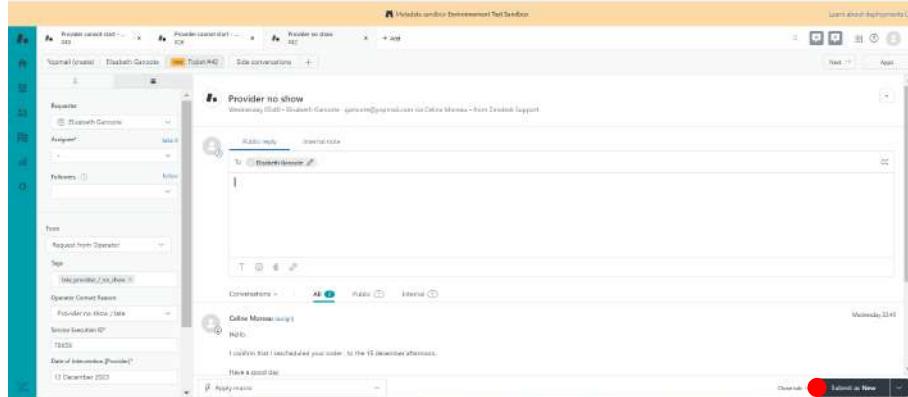
Date of Intervention (Provider): 13 December 2023

Comments:

- I confirm that I rescheduled your order to the 15 December afternoon.
- Have a good day

Actions: Apply memo, Close ticket, Submit as New

- Go to the SOP portal and contact the provider. If needed you can [\[reschedule\]](#) or [\[reallocate\]](#) the provider
- Once you solve the issue, you can close the ticket in Zendesk and check the information related to the task to manage



Status	The status of the service is <b>Confirmed</b>
important business rules	The actions to solve the issue must be managed out of the tool
Event	A task is created in Zendesk
Notification	Notifications are sent in case of reschedule or reallocation

Stream	Service Execution
Business Capability	5-Track & Supervise Service execution
Business activity	5.X
Business task	<b>Manage Extra Cost request</b>
Operator Role	Service execution operator
<b>What - As an operator, I want to ...</b>	
<ul style="list-style-type: none"> <li>&gt; collect the information of extra cost declared by the provider</li> <li>&gt; attach the extra cost to the service to ensure the invoicing</li> </ul>	
<b>How to - Process flow</b>	

Commented [15]: ZENDESK à décrire

1. You are now able to [\[Open a project and related service\]](#)

2. Click on the button Service Management

The screenshot shows the 'Project execution 143' interface. It displays three service items:

- Dépose de carrelage existant**:
  - Executed by: Johnny Cadillac (SARL, Jerem Elec)
  - Sold by: Randal Kolo-Musni
  - Status: Scheduled
  - Starting date: July 23, 2023
  - Ending date: July 27, 2023
  - Last update: July 10, 2023
- Pose du nouveau carrelage**:
  - Executed by: Johnny Cadillac (SARL, Jerem Elec)
  - Sold by: Randal Kolo-Musni
  - Status: Scheduled
  - Starting date: July 23, 2023
  - Ending date: July 27, 2023
  - Last update: July 10, 2023
- Finitions de carrelage**:
  - Executed by: Johnny Cadillac (SARL, Jerem Elec)
  - Sold by: Randal Kolo-Musni
  - Status: Scheduled
  - Starting date: July 23, 2023
  - Ending date: July 27, 2023
  - Last update: July 10, 2023

Each service item has a 'Service management' button, which is highlighted with a red circle.

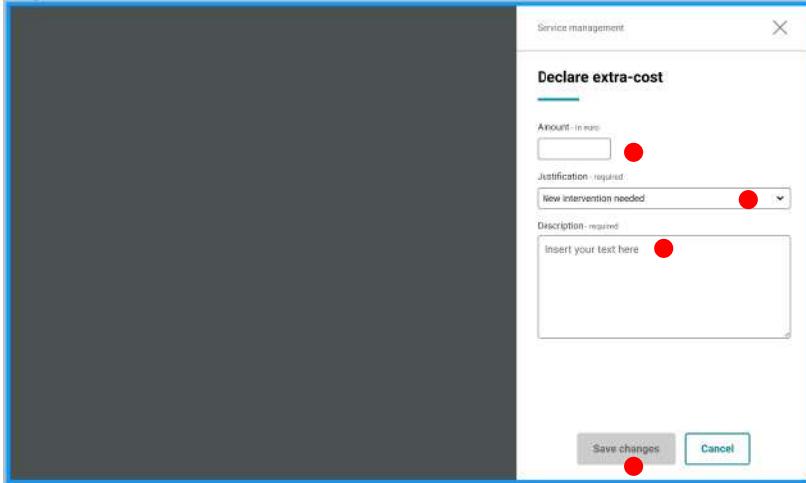
3. Click on the button Add extra cost

The screenshot shows a software interface for project management. At the top, there's a header bar with user information: 'Dernière visite: Henrique CRUZ DA SILV...', 'Phone: +23 09.04.53.34.12', 'Mail: Henriquecruz@gmail.com...', and 'Tope: 15 - La Touquet - Marquenterre'. Below the header, there's a sidebar with navigation links: 'Services' (highlighted in green), 'Documents', 'History', and 'Chat'. The main content area displays three service entries:

- Excecuted**: Installation - Service Execution 56888  
Dépose de carrelage existant  
Executed by: Johnny Cadillac (SARL, Jerem Elec)  
Sold by: Randal Kolo-Musni  
[Late order](#)
- Scheduled**: Installation - Service Execution 57756  
Pose du nouveau carrelage  
Executed by: Johnny Cadillac (SARL, Jerem Elec)  
Sold by: Randal Kolo-Musni  
[Late order](#) [Manual distribution](#)
- Scheduled**: Installation - Service Execution 56999  
Finitions de carrelage  
Executed by: Johnny Cadillac (SARL, Jerem Elec)  
Sold by: Randal Kolo-Musni  
[Late order](#)

At the bottom right of the main content area, a context menu is open with the following options: 'Reschedule', 'Distribute', 'Add extra-cost', 'Send contract', 'See contract code', and 'Cancel'. A red circle highlights the 'Add extra-cost' option.

- Fill the fields : amount , justification and description, then click on Save Changes  
We have 4 different types of extra costs :
  - Extra kilometers
  - Extra products needed to perform the job
  - Extra Services needed to perform the job
  - Extra transportation for delivery of the product by the provider himself
- The max amount that can be entered for extra costs requests can be set up at BU level (i.e. current LMES setup = 1000 €). This means that SOP will display an error message, and not register the extra cost if the amount is higher than 1 000 €).
- Extra costs will be monitored through a dedicated [financial monitoring dashboard](#).



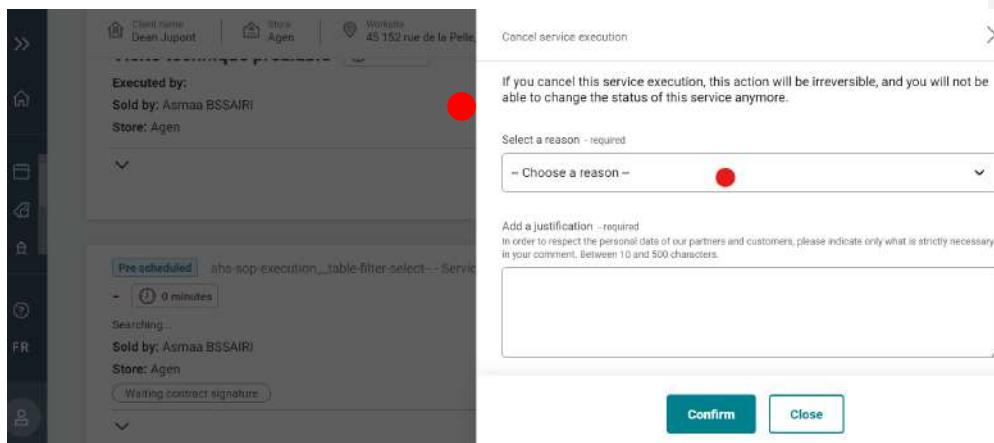
Status	The status of the service is <b>In Progress</b>
important business rules	<p>The extra costs asked by the Provider and validated by the operator are paid to the Provider</p> <p>If extra costs must be invoiced to the customers, they have to be integrated in Pyxis order under the 49 codes defined in SMD.</p> <p>The service will be integrated in the Service execution order and the pro will be paid for the extra costs</p> <p>Extra cost can be managed with decimals</p> <p>A maximum value is defined by BU as a parameter to avoid issue of over invoicing of extra cost</p>
Event	A task in Zendesk created when the provider asks for an extra cost
Notification	A Notification will be sent to SMA application (evolution to plan)

Stream	Service Execution
Business Capability	5-Track & Supervise Service execution
Business activity	5.X
Business task	<b>Cancel a service</b>
Operator Role	Service execution operator
<b>What - As an operator, I want to ...</b>	
<p>&gt; Cancel the service : Pyxis is master of the cancellation of the service            It is not possible to cancel from SOP, the working way of the feature is dedicated to inform about the need to contact Sales team to cancel if the information is coming from Execution teams.</p>	
<b>How to - Process flow</b>	
<ol style="list-style-type: none"> <li>1. Look for the Service that you want to cancel : you can find the way to proceed by going to the tutorial <a href="#">[Open a customer Project and related Service order]</a></li> <li>2. Click on the button Service Management and click on cancel</li> </ol>	

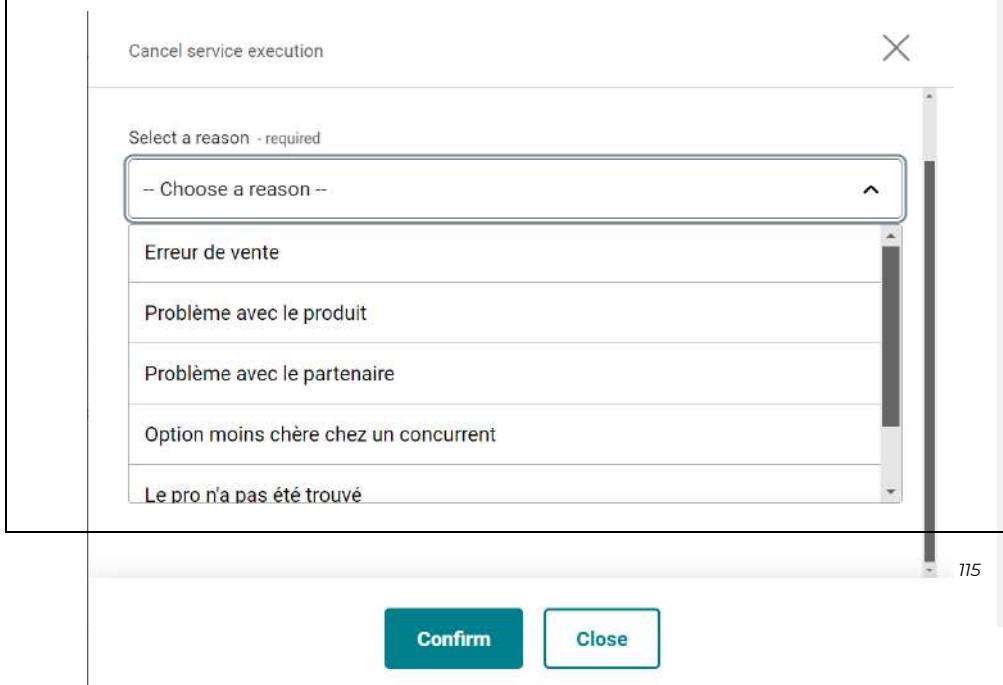


3. The following screen appears : fill the reason of cancellation and click on Confirm button

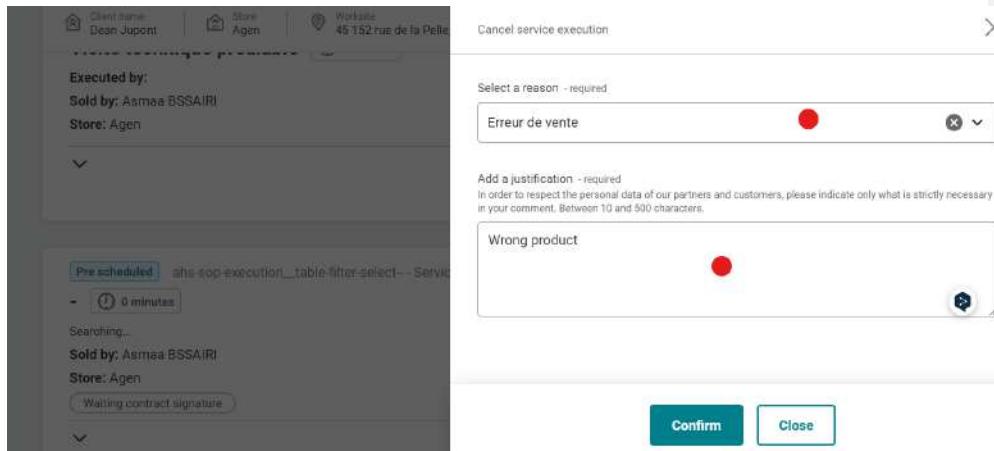
4. You need to choose a reason



5. The dropping list will appear with reasons to cancel the order



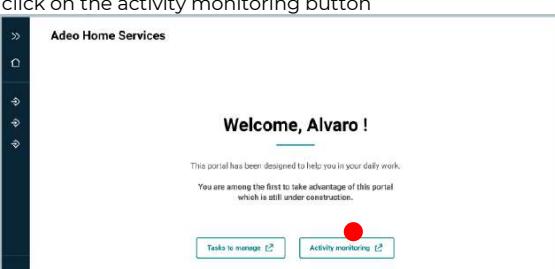
6. You need to add a justification to cancel the service execution



7. The new status of the service is Cancelled

Status	The status of the service is <b>Canceled</b> <b>This action can be done under the below conditions :</b> 00 PRE SCHEDULED (Role : Execution Admin) 01 SCHEDULED (Role : Execution Admin) 02 DISTRIBUTED (Role : Execution Admin) 04 CONFIRMED (Role : Execution Admin)
--------	---

	05 IN PROGRESS (Role : Execution Admin)
important business rules	You cannot go back on this status If the cancellation is coming from Service execution teams, the Pyxis team must be informed There is no refund from SOP, the refund must be managed at Pyxis level by the sales teams.
Event	No event linked to this action
Notification	Notification is sent to the Customer and to the Provider

Stream	Service Execution
Business Capability	5-Track & Supervise Service execution
Business activity	5.X
Business task	<b>Monitor Pending TV report</b>
Operator Role	Service execution operator
<b>What - As an operator, I want to ...</b>	
> monitor the pending TV report (The Pro has not yet updated the TV report in SMA or SPP)	
<b>How to - Process flow</b>	
<p>1. Open SOP and click on the activity monitoring button</p> 	
<p>2. You arrive on the monitoring dashboard in Power BI, a. please click on Pending Quotes page</p>	

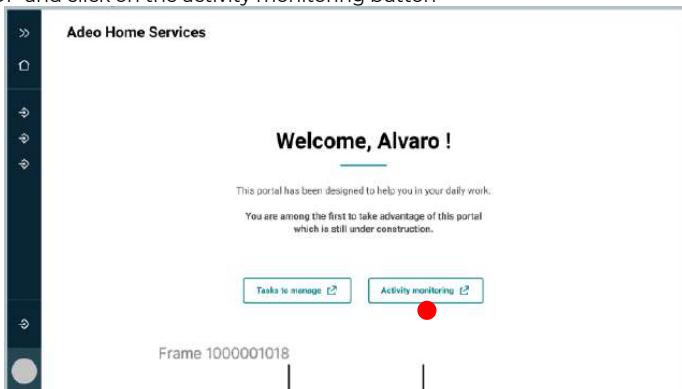
b. once in the page please click on Provider Upload 48h or 7d

The screenshot shows the 'Alertes' section of the dashboard. On the left, there's a sidebar with links like 'Devis en attente' (highlighted with a red circle) and 'Provider Upload 48h'. The main area displays two alert categories: 'Alertes clients' and 'Alertes artisan'. Under 'Alertes clients', there are four boxes: 'client response 14d' (yellow), 'provider upload 7d' (pink), 'client response 7d' (green), and 'Provider upload 48h' (yellow). Below these are sections for 'Quote status' and 'Alertes LM'. To the right, a table lists alerts with columns for SX Id, Px id, Description Alert, and Date de création. The last row in the table also has a red circle highlighting the 'Provider upload 48h' entry.

Sx Id	Px id	Description Alert	Date de création
242090	129011	Waiting for provider to upload the quote for 48h - 13/02/2024	
243688	129072	Waiting for provider to upload the quote for 48h - 15/02/2024	
239277	129352	Waiting for provider to upload the quote for 48h - 03/02/2024	
240755	129294	Waiting for provider to upload the quote for 48h - 08/02/2024	
243131	129353	Waiting for provider to upload the quote for 48h - 17/02/2024	
240769	127917	Waiting for provider to upload the quote for 48h - 06/02/2024	

2. You can filter then in the alerts of all TV reports not yet uploaded by the Provider. (You can check all Service waiting for TV report from 48h or 7Days)
3. You can then click on the SX Number to access directly the Service you want to manage.
4. When you entre the Service, you can check who is the PRO and contact him to remind him to upload the TV

Status	The status of the Technical visit / Quotation flow is <b>done</b>
important business rules	The reminders are done out of the tool <b>The description of the alert trigger is available in the home page of the PBI : AHS Activity Monitoring Dashboard Alert</b> <a href="#">AHS Activity monitoring dashboard Alerts</a>
Event	No event linked to this task
Notification	No notification linked to this task

Stream	Service Execution
Business Capability	5-Track & Supervise Service execution
Business activity	5.X
Business task	<b>Monitor Pending quotes</b>
Operator Role	Service execution operator
<b>What - As an operator, I want to ...</b>	
> monitor the pending quotes without answer from the customer to ask him the status	
<b>How to - Process flow</b>	
<p>1. Open SOP and click on the activity monitoring button</p>  <p>2. Click on pending quotes :</p>	

This dashboard aims to provide a monitoring tool over AHS executions.

The dashboard is organized in overviews and prefiltered pages. You can navigate through these pages using the left side menu. You can use the arrow button to come back to the previous visualization and the home button to come back here.

The dashboard language depends on your powerbi preferences. Data is filtered depending on you BU (we use the email domain to identify your BU).

Alerts have been defined to help you identify executions that require special attention or action. Each alert category is accessible via a specific page in the navigation menu. You'll find more details on alerts in the attached gsheet.

For any doubt about this dashboard please have a look at our documentation on Gitbook. If you still have some doubts contact us at ahs-data@adeo.com

- You arrive on the monitoring dashboard in Power BI and you can click on the service Id to consult the details

Order id	Px id	Alert description	Creation Date	Status	Dept
11014	1-1014	Waiting for provider to upload the quote for 7 days	2023/05/01	ON HOLD	Technical visit - Completed successfully - CONFIRMED NO PREFERENCES
11015	1-1015	Waiting for provider to upload the quote for 7 days	2023/05/01	ON HOLD	Technical visit - Completed successfully - CONFIRMED NO PREFERENCES
11016	1-1016	Waiting for provider to upload the quote for 7 days	2023/05/01	ON HOLD	Technical visit - Completed successfully - CONFIRMED NO PREFERENCES
11017	1-1017	Waiting for provider to upload the quote for 7 days	2023/05/01	ON HOLD	Technical visit - Completed successfully - CONFIRMED NO PREFERENCES

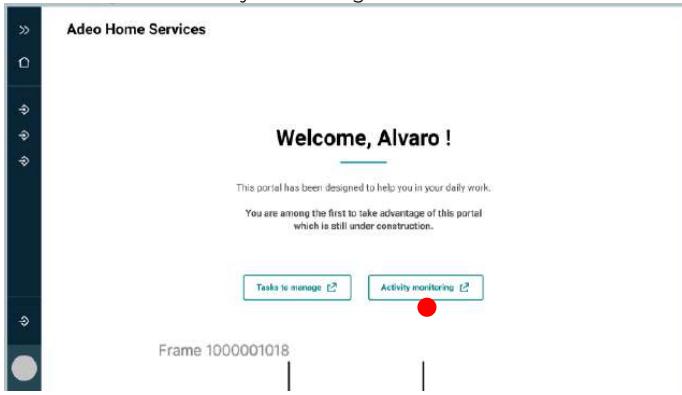
Provider alert : The Technical visit / Quotation flow / Provider Quote is not uploaded

LM alert : The quotation must be presented to the customer

Customer alert : The Customer answers is awaited

- You are redirected in SOP in the Service execution concerned
- You can check the **[customer contact information]** to contact him
- You can check the providers information to remind him to upload the quotation

Status	The status of the Technical visit / Quotation flow is <b>done</b>
important business rules	The reminders are done out of the tool <b>The description of the alert trigger is available in the home page of the PBI : AHS Activity Monitoring Dashboard Alert</b> <a href="#">AHS Activity monitoring dashboard Alerts</a>
Event	No event linked to this task
Notification	No notification linked to this task

Stream	Service Execution
Business Capability	5-Track & Supervise Service execution
Business activity	5.X
Business task	<b>Monitor Late check-out from the Provider</b>
Operator Role	Service execution operator
<b>What - As an operator, I want to ...</b>	
> monitor the late check-out from the Provider after 48h, then 7 days to remind him to check out.	
<b>How to - Process flow</b>	
1. Open SOP and click on the activity monitoring button	 <p>The screenshot shows the Adeo Home Services portal. On the left is a dark sidebar with icons for navigation. The main area has a "Welcome, Alvaro!" message at the top. Below it, there's some introductory text about the portal being under construction. At the bottom, there are two buttons: "Tasks to manage" and "Activity monitoring". The "Activity monitoring" button is circled in red.</p>
2. You arrive on the monitoring dashboard in Power BI and you can click on the service Id to consult the details	

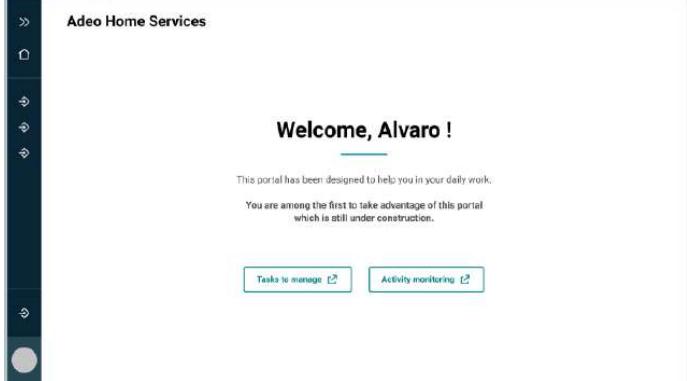
The screenshot shows the ANS activity monitoring dashboard. On the left, there's a sidebar with navigation links like Home, Overview, Activity Overview, Operational Overview, Service Locations, Alerts, Monitoring, and Help. The main area has a search bar at the top. Below it, there are several sections: 'Alerts' (with a red background), 'Provider' (listing 283 providers), and a table titled 'Alerts' with columns for ID, Alert description, Time since check-in, Creation Date, Cluster, Share, Type, Status, and Provider. The table contains six rows of alert data. At the bottom, there's a table titled 'Order Id' with columns for Date, Dept, Product number, Product/Service label, Qty, Sum of € (excl. taxes), Sum of € (incl. taxes), Status, and Delta.

3. You are redirected in SOP in the Service execution [concerned]
4. You can check the providers information to remind him to upload the quotation

Commented [16]: Insert printscren

Status	The status of the Technical visit / Quotation flow is <b>In progress</b>
important business rules	The reminders are done out of the tool
Event	No event linked to this task
Notification	No notification linked to this task

## 6. Manage claims & feedback

Stream	Service Execution
Business Capability	6-Manage claims
Business activity	6.X
Business task	<b>Work closing form not signed</b>
Operator Role	Service execution operator
<b>What - As an operator, I want to ...</b>	
> Manage the claim that appears at the end of the execution of the service > Check why the work closing form has not been signed > Make the Work closing Form signed by the Customer	
<b>How to - Process flow</b>	
1. As Service Execution operator, you follow the task in Zendesk accessible from SOP Homepage	
	
2. At the end of the job, if the customer did not sign the work closing form, you will receive a task to manage in Zendesk after automatic reminders : D+7 days	
3. Open the Zendesk ticket to look for the order information	
4. Go to SOP to find the customer information and ask him/her to sign the Work closing form. As an operator the following actions will be also available in SOP: <ul style="list-style-type: none"><li>- resend the WCF to the customer</li><li>- upload a WCF manually (in case of paper WCF)</li><li>- close the WCF manually on the customer's behalf</li></ul>	



Status	The status is <b>Waiting for WCF signature</b>
important business rules	<p>The Work closing form is sent to the customer once the Pro did the check-out (or <a href="#">signed digitally by Pro</a> for LMFR)</p> <p>In happy flow case, the customer signs the work closing form online through Adobe</p> <p>The Work closing form is automatically uploaded in Documents of SOP</p> <p>Reminder :</p> <p>From Day 1 To day 7 : Daily email from Adobe Sign reminder with link</p> <p>⇒ + 7 days: task management trigger in Zendesk assigned to call to the client</p>
Event	The task has been created because the customer did not sign the work closing form
Notification	The Customer is notified to send the Work closing form by Adobe before the opening of the task.

Stream	Service Execution
Business Capability	6-Manage claims
Business activity	6.X
Business task	<b>Work closing signed with reserves</b>
Operator Role	Service execution operator

#### What - As an operator, I want to ...

- > Manage the claim that appears at the end of the execution of the service : reserves, aftersales, warranty
- > Check the reserves declared by the customer in the Work closing form
- > Manage the reserves with the customer

#### How to - Process flow

1. As Service Execution operator, you follow the task in Zendesk accessible from SOP Homepage
2. At the end of the job, if the customer signed the work closing form with reserves, you will receive a task to manage in Zendesk

The screenshot shows the Zendesk interface with the title 'All unsolved tickets'. The sidebar lists various ticket categories like 'Unclassified requests', 'Customer', 'Tech issues', etc. The main table lists several tickets, with one specific ticket highlighted by a red circle: 'Work Closing Form signed with reserves'.

Subject	Requester	Requested	Updated	Type	Provider's Name (Provided)
Cancelation asking	Audrey Permal	Today 01:57	Today 03:46	Ticket	
Test		Thursday 03:36	Thursday 06:36	Ticket	
WRONG		Thursday 03:41	Thursday 03:41	Ticket	
FROMD		Thursday 03:59	Thursday 03:59	Ticket	
Update customer address	Elizabeth Gencore	Thursday 03:54	Thursday 03:54	Ticket	
Customer wants to reschedule in January	CLÉMENT JOVY	Thursday 03:52	Thursday 03:53	Ticket	
Work Closing Form signed with reserves	Céline Moreau	Thursday 03:58	Thursday 03:58	Ticket	
Provider ticket start - broken product	Mirella	Thursday 02:17	Thursday 02:17	Ticket	
Work Closing Form signed with reserves	Mirella	Wednesday 23:54	Wednesday 23:54	Ticket	
The work closing form has been signed with reserves. Please look into the document to read the reserves.	Mirella	Wednesday 23:53	Wednesday 23:53	Ticket	
In Pro		Wednesday 23:46	Wednesday 23:46	Ticket	DEBORAH
Provider cannot start - broken product	Céline Moreau	Wednesday 23:40	Wednesday 23:40	Ticket	

3. Open the ticket and check the Work Closing Form and check the order information.

**Commented [17]:** We are checking the availability of the WCF in ZDSK - @celine.moreau@adeo.com could you please let me know the status ?

4. Go to SOP to find the customer information based on the order information and contact him/her to inquire about the reserves. The operator will also be able to:
- **(re-)send the WCF manually** from SOP if needed:

- **upload a WCF manually** (in case of paper WCF):

Add WCF to the service

Select a file to upload

The customer has raised reservations.  
 The client has not raised any reservations.

Upload the WCF Cancel

- manually close the WCF on behalf of the customer from SOP:

Waiting for customer validation Installation - Service Execution 74790

Instalação de ar condicionado monosplit inferior ou igual a 12000 btus std

Executed by: 179 - Deborah Soutoens (01 - instalador teste)

Sold by: -

Store: TESTE

Print Order: 4677540

Service Management

- Send WOF to the customer
- Add WCF to the service
- Close WCF manually**
- Open a rework

Close WCF manually

**Do you really want to close the WCF manually ?**

(\*) Complete this action only if your client has not responded after 7 days

Add a justification - required  
In order to respect the personal data of our partners and customers, please indicate only what is strictly necessary in your comment.

Cust has not signed and 7 days have passed

**Confirm closing** **Cancel**

5. You can close the ticket in Zendesk with the appropriate status

The screenshot shows a Zendesk ticket interface with the following details:

- Ticket Information:** Work Closing Form signed with reserves, ID #12, Status: Closed.
- Comments:** A yellow-highlighted comment from Celine Mornet states: "The work closing form has been signed with reserves. Please look into the document to read the reserves."
- Action Bar:** Includes buttons for "Submit as New", "Submit as Open", "Submit as Pending", and "Submit as Solved".

**Status Summary:**

Status	The status is <b>Done</b>
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important business rules	The Work closing form is sent to the customer once the Pro did the check-out In happy flow case, the customer signs the work closing form online through Adobe The Work closing form is automatically uploaded in Documents of SOP
Event	The task has been created because the customer signed the work closing form with reserves
Notification	No notification

Stream	Service Execution
Business Capability	6-Manage claims
Business activity	6.X
Business task	<b>Rework flow</b>
Operator Role	Service execution operator
<b>What - As an operator, I want to ...</b>	
<ul style="list-style-type: none"> <li>&gt; Manage the claim that appears by launching a rework on the customer worksite</li> <li>&gt; Follow the rework flow as a normal operation flow</li> <li>&gt; Confirm the removal of reserves</li> </ul>	
<b>How to - Process flow</b>	
<ol style="list-style-type: none"> <li>1. As Service Execution operator, you can launch a rework flow by clicking on the call to action "Service management" button on the service execution page and click on "Open a rework"</li> </ol>	

**Project detail 5767**

2. Select on the screen the service - 49 code to operate according to the initial service not compliant. This allows the operator to select a provider with the good specialty to operate a rework service.

**Project detail 5767**

3. Select a root cause for opening a rework amongst the 6 options available (**Product:** defective, wrong/incorrect, damaged; **Service:** execution defect, assignment issue, execution scope):

**Project detail 5767**

List of root causes :

- Product - Defective
- Product - Wrong /Incorrect
- Product - Damaged
- Service - Execution defect
- Service - assignment issue
- Service - Execution scope

4. As an optional field, a Pyxis order number can be typed in order to create a link between the rework and a Product Pyxis order needed to solve the problem.  
NB: if the Pyxis order number is filled, then a store will have to be selected in order to attach the order to the correct store.  
Following this, a short description to recap the reason for opening a rework will have to be added in the dedicated field in order to be able to confirm the whole action.

**Project detail 5767**

**Rework**

**Select the services who make a rework**

Insert Pyxis order number - optional  
4320779

What is the main reason ? - required  
Service - execution defect

Add a description - required  
Between 10 and 200 characters. In order to respect the pyxis rule, indicate only what is strictly necessary in this comment.

Add a store  
A Coruña  
Alcalá de Henares  
Las Rozas  
Madrid Barajas

Confirm Cancel

5. The SX will now appear as a “rework” that needs to be manually assigned to a provider:

**Project detail 5767**

**Reworks**

Pyxis Order: 4320779

Service Management

Starting date: 18/06/2024 (AN)

Creation date: 17/06/2024

49000266 - Toma de medidas previa si la instalación no se ejecuta - Quantity: 1

Note(s): 1 Document(s): 0 Picture(s): 0 History: 4 Products: 0

Last update: 17/06/2024  
Creation date: 17/06/2024

6. You can now schedule the rework service and assign the provider. The same provider as the initial service is proposed by default but you can change.

[← Scheduling : Service Execution 75176](#)

7. Assign the worker:

8. The service is created and you can identify the correlation between the rework SX and the non compliant one thanks to the tags 'rework' and 'non compliant'

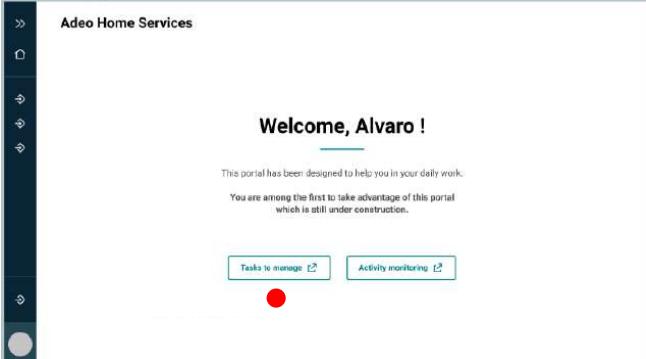
6. You can [\[manage the extra cost\]](#) according to the responsibility of the non compliant initial

service. If the provider needs to be paid for the rework, you add the extra service cost accordingly.

For more detail on the business process, pls refer to the presentation [\[Rework flow\]](#)

Status	You can open the rework when the status is from <b>Waiting for WCF</b> to <b>Closed</b> . The status of the initial service becomes <b>Not compliant</b> The statuses of the rework service are the standard ones
important business rules	<p>There is no contract signature for the rework service</p> <p>The rework SX is not linked to the Pyxis orders added by the operator and the products included will not be displayed in the same SX.</p> <p>You define the cost to pay or not to the Provider by defining the Extra cost linked to the rework service.</p> <p>The rework service is based on the 49 codes of the Technical visit / Quotation flow</p>
Event	You open the rework to manage the claim, a task has been created because the customer signed the work closing form with reserves or following to a warranty claim opened by the customer after a SX has been terminated without any reserve. You can put the ticket number in the Notes part to link the task and the rework
Notification	The notifications are the same as a standard installation

## 7. Invoice & Pay

Stream	Service Execution
Business Capability	7-Invoice & Pay
Business activity	7.1
Business task	<b>Invoice dispute management</b>
Operator Role	Service execution operator
<b>What - As an operator, I want to ...</b>	
> manage the dispute of the invoice by the provider > monitor any financial aspects (invoicing included) related to the executed service executions	
<b>How to - Process flow</b>	
1. As Service Execution operator, you follow the task in Zendesk accessible from SOP Homepage	
2. During the invoicing phase, the provider can declare an invoice dispute in SMA/SPP form. You will receive a task to manage in Zendesk	
3. Open the ticket to check the details of the invoice dispute.	
4. Contact the provider to solve the issue	
5. Close the ticket in Zendesk	
In order to monitor invoices by their statuses the operators will have access to a dedicated <a href="#">financial monitoring dashboard</a> .	
Status	The status of the service is <b>Closed</b>
	<small>Commented [18]: @celine.moreau@adeo.com can you pls confirm that the status is closed ?</small>

important business rules	No specific business rule
Event	A task management is created in Zendesk
Notification	No notification

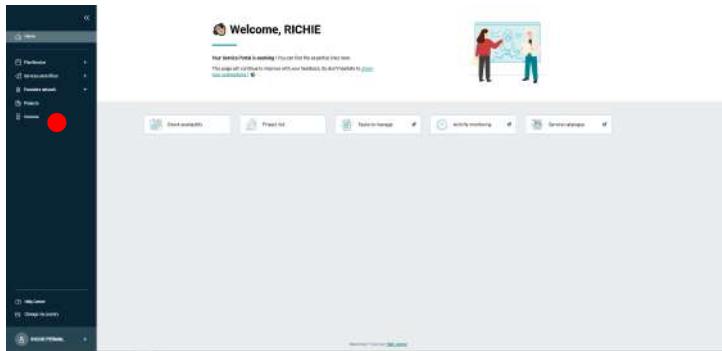
Stream	Service Execution
Business Capability	7-Invoice & Pay
Business activity	7.2
Business task	<b>Invoice consultation</b>
Operator Role	Service execution operator

#### What - As an operator, I want to ...

- > Consult the invoice of a provider
- > Get information on invoicing to answer to the Provider

#### How to - Process flow

1. As Service Execution operator or Provider Success Manager, you will find in the bar on the left a dedicated menu to access to the invoicing :



2. You can consult the list of invoices, download or view the invoices

3. You can filter by provider or date

4. The list of status is:

- **Pending**: The invoice is waiting for provider's validation or for them to send their own invoice
  - **In Progress**: The invoice has been generated and is about to be paid
  - **Payment sent**: The payment order has been issued. The pro will receive the payment or has already received it.

Status	The Invoice appears when the status of the service is Done
important business rules	No specific business rule
Event	No event for the moment

Notification	No notification
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## 8. Support & Manage