



SERVICE OPERATOR PORTAL (SOP) User guide

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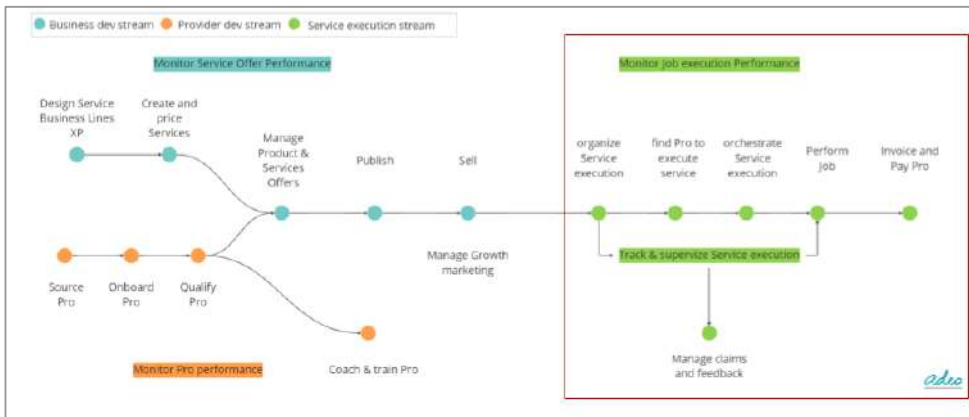
Welcome in the Service Operator Portal User guide

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

Commented [2]: Gitbook ne parle pas de "fiscal nbr", mais de "client ID", il y a une nuance ? <https://app.gitbook.com/o/0gRIAkSocTvnN36NTnDZ/s/oKvIlnxLGVE1aAjtEXaj/business-process/px-grouping-rules>

Commented [3]: J'ai fait cela en arrivant, j'ai peut-être fait un raccourci, Gitbook doit avoir raison

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.

Statutes 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 timeframe 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. Statutes of PX (Project Execution)

Status	Description	Business rules
New	a new Project Execution (PX) has been created.	<ul style="list-style-type: none">• All Service Execution (SX) are in status "Pre scheduled"• Once one of Service Execution (SX) moves to scheduled then status of PX moves to Ongoing
Ongoing	Project Execution is ongoing (it means that at least one of the Service Execution is scheduled)	<ul style="list-style-type: none">• at least one of the Service Execution (SX) is in Scheduled status
<div> Canceled</div>	Project Execution is canceled	<ul style="list-style-type: none">• All Service Execution (SX) are in status Canceled
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">• The Pex stays open 90 days after the closure of the last Sx in case of new service added with the same context (parameter)

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

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

		<p>creation if not generated yet (I is a parameter)</p> <ul style="list-style-type: none"> When Service is generated and sent by email, Service order is waiting for contract signature from customer Reminders for contract signature are sent automatically Task "Contract Not Signed" is created after expiration of reminders : Adobe reminders to the customer daily and task opened in Zendesk after 72h 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.
<div>Scheduled</div>	<p>Contract has been signed by customer</p> <p>Conditions to move to next Statuts :</p> <ul style="list-style-type: none"> Pro must be identified (must match to the context) 	<ul style="list-style-type: none"> triggers the Automatic Assignment feature to identify an available PRO <p>Based on the following criterias :</p> <ul style="list-style-type: none"> > Professions & Specialties > Intervention Zone > Theoretical Availability for the date > Not already booked for the

		<p>date + Declared unavailabilities > Available for the duration of the Service(s)</p> <ul style="list-style-type: none"> if no Pro found > task is created to manage Pro allocation manually using Assign a Pro manually feature 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.
<div>Distributed</div> <p>Distributed</p>	<p>Pro has been identified and Job has been proposed to him</p> <p>Conditions to move to next Statuts : che 2 methods to assign a Pro :</p> <ul style="list-style-type: none"> Bid > Job is proposed to the identified PRO. he can accept or refuse Direct Assignment > Job is booked automatically to the identified PRO. 	<ul style="list-style-type: none"> Assign Pro methods can be setup @ BU level as parameters Bid > Timeout of the job offer. Once timeout is reached, assignment is triggered again with another Pro Bid > Pro can refuse the job. In this case Service goes back to Scheduled status Direct assignment > Pro cannot refuse the Job status pass automatically in Confirmed for both method : Assigned Pro must select a worker by his

		<p>own</p> <ul style="list-style-type: none"> 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.
<div>Confirmed</div> <p>Confirmed</p>	<p>Pro has accepted the Job (bid mode) or Pro is booked automatically (direct assignment)</p> <p>Conditions to move to next Statuts :</p> <ul style="list-style-type: none"> Pro must perform the check in 	<ul style="list-style-type: none"> Provider must accept Job in SMA if bid Provider has accepted automatically if direct assignment in both case Provider must assign a Worker 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.
<div>In progress</div> <p>In progress</p>	<p>Pro starts the job once he is in customer worksite address by doing the check-in</p> <p>Conditions to move to next Statuts :</p>	<ul style="list-style-type: none"> PRO check-in is mandatory in the app it is possible for the Pro not do the check-in

	<ul style="list-style-type: none"> • Pro must perform the Check out to close the Job and get paid 	<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"> • 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.
<div>Waiting for WCF</div> <p>Waiting for WCF</p>	<p>Pro makes the check out</p> <p>Conditions to move to next Statuts :</p> <ul style="list-style-type: none"> • Customer must sign WCF (can be with or without reserves) 	<ul style="list-style-type: none"> • PRO Check-out is mandatory in the app • it is mandatory to make the check-in to be able to make the check-out • Pro Check out triggers automatically work closing form. WCF is sent automatically to the customer by email. Customer must sign it • Customers can formalize reserves in the WCF directly. When Reserves are formalized, it automatically creates task management in Zendesk. • Customers can also decide not to sign. After Adobe reminders

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

		Rework operation (New service Order is created automatically with same PRO no need to sign contract)
<div>Closed</div>	Customer has fulfilled the Survey (or system time out)	<ul style="list-style-type: none"> Job is completely closed. Cannot be reopened Payment of the Pro is active in parallel Operator can trigger Rework operation (New service Order is created automatically with same PRO no need to sign contract)
<div>Cancelled</div>	Service Order has been canceled PYXIS is the master of customer order. To cancel a Service Order, PYXIS order must be canceled first. Cancel PYXIS order will automatically cancel service Order	<ul style="list-style-type: none"> If PYXIS order is canceled then Service Order is automatically canceled (whatever if order is paid or not) 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 ...) The cancellation status is definitive. Once the order is canceled, a new order must be created to reopen a Service order
<div>Non compliant</div>	A claim flow (rework) is needed	<ul style="list-style-type: none"> 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.

3. Activities mapping by status

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

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

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

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

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

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

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	-
Additionalnall 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

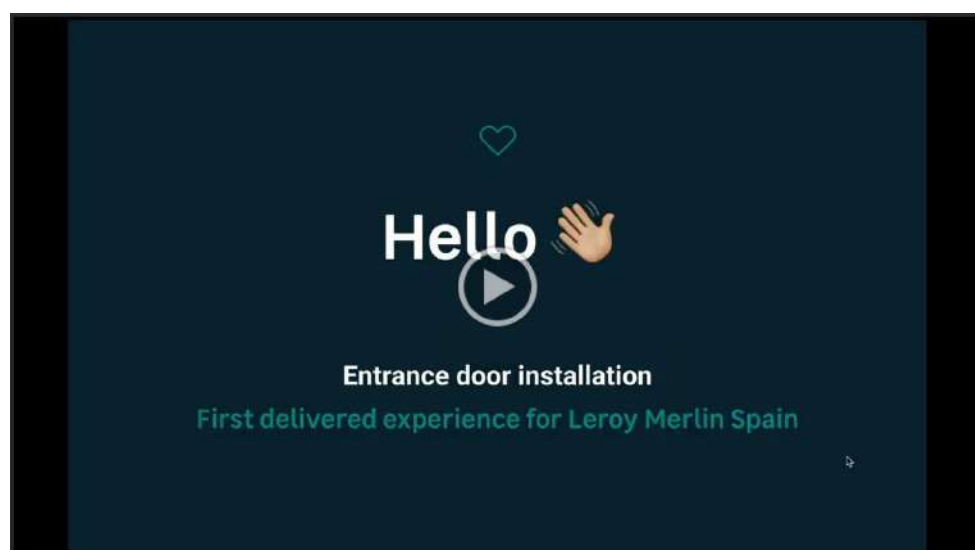
AHS platform is covering, for the MVP experience, two main Service Lines :

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.

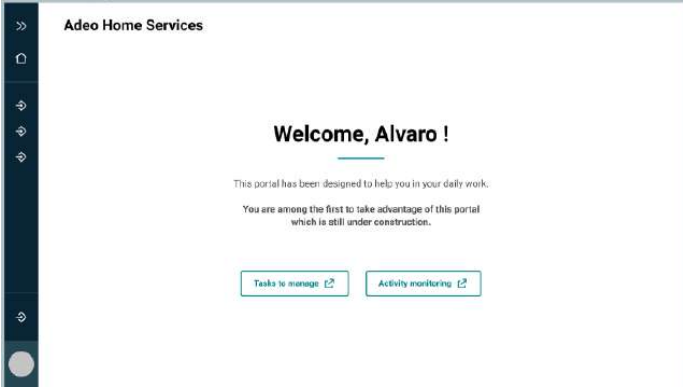
You can find the description of the roles in the following documents : [SOP - Global presentation - March 25](#)
[AHS - Features Map](#)

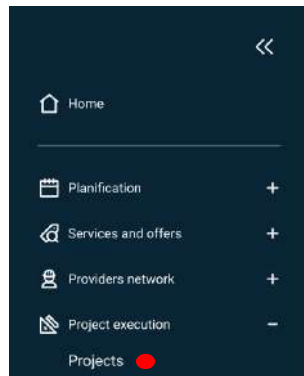
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Schedule service date (AFTER order is created)	33
Generate contract, send it to the customer, paper flow, (LMES only) skip the contract stage	36
Update customer contact	44
Change worksite address (BEFORE Pro allocated)	46
Change worksite address (AFTER Pro allocated)	49
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2. Find Pro to execute the Service	55
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3. Orchestrate Service Execution	60
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Monitor Contract signature & make contract signed by Customer	83
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5. Track & supervise Service Execution	94
Monitor Contract signature & make contract signed by Customer after automatic reminders	94
Monitor Pro automatic assignment	95
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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	Open a customer Project and related Service order
Operator Role	ALL users
What - As an Services Sales operator, I want to ...	
<ul style="list-style-type: none"> > Open Service Operator Portal > Open the Project list functions > Search for a customer Project > Get all the information about a Service Order 	
How to - Process flow	
<p>1. Open Service Operator Portal</p>  <p>2. Open Planification menu > "Project Execution" > "Projects" menu</p>	



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	TAGS	PRICE	DATES	CLIENT
138	To plan	Installation - Bombas de c...		150.00 €	Planned : 21/03/2023 PM Last action : 19/03/2023	Henrique CRUZ 05 0453 34 15
143	Planned	Multiservices		450.00 €	Planned : 21/03/2023 PM Last action : 19/03/2023	Henrique CRUZ 05 0453 34 15
156	Planned	Multiservices		150.00 €	Planned : 21/03/2023 PM Last action : 19/03/2023	Henrique CRUZ 05 0453 34 15
140	Planned	Multiservices		150.00 €	Planned : 21/03/2023 PM Last action : 19/03/2023	Henrique CRUZ 05 0453 34 15
218	Canceled	Multiservices		150.00 €	Planned : 21/03/2023 PM Last action : 19/03/2023	Henrique CRUZ 05 0453 34 15
135	Closed	Installation - litchiers		150.00 €	Planned : 21/03/2023 PM Last action : 19/03/2023	Henrique CRUZ 05 0453 34 15
244	Closed	Multiservices		150.00 €	Planned : 21/03/2023 PM Last action : 19/03/2023	Henrique CRUZ 05 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

0 results

Search a project

Filter

PROJECT	STATUS	SERVICE	TAGS	PRICE	DATES	CLIENT
138	To plan	Installation : Borne de c...		15001 €	Planned: 21.05/2023 PM Last action: 9/10/2023	Henrique CRUZ h.cruz@pyxis.fr
143	Planned	Multi-services		45001 €	Planned: 21.05/2023 PM Last action: 9/10/2023	Henrique CRUZ h.cruz@pyxis.fr
EX 30805	In progress	Dépose de carrelage exte...	Leak order	15001 €	Checkout: July 27, 2023	
EX 27716	Scheduled	Pose de nouveaux carrelage	Manual distrib...	15001 €	Starting date: July 23, 2023	
EX 24019	Scheduled	Finitions de carrelage	Leak order	15001 €	Starting date: July 24, 2023	
136	Planned	Multi-services		15001 €	Planned: 21.05/2023 PM Last action: 9/10/2023	Henrique CRUZ h.cruz@pyxis.fr
146	Planned	Multi-services		15001 €	Planned: 21.05/2023 PM Last action: 9/10/2023	Henrique CRUZ h.cruz@pyxis.fr

Rows per page: 20 1 of 8 items

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5. Different Service Execution exist :

a. Technical visit / Quotation flow Service execution

Pré-programmé • Visite Technique - Execution de services 86572

Visite technique préalable 31 min 45.00 € 40.00 €

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

Vendu par: THIBAUT MASSE

Magasin: Lesquin

En attente signature

✓

Dernière mise à jour: 03/10/2024

Date de création: 03/10/2024

b. Installation Service execution

Pré-programmé • Installation - Execution de services 115410

Fft pose chauff eau elec 200l max tvared 2 h 0.00 € 0.00 €

Système de vente à vide: 4650191

Gestion du service

Date de planification initiale: 30/04/2025

Date prévue: 30/04/2025

Date de fin prévue: 30/04/2025

Vendu par: -

Magasin: -

En attente signature

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

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

^

Dernière mise à jour: 08/04/2025

Date de création: 08/04/2025

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

Pré-programmé • Visite Technique - Execution de services 1165 (HSE: 25041744631676789 - v0)

Visite technique pour pose de cuisine 1 h 90.00 € 1.23 €

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

Vendu par: Sara SENTOUH

Magasin: Agen

En attente signature

✓

Dernière mise à jour: 14/04/2025

Date de création: 14/04/2025

d. Pending Installation linked to a pre-estimation

En attente de la visite technique

Visite Technique - Execution de services 1150

(HSE: 25041744378944773 - vt)

Commande Pyxis: 836416

Gestion du service

Cod oap rt obl fenetre tva std robson

4 h 30 min

373.00 €

30.00 €

Réalisé par:

Vendu par: Sara SENTOLH

Magasin: Agen

Date de planification initiale: 03/07/2025

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

Prévu

Installation - Execution de services 1190

(HSE: 25041744377856942 - vt)

Commande Pyxis: 836414

Gestion du service

Depose cuisine red

7 h 48 min

550.00 €

0.00 €

Vendu par: Sara SENTOLH

Magasin: Agen

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

En cours

Travailler - Execution de services 11395

Commande Pyxis: 835013

Gestion du service

Visite technique wc

1 h 30 min (cote)

0.00 €

0.00 €

Réalisé par: 887 - Test DTS Plombier (354 - DTS Plombier)

Vendu par: Thomas HAUDQUIERT

Magasin: Agen

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"> Project list is dedicated to access Service orders in order to perform some actions or access further information The main function of Project list is not to monitor Service Execution. To monitor service please refer to [Monitor Service Execution] feature After the Pyxis order creation, the Service execution order is scheduled 48h (excluded saturday and sunday) after the Pyxis order installation date 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 The service execution order is created once the Pyxis order is created. There is no link with the payment.
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)

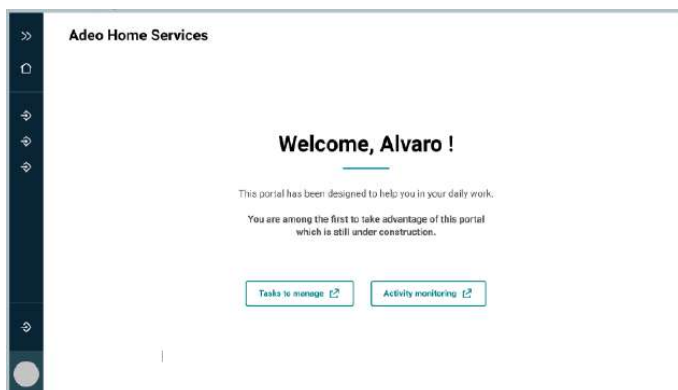
Stream	Service Execution
Business Capability	1-Organize service execution
Business activity	1.1-Plan service execution
Business task	Check availability (BEFORE order is created)
Operator Role	Service Sales operator

What - As an Services Sales operator, I want to ...

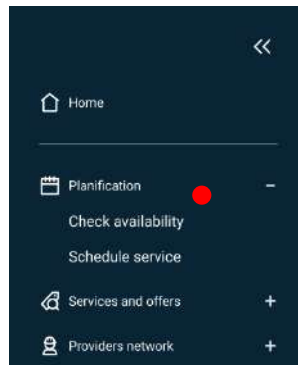
- > inform the Customer on when the service could be done
- > Seller opens Service Operator Portal (SOP) and checks availability using the agenda view
- > Seller can :
 - fill one or several 49 codes,
 - the postcode of the customer
 - select a desired date
- > He can precise then the available dates to the customer before creating the order

How to - Process flow

1. Open SOP



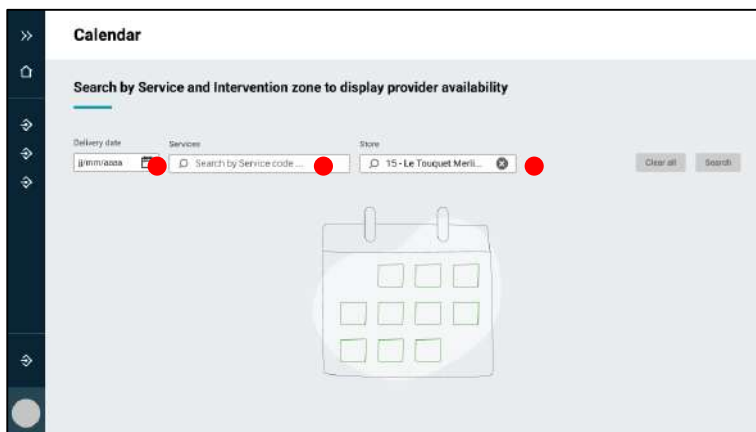
2. Open Planification menu > "Check availability" menu



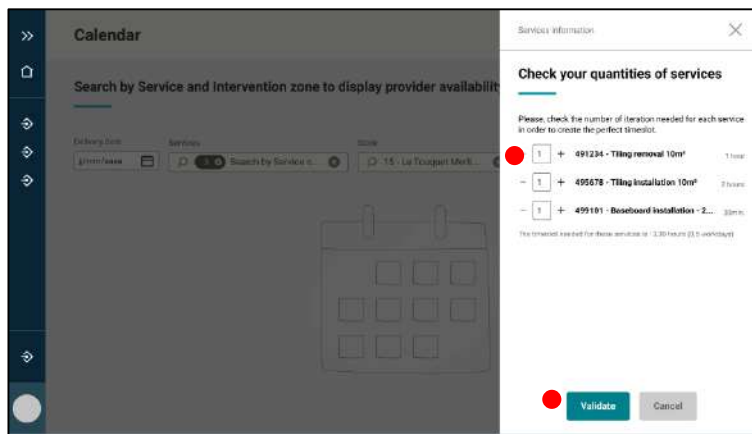
3. The “check availability” is an informative view using the Agenda feature

Important :

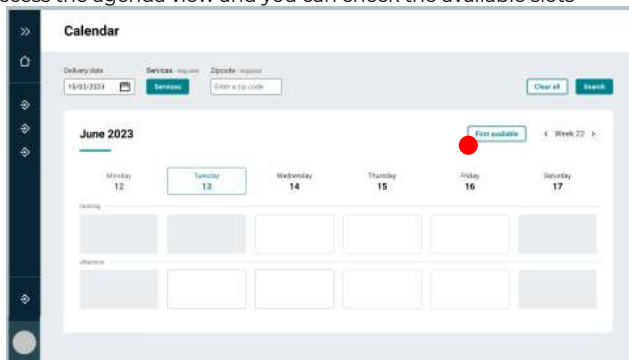
- This “check availability”view is informative, it is used when an Order is not yet created to give a possible available date to the customer before order is placed.
- It is not contextualized with the information of an order that's why the Seller must fill information to be able to access the available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



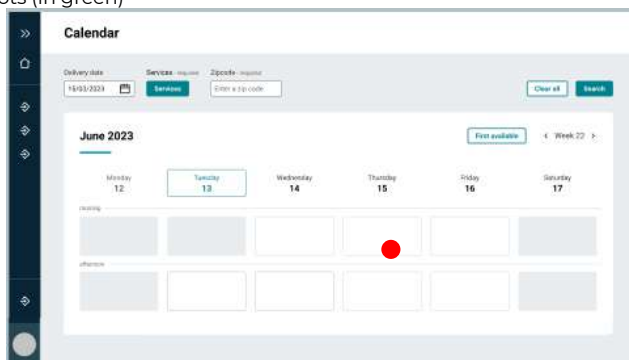
4. To access calendar availability you must fill :
- date (based of the estimated date of delivery of the product you can check in PYXIS)
 - 49 codes (you can add several 49 codes)
 - A store or the customer ZIP code (evolution in progression from Store to intervention zone)
- And then click on Search
5. Adjust the Service to fit to the customer project and Project duration and then validate



6. Then you access the agenda view and you can check the available slots



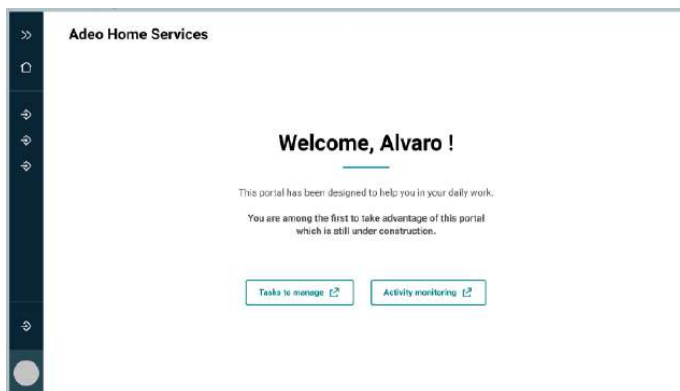
If you do not see any available slots you can click directly on “First available” to access directly available slots (in green)



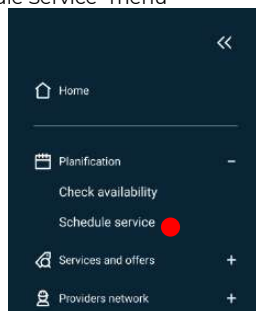
Congratulations ! You know how to propose to the customer available installation dates.
You can now suggest dates to your customer, create the order in PYXIS and then [\[schedule\]](#)

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"> - The unavailability declared in SMA - The authorization to receive job activated in SPO (SOP) by the Provider Success Manager (PSM) <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	Schedule service date (AFTER order is created)
Operator Role	Service Sales operator
What - As an Services Sales operator, I want to ...	
> Open the Service I have just created to select an available date with the customer > Open the agenda view to identify possible date & slots > Propose the slots to the customer > Validate the date of installation selected with the customer > Manage the case of 2 TV with the same specialty for the same service (different behaviour depending on BU)	
How to - Process flow	
1. Open SOP	

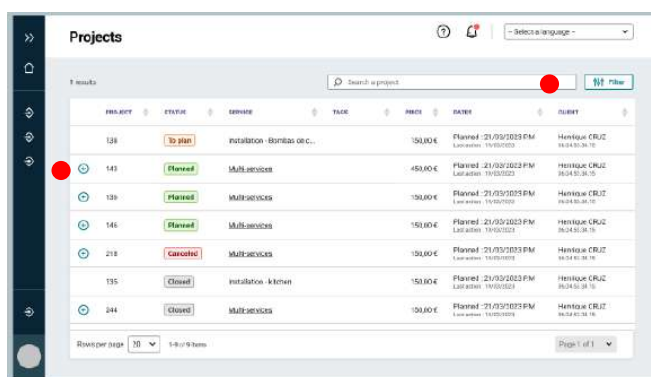


2. Open Planification menu > "Schedule Service" menu



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



4. Click on the concerned Service order to open it

Projects

1 results

Search a project

Filter

PROJECT	STATUS	SERVICE	TITLE	PRICE	DATES	CLIENT
138	To plan	Installation - Bonitas dec...		150,00 €	Planned - 21/09/2023 PM Last action: 19/09/2023	Henrique CRUZ
143	Planned	Multi-services		450,00 €	Planned - 21/09/2023 PM Last action: 19/09/2023	Henrique CRUZ
139	Planned	Multi-services		150,00 €	Planned - 21/09/2023 PM Last action: 19/09/2023	Henrique CRUZ
146	Planned	Multi-services		150,00 €	Planned - 21/09/2023 PM Last action: 19/09/2023	Henrique CRUZ
218	Cancelled	Multi-services		150,00 €	Planned - 21/09/2023 PM Last action: 19/09/2023	Henrique CRUZ
135	Closed	Installation - kitchen		150,00 €	Planned - 21/09/2023 PM Last action: 19/09/2023	Henrique CRUZ
244	Closed	Multi-services		150,00 €	Planned - 21/09/2023 PM Last action: 19/09/2023	Henrique CRUZ

Results per page: 10 1-8 of 8 items

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

Project execution 56813

Client name: Elisabeth GAKOOTE Phone: +20 06 04 53 34 12 Mail: elisabeth.aks@vpsmail... Store: 11 - Alsals

Scheduled

Services: Technical visit - Service Execution 301523 Pyxis Order: 850114

Documents: Technical visit for Shower screen

History: Executed by: - Sold by: Chloé Joly

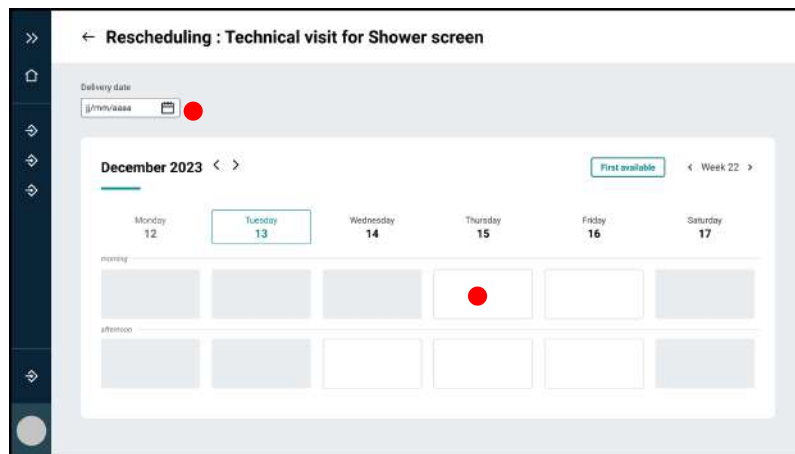
491234 - Service name

Notes: 0 Documents: 1 Pictures: 0 History

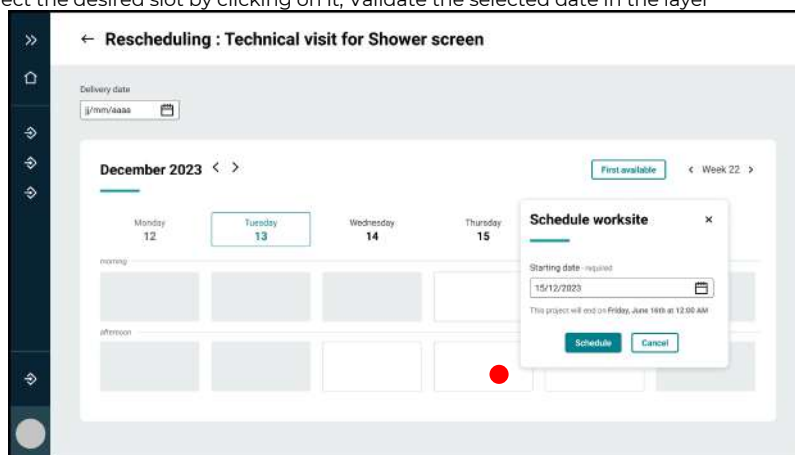
Service management

- Reschedule
- Distribute
- Add extra-cost
- Send contract
- Use contract code
- Cancel

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.



- 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

Status	The status of the Service is Pre-scheduled : Service order is created, waiting for contract signature from customer
important business rules	<ul style="list-style-type: none"> • It is not possible to book a date by anticipation (date before date given by PYXIS) • If Project contains several orders services you must perform a reschedule by service execution • The available day for booking is a setting by BU
Event	No task management
Notification	

Stream	Service Execution
Business Capability	1-Organize service execution
Business activity	1.1-Plan service execution
Business task	Generate contract, send it to the customer, paper flow, (LMES only) skip the contract stage
Operator Role	Service Sales operator

What - As an Services Sales operator, I want to ...

- > 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

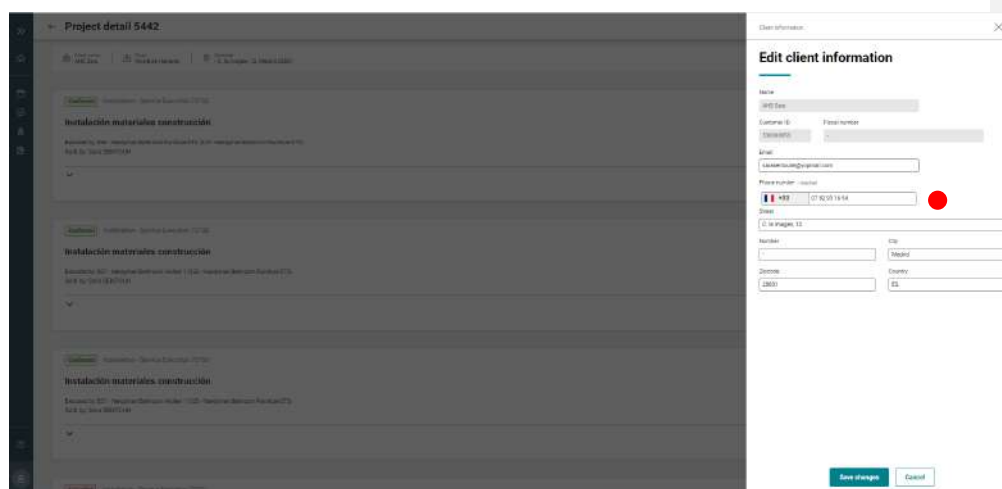
How to - Process flow

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



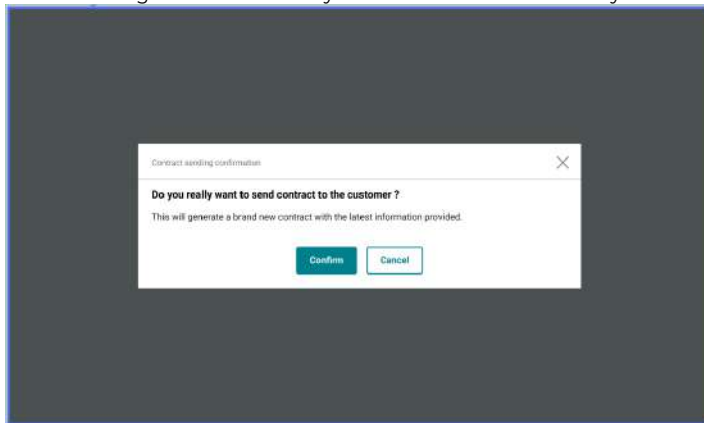
2. If customer email is not correct please update it and save changes



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



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.

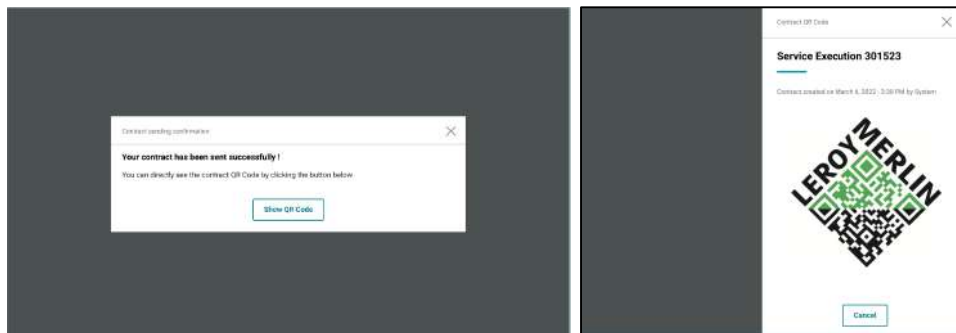
Check the email of the customer before generating contract

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

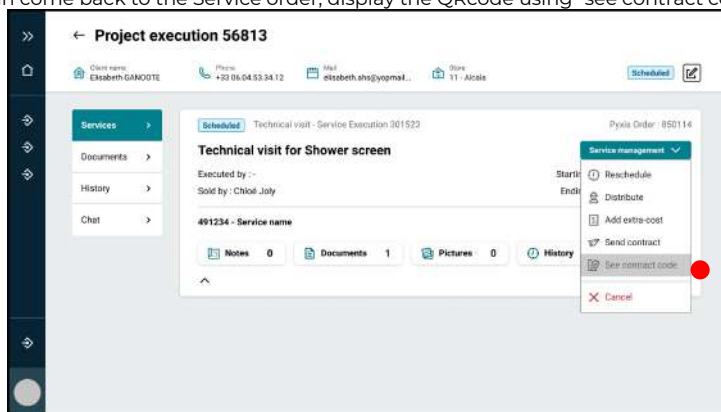
5. **Show QRcode :** display on screen a QRcode to access the contract using the smartphone of the customer or the one of the seller.



6. 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

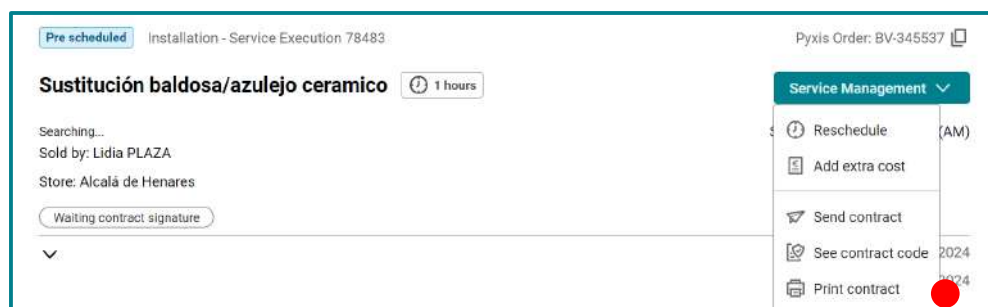
If you have sent by email but you want to make it signed directly

7. 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)

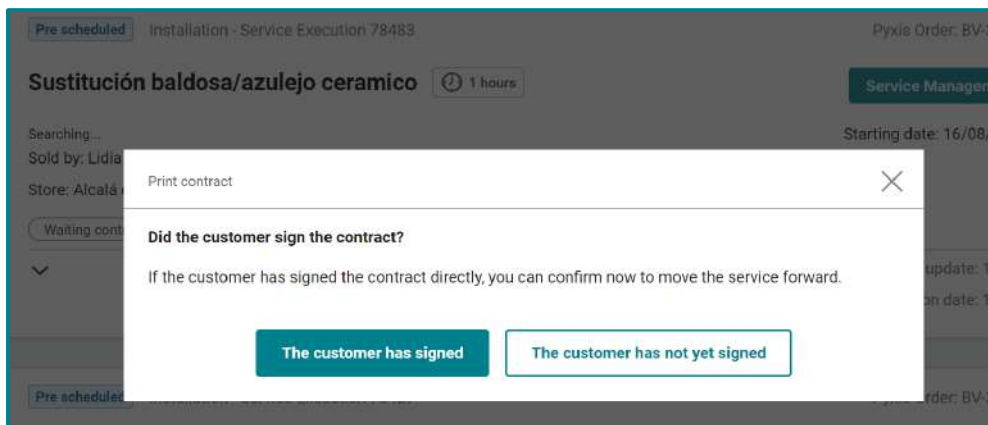
8. If the Customer has no email address or want to get the paper version of the contract for signature, click on "**Print contract**" button



9. 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.

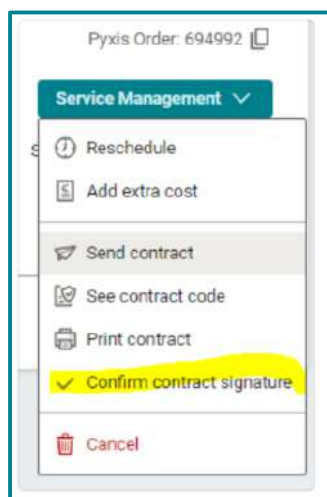


11. If the operator confirms, then the status of the SX will move to "scheduled". If the operator declares that the customer has not yet signed, the status will remain "pre-scheduled". A tag will appear to indicate that the customer's signature is pending.



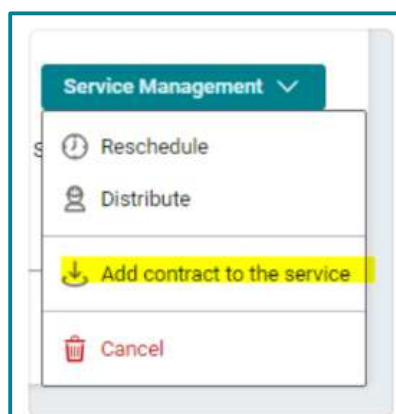
12. If the paper contract is signed at a later stage, the operator will be able to confirm this step in order for the status to progress to "scheduled" and for the execution flow to continue. In order to do so, the operator will have to click on "Service Management" and then on "Confirm Contract"

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.

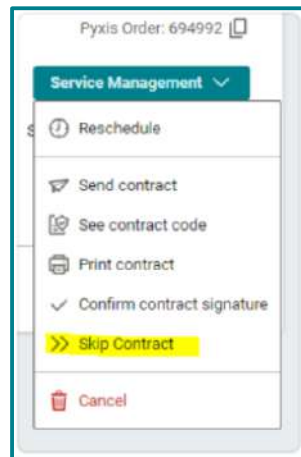
NB: Failure to enter the contract **does NOT** block any Sx flow.



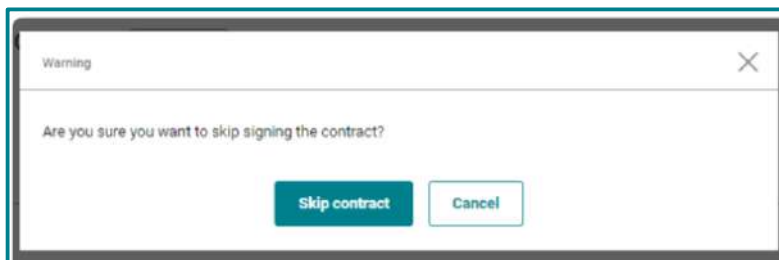
14. **[LMES only]** An experienced operator (admin) may decide that in a specific situation the contract signature step will have to be skipped. To this purpose, a CTA in Service Management called "Skip contract" will only be available **ADMIN ROLE** when the SX is in **pre-scheduled** status.

Commented [4]: and limit?

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	<p>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 Pre-Scheduled to Scheduled : Contract is signed by Customer. The date is confirmed.</p> <p>A new version of the contract may be generated until In progress status (PRO's check-in).</p>
Important business rules	<p>The contract sending is triggered by the service execution ordered scheduling.</p> <p>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.</p> <ul style="list-style-type: none"> > Display contract with QRCode > Ask the customer to open his email and sign the contract <p>If customer has not signed the contract he will receive</p>

	<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>Important point : if the contract is not sent manually, it is sent automatically after 1 hour.</p> <p>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 : [Monitor contract signature]</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	Update customer contact
Operator Role	Service Sales operator or Service execution operator

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

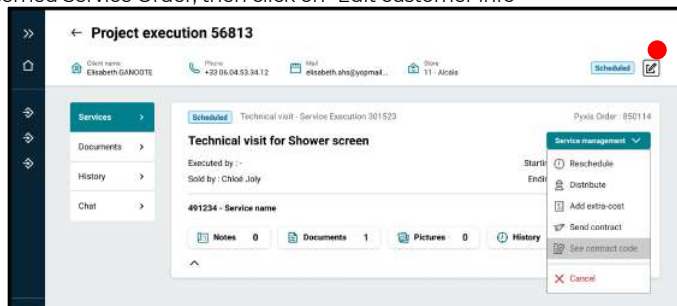
> Update the customer contact email or mobile after the Service order is created

How to - Process flow

Prerequisite : 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.

Entry point of this operations : you must be able to :

- Open Project list > select a Service order > Open the concerned Service order
1. If customer contact needs to be updated (email of Mobile), after Service Order is placed, open the concerned Service Order, then click on "Edit customer info"



2. Update email or mobile and save changes

Client information

Client information

Name

Henrique

Surname

PEREIRA DA SILVA

Identifier

112345678910

Email

henriquepereira@gmail.com

Phone number

+33

06 04 53 35 15

Address

10, R Arthur Lobao Pereira, VILA NOVA...

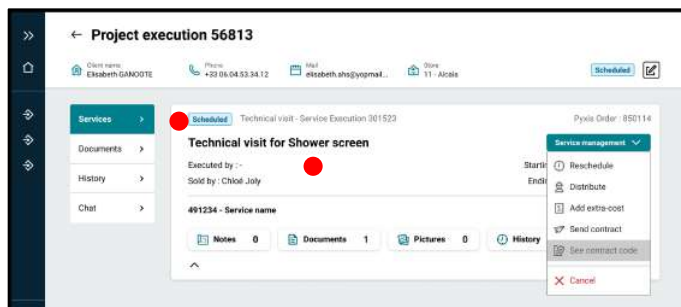
Save changes

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 as 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

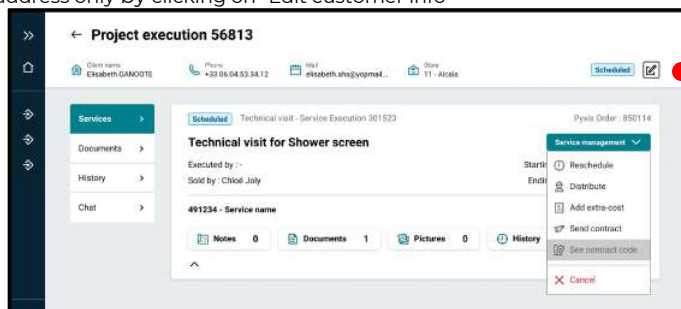
Stream	Service Execution
Business Capability	1-Organize service execution
Business activity	1.1-Plan service execution
Business task	Change worksite address (BEFORE Pro allocated) <div style="border: 2px solid black; background-color: #f08080; padding: 10px; text-align: center; margin: 10px 0;"> UNDER MODIFICATION </div>
Operator Role	Service Sales operator or Service execution operator
What - As an operator, I want to ...	
> Update the customer address after the Service order is created but <u>BEFORE Pro is allocated</u>	
How to - Process flow	
<p>Prerequisite : 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"> - Updated address belongs to same ZIP code = No impacts - Updated address does not belong to same ZIP code = Major impact (see business rules) 	
<p>Entry point of this operations : you must be able to :</p> <ul style="list-style-type: none"> • Open Project list > select a Service order > Open the concerned Service order 	
<p>1. Before changing address of the worksite you must identify if Pro is already allocated or not</p> <ul style="list-style-type: none"> • Prescheduled or Scheduled status = Service has not been allocated to a Pro yet • Executed by : <u>Empty</u> = Service has not been allocated to a Pro 	



⇒ 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

Client information

Client information

Name

Henrique

Surname

CRUZ DA SILVA

Identifier

12345678910

Email

Henriquecruz@gmail.com

Phone number

+33 06 04 53 35 18

Address



10, R Arthur Lobao Peixoto, VILA NOVA...

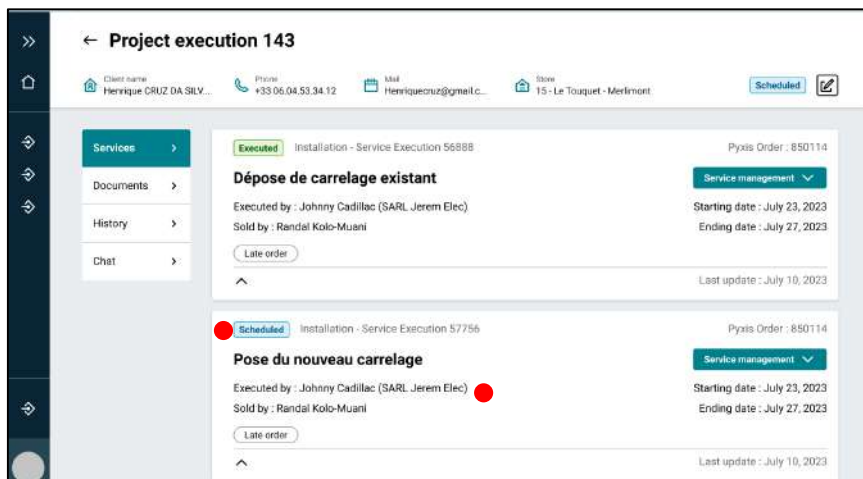
Save changes

Cancel

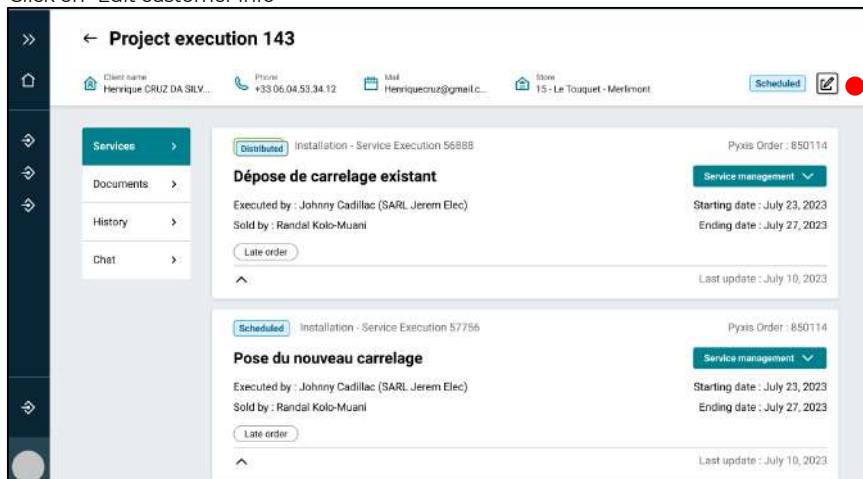
- a. You should update contract > please refer to [\[Generate contract & send it to the customer\]](#)

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 ! Updating an address may have several important impact :</p> <p>Is Pro already allocated = YES</p> <ul style="list-style-type: none">• If same ZIP code ⇒ No impact• If updated address has different ZIP code ⇒ Major impacts : <ol style="list-style-type: none">1. Pro allocated may not cover the new address2. Extra KM may be necessary to incentive Pro to manage the job3. Reallocation of a Pro should be necessary
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	Change worksite address (AFTER Pro allocated) 
Operator Role	Service Sales operator or Service execution operator
What - As an operator, I want to ...	
> Update the customer address after the Service order is created but <u>AFTER Pro is allocated</u>	
How to - Process flow	
<p>Prerequisite : 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"> - Updated address belongs to same ZIP code = No impacts - Updated address does not belong to same ZIP code = Major impact (see business rules) 	
<p>Entry point of this operations : you must be able to :</p> <ul style="list-style-type: none"> • Open Project list > select  Service order > Open the concerned Service order 	
<p>1. Before changing address of the worksite you must identify if Pro is already allocated or not</p> <ul style="list-style-type: none"> • Distributed or Confirmed or in Progress status = Service has been allocated to a Pro • Executed by : {Name of the Provider} = Service has been allocated to a Pro 	



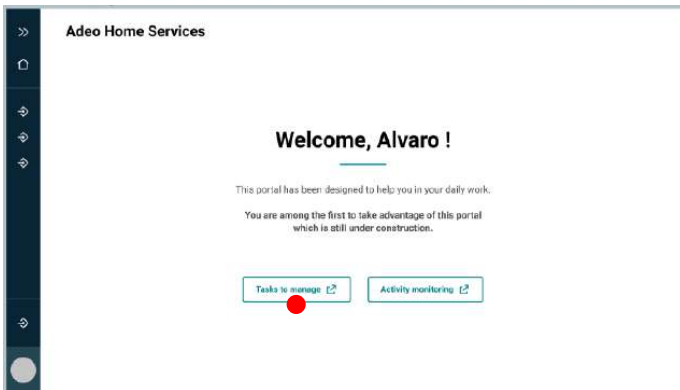
2. **Pro is already allocated,**
you must check if ZIPcode of the updated address is the same or not to manage properly the situation
 - ZIPcode is the same = you can proceed to the address update only
 - ZIPcode is different = you can proceed to the address only + you must solve the issue
3. Click on "Edit customer info"



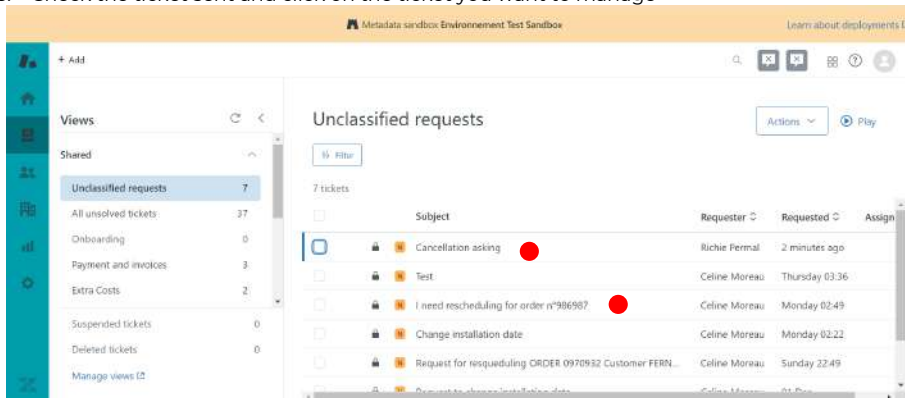
4. Update customer address and save

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 :
 - You can check Intervention zone of the PRO to evaluate impact
 - Contact PRO (address is within the Intervention Zone of the PRO)
 - Propose the Pro EXTRA KM to secure his commitment using [\[Manage Extra Cost\]](#) feature
 - Reassign manually a Pro if PRO KO after contact using [\[Reassign Manually a Pro\]](#) feature
 - Cancel a Service [\[Cancel a Service\]](#) feature

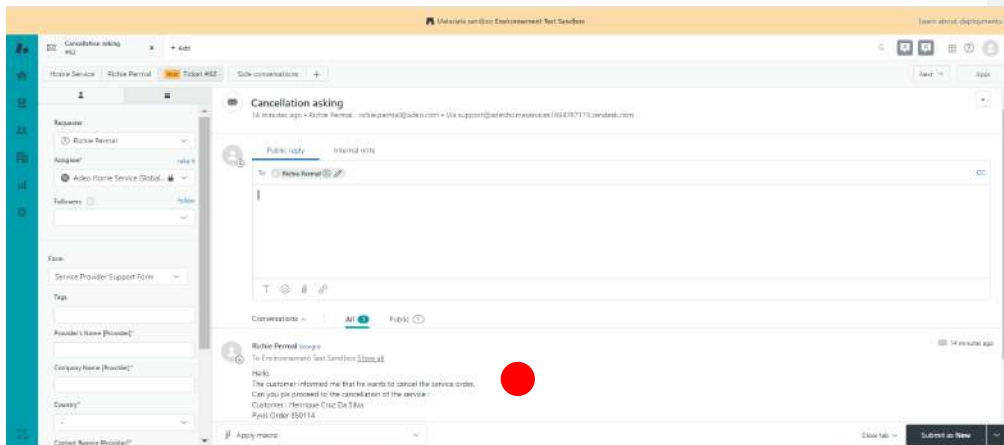
Status	This operation has no impact on the status of the Service The Service remains on the same status
important business rules	<p>It is very important to check the customer address before Service order is placed because allocation of the Pro depends on the ZIP code of the Customer ! Updating an address may have several important impact :</p> <p>Is Pro already allocated = YES If updated address has same ZIP code ⇒ No impact If updated address has different ZIP code ⇒ Major impacts</p> <ol style="list-style-type: none"> 1. Pro allocated does not cover the new address 2. Extra KM could may be necessary to incentive Pro to manage the job 3. Reallocation of a Pro should be necessary
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	Solve Service organization issues
Operator Role	Service Execution Operator
What - As an operator, I want to ...	
<p>> perform all actions required to solve the service organization issues.</p> <p>> avoid a service execution process to be stuck at one stage of the execution.</p> <p>> ensure continuity of the service execution and comply with the terms and conditions of the service sold to the customer</p>	
How to - Process flow	
<p>1. At this step of the orchestration you can face several organization issues</p> <ul style="list-style-type: none"> - Cancellation asking - Rescheduling asking - Update of the worksite address <p>The Customer can :</p> <ul style="list-style-type: none"> - 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 - act from his space (cancel/reschedule/modify the address) <i>My account</i> ⇒ sent to L2 Service Execution Operator - Go to the store and ask to the sales team ⇒ email sent to L2 Service Execution Operator <p>2. As Service Execution operator, you follow the task in Zendesk accessible from SOP Homepage</p>	
	

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



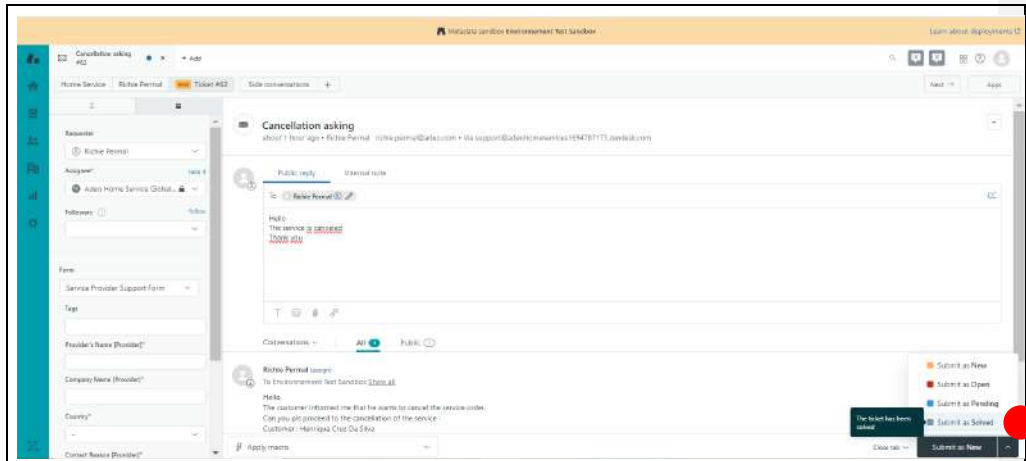
4. You can see the details of the asking



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



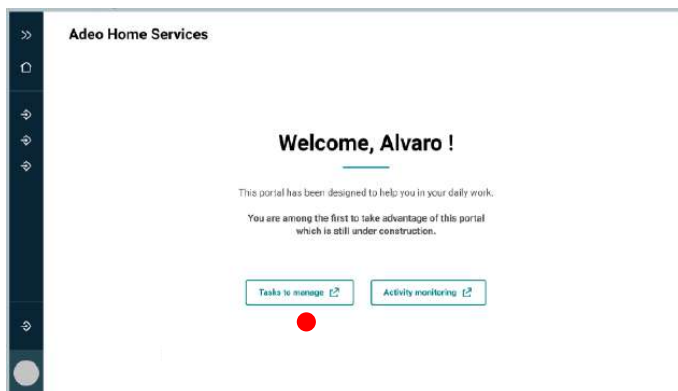
Status	The status of the service is Pre Scheduled or scheduled
important business rules	The cancellation is definitive, you cannot come back on the status
Event	The task management allows to solve the service organization issues
Notification	The customer is notified in his account

2. Find Pro to execute the Service

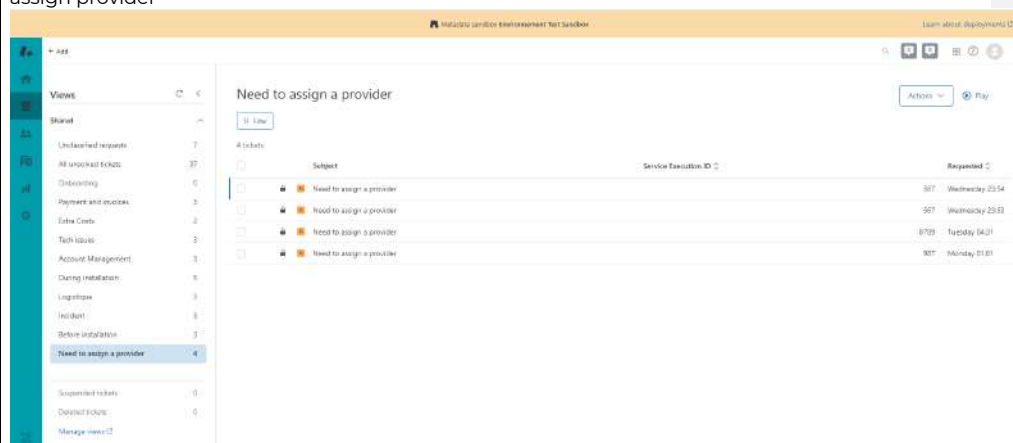
Resource : [Automatic Assignment description](#) : description of the feature that allow to assign automatically a provider according to the context of the service (Service, profession and specialties, location and date)

[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

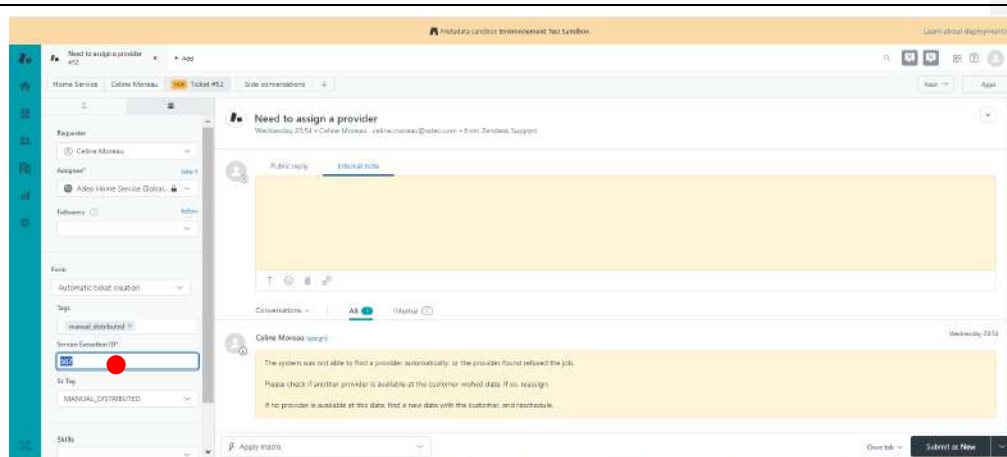
Stream	Service Execution
Business Capability	2-Find Pro to execute the service
Business activity	2.2-Supervise and Monitor Matching
Business task	Solve Provider matching issues
Operator Role	Service Execution Operator
What - As an Services Execution Operator, I want to ...	
> perform all actions required 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	
How to - Process flow	
1. You can monitor the matching / bidding of provider issues due to : <ul style="list-style-type: none">- No matching result for the defined schedule- the matched Provider refused the job 2. You can follow those issues in two different ways : <ul style="list-style-type: none">a. Go on SOP homepage and click on Activity Monitoring (Power BI <u>for LMPT start</u>)	



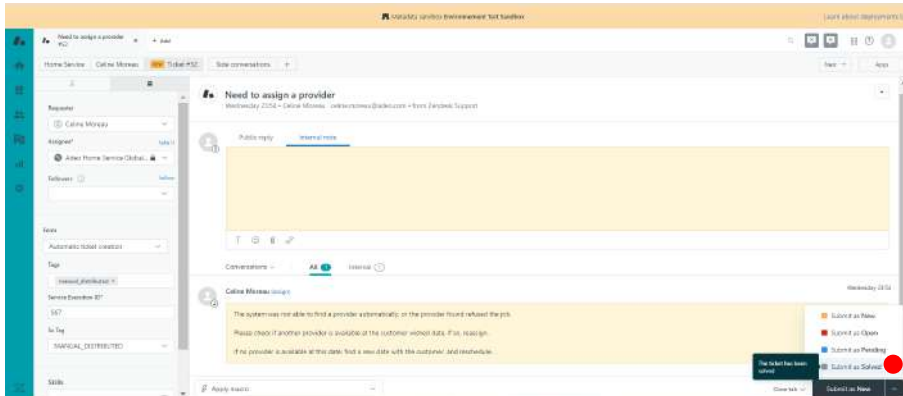
You can see all the execution to assign by with the tickets open in Zendesk by clicking on Need to assign provider



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, that 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 :

Prévu

Installation - Execution de services 71566

Commande Pyxis: 300502

Montagem abrigo metal ate 3m2

Recherche en cours...

Vendu par: Pierre Arnaud DROUARD

Cotisation manuelle

Gestion du service

Date de début: 22/03/2024 (M)

Dernière mise à jour: 05/03/2024

Date de création: 05/03/2024

Status	The status will move from Distributed to Scheduled if the provider canceled The status stays as Scheduled 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 automatisisation 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 system, it will be 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 sent 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	Add notes about the job
Operator Role	Service execution operator

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

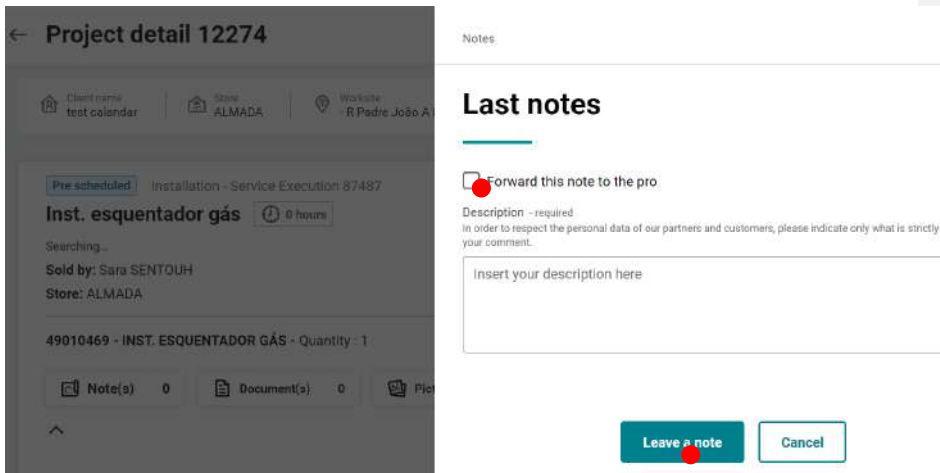
- > add internal execution notes available for the internal teams regarding the service
- > read notes dedicated to the provider from Pyxis
- > receive notes from the provider filled in SMA
- > communicate informations that are communicated through direct contact in store or phone
- > cancel a previously planned SX
- > select whether to share a note with providers

How to - Process flow

1. Consult the service on which you want to leave a note. You can find the detail on [\[Open a customer Project and related Service order\]](#)
2. Click on Notes field



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

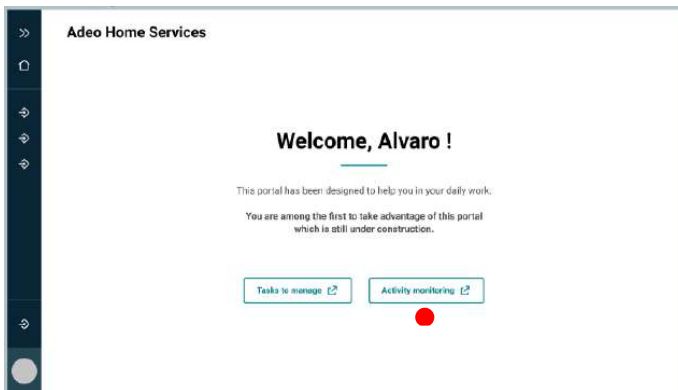


The screenshot shows a mobile application interface for 'Project detail 12274'. The top bar includes a back arrow and the title. Below the title, there are three tabs: 'Client name' (test calendar), 'Store' (ALMADA), and 'Worksite' (R Padre João A.). The main content area is divided into two sections. The left section, titled 'Pre-scheduled', shows 'Installation - Service Execution 87487' and 'Inst. esquentador gás' with a '0 hours' timer. It also lists 'Sold by: Sara SENTOUH' and 'Store: ALMADA'. The right section, titled 'Notes', has a 'Last notes' card with a checkbox for 'Forward this note to the pro.' and a text box for 'Description - required'. Below this is a larger text box labeled 'Insert your description here'. At the bottom right, there are two buttons: 'Leave a note' and 'Cancel'.

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	Update Product and/or Service Order
Operator Role	Service execution operator
What - As an operator, I want to ...	
> To follow in SOP the update in Pyxis of the Product order (only product) by the seller	
How to - Process flow	
<ol style="list-style-type: none"> 1. The sales team can add or remove one or several products in Pyxis until the "In Progress" status (included) 2. You can see the details of the update in SOP on the Service execution details and in SMA for the pro 	
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"> - Spain : in progress included for Product or Service update - Portugal : in progress included for Product update / and "In progress" excluded for Service
important business rules	<p>The product list is available in Service execution details in SOP and in SMA for the provider.</p> <p>Service Execution - UPDATE ORDER</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	3.2-Monitor Synchronization Product / Service
Business task	Monitor Product Order status
Operator Role	Service execution operator
What - As an operator, I want to ...	
<p>> 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>> At this stage we monitor the [Synchronization Product / Service] activity (see related tasks)</p>	
How to - Process flow	
<p>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</p> <div data-bbox="284 1070 965 1458">  </div> <p>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.</p> <p>Click on the Id of the project, you will be directed to the SOP tool on the associated project page.</p>	

Stream	Service Execution
Business Capability	3-Orchestrate Service Execution
Business activity	3.3-Manage event before Job
Business task	Monitor Pyxis order cancellation
Operator Role	Service execution operator
What - As an operator, I want to ...	
> See the Pyxis order cancellation in SOP	
How to - Process flow	
<ol style="list-style-type: none"> 1. The Pyxis order can be canceled before or after payment of the customer 2. The cancellation is displayed in SOP portal on the Service execution status 3. If one line of the Pyxis order is canceled, the line is canceled on the Service execution view on SOP portal 	
Status	The status of the service is from pre-scheduled to Confirmed
important business rules	<p>The sales team must not cancel a service that is in progress in SOP. It will not modify the status if the Service reached In progress status</p> <p>The Pyxis order / Sales note is canceled after 24H if the payment is not done</p> <p>If the provider cancels : 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	3.3-Manage event before Job
Business task	Modify the duration of an Sx
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

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

Picture(s) 0

History 30

Products 0

Last update: 09/01/2025

Creation date: 07/01/2025

Empty Sale System: 4617185

Service Management

Starting date: 27/01/2025 (AM)

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

Project detail 6241

Orçamento para instalação esquentador

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

Picture(s) 0

SX 77527 - Duration change

Change Sx duration

Day(s) 2

Hour(s) 1

Minute(s) 1

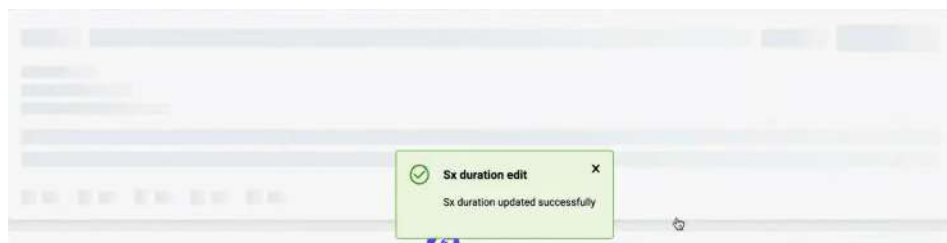
Previous duration: 1h01

Save change

Cancel

r 2023 - 67

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".

Confirmed Budget - Service Execution 77527

Empty Sale System: 4617185

Service Management

Starting date: 27/01/2025 (AM)

Orçamento para instalação esquentador ⓘ 2 days 1 hour (edited) ⓘ 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

Picture(s) 0

History 31

Products 0

Last update: 26/02/2025

Creation date: 07/01/2025

5. Congrats, you just change the duration manually.

Rules :

🕒 2 hours

💰 69.99 €

👤 0.00 €

➡

✎ 2h49 (edited)

💰 69.99 €

👤 0.00 €

Operators

Status

- Pre Scheduled
- Scheduled
- Distributed
- Confirmed
- In progress

Can freely change the time

Sellers

Status

- Pre Scheduled
- Scheduled
- Distributed
- Confirmed
- In progress

Limited to ⅔ of the original time value

Status	The status of the service is from Pre-Scheduled to In Progress
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	3.3-Manage event before Job
Business task	Monitor Pyxis order modification
Operator Role	Service execution operator

What - As an operator, I want to ...	
> See the Pyxis order modification in SOP	
How to - Process flow	
<div>4. The Pyxis order can be modified before or after payment of the customer</div> <div>5. The cancellation is displayed in SOP portal on the Service execution status</div> <div>6. If one line of the Pyxis order is canceled, the line is canceled on the Service execution view on SOP portal</div>	
Status	The status of the service is from pre-scheduled to Confirmed
important business rules	The sales team must not cancel a service that is in progress The Pyxis order is canceled after 24H if the payment is not done
Event	No automatic event linked to this step
Notification	No notification at this step

Commented [9]: Add view

Commented [10]: Add view

Stream	Service Execution
Business Capability	3-Orchestrate Service Execution
Business activity	3.3-Manage event before Job
Business task	Reschedule due to Product delay
Operator Role	Service execution operator

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

> reschedule the service due to product delay

How to - Process flow

7. [\[Monitor the Product order status\]](#)

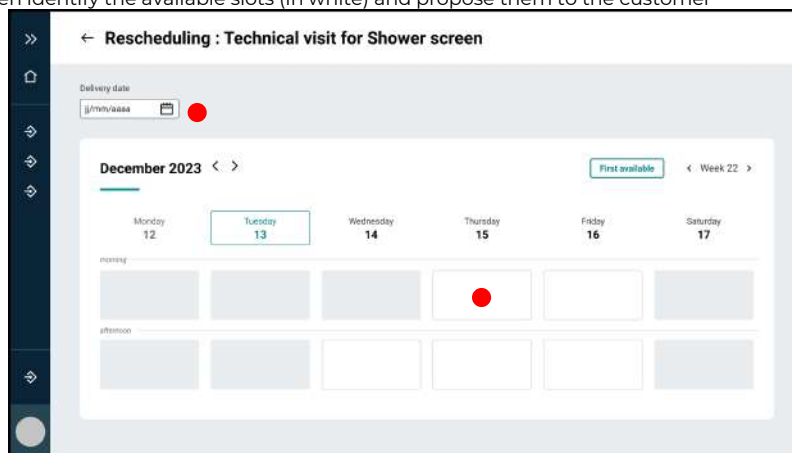
8. If the date of reception of the product is later than the date of the job execution, you can reschedule the service.
By clicking on the project in Power BI, you are directed on the project page

PROJECT	STATUS	SERVICE	PRICE	DATE	CLIENT
138	To plan	Installation - Bonitas de c...	150,00 €	Planned - 21/03/2023 PM Last action: 11/03/2023	Hemique CRUZ 86/24.03.24.16
143	Planned	Multi-services	450,00 €	Planned - 21/03/2023 PM Last action: 11/03/2023	Hemique CRUZ 86/24.03.24.16
139	Planned	Multi-services	150,00 €	Planned - 21/03/2023 PM Last action: 11/03/2023	Hemique CRUZ 86/24.03.24.16
146	Planned	Multi-services	150,00 €	Planned - 21/03/2023 PM Last action: 11/03/2023	Hemique CRUZ 86/24.03.24.16
218	Canceled	Multi-services	150,00 €	Planned - 21/03/2023 PM Last action: 11/03/2023	Hemique CRUZ 86/24.03.24.16
135	Closed	Installation - kitchen	150,00 €	Planned - 21/03/2023 PM Last action: 11/03/2023	Hemique CRUZ 86/24.03.24.16
244	Closed	Multi-services	150,00 €	Planned - 21/03/2023 PM Last action: 11/03/2023	Hemique CRUZ 86/24.03.24.16

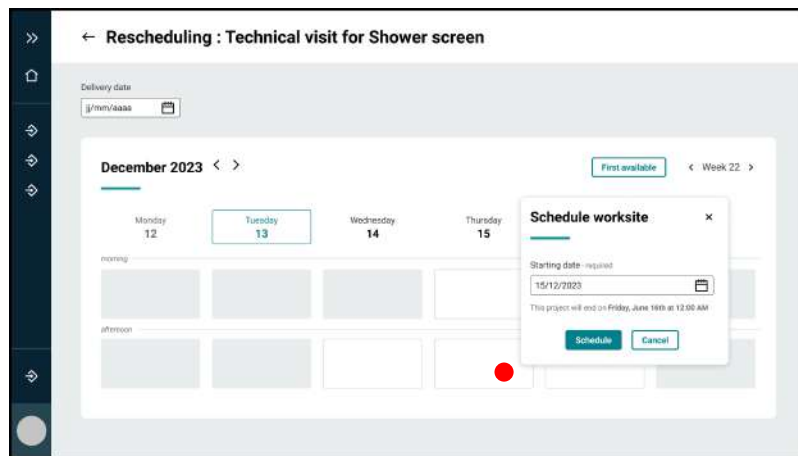
9. Once it is opened, select "Service Management" and then Reschedule



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 Distributed by waiting the acceptance by the Provider ⇒ Then Confirmed 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	3.3-Manage event before Job
Business task	Reschedule - Pro request
Operator Role	Service execution operator

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

> Reschedule the service due to asking from the Provider

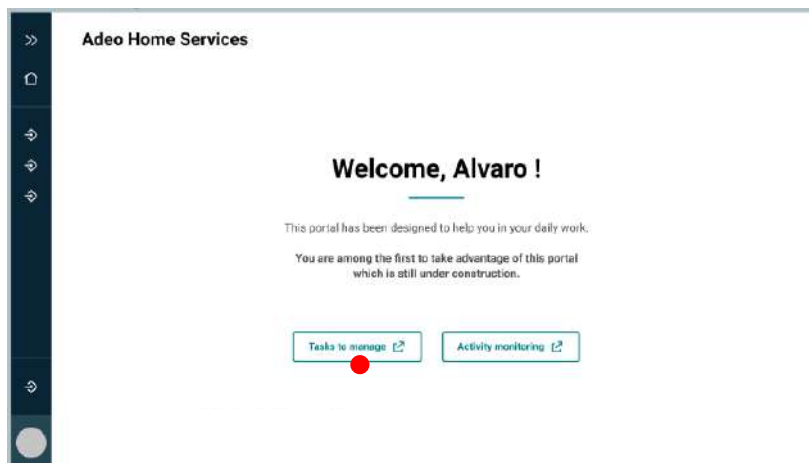
How to - Process flow

There are 2 ways for a Provider to ask or directly reschedule the service.

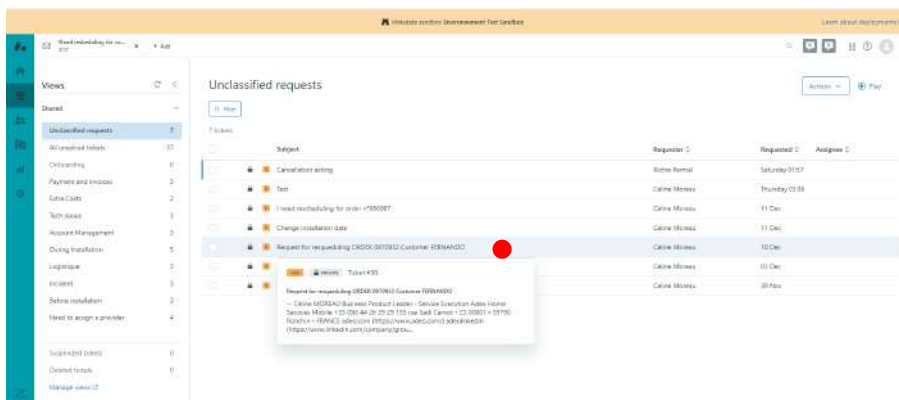
- The Provider can use SMA application to make a reschedule by himself after having contacted the customer and defined the new date.
See in SMA documentation how "[Reschedule Button](#)" triggers a direct reschedule in SOP (no Zendesk ticket)
- The Provider contact the generic email address for support or call directly the store/operator (inbound contact)

The case of inbound contact (case "b") is described below :

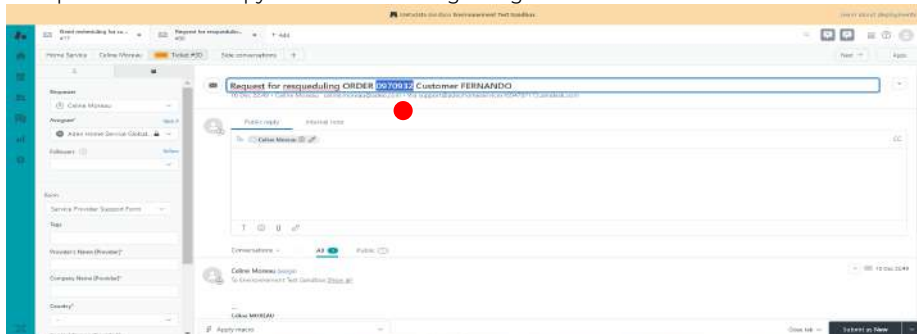
- As Service Execution operator, you follow the task in Zendesk accessible from SOP Homepage



2. You receive in Zendesk a task to reschedule

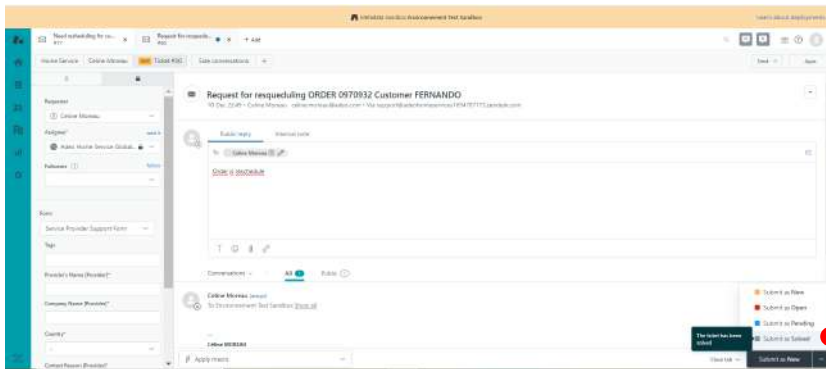


3. Open the ticket to copy the information regarding the order number



4. Go in SOP to contact the customer and reschedule the service : [\[Schedule service date \(after order created\)\]](#)

5. Close the ticket



Status	The status of the service is Confirmed
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	3.3-Manage event before Job
Business task	Reschedule - Customer request
Operator Role	Service execution operator
What - As an operator, I want to ...	
> reschedule the service after asking from the customer	
How to - Process flow	
<p>There are 2 ways for a Customer to ask for a reschedule of the service.</p> <ul style="list-style-type: none"> a. The Customer can use his My Account space and click on reschedule button ⇒ it will create directly a task to manage in Zendesk b. The Customer can contact the seller or the Care to ask for the reschedule. The Care creates a task to manage in Zendesk <p>Follow the step describe in the [Reschedule] sheet</p>	
Status	The status of the service is Confirmed
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 acceptance of the provider : he received a notification of update of the proposal After the acceptance 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	3.3-Manage event before Job
Business task	Monitor Contract signature & make contract signed by Customer
Operator Role	Service execution operator

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

> 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.

At this stage we monitor the [Synchronization Product / Service] activity (see related tasks) :

- the contract signature

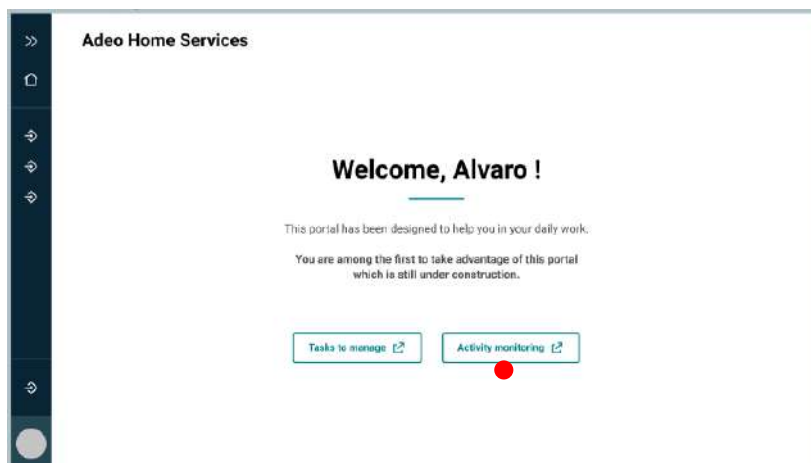
How to - Process flow

The Monitoring of the contract signature can be done in 2 different ways :

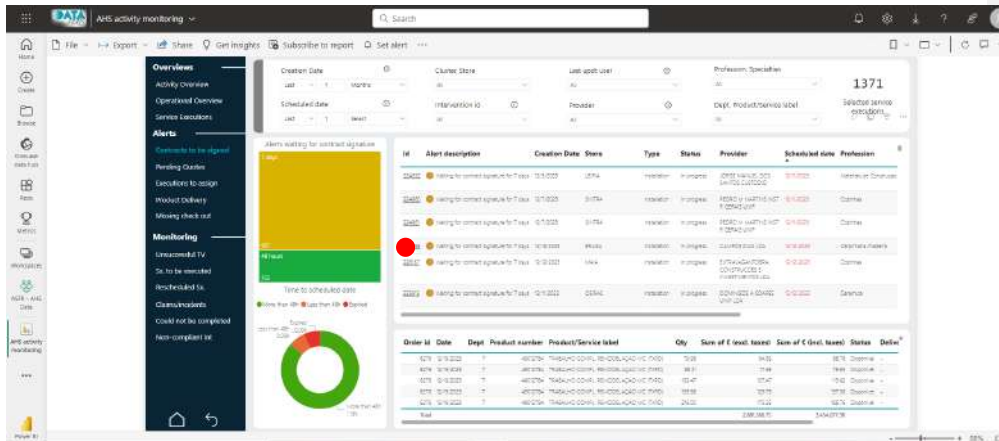
- Through the data visualisation in Power BI
- Through the Task management (from February 2024) as a task will be created in Zendesk once a contract is not signed

DATAVISUALISATION in POWER BI

1. As Service Execution operator, you follow the activity monitoring in the dashboard Power BI from the Home Page



- 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.



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

Projects

9 results

Search a project

Filter

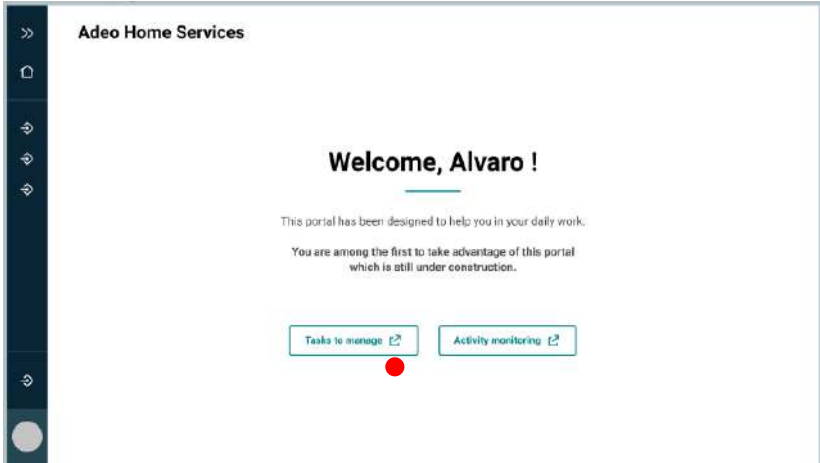
PROJECT	STATUS	SERVICE	TAGS	PRICE	DATES	CLIENT
138	Scheduled	Installation - Bombas de c...		150,00 €	Planned : 21/03/2023 P.M. Last action : 19/03/2023	Henrique CRUZ 06.04.53.34.15
143	Scheduled	Multi-services		450,00 €	Planned : 21/03/2023 P.M. Last action : 19/03/2023	Henrique CRUZ 06.04.53.34.15
136	Scheduled	Multi-services		150,00 €	Planned : 21/03/2023 P.M. Last action : 19/03/2023	Henrique CRUZ 06.04.53.34.15
146	Scheduled	Multi-services		150,00 €	Planned : 21/03/2023 P.M. Last action : 19/03/2023	Henrique CRUZ 06.04.53.34.15
218	Rescheduled	Multi-services		150,00 €	Planned : 21/03/2023 P.M. Last action : 19/03/2023	Henrique CRUZ 06.04.53.34.15
135	Scheduled	Installation - kitchen		150,00 €	Planned : 21/03/2023 P.M. Last action : 19/03/2023	Henrique CRUZ 06.04.53.34.15
244	Scheduled	Multi-services		150,00 €	Planned : 21/03/2023 P.M. Last action : 19/03/2023	Henrique CRUZ 06.04.53.34.15

Rows per page: 20 1-9 of 9 items Page 1 of 1

- [\[Generate contract & send it to the customer\]](#)

TASK MANAGEMENT IN ZENDESK

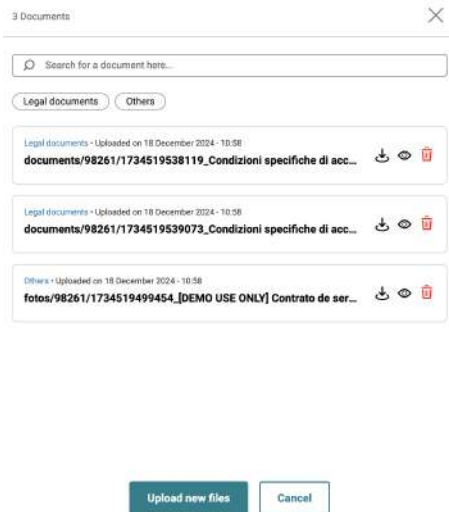
1. As Service Execution operator, you follow the Task management from the Home Page



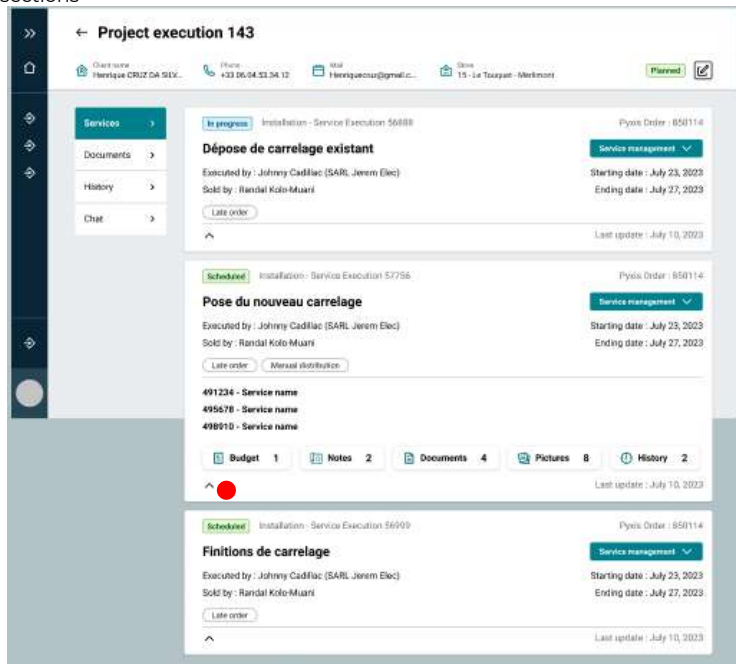
2. Open the ticket of the task Contract to sign
3. Open the ticket to copy the information regarding the order number
4. Go in SOP to [\[Generate contract & send it to the customer\]](#)

Status	The status of the service is pre-scheduled 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	3.3-Manage event before Job
Business task	Access to service information : budget, documents, pictures, history
Operator Role	Service execution operator
What - As an operator, I want to ...	
<p>> Access to the resources available linked to a service :</p> <ul style="list-style-type: none"> - budget, - Understand categories of documents - documents (integrating Technical visit / Quotation flow report) - Multi Upload - pictures, - history 	
How to - Process flow	
<ol style="list-style-type: none"> 1. You are now able to [Open a customer Project and related Service] 2. Whenever a document is added to a Sx, it will be categorized differently. Here is the categorization: <ul style="list-style-type: none"> - Legal documents : Contract, Contract - audit trail and WCF - Provider photos : All photos concerning the start, end (checkin and checkout) and during execution - Providers/workers documents : 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) - Budget : All budget documents (Cotazo, CraftsMen, shared agenda) - Other : Any document entered by SOP (except legal ones) 	



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



4. Multi upload

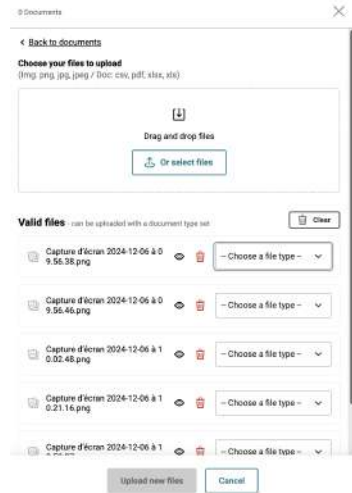
Users are able to upload multiple documents at the same time either using the button on SOP or by dragging and dropping the files from their devices.

accepted file types :

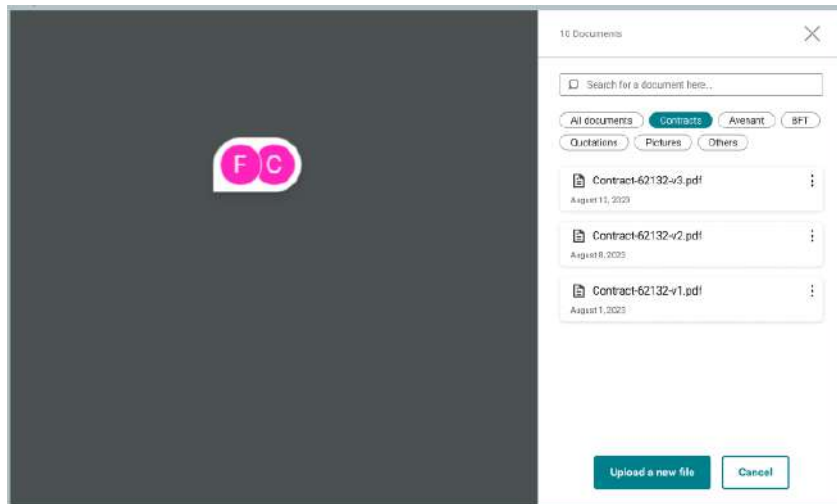
Images: png, jpg, jpeg

Documents : csv, pdf, xlsx, xls

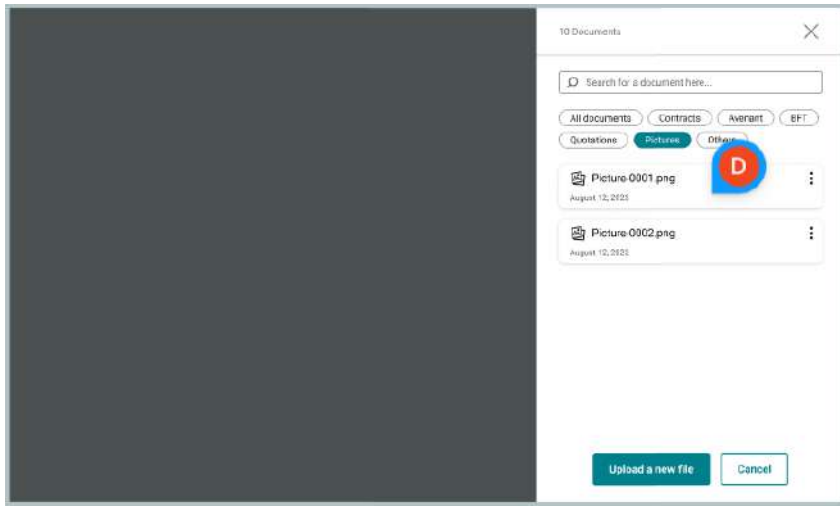
Users can use the “Clear” button to remove all uploading documents at once or do it one by one.



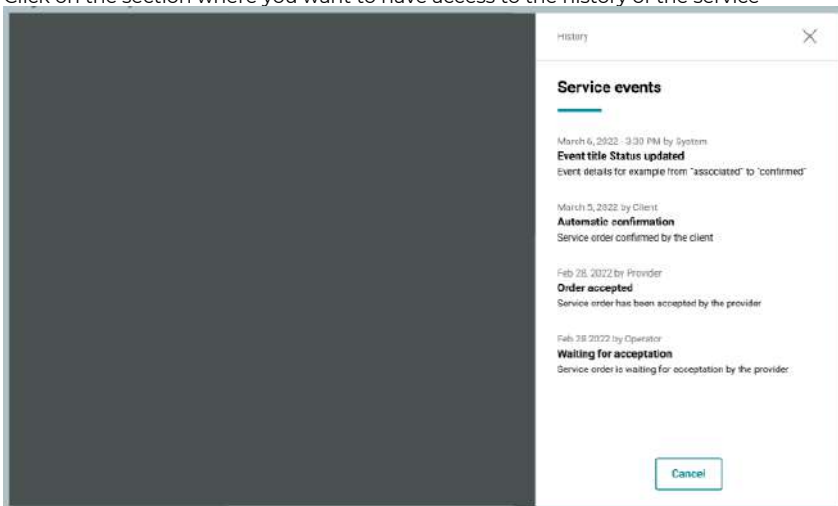
5. Click on the section where you want to have access or upload to the document



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

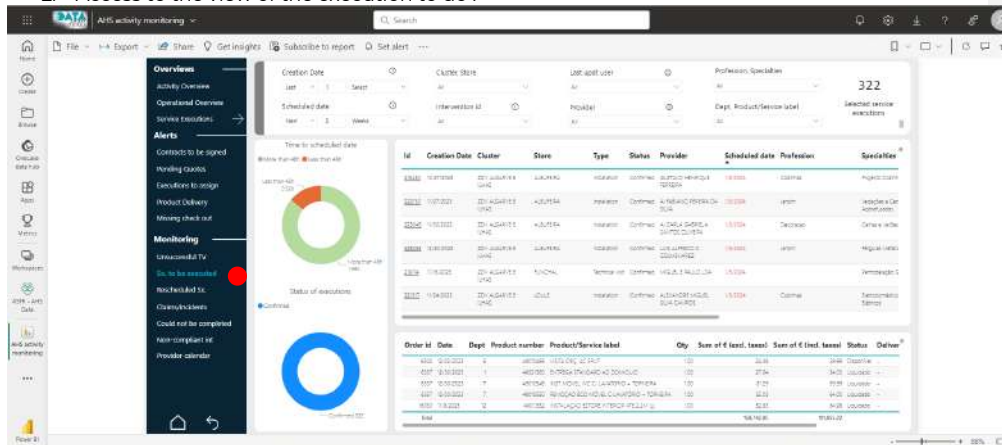


Status	The resources are available whatever the status
important business rules	Visibility and accessibility of the documents are only internal. They are not available for the customers and the providers
Event	No event linked to this task
Notification	No notification linked to this task

4. Perform the Job

Stream	Service Execution
Business Capability	4-Perform the Job
Business activity	4.2-Supervise Start the job
Business task	Monitor job starting
Operator Role	Service execution operator
What - As an operator, I want to ...	
<p>> Monitor real time all transactions and evaluate the one who will need treatment at the job starting.</p> <p>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.</p> <p>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</p>	
How to - Process flow	
<p>1. In the SOP portal menu, click on Data and dashboard menu</p> <div><div><div>>></div><div>🏠</div><div>🔍</div><div>📊</div><div>📅</div><div>🔧</div><div>⚙️</div><div>👤</div><div>🔒</div></div><div><div>Adeo Home Services</div><div><div>Welcome, Alvaro !</div><div><div>This portal has been designed to help you in your daily work.</div><div>You are among the first to take advantage of this portal which is still under construction.</div></div><div><div>Tasks to manage 📄</div><div>Activity monitoring 📄</div></div></div></div></div>	

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	All status 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	Budget Flow / Quotation Flow
Operator Role	Service execution operator

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

> Follow the result of the budget flow / Quotation flow

> follow the reception of the provider quotation/report (Budget flow / Quotation flow report & quotation)

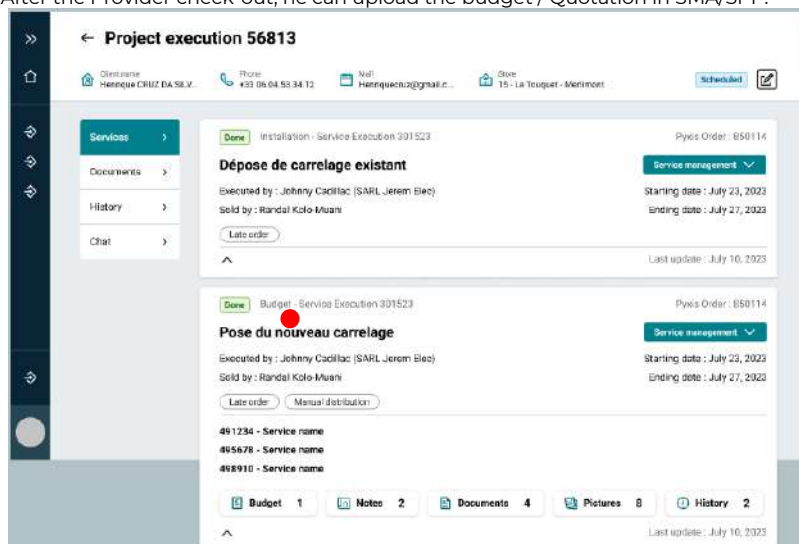
> introduce the quotation to the customer

> register the result of the quotation approval

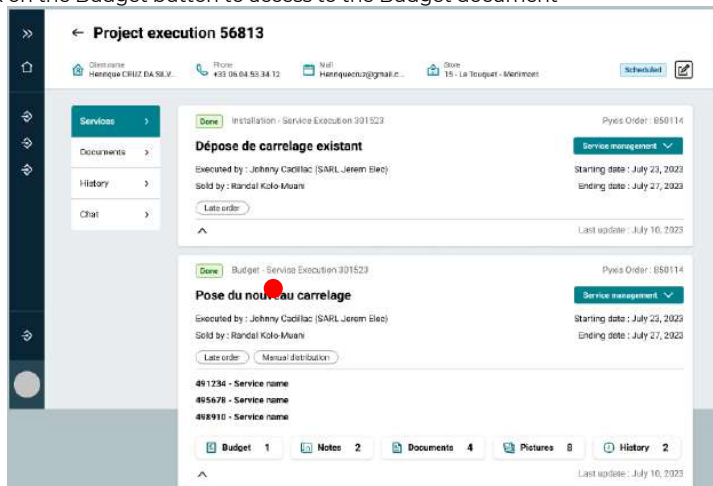
Video of the Quotation flow available [here](#)

How to - Process flow

1. [\[Open the project and the relative service order\]](#)
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.



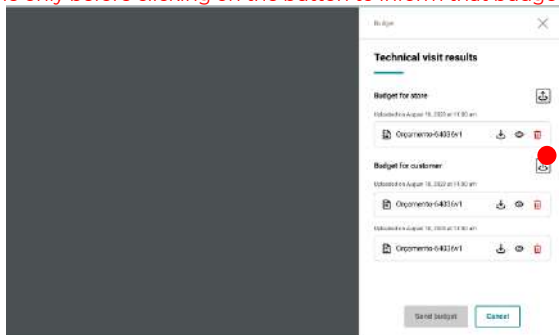
- Click on the Budget button to access to the Budget document



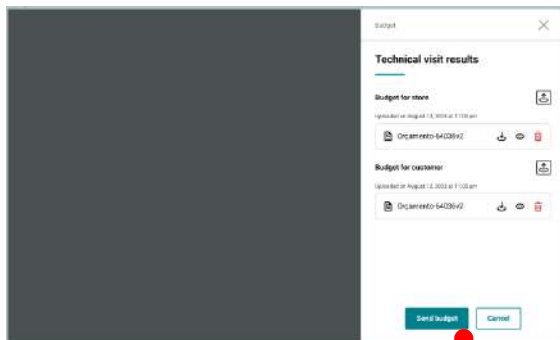
The tracking of the Technical Visit report upload can be done through the Power BI. You can refer to the part [\[monitor pending quote\]](#) to see the Alerting.

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

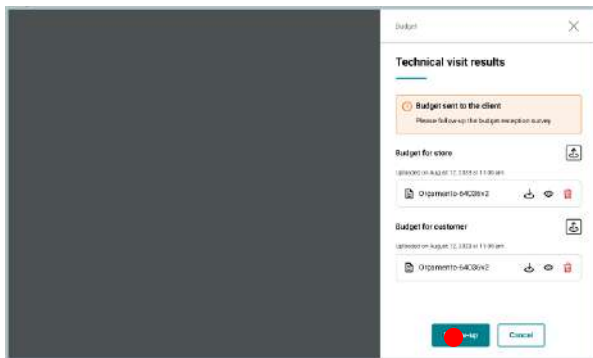
This is possible only before clicking on the button to inform that budget has been sent



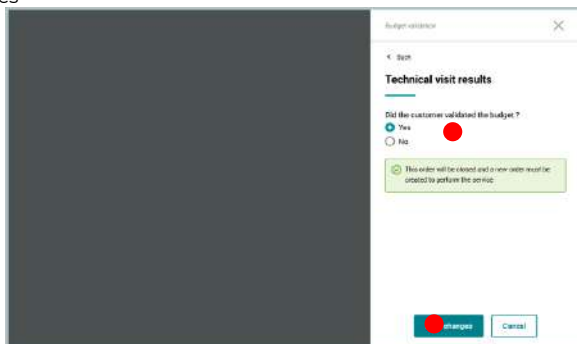
- You can select a document and click to inform that you have sent/introduced the budget to the customer



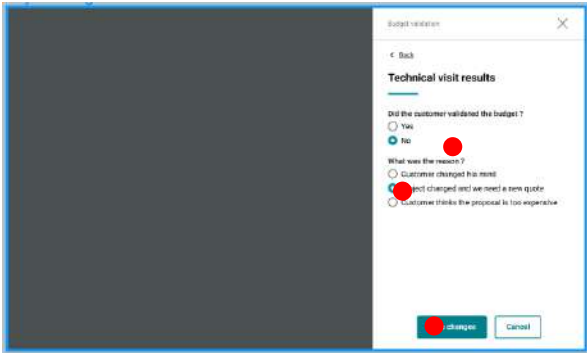
6. You can manage the follow up of the quotation's validation by clicking on the Follow up button



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



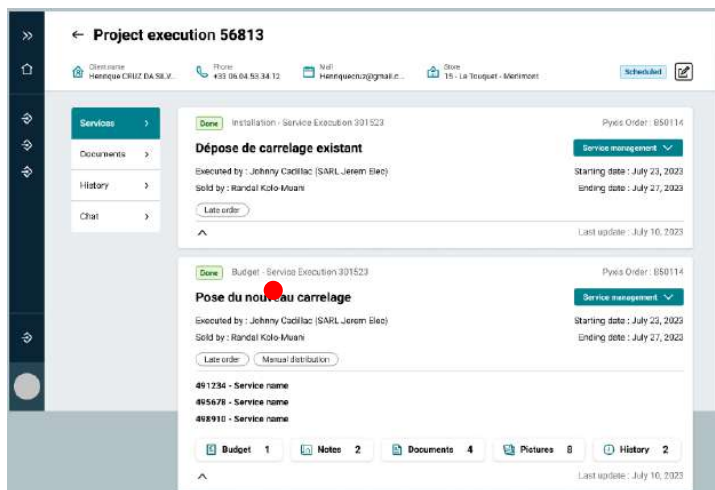
8. If the quotation has not been validated, click on "No", give the reason by clicking on it and save changes

	
Status	The budget flow status is Done
important business rules	<p>The reminder to the provider or customer are done out of the tool.</p> <p>To [monitor pending quote], 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

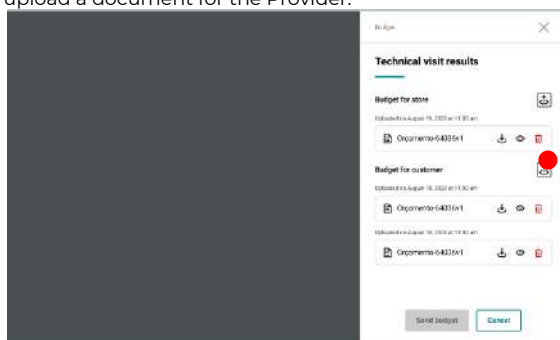
Commented [11]: @btorres@leroymerlin.com.br , for the Portuguese "Budget Flow" for technical visits, can you precise me the end of the workflow :
=> status "In progress" to "Done" is triggered by Pro check-out
= How do we pass from "Done" to "closed" ? Cotazo update ?
Assigned to btorres@leroymerlin.com.br

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

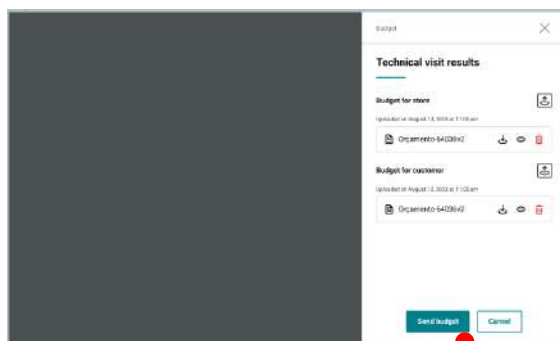
Stream	Service Execution
Business Capability	4-Perform the Job
Business activity	TO BE REMOVED AFTER QUOTATION FLOW IMPLEMENTATION
Business task	
Operator Role	
What - As an operator, I	
<div>> Follow the Technical visit / Quotation flow execution</div> <div>> Access to the deliverable of the Technical visit / Quotation flow</div>	
How to - Process flow	
<div>1. [Open the project and the relative service order]</div> <div>2. Click on the service line to open the service execution details. You can see the Technical visit / Quotation flow status of the service</div>	
<div><div><div>>></div><div>← Project detail 3972</div></div><div><div><div>Services</div><div>Documents</div><div>History</div></div><div><div><div><div>Client name</div><div>Cristina Ferreira</div></div><div><div>Owner</div><div>Albuquerque</div></div><div><div>Address</div><div>TRAVESSA DOS BURACOS Nº 7, DEIXA-O PRETO 7506119</div></div></div><div>Contact</div></div><div><div><div>Scheduled</div><div>Technical Visit - Service Execution 70322</div></div><div><div>Orçamento para instalação porta blindada</div><div>Searching...</div><div>Sold by:</div><div>▼</div></div><div><div>Pyxis Order: 379426</div><div>Service Management</div><div>Starting date: 06/02/2024 (A)</div><div>Last update: 06/02/2024</div><div>Creation date: 02/02/2024</div></div></div></div></div>	
<div>3. Once the Technical visit / Quotation flow is confirmed with date and provider, the Provider will execute the Technical visit / Quotation flow</div>	



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

Budget

Technical visit results

Budget sent to the client
Please follow up the budget inspection survey

Budget for owner
Generated on Aug 07, 2023 at 11:30 AM
Organization: O123456789

Budget for customer
Generated on Aug 07, 2023 at 11:30 AM
Organization: O123456789

Save Cancel

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

Budget validation

Back

Technical visit results

Did the customer validate the budget?

Yes No

This order will be closed and a new order must be created to perform the service

Save changes Cancel

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

Budget validation

Back

Technical visit results

Did the customer validate the budget?

Yes No

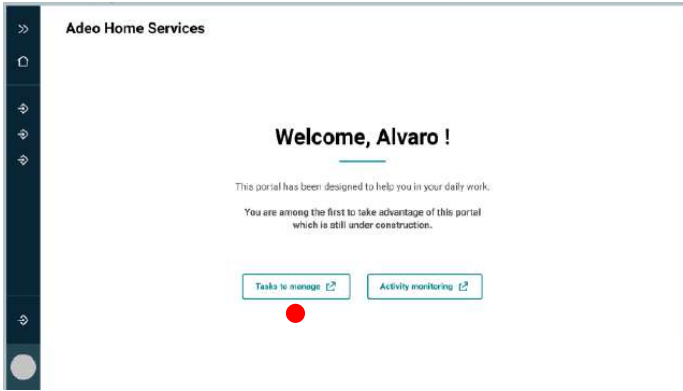
What was the reason?

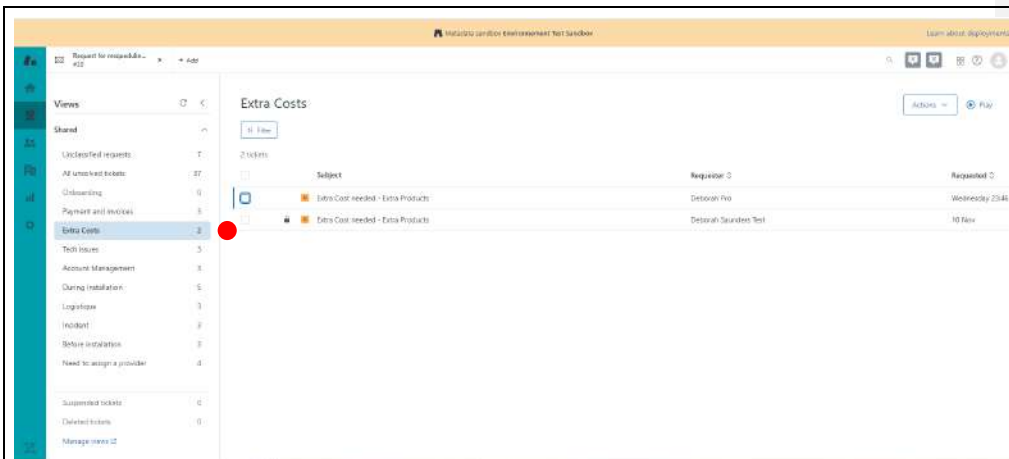
Customer changed his mind
Not changed and we need a new quote
Customer thinks the proposal is too expensive

Save changes Cancel

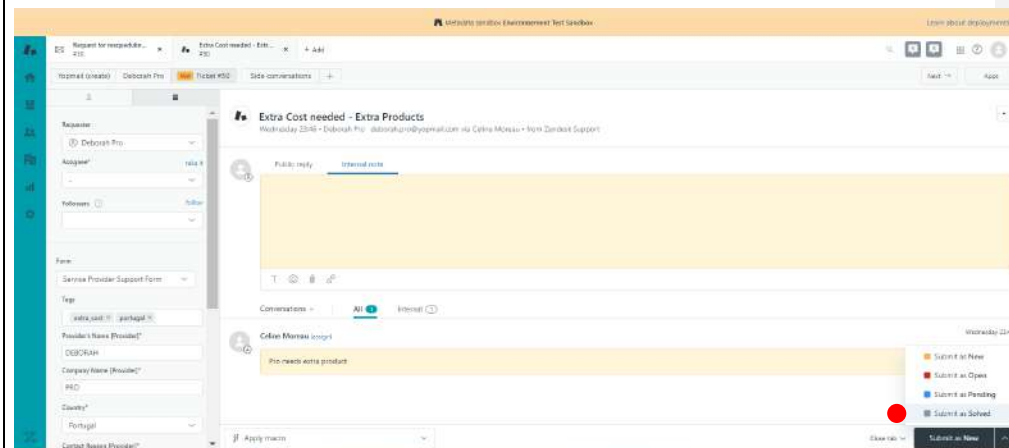
Status	The budget flow status is Done
important business rules	The reminder to provider or customer are done out of the tool. To [monitor pending quote] , use the Power BI

	<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	4.2-Supervise Start the job
Business task	Solve job starting issues (Customer & Pro)
Operator Role	Service execution operator
What - As an operator, I want to ...	
> solve all the critical situation where the service is supposed to start but he has not started yet	
How to - Process flow	
<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>	



4. Open the task to manage 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

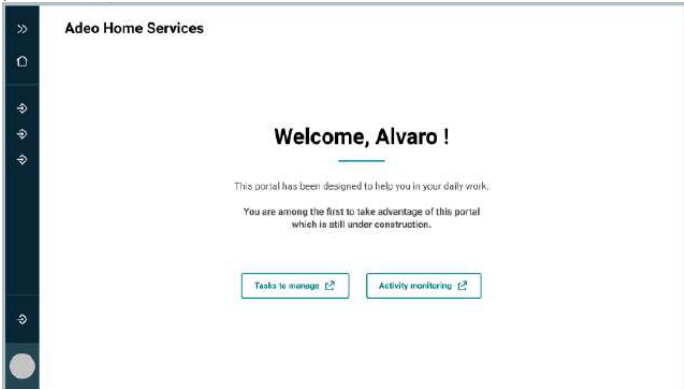


Status	The status of the job is in progress after the check in of the provider or cancel
important business rules	<p>It is very important to follow the Task management in zendesk in real time at the starting point.</p> <p>For extra costs that must be paid by the customers, a Pyxis order must be created. 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	Monitor Contract signature & make contract signed by Customer after automatic reminders
Operator Role	Service execution operator
What - As an operator, I want to ...	
> Monitor the contract signature by the customer > Have an action to the customer to make him sign the contract	
How to - Process flow	
Pls check the link to go on the actions to perform : [Monitor contract signature & make contract signed by Customer after automatic reminders]	
Status	The status is pre-scheduled 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	Monitor Pro automatic assignment
Operator Role	Service execution operator
What - As an operator, I want to ...	
> Monitor by project, by service the provider assigned automatically to the job	
How to - Process flow	
<p>1. Open SOP</p>  <p>2. Identify the concerned Project just created</p> <ul style="list-style-type: none"> • 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 to identify the Order • If Project contains several Projects, just click on the Project line to show all Services orders 	

Projects ⓘ 🔔 - Select a store -

9 results Search a project Filter

PROJECT	STATUS	SERVICE	TAGS	PRICE	DATES	CLIENT
135	Scheduled	Installation - Bombas de e...		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 05.04.53.34.15
143	Scheduled	Multi-services		430,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 05.04.53.34.15
186	Scheduled	Technical Visit - Shower screen		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Elisabeth GANOOTE 05.04.53.34.15
201	Scheduled	Multi-services		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 05.04.53.34.15
198	Rescheduled	Multi-services		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 05.04.53.34.15
144	Scheduled	Installation - Kitchen		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 05.04.53.34.15
164	Scheduled	Multi-services		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 05.04.53.34.15

Rows per page 20 1-8 of 9 items Page 1 of 1

- Click on the concerned Service order to open it

Projects ⓘ 🔔 - Select a store -

9 results Search a project Filter

PROJECT	STATUS	SERVICE	TAGS	PRICE	DATES	CLIENT
135	Scheduled	Installation - Bombas de e...		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 05.04.53.34.15
143	Scheduled	Multi-services		430,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 05.04.53.34.15
186	Scheduled	Technical Visit - Shower screen		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Elisabeth GANOOTE 05.04.53.34.15
201	Scheduled	Multi-services		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 05.04.53.34.15
198	Rescheduled	Multi-services		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 05.04.53.34.15
144	Scheduled	Installation - Kitchen		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 05.04.53.34.15
164	Scheduled	Multi-services		150,00 €	Planned: 21/03/2023 PM Last action: 19/03/2023	Henrique CRUZ 05.04.53.34.15

Rows per page 20 1-8 of 9 items Page 1 of 1

- You can see all the services with the assigned provider

Stream	Service Execution
Business Capability	5-Track & Supervise Service execution
Business activity	5.X
Business task	Solve automatic assignment issues
Operator Role	Service execution operator

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

> 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
 > select a provider who is not available in the list

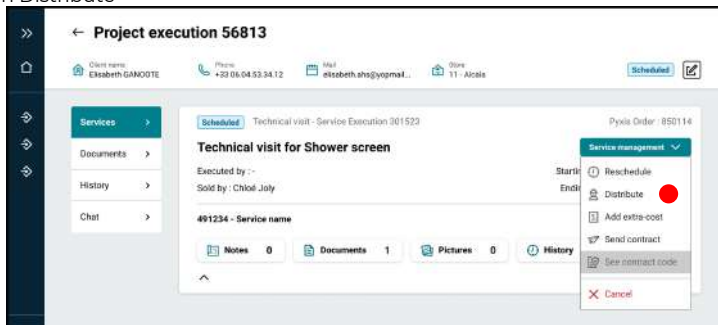
How to - Process flow

1. Look for the Service that you want to manage : you can find the way to proceed by going to the tutorial [\[Open a customer Project and related Service order\]](#)
2. Click on the button Service Management

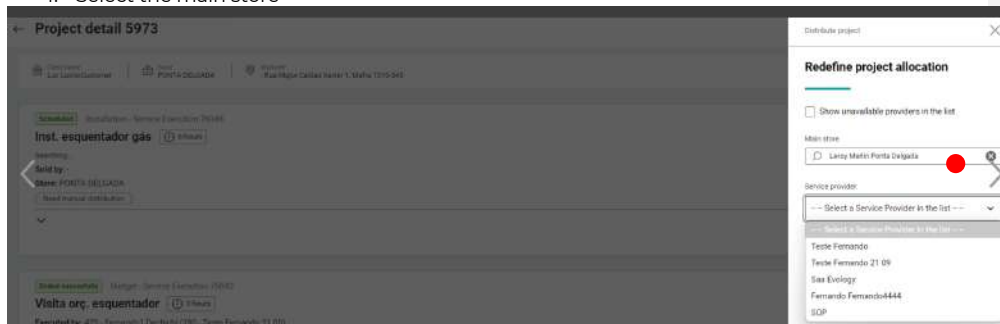
The screenshot displays the 'Project execution 143' interface. It features a sidebar with navigation options: Services, Documents, History, and Chat. The main content area shows three service execution cards, each with a status (Executed or Scheduled), a title, execution details, and a 'Service management' button.

Service Execution ID	Status	Title	Executed by	Sold by	Starting date	Ending date	Last update
56888	Executed	Dépose de carrelage existant	Johnny Cadillac (SARL Jerem Elec)	Randal Koko-Muani	July 23, 2023	July 27, 2023	July 10, 2023
57756	Scheduled	Pose du nouveau carrelage	Johnny Cadillac (SARL Jerem Elec)	Randal Koko-Muani	July 23, 2023	July 27, 2023	July 10, 2023
56999	Scheduled	Finitions de carrelage	Johnny Cadillac (SARL Jerem Elec)	Randal Koko-Muani	July 23, 2023	July 27, 2023	July 10, 2023

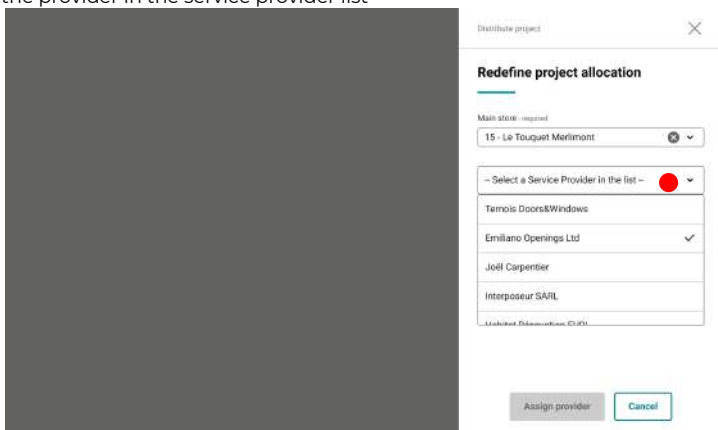
3. Click on Distribute



4. Select the main store



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"

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

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

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

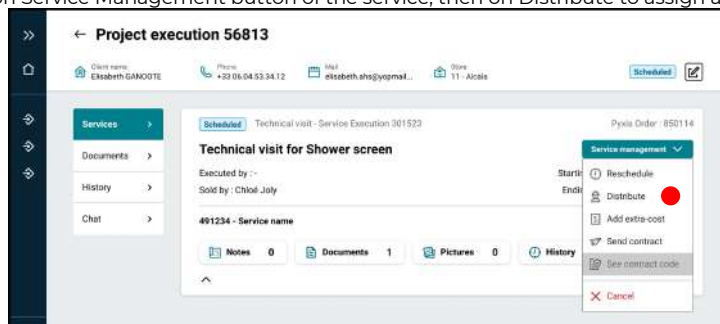
Stream	Service Execution
Business Capability	5-Track & Supervise Service execution
Business activity	5.X
Business task	Assign a Pro Manually
Operator Role	Service execution operator

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

> 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

How to - Process flow

1. Look for the Service that you want to cancel : you can find the way to proceed by going to the tutorial [\[Open a customer Project and related Service order\]](#)
2. Click on Service Management button of the service, then on Distribute to assign a new provider



4. Select the main store

Distribute project

Redefine project allocation

Main store required

15 - Le Touquet Merlimont

-- Select a Service Provider in the list --

-- Select a worker in the list --

Assign provider

Cancel

5. Select the provider in the service provider list

Distribute project

Redefine project allocation

Main store required

15 - Le Touquet Merlimont

-- Select a Service Provider in the list --

Terris Doors&Windows

Emiliano Openings Ltd

Joël Cepentier

Interposeur SARL

Assign provider

Cancel

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

Distribute project

Redefine project allocation

Main store required

15 - Le Touquet Merlimont

Emiliano Openings Ltd

-- Select a worker in the list --

Assign provider

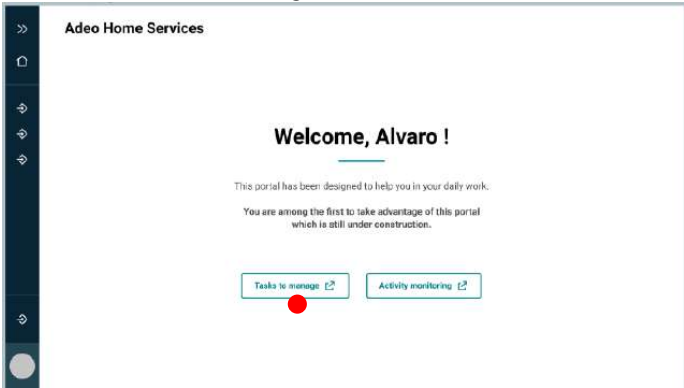
Cancel

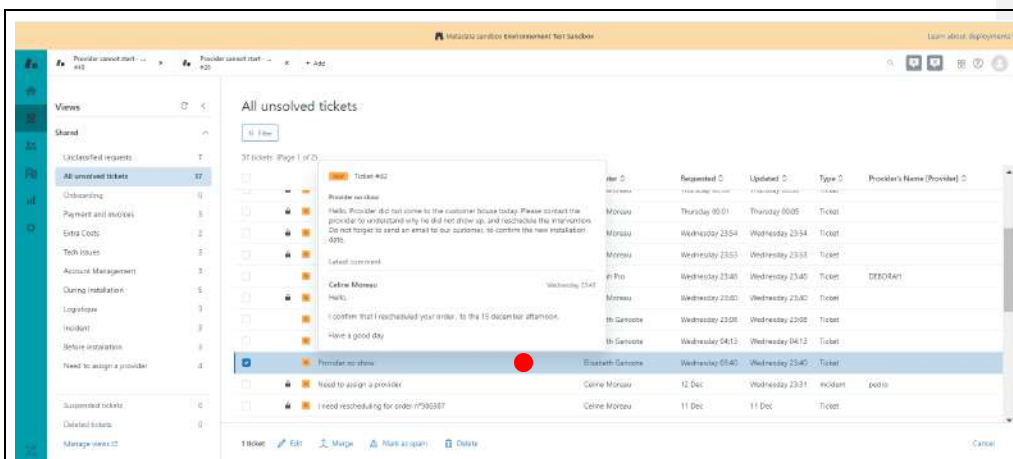
Status

The status will move from **Distributed** to **Scheduled** if the provider canceled

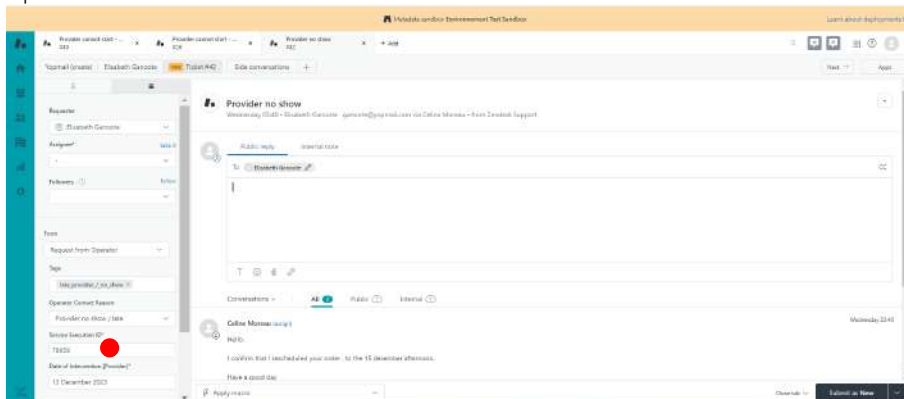
User Guide/Execution Stream/December 2023 - 106

	The status stays as Scheduled 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	Manage PRO No Show / is late
Operator Role	Service execution operator
What - As an operator, I want to ...	
> Investigate the status of the service after a No Show information from the customer > Find a solution to the issue raised by the customer	
How to - Process flow	
1. Open SOP and follow the task to manage 	
2. Look for the concerned ticket in Zendesk	

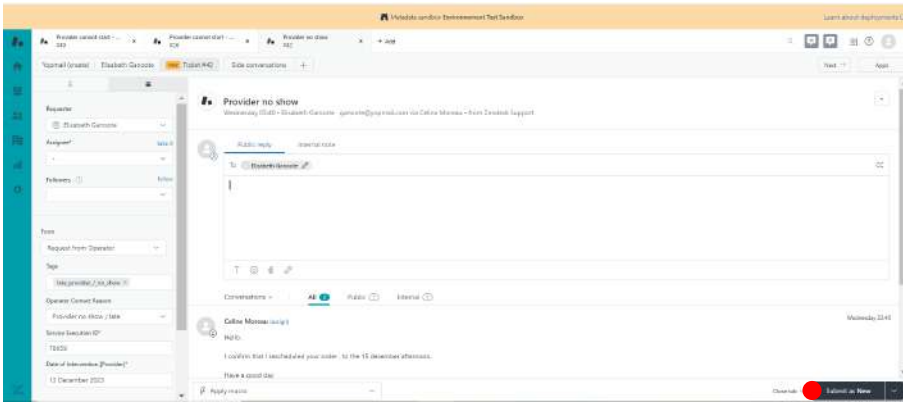


3. Open the ticket to check the issue. You can find the service Id



4. Go to the SOP portal and contact the provider. If needed you can [reschedule](#) or [reallocate](#) the provider

5. Once you solve the issue, you can close the ticket in Zendesk and check the information related to the task to manage



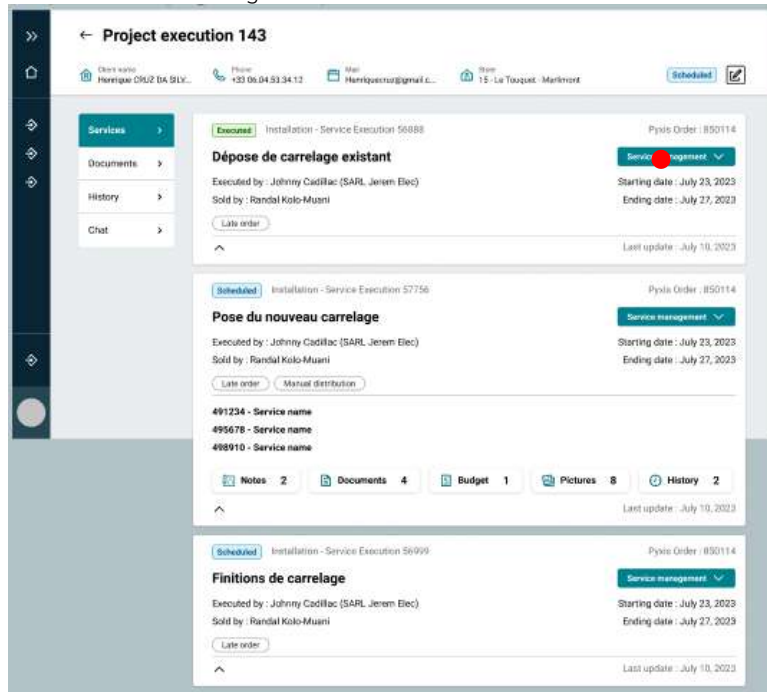
Status	The status of the service is Confirmed
important business rules	The actions to solve the issue must be managed out of the tool
Event	A task is created in Zendesk
Notification	Notifications are sent in case of reschedule or reallocation

Stream	Service Execution
Business Capability	5-Track & Supervise Service execution
Business activity	5.X
Business task	Manage Extra Cost request
Operator Role	Service execution operator
What - As an operator, I want to ...	
> collect the information of extra cost declared by the provider > attach the extra cost to the service to ensure the invoicing	
How to - Process flow	

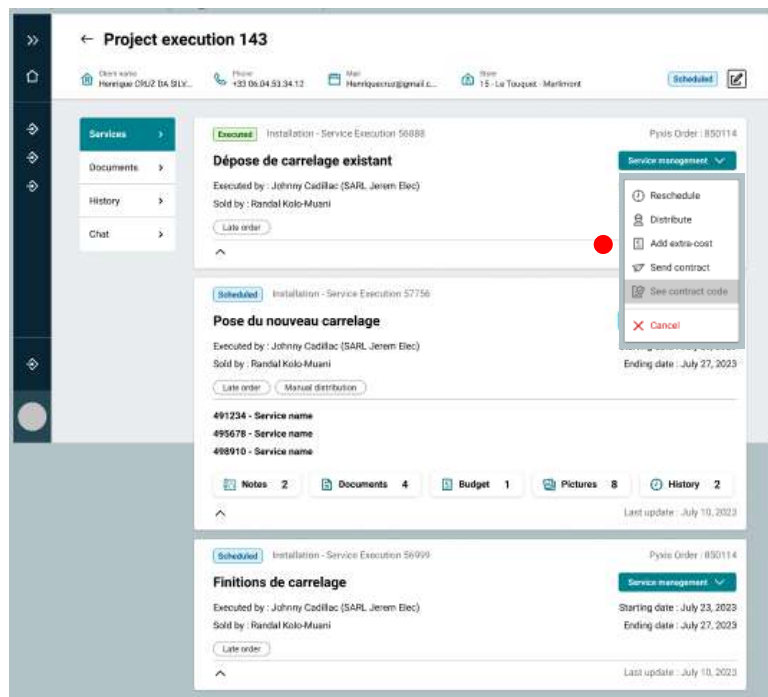
Commented [15]: ZENDESK à décrire

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

2. Click on the button Service Management



3. Click on the button Add extra cost



4. 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
5. 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 €).
6. Extra costs will be monitored through a dedicated [financial monitoring dashboard](#).

Service management

Declare extra-cost

Amount - in euro

Justification - required

New intervention needed

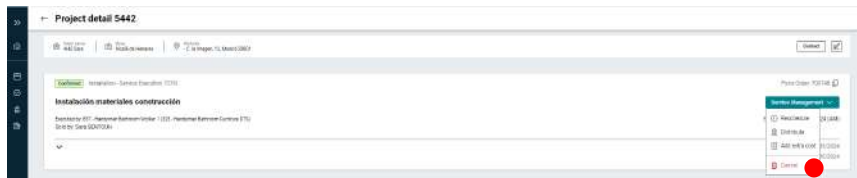
Description - required

Insert your text here

Save changes Cancel

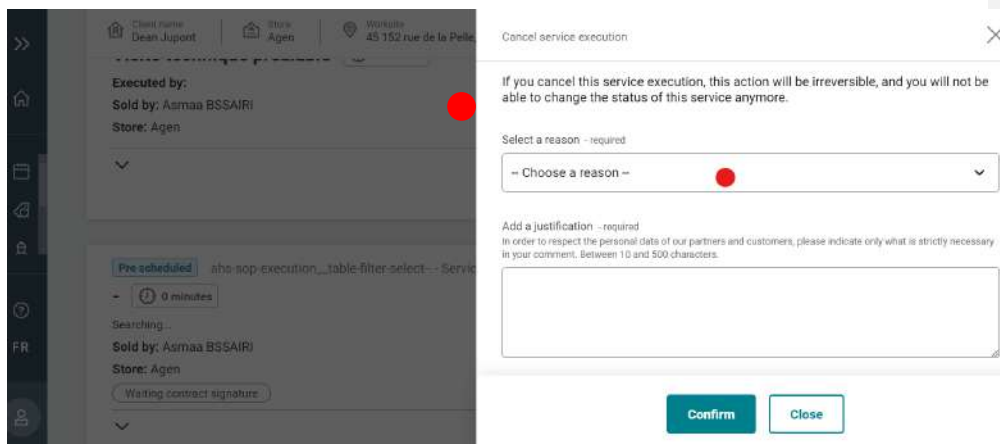
Status	The status of the service is In Progress
important business rules	<p>The extra costs asked by the Provider and validated by the operator are paid to the Provider</p> <p>If extra costs must be invoiced to the customers, they have to be integrated in Pyxis order under the 49 codes defined in SMD.</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	Cancel a service
Operator Role	Service execution operator
What - As an operator, I want to ...	
<p>> 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>	
How to - Process flow	
<ol style="list-style-type: none"> 1. Look for the Service that you want to cancel : you can find the way to proceed by going to the tutorial [Open a customer Project and related Service order] 2. Click on the button Service Management and click on cancel 	

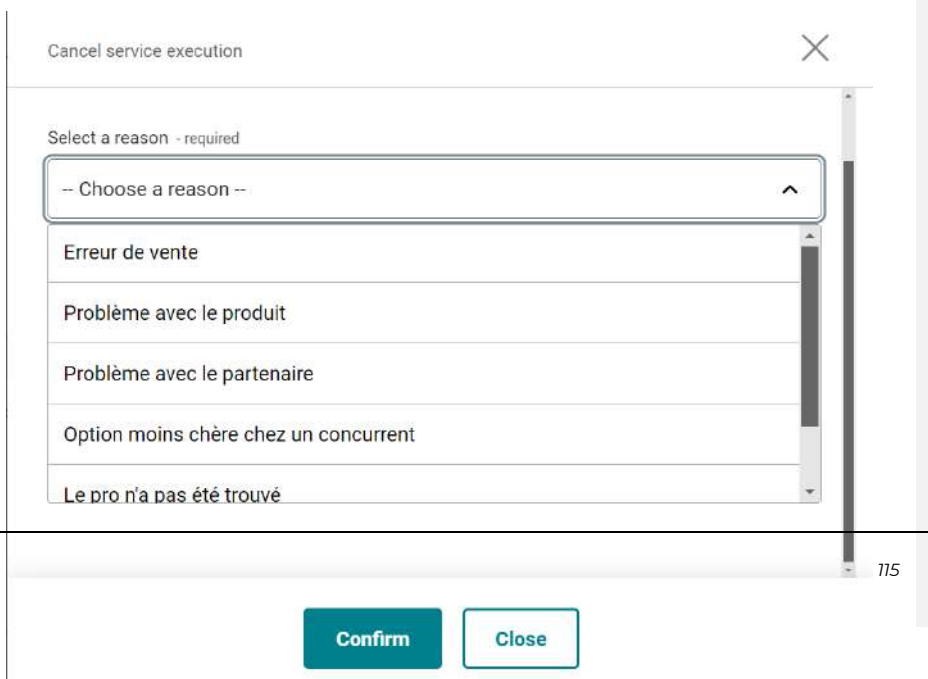


3. The following screen appears : fill the reason of cancellation and click on Confirm button

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

Client name:
Dean Jupont

Store:
Agen

Address:
45-152 rue de la Pelle

Executed by:

Sold by: Asmea BSSA/IRI

Store: Agen

Pre-scheduled

0 minutes

Searching...

Sold by: Asmea BSSA/IRI

Store: Agen

Waiting contract signature

Cancel service execution

Select a reason - required

Erreur de vente

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. Between 10 and 500 characters.

Wrong product

Confirm

Close

7. The new status of the service is Cancelled

Cancelled

Service Execution 73961

Installation materials construction

Executed by:
Operator: Sam BENTOUH

Price Order: 201046

Service Management

Starting date: 20/06/2024 (AM)

Last update: 06/07/2024

Creation date: 06/07/2024

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

	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

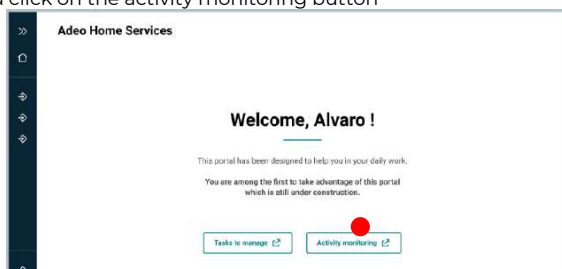
Stream	Service Execution
Business Capability	5-Track & Supervise Service execution
Business activity	5.X
Business task	Monitor Pending TV report
Operator Role	Service execution operator

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

> monitor the pending TV report (The Pro has not yet updated the TV report in SMA or SPP)

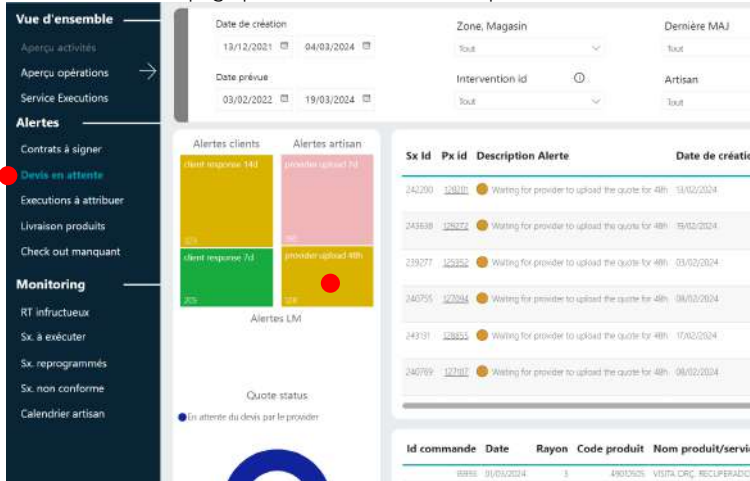
How to - Process flow

1. Open SOP and click on the activity monitoring button



2. You arrive on the monitoring dashboard in Power BI,
 - a. please click on Pending Quotes page

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



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 done
important business rules	The reminders are done out of the tool The description of the alert trigger is available in the home page of the PBI : AHS Activity Monitoring Dashboard Alert AHS Activity monitoring dashboard Alerts
Event	No event linked to this task
Notification	No notification linked to this task

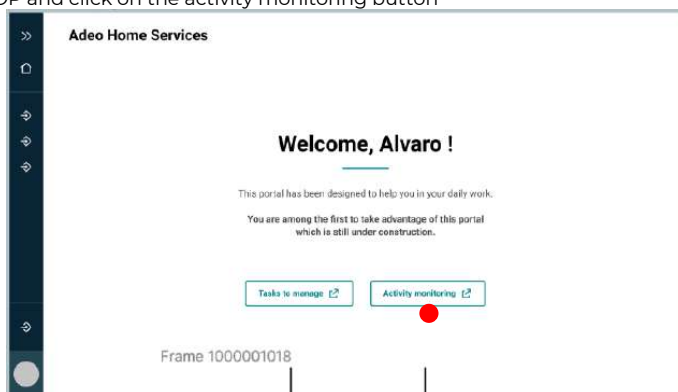
Stream	Service Execution
Business Capability	5-Track & Supervise Service execution
Business activity	5.X
Business task	Monitor Pending quotes
Operator Role	Service execution operator

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

> monitor the pending quotes without answer from the customer to ask him the status

How to - Process flow

1. Open SOP and click on the activity monitoring button



2. Click on pending quotes :

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

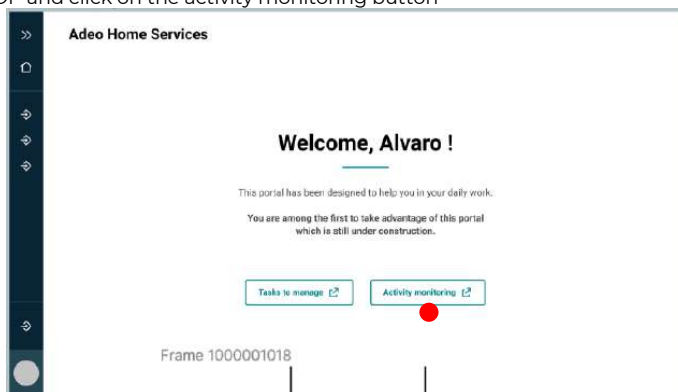
Stream	Service Execution
Business Capability	5-Track & Supervise Service execution
Business activity	5.X
Business task	Monitor Late check-out from the Provider
Operator Role	Service execution operator

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

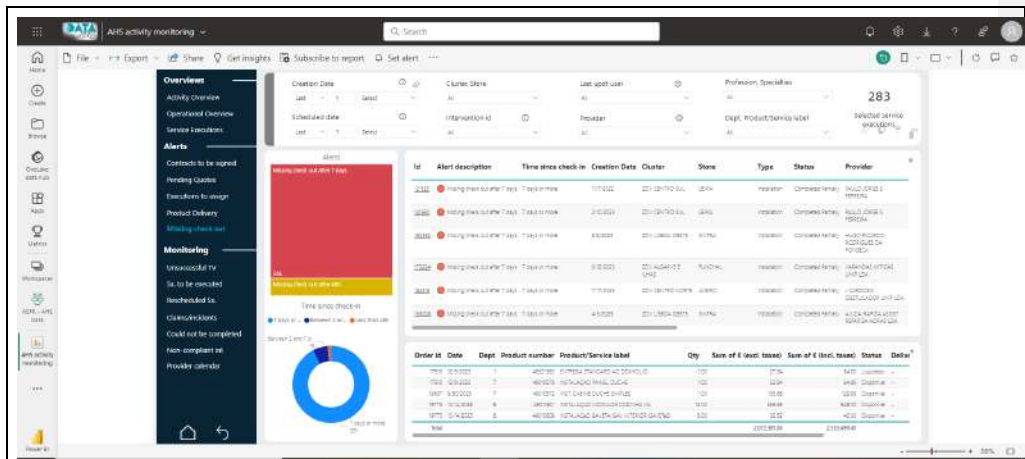
> monitor the late check-out from the Provider after 48h, then 7 days to remind him to check out.

How to - Process flow

1. Open SOP and click on the activity monitoring button



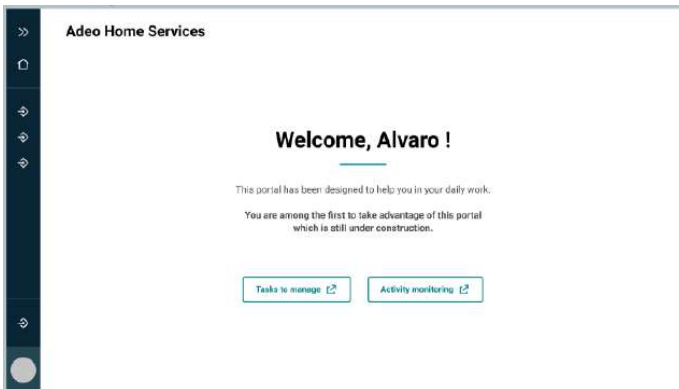
2. You arrive on the monitoring dashboard in Power BI and you can click on the service Id to consult the details




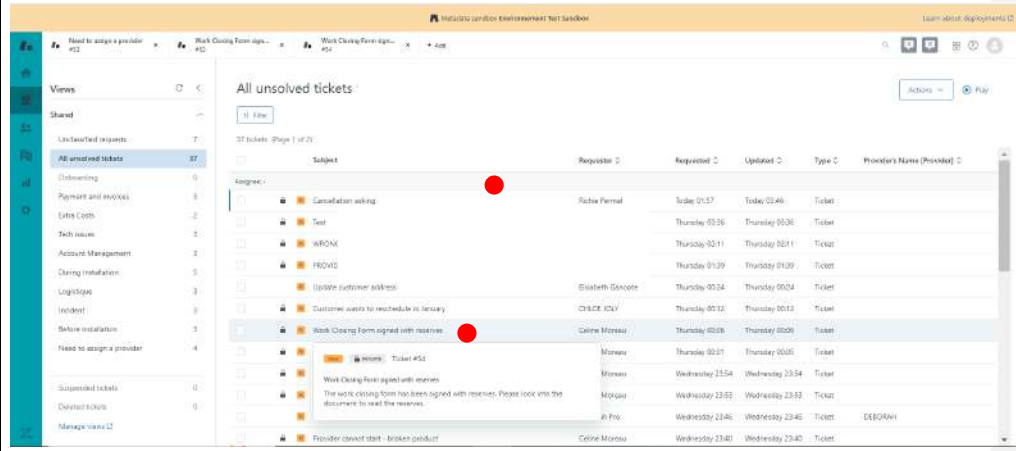
Commented [16]: Insert printscreen

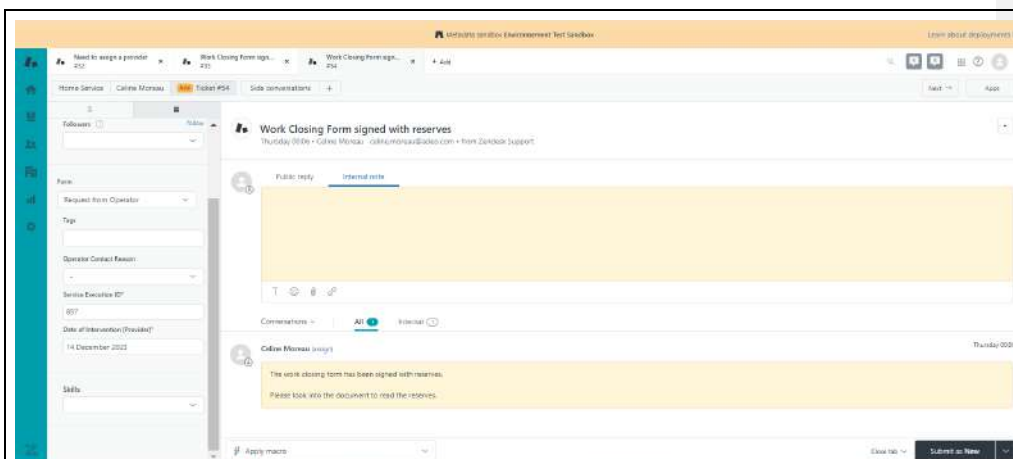
3. You are redirected in SOP in the Service execution concerned	
4. You can check the providers information to remind him to upload the quotation	
Status	The status of the Technical visit / Quotation flow is In progress
important business rules	The reminders are done out of the tool
Event	No event linked to this task
Notification	No notification linked to this task

6. Manage claims & feedback

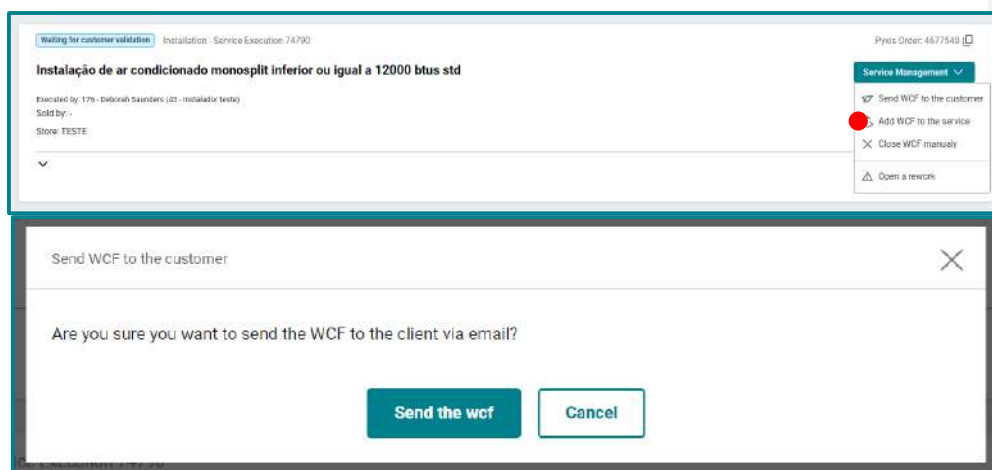
Stream	Service Execution
Business Capability	6-Manage claims
Business activity	6.X
Business task	Work closing form not signed
Operator Role	Service execution operator
What - As an operator, I want to ...	
> Manage the claim that appears at the end of the execution of the service > Check why the work closing form has not been signed > Make the Work closing Form signed by the Customer	
How to - Process flow	
1. As Service Execution operator, you follow the task in Zendesk accessible from SOP Homepage <div data-bbox="285 1084 967 1471">  </div>	
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"> - resend the WCF to the customer - upload a WCF manually (in case of paper WCF) - close the WCF manually on the customer's behalf 	

	
Status	The status is Waiting for WCF signature
important business rules	<p>The Work closing form is sent to the customer once the Pro did the check-out (or signed digitally by Pro 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	Work closing signed with reserves
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	
	
3. Open the ticket and check the Work Closing Form and check the order information.	<div>Commented [17]: We are checking the availability of the WCF in ZDSK - @celine.moreau@adeo.com could you please let me know the status ?</div>



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

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

Waiting for customer validation

Installation : Service Execution 74790

Physis Order: 6577549

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

Executed by: 179 - Edson de Saunders (OT - installer test)

Sold by: -

Store: TESTE

Service Management

Send WCF to the customer

Add WCF to the service

Close WCF manually

Open a review

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

Metasploit service environment test handbook

Learn about deployment 12

Need to assign a provider #12

Work Closing Form sign- #12

Work Closing Form sign- #12

App

Home Service

Online Monitor

Ticket #52

Side conversations

Need 12

App

Followers

Solve

Work Closing Form signed with reserves

Thursday 14th • Online Monitor • cat@redwoodbarbecue.com • from Zendesk Support

Public reply

Internal note

Conversations

All

Internal

Online Monitor assign

The work closing form has been signed with reserves.

Please look into the document to read the reserves.

Submit as New

Submit as Open

Submit as Pending

Submit as Solved

Thursday 14th 2023

Apply macros

Close this

Submit as New

Congratulations, you have found the customer contact information and you can solve the issue

Status	The status is Done
--------	---------------------------

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	Rework flow
Operator Role	Service execution operator
What - As an operator, I want to ...	
<ul style="list-style-type: none"> > Manage the claim that appears by launching a rework on the customer worksite > Follow the rework flow as a normal operation flow > Confirm the removal of reserves 	
How to - Process flow	
<ol style="list-style-type: none"> 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" 	

← **Project detail 5767**

Client name: FLOO TEST | Store: Alcalá de Henares | Website: Calle Variosa, 2, Alcalá de Henares 28815

Project Order: 701271

Spotted successfully Installation - Service Execution 75092

Instalación split 2x1 b

Executed by: 1003 - RICARDO S LAMES CA (411 - LAMES CA)
Sold by: FLORIAN RICHARD BORGUS
Store: Alcalá de Henares

Service Management

Open a rework 06/2024

Last update: 14/06/2024
Creation date: 14/06/2024

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**

Client name: FLOO TEST | Store: Alcalá de Henares | Website: Calle Variosa, 2, Alcalá de Henares 28815

Project Order: 701271

Spotted successfully Installation - Service Execution 75092

Instalación split 2x1 b

Executed by: 1003 - RICARDO S LAMES CA (411 - LAMES CA)
Sold by: FLORIAN RICHARD BORGUS
Store: Alcalá de Henares

Waiting for technician validation: Installation - Service Execution 75091

Instalación split 2x1 b

Executed by: 1003 - RICARDO S LAMES CA (411 - LAMES CA)
Sold by: FLORIAN RICHARD BORGUS
Store: Alcalá de Henares

Select the services who make a rework

Select 49 code - required

Search a technical visit

At least one 49 code must be selected

49800266 SPLIT AIR CONDITIONING MEASUREMENT	<input type="checkbox"/>
49800267 MEASUREMENT INSTAL. FS DUCTS	<input type="checkbox"/>
49811168 MEASUREMENT VENTILATION SYSTEMS	<input type="checkbox"/>
49812668 MEASUREMENT INSTAL. FS TOL DUCTS	<input type="checkbox"/>
49813668 SPLIT TOL. AIR CONDITIONING MEASUREMENT	<input type="checkbox"/>

Add a description - required:
Between 10 and 100 characters - in order to help the generalists of our partners and customers, please include any detail or detail in your comment

Confirm Cancel

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**

Client name: FLOO TEST | Store: Alcalá de Henares | Website: Calle Variosa, 2, Alcalá de Henares 28815

Project Order: 701271

Spotted successfully Installation - Service Execution 75092

Instalación split 2x1 b

Executed by: 1003 - RICARDO S LAMES CA (411 - LAMES CA)
Sold by: FLORIAN RICHARD BORGUS
Store: Alcalá de Henares

Waiting for technician validation: Installation - Service Execution 75091

Instalación split 2x1 b

Executed by: 1003 - RICARDO S LAMES CA (411 - LAMES CA)
Sold by: FLORIAN RICHARD BORGUS
Store: Alcalá de Henares

Select the services who make a rework

Select 49 code - required

Search a technical visit

What is the root reason? - required

Choose a reason:

Product - defective	<input type="checkbox"/>
Product - wrong/incorrect	<input type="checkbox"/>
Product - damaged	<input type="checkbox"/>
Service - execution defect	<input type="checkbox"/>
Service - assignment issue	<input type="checkbox"/>

Confirm Cancel

List of root causes :

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

- 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.

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

- 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

Product delivery date: 17/06/2024 | Zipcode: 28003 | [Search](#)

June 2024 | [Print available](#) | Week 25

Monday 17	Tuesday 18	Wednesday 19	Thursday 20	Friday 21	Saturday 22
morning					
afternoon					

7. Assign the worker:

Schedule worksite

Service provider: **AGAME SERVICIOS INTEGRALES**

Service worker: **adame worker 2 Instalador**

[Schedule](#) [Cancel](#)

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'

<p>Confirmed Rework - Service Execution 75176</p> <p>Toma de medidas previa si la instalación no se ejecuta</p> <p>Executed by: 1223 - adame worker 2 Instalador (AGS - AGAME SERVICIOS INTEGRALES)</p> <p>Sold by: -</p> <p>Store: Alcalá de Henares</p>	<p>Pyxis Order: 4520772</p> <p>Service Management</p> <p>Starting date: 19/06/2024 (AM)</p> <p>Last update: 17/06/2024</p> <p>Creation date: 17/06/2024</p>
<p>Non compliant Installation - Service Execution 75092</p> <p>Instalación split 2x1 b</p> <p>Executed by: 1169 - RECURSOS 3 LINES E4 (411 - LINES E4)</p> <p>Sold by: FLORIAN RICHARD BORGUS</p> <p>Store: Alcalá de Henares</p>	<p>Pyxis Order: 701271</p> <p>Service Management</p> <p>Starting date: 14/06/2024</p> <p>Last update: 17/06/2024</p> <p>Creation date: 14/06/2024</p>

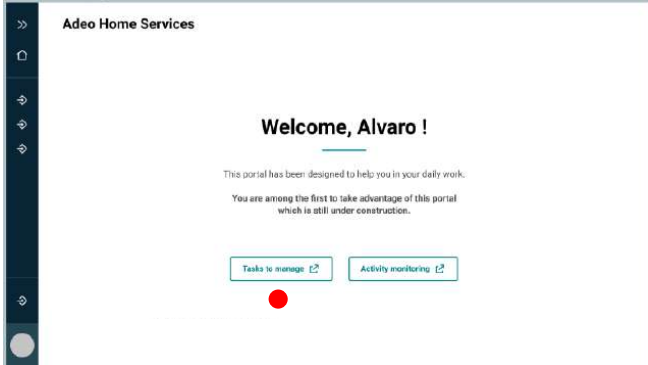
6. You can [manage the extra cost](#) according to the responsibility of the non compliant initial

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	<p>You can open the rework when the status is from Waiting for WCF to Closed.</p> <p>The status of the initial service becomes Not compliant</p> <p>The statuses of the rework service are the standard ones</p>
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	<p>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</p>
Notification	<p>The notifications are the same as a standard installation</p>

7. Invoice & Pay

Stream	Service Execution
Business Capability	7-Invoice & Pay
Business activity	7.1
Business task	Invoice dispute management
Operator Role	Service execution operator
What - As an operator, I want to ...	
> manage the dispute of the invoice by the provider > monitor any financial aspects (invoicing included) related to the executed service executions	
How to - Process flow	
1. As Service Execution operator, you follow the task in Zendesk accessible from SOP Homepage <div data-bbox="303 1070 954 1433">  </div>	
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 financial monitoring dashboard .	
Status	The status of the service is Closed

Commented [18]: @celine.moreau@adeo.com can you pls confirm that the status is closed ?

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	Invoice consultation
Operator Role	Service execution operator

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

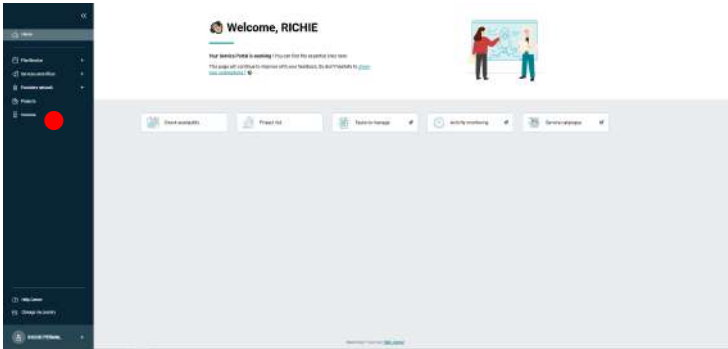
- > Consult the invoice of a provider

> 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

Notification	No notification
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8. Support & Manage