

## Paul's Workflow Bucket System

Customer calls for appointment

Can the work be completed while customer waits?

YES

Work with customer to get a detailed description of the problems. Get pictures of serial numbers and brands. Order the parts based on the information received. When the parts arrive, make an appointment for the customer to bring the unit in and wait for repairs.

NO

Is the problem likely an adjustment (loose molding, door out of alignment) or explain to the customer how to properly use the (TV, Thermostat, lighting controls, etc)

YES

Make appointment and have a tech meet the customer in the driveway with some basic tools to attempt a repair or customer usage problem.

NO

Ask the customer to email a list of complaints along with pictures so a drop off appointment can be scheduled.

Customer arrives with unit. Add any last minute complaints to the appointment, then convert the appointment to a work order. Grab your tablet and check the unit in. Take pictures of any complaints that you think the tech will need clarification on. Take pictures of any pre-existing damage so there is no dispute later. Include the customer in pictures if possible.

Dispatch the RO to a tech. The tech should log on to each job as they start work. Once the tech knows what will be needed to make the repair or get authorization, he writes that information in the CAUSE section of the job. He should also take pictures of any serial number plates or stickers, and any item that color or size might be in question. Keep a yardstick handy to put next to items where size is important like trim and molding. The tech can also put the time they think they will need to complete the repair. The tech then logs off the job with the status of NEED PARTS or NEED AUTH depending on dealership parameters.

If the tech is going to lunch or home or to work on another job, he logs off PAUSE and will restart work at a later date.

The CORRECTION field is to be used once the repair is complete. This field is for what you DID to make the repair. It is not for what you WILL DO. What you WILL DO goes in the cause.

Now we will discuss Work Order JOB Status codes.

0-9 are reserved for the mobile app communication with IDS. You as the dealer can create any letter codes you think you will need to operate your dealership. A list of suggestions is at the end of this document.

My workflow concept assumes that every job is in a "bucket" Bucket meaning work order job status. Every bucket has an owner. Some or most people will have more than one bucket they need to monitor. You look at your bucket or buckets several times a day and do what ever work is required and change the job status to move the job into someone else's bucket. Eventually the job will be completed and no one will have to do anything except let the customer know.

Example 1: Tech logs off “parts needed.” Someone in parts runs “WO Jobs by Job Status Report” for Status 4 and collects up all the jobs where the tech says they need parts. That person opens up the work order, goes to the job and looks at the tech notes and documents. Between those two places, the parts should be able to be ordered. If the parts are ordered, the status is changed to PO. Make any note in Job Comments as required. If not, make a note in Job Comments for that job and change the status to SA so the service advisor can get the missing info.

Example 2:

Tech logs off “Auth Needed.” Service advisor runs “WO Jobs by Job Status Report” for Status 3. He opens each work order job and either gets the approval if it should be from the customer or extended warranty company or insurance company. Or he move the job to another bucket if auth needs to come from elsewhere. Warranty, Sales, Service Manager, Etc. Those people monitor their buckets and take appropriate action then change the job status again.

Example 3:

Tech logs off needs auth. Service advisor opens that WO, sees that it is an E job and calls the customer with the bad news. “Your refer is shot.” Customer says OK, I need to know what my options are before I decide. Status changes to PA. Parts collects that job and looks up what brands of refer are available, when they can get here, freight costs, etc. They might also include an option for a residential refer and lithium battery upgrade. They put the info in the Job Comments for that job, then change the status to PC. The service advisor will collect the jobs where price and availability is completed and relay the info back to the customer.

Example 4:

Tech logs off needs auth. Service advisor opens the job and determines that the auth should come from the MFGR. He changes the status to WA. The warranty person collects those jobs. He opens each one and looks at tech notes and document manager and tries to get the preauth. If there is not enough info to get the preauth, the staus is changed to SA so the service advisor can get the additional info. If the preauth is approved, the status can be changed to PR if parts need to be ordered, or RD if it can be dispatched back to the tech or WC if the service advisor needs to decide the next step. If the warranty is denied, then change the status to WD and the service advisor can let the customer know if the repairs are needed they have to pay.

“WO Jobs by Job Status Report” can be filtered by WO author if the advisors are only responsible for work order that they wrote.

Someone needs to be responsible for running “WO Jobs by Job Status Report” for all statuses to make sure everyone is doing their job and things are not piling up somewhere.

Examples of who own each bucket.

Owned by parts

4 - Needs parts (From Tech)

PR - Parts Required (Different than the Parts Required that comes from the tech. This would one indicates someone inside decided parts are needed.)

PO - Parts Ordered

PA - Price & Availability required

Owned by Service advisor  
3 - Needs Auth (From tech)  
PC - Price & Availability complete  
WC - Warranty preauth complete  
WD - Warranty preauth denied  
HC - Approval from Sales complete  
SA - Needs attention from Service Advisor

Owned by Dispatcher  
PH - Parts Here  
RD - ready to dispatch

Owned by Warranty  
WA - Warranty preauth needed

Owned by Sales  
HS - Hold for Approval from Sales

Owned by Service Manager  
SM - Needs Service Manager Attention

These are examples that are NOT a job status. In these cases, the status is COMPLETE and this is the correction taken. An exception is if you want the service advisor to contact the customer to get more information, you could use no problem found. In this case, that status would be owned by the service advisor and he would change the status to the appropriate one after discussing it with the customer.

- Works as designed
- Customer declined repair
- no problem found