

MOBILEERP

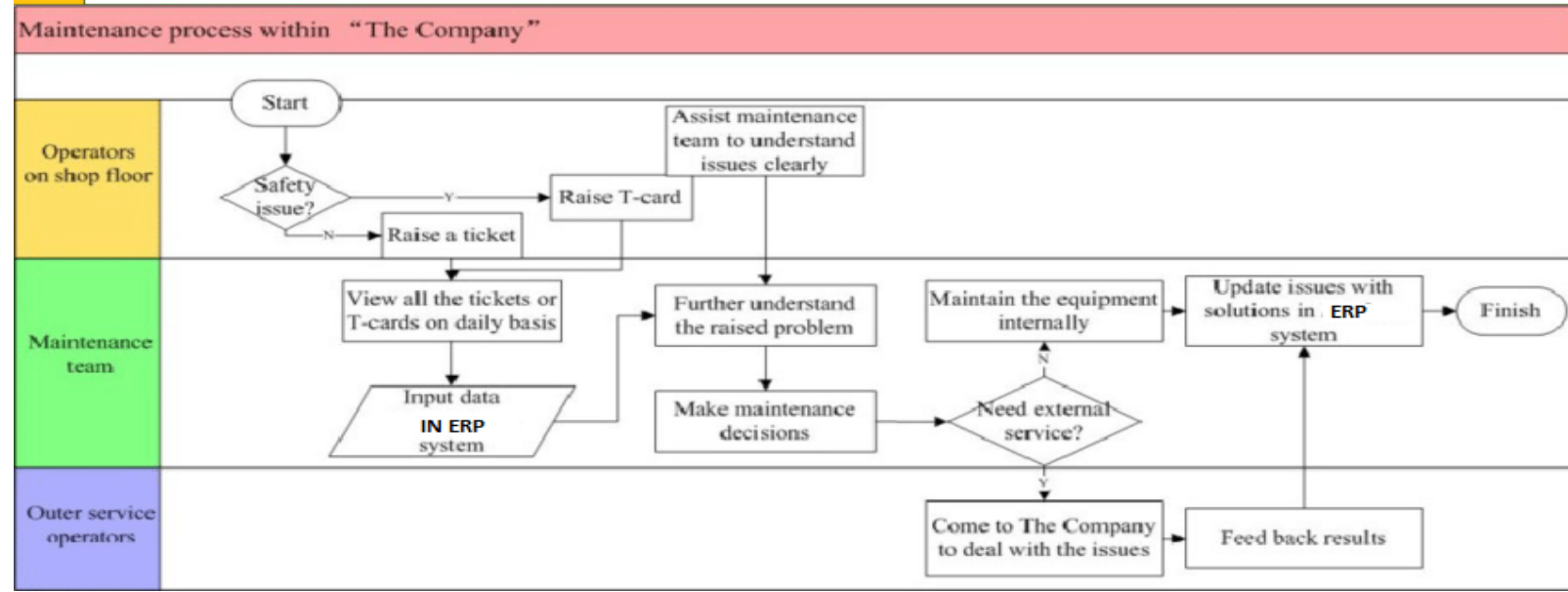
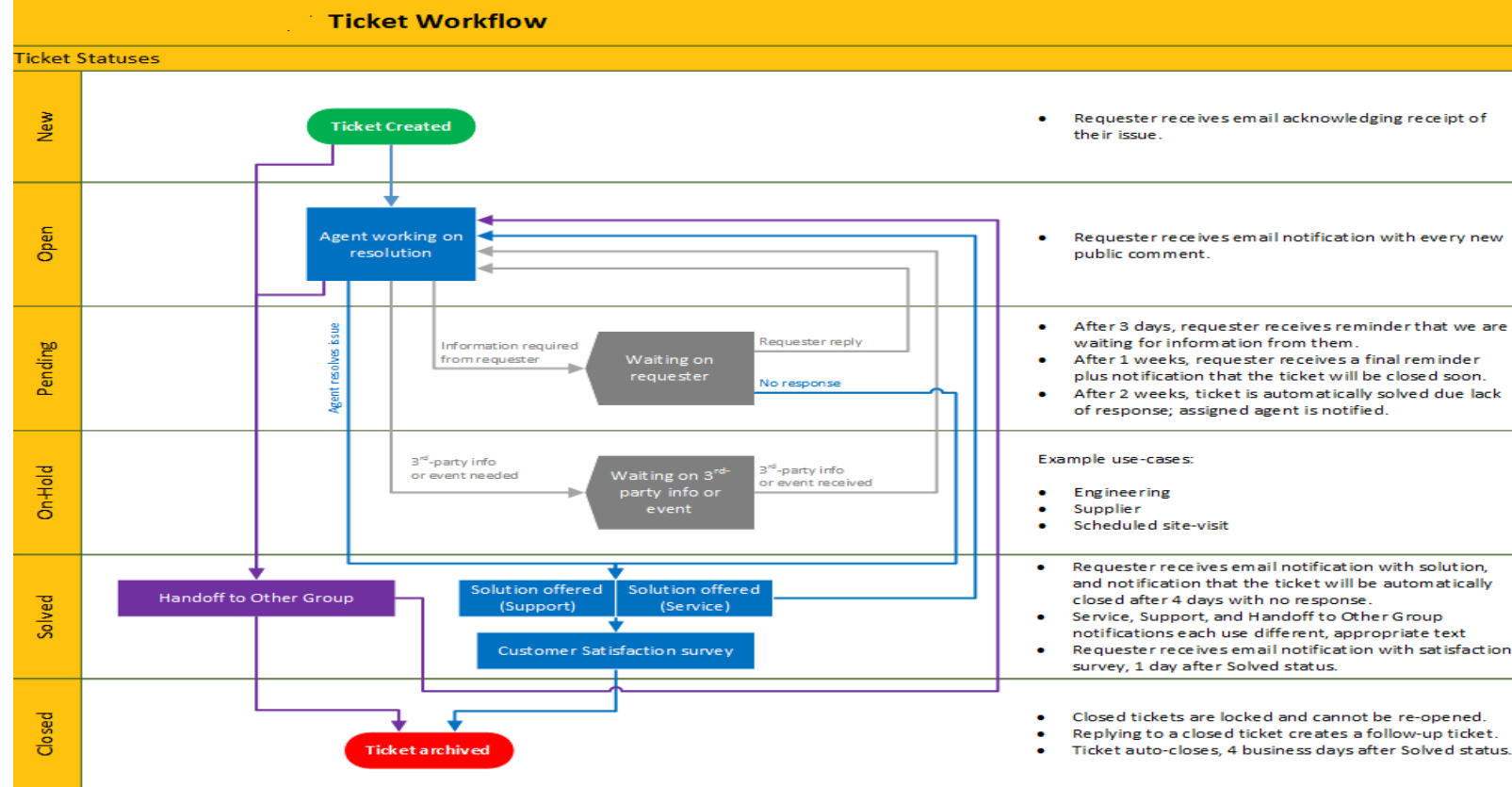
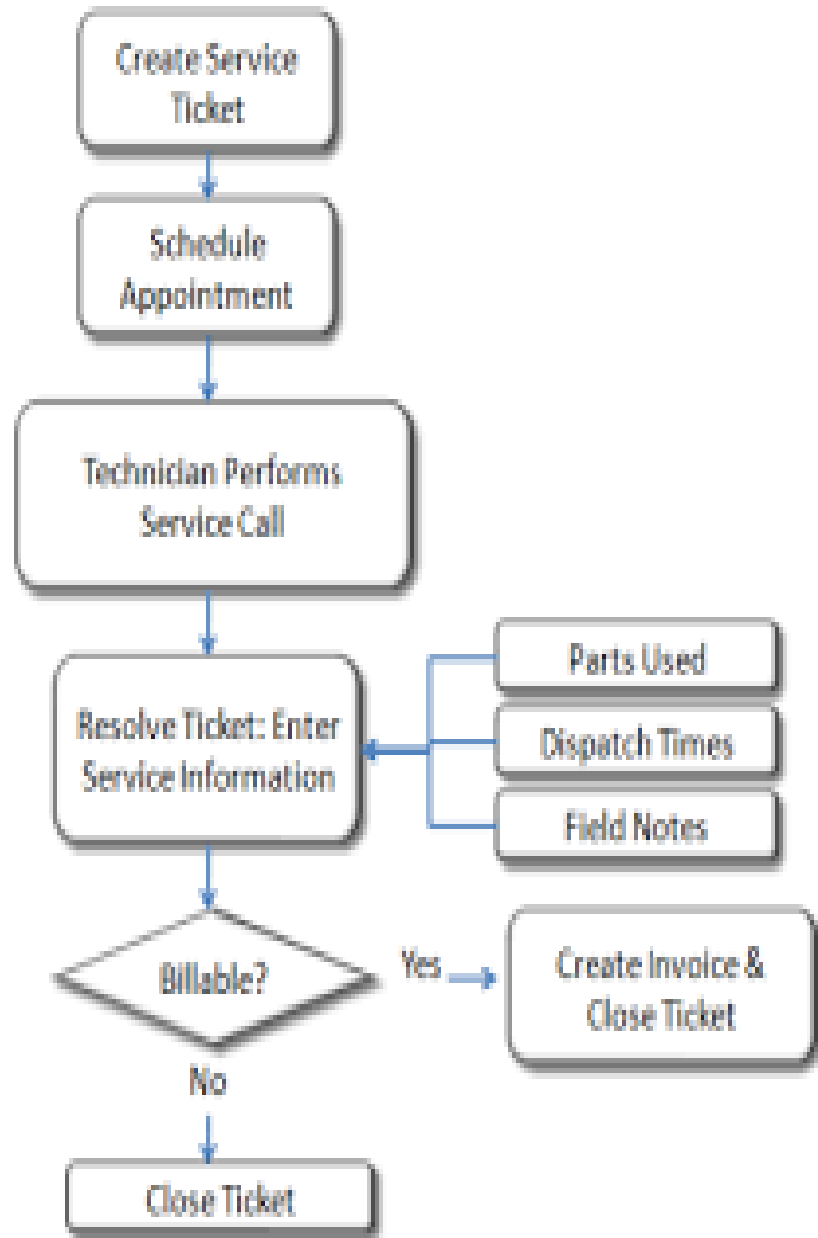


Ticket based Service System

MobileERP

14 OCT 2019

Service Ticket Flow



Generate Service Tickets via various Methods

TICKET SAMPLE FOR JAYAIR, SAIAIR, SKS ETC.

How Tickets can be generated?.

1. Customer Scanning QRCode of product



2. Customer entering it from website



3. Manual entry by HelpDesk at company when phone, email or whatsapp received.



4. Against Service Contract

- AMC
- CMC
- Warranty



HVAC SERVICE ORDER INVOICE

1001

FREE
Business
Design

YOUR COMPANY NAME HERE
123 Main Street
YOUR TOWN, STATE and ZIP
Phone 123-4567

METHOD OF PAYMENT	UNIT	UNIT	CHECK LIST
<input type="checkbox"/> CASH <input type="checkbox"/> CHECK DRIVER'S LIC. NO. _____ <input type="checkbox"/> CREDIT CARD <input type="checkbox"/> MC <input type="checkbox"/> VISA <input type="checkbox"/> AMEX EXP. DATE: _____ CC NO. _____	MAKE: _____ MODEL: _____ SERIAL NUMBER: _____	MAKE: _____ MODEL: _____ SERIAL NUMBER: _____	<input type="checkbox"/> COMPRESSOR <input type="checkbox"/> SUCTION _____ PSI <input type="checkbox"/> HEAD _____ PSI <input type="checkbox"/> VOLTS _____ AMP'S <input type="checkbox"/> ELECTRICAL CONNECTIONS <input type="checkbox"/> CONTACTS TIGHT & CLEAN <input type="checkbox"/> OIL LEVEL & CONDITION <input type="checkbox"/> CONDENSER COIL <input type="checkbox"/> CLEAN COIL & CHECK FAN <input type="checkbox"/> ENT. _____ °F LVS. _____ °F <input type="checkbox"/> REFRIGERANT <input type="checkbox"/> LEAK <input type="checkbox"/> CHARGE <input type="checkbox"/> FAN AND MOTOR <input type="checkbox"/> VOLTS _____ AMP'S <input type="checkbox"/> ELECTRICAL CONNECTIONS <input type="checkbox"/> CONTACTS TIGHT & CLEAN <input type="checkbox"/> FAN PULLEYS (ADJUST BELT) <input type="checkbox"/> CHK. LUBE BEARINGS & MOTOR <input type="checkbox"/> EVAPORATOR COIL <input type="checkbox"/> CLEAN COIL & CHECK FAN <input type="checkbox"/> ENT DR. _____ °F LVS. DR. _____ °F <input type="checkbox"/> ENT WS. _____ °F LVS. WS. _____ °F <input type="checkbox"/> CONDENSATE AREAS <input type="checkbox"/> INSPECT & CLEAN DRAIN PAN <input type="checkbox"/> INSPECT & CLEAN DRAIN <input type="checkbox"/> AIR FILTERS <input type="checkbox"/> CLEANED <input type="checkbox"/> REPLACED FILTER SIZE: _____ <input type="checkbox"/> HEATING ASSEMBLY <input type="checkbox"/> BURNER & HEAT EXCHANGER <input type="checkbox"/> FUEL SUPPLY & PRESSURE <input type="checkbox"/> PLOT ASSEMBLY <input type="checkbox"/> FLAME ADJUSTMENT <input type="checkbox"/> PRIMARY RELAY & FLUE <input type="checkbox"/> FAN & LIMIT SWITCH OPER. <input type="checkbox"/> BLOWER ASSEMBLY <input type="checkbox"/> RV VALVE <input type="checkbox"/> STRIP HEAT <input type="checkbox"/> DEFROST CYCLE <input type="checkbox"/> ELECTRICAL COMPTS. <input type="checkbox"/> RELAYS <input type="checkbox"/> CONTRACTORS <input type="checkbox"/> OVERLOAD <input type="checkbox"/> PRESS. SWITCH <input type="checkbox"/> THERMOSTAT <input type="checkbox"/> OK <input type="checkbox"/> REPLACE <input type="checkbox"/> RELOCATE
ENVIRONMENTAL CHECKLIST			
CONDENSING UNIT: _____ QTY: _____		TYPE/DISPOSITION: _____	
<input type="checkbox"/> RECOVERED <input type="checkbox"/> RECYCLED <input type="checkbox"/> RECLAIMED <input type="checkbox"/> RETURNED <input type="checkbox"/> DISPOSAL <input type="checkbox"/> DISMANTLED <input type="checkbox"/> CHANGED OUT/REPLACED		TOTAL \$: _____	
QTY MATERIALS & SERVICES UNIT PRICE AMOUNT		QTY MATERIALS & SERVICES UNIT PRICE AMOUNT	
REFRIGERANT R- _____ LBS.		REFRIGERANT R- _____ LBS.	
FILTERS: X X		FILTERS: X X	
TOTAL MATERIALS		TOTAL MATERIALS	
LABOR RATE AMOUNT		LABOR RATE AMOUNT	
TOTAL LABOR		TOTAL LABOR	
RECOMMENDATIONS 		TERMS 	
<small>I have authority to order the work outlined above which has been satisfactorily completed. I agree that Seller retains the equipment/materials furnished until final payment is made. If payment is not made as agreed, Seller may remove said equipment/materials at Seller's expense unless repairs is 2% (two percent) less of the entire amount concerned in the below Buyer's description. Any damage resulting from such removal shall not be the responsibility of Seller.</small>		<small>LIMITED WARRANTY: All materials, parts and equipment are warranted by the manufacturers or suppliers' written warranty only. All labor performed by the above named company is warranted for 90 days or 90,000 miles (whichever is first). The above named company makes no other warranties, express or implied, and as agents of technicians are not authorized to make any such warranties on behalf of above named company.</small>	
<input type="checkbox"/> REGULAR <input type="checkbox"/> WARRANTY <input type="checkbox"/> SERVICE CONTRACT		Thank You	
CUSTOMER SIGNATURE: _____ DATE: _____		TOTAL SUMMARY TOTAL MATERIALS: _____ TOTAL LABOR: _____ TRAVEL CHARGE: _____ TAX: _____ TOTAL : _____	

Customized Service Ticket Samples

Software Support Ticket

Your information

Your Name:

Your Email:

Your Phone or Skype ID (optional):

CC to (optional):

Please note that followers will receive all the messages that will be shared

Your Installation info

Edition & Hosting:

- Online
- Enterprise
- Community

Your Subscription Code:

Version:

Ticket Description

Ticket type

- A question related to my subscription or billing
- A question to use or configure
- A bug or a wrong behavior but no traceback
- A bug with a traceback
- An issue related to my upgrade
- Other

Subject:

Detailed description

What are the steps to reproduce your issue?

What is the current behavior that you observe?

What would be your expected behavior in this case?

Attach files

No file chosen

Already have an account?

Login to find your contract ID

We mainly do support in English.

Support in Spanish, French and Dutch is possible too.

Emergency lines

- America:
- Europe:
- Africa:
- Asia:

What's included?

Here is what you can expect from our support.

W/O Number:

Transportation Department
Mechanic Work Order Ticket

Mechanic Name	Vehicle Number	Vehicle Description	Department	Vehicle Mileage	Reporting Employee	W/O Intake Date
Art Haynes	001	2000 Thomas	Transportation	350,000	Tom Larson	08/05/2008

Reported Problem:
 Repair: **Service/Repair Category** **Service/Repair Description**

1 A Service - ABBBB Safety inspection. Review all major systems for safety and wear.

Repair No.	Qty	Part Number - Description	Repair No.	Work Performed Description	Hours
1	24	123-12345 - OIL, Motor			
1	4	200-0149-20 - BRAKE PADS			

FREE Business Design **YOUR COMPANY NAME HERE**
 123 Main Street
 Your Town, State and Zip
 Phone 123-4567

FIELD TICKET

MAINTENANCE CALL
 REPAIR SERVICE CALL

DATE: TECH: VEHICLE NO.:

CLIENT: ADDRESS:

CITY: STATE: ZIP:

WEATHER: Sunny Overcast Windy Rain

TEMPERATURE READINGS:
 AIR: POOL: SPA:

Services Performed:

- Pool Maintenance
- Pool Vacuumed
- Waterline Scrubbed
- Baskets Cleaned
- Surface Skimmed
- Filter Cleaned
- Water Tested
- Spa Maintenance
- Spa Vacuumed
- Waterline Scrubbed
- Baskets Cleaned
- Surface Skimmed
- Filter Cleaned
- Water Tested

Filter Pressure: Pool Filter Pressure: Spa

Water Analysis:

pH TA FC pH TA FC

TC CyA Hrd TC CyA Hrd

Chemicals Applied:

Tabc SA BI CyA Hrd

Chemicals, Parts or Notes:

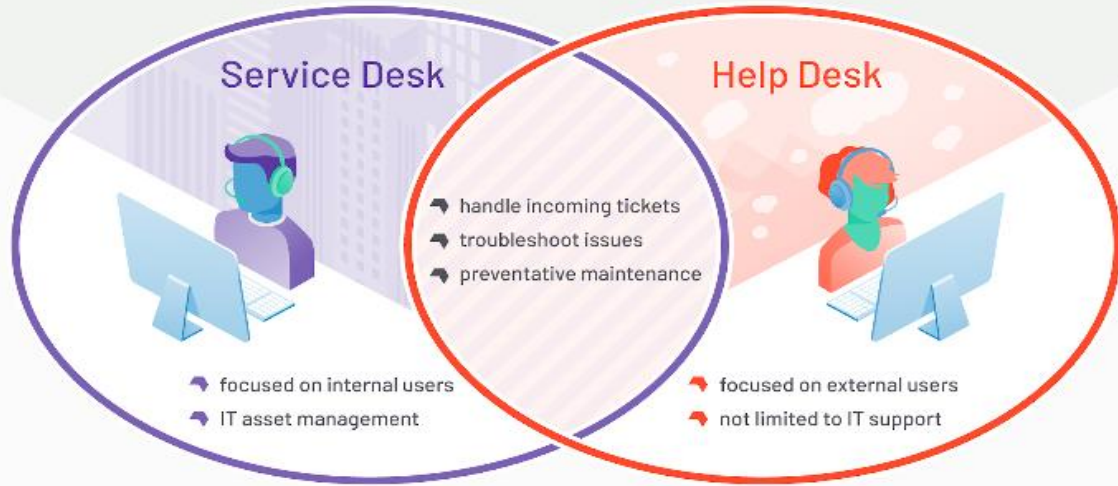
QTY.	CODE	DESCRIPTION

Labor		Total Labor	
Tech's Labor: _____	hours @ \$ _____	Total \$ _____	
Asst's Labor: _____	hours @ \$ _____	Total \$ _____	
Total Labor \$ _____			

TECHNICIAN: Total:

Service Ticket System Design

Service Desk vs. Help Desk



Tickets

Incidents

- Unplanned work that requires a physical touch to a device
 - Hardware break/fix
 - Device failure
 - Connectivity failure

Service Requests

- Planned work that requires a physical touch to one or more devices
 - Move/Add/Change
 - Hardware or software upgrade
 - Device refresh
 - Device set-up

Incident Volume + Service Request Volume = Ticket Volume

Key Performance Indicators		
	Inbound Customer Service Contact Center	Technical Support Contact Center
Productivity	Total calls/emails/chat sessions/social media offered	Same as for an inbound customer service center
	Total calls/emails/chat sessions/social media handled	
	Service level (for each channel)	
	Average speed of answer (ASA)	
	Abandonment rate	
	Average talk time (ATT)	
	Average wrap (after-call work) time (AWT)	
Average handle time (AHT = ATT + AWT)		
Effectiveness	First contact resolution (FCR) rate	FCR rate
	Number of transactions escalated to a supervisor	Number of transactions escalated to a supervisor
	Number of transactions transferred	Number of transactions transferred/escalations
	Number of calls placed on hold	Number of calls placed on hold
	Backlog (email and other back-office activities)	Backlog (email and other back-office activities)
	Average time to resolve an email	Average time to resolve an email
Quality	Quality assurance scores by agent	Quality assurance scores by technician
	Accuracy of information/transactions (error rates)	Accuracy of information/transactions (error rates)
	Customer satisfaction ratings	Customer satisfaction ratings
Customer Satisfaction	Percent of complaints	Percent of complaints
	Training time per agent	Training time per technician
Training	Agent skill proficiency	Agent skill proficiency
	Agent compliance rate	Agent test scores
	Agent test scores	
Revenue	Number of sales attempts	
	Number of successful sales attempts	
	Average revenue per sale	
	Number of attempted sales	
	Number of saved accounts	
General	Occupancy rate	Occupancy rate
	Shrinkage rate	Shrinkage rate
	Adherence rate	Adherence rate
	Cost per transaction	Cost per transaction

MobileERP Service Ticket based Flow Types

TYPE 1	CHARGEABLE SERVICE WITHOUT ADVANCE	USER	SERVICE		TYPE 5	SERVICE AGAINST WARRANTY	USER	SERVICE
	TICKET ENTRY	POST10	Installation Service			TICKET GENERATION	POST10	Warranty
	TICKET EXECUTION	POST5	Installation Service			TICKET EXECUTION	POST5	Warranty
	INVOICE ENTRY	POST10	Installation Service			FREE REPAIR PARTS REPLACED	POST5	Warranty
	COLLECTION ENTRY	POST10	Installation Service					
	RECEIPT VOUCHER	POST14	Installation Service					
TYPE 2	CHARGEABLE SERVICE WITH ADVANCE	USER	SERVICE		TYPE 6	INHOUSE PAID REPAIR SERVICE	USER	SERVICE
	INVOICE ENTRY	POST10	Installation Service			TICKET GENERATION	POST10	Repair
	COLLECTION ENTRY	POST10	Installation Service			TICKET EXECUTION	POST5	Repair
	RECEIPT VOUCHER	POST14	Installation Service			CHARGEABLE PARTS REPLACED	POST5	Repair
	TICKET ENTRY	POST10	Installation Service			INVOICE ENTRY	POST10	Repair
	TICKET EXECUTION	POST5	Installation Service			COLLECTION ENTRY	POST10	Repair
						RECEIPT VOUCHER	POST14	Repair
TYPE 3	AMC SERVICE AGAINST CONTRACT	USER	SERVICE		TYPE 7	FIELD PAID REPAIR SERVICE	USER	SERVICE
	INVOICE ENTRY	POST10	AMC			TICKET GENERATION	POST10	Repair
	COLLECTION ENTRY	POST10	AMC			TICKET EXECUTION	POST5	Repair
	RECEIPT VOUCHER	POST14	AMC			CHARGEABLE PARTS REPLACED	POST5	Repair
	SERVICE CONTRACT ENTRY	POST10	AMC			INVOICE ENTRY	POST5	Repair
	TICKET GENERATION	POST10	AMC			COLLECTION ENTRY	POST5	Repair
	TICKET EXECUTION	POST5	AMC			RECEIPT VOUCHER	POST14	Repair
TYPE 4	CMC SERVICE AGAINST CONTRACT	USER	SERVICE					
	INVOICE ENTRY	POST10	CMC					
	COLLECTION ENTRY	POST10	CMC					
	RECEIPT VOUCHER	POST14	CMC					
	SERVICE CONTRACT ENTRY	POST10	CMC					
	TICKET GENERATION	POST10	CMC					
	TICKET EXECUTION	POST5	CMC					
	FREE REPAIR PARTS REPLACED	POST5	CMC					

STEP 1: POST 10 Sales Department receiving service contract and creates tickets

The screenshot shows a project management dashboard with a top navigation bar containing 'PLAN', 'WORK', 'BACKLOG', 'DASHBOARD', and 'SCOREBOARD'. Below this are five main columns: 'New', 'ToDo', 'InProgress', 'Completed', and 'Reports'. The 'New' column contains five items: SALES ORDER, SERVICECONTRACT, Inquiry, TICKET, and RENEWCONTRACT. The 'ToDo' column is empty. The 'InProgress' column contains one item: '2.Ticket work done?'. The 'Completed' column contains two items: '1036.Resolve Sales Order' and '1036.Collections Entry'. The 'Reports' column contains five items: Analysis Group, Tender Leads/Prospects, SALES ORDER, OPPORTUNITY, and Inquiry. Annotations with arrows point to specific items in the 'New' column: 'SERVICECONTRACT' (circled in blue), 'TICKET' (circled in red), 'RENEWCONTRACT' (circled in blue), and 'GENERATETICKET' (circled in red).

POST10 -Durgesh Sureshchandra Verma | PLAN | WORK | BACKLOG | DASHBOARD | SCOREBOARD

New | **ToDo** | **InProgress** | **Completed** | **Reports**

SALES ORDER
[Create New and Approve](#)
[Discuss](#)

SERVICECONTRACT
[Create New and Approve](#)
[Discuss](#)

Inquiry
[Create New and Approve](#)
[Discuss](#)

TICKET
[Create New and Approve](#)
[Discuss](#)

RENEWCONTRACT
[Create New and Approve](#)
[Discuss](#)

GENERATETICKET
[Create New and Approve](#)

2.Ticket work done?
WHOLESALE DEALER
Delay: 2 days-[DO_WORK](#)
[Complete](#)

1036.Resolve Sales Order
Fulfilment Issues
CITY HEART HOSPITAL
Plan: 1 Days 1 Hrs - Actual: 0 Hrs
Start: 04/10/2019 16:25:16
End: 04/10/2019 16:50:33
COST:100

1036.Collections Entry
CITY HEART HOSPITAL
Plan: 1 Days 1 Hrs - Actual: 3 Hrs
Start: 07/10/2019 12:56:55
End: 07/10/2019 15:05:52
COST:100

Analysis Group
[You have 0 messages today](#)
[Dashboard/Discuss](#)

Tender Leads/Prospects
[You have 0 messages today](#)
[Dashboard/Discuss](#)

SALES ORDER
[You have 0 messages today](#)
[Dashboard/Discuss](#)

OPPORTUNITY
[You have 0 messages today](#)
[Dashboard/Discuss](#)

Inquiry
[You have 0 messages today](#)
[Dashboard/Discuss](#)

TICKET
[You have 4 messages today](#)

New Service Contract can be entered here

Service Quotation can be given from here

Tickets Allocation can be done here

Renew expired contracts

Click here to raise service ticket against contract

STEP 1: POST 10 Sales Department receiving service contract and creates tickets

MobileERP Edit SERVICECONTRACT Page

View

Servicecontractid: 2

Contractno
CO/TEST/2

Contractfrom
01/03/2015 Cal

Salesmen
1 Akash

Payment_Terms
-

Tr
1

Months_In_Contract
12

Renewed

Customer
1 WHOLESALE DEALER

Contractto
01/03/2016 Cal

No_Of_Freeservice
3

Product
1 VIC Karaoke

No_Of_Units
1

Total
10000

Contractdate
01/03/2016 Cal

Contract Type
2 PREVENTIVE

Applicable Taxes
3 Sales 12% GST Local

Paid_Components
-

Srno
3454353435

Rate_Per_Unit
10000

Save Document

CURRENT PAGE NO: 1 --> || 1

TOTAL RECORDS: 3

SERVICE	TECHNICIAN	STARTDATE	ENDDATE	TKTGENERATED	Action
6 Free Service under Service Contract	2 Prajesh Mehta	10/10/2019 Cal	25/09/2019 17: Cal	<input checked="" type="checkbox"/>	Delete
6 Free Service under Service Contract	7 Patel Mehulkumar	25/09/2019 Cal	25/09/2019 17: Cal	<input type="checkbox"/>	Delete
6 Free Service under Service Contract	7 Patel Mehulkumar	31/10/2019 Cal	25/09/2019 17: Cal	<input type="checkbox"/>	Delete
0	NONE	14/10/2019 Cal	14/10/2019 Cal	<input type="checkbox"/>	Add New

STEP 2: POST 10 HELP DESK Creating Service Ticket Manually

POST10 -Durgesh Sureshchandra Verma PLAN WORK BACKLOG DASHBOARD SCOREBOARD

New	ToDo	InProgress	Completed	Reports
<p>SALES ORDER Create New and Approve Discuss</p>		<p>2. Ticket work done? WHOLESALE DEALER Delay: 2 days-DO_WORK Complete</p>	<p>1036. Resolve Sales Order Fullfilment Issues CITY HEART HOSPITAL Plan: 1 Days 1 Hrs - Actual: 0 Hrs Start: 04/10/2019 16:25:16 End: 04/10/2019 16:50:33 COST:100</p> <p>1036. Collections Entry CITY HEART HOSPITAL Plan: 1 Days 1 Hrs - Actual: 3 Hrs Start: 07/10/2019 12:56:55 End: 07/10/2019 15:05:52 COST:100</p>	<p>Analysis Group You have 0 messages today Dashboard/Discuss</p> <p>Tender Leads/Prospects You have 0 messages today Dashboard/Discuss</p> <p>SALES ORDER You have 0 messages today Dashboard/Discuss</p> <p>OPPORTUNITY You have 0 messages today Dashboard/Discuss</p> <p>Inquiry You have 0 messages today Dashboard/Discuss</p> <p>TICKET You have 4 messages today</p>

Click here to raise service ticket

STEP 2: ENTER DETAILS OF SERVICE AND RAISE TICKET FOR SERVICE ENGINEER

POST10 -Durgesh Sureshchandra Verma PLAN WORK BACKLOG DASHBOARD SCOREBOARD

MobileERP Edit TICKET Page View

Ticketid: 3

Customer 1 WHOLESALE DEALER

Complain Type 2 Installation Service: CHARGEABLE SERVICE WITH ADVANCE

Product 2 Reverse Osmosis Plant-250 LPH

Invoiceid 0

Against Contract 0

Startdate 14/10/2019 Cal

Enddate 14/10/2019 Cal

Srno 9879898798

Sorderid 0

Ticket Issued To 5 POST5 **SERVICE ENGINEER**

Ticketdate 14/10/2019 Cal

Complain INSTALL

Phoneno 98798799

Warranty Card 0

Solution INSTALL

Save Document

CURRENT PAGE NO: 1 --> || 1 TOTAL RECORDS: 1

SERVICE	EMPLOYEEID	PLANDATE	Action
3525 INSTALLATION SERVICE	5 Narendra Singh	14/10/2019 Cal	Delete
0	NONE	14/10/2019 Cal	Add New

STEP 3: Sales Person Invites Service Engineer Narendra to post chat discussion on his ticket

MobileERP CRM Offer Industry Sales Purchase Store MFG HR Finance Masters Boards HelpDesk SoftRobot Logout

POST10 -Durgesh Sureshchandra Verma PLAN WORK BACKLOG DASHBOARD SCOREBOARD

Home / Folder

TICKET

Found 3 Documents - Page 1 of 1

3.WHOLESALE DEALER 2.WHOLESALE DEALER 1.WHOLESALE DEALER

Previous 1 of 1 Next Reset

Search :

Search Data

or Sort None or Goto page no: 1 on field: TICKETID Search

Dashboard Reports Invite

Invite Member to chat

Select User/Employee

Invite **Select employee and click Invite**

Durgesh Sureshchandra Verma - Joined:04/10/2019 15:31:46

Pradeep Jadhav - Joined:04/10/2019 15:31:55

Narendra Singh - Joined:14/10/2019 15:39:23

To send message click on ticket

STEP 4: Sales Person clicks on Ticket and sends message to service engineer group

POST10 -Durgesh Sureshchandra Verma PLAN WORK BACKLOG DASHBOARD SCOREBOARD


Home / Folder / Page


3. TICKET




Customer: WHOLESALE DEALER
Status: Open





Sr#	SERVICE	EMPLOYEEID	PLANDATE
1	INSTALLATION SERVICE	Narendra Singh	14/10/2019

Dashboard Discuss

 POST10 -Durgesh Sureshchandra Verma
Record ADD on 14/10/2019 12:47:36
Record DETADD on 14/10/2019 12:48:54
Record EDIT on 14/10/2019 12:50:27
Record EDIT on 14/10/2019 12:50:56
Record APPROVE on 14/10/2019 13:07:01

 POST10 -Durgesh Sureshchandra Verma
Lets try to solve this ticket tommorrow on 14/10/2019 15:43:55

Message **Send**   

 POST10 -Durgesh Sureshchandra Verma 
 POST5 -Narendra Singh  POST8 -Pradeep Jadhav

Powered by [SoftRobot.biz](#) and [Mobileerp.in](#)

STEP 5: Approve and Release Service Ticket to Service Engineer for further action

TICKET Folder

1 Documents found - Page 1 of 1



Action	Ticketid	Ticketdate	Customer	Complain Type	Complain	Product	Srno	Phoneno	Warranty Card	Against Contract	Ticket Issued To	Solution	Startdate	Enddate
Edit Approve Show Discuss	3	14/10/2019	WHOLESALE DEALER	Installation Service: CHARGEABLE SERVICE WITH ADVANCE	INSTALL	Reverse Osmosis Plant-250 LPH	9879898798	98798799	0	0	POST5	INSTALL	14/10/2019	14/10/201

[Add New](#) [Previous](#) 1 of 1 [Next](#) [Reset](#)
Search : or Sort or Goto page no: on field:

CLICK ON APPROVE

Hydro Filtsep Technologies Pvt. Ltd.
20-21, 3rd floor, Darshanam Arise, Gotri Sevasi Road, Vadodara - 390021

TICKET

Remarks: Sign here: Email

Required:

STEP 6: POST5 Service Engineer Login– Ticket will appear in his Work Calendar

MobileERP CRM Offer Industry Sales Purchase Store MFG HR Finance Masters Boards HelpDesk SoftRobot Logout

POST5 -Narendra Singh PLAN WORK BACKLOG DASHBOARD SCOREBOARD

Calendar

today month week day

October 2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	1 (FULL DAY) All Day Event	2 (FULL DAY)	3 (FULL DAY)	4 (FULL DAY)	5 (FULL DAY)
6 (SUNDAY)	7 (FULL DAY)	8 (HOLIDAY)	9 (FULL DAY)	10 (FULL DAY)	11 (FULL DAY)	12 (FULL DAY)
13 (SUNDAY)	14 (FULL DAY) 12a WIP(Ticket work done?)	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Chatbot

Chatbot-Augmented Analytics
Welcome Narendra Singh.
What would you like to do?

Chatbot: Select from below

- Find Price
- Find Stock
- Who are on Leave
- Apply for Leave
- Submit my Expenses
- Which Products not doing well?
- How to increase sales of product?
- What Pending work I have today?
- Which messages I have today?

Narendra Singh.
Selected: Who are on Leave

Chatbot
Following 2 people on Leave

Your Answer

STEP 7: POST5 Service Engineer Reads and replies to message of sales

Home / Folder / Page


3. TICKET

Customer: WHOLESALE DEALER

Status: Open

Sr#	SERVICE	EMPLOYEEID	PLANDATE
1	INSTALLATION SERVICE	Narendra Singh	14/10/2019

Dashboard Discuss

 POST10 -Durgesh Sureshchandra Verma


Record ADD on 14/10/2019 12:47:36

Record DETADD on 14/10/2019 12:48:54


Record EDIT on 14/10/2019 12:50:27

Record EDIT on 14/10/2019 12:50:56

Record APPROVE on 14/10/2019 13:07:01

 POST10 -Durgesh Sureshchandra Verma

Lets try to solve this ticket tommorrow on 14/10/2019 15:43:55

 POST5 -Narendra Singh

I am doing work today on 14/10/2019 16:20:38

Message Replied by POST5

Message

Send



STEP 8: POST5 Service Engineer collects inventory needed for today's service from stores and moves to customer place if field service

The screenshot displays a mobile application interface for a service engineer. The top section, 'Installations For Today', lists three tasks:

- James K. Person**: From 08:06 AM to 09:06 AM. Address: 769 Ponce De Leon Place, Northeast, Atlanta, Georgia, USA. Phone: 1-555-252-246. Email: james.person@... Task: Upgrade Phone. WO #00140787/2017.
- John McClaine**: From 09:06 AM to 10:06 AM. Address: 1966 Lakewood Terrace Southeast, Atlanta, Georgia, USA. Phone: 1-555-252-246. Email: josh.mcadams@... Task: Check WiFi issues. WO #00140791/2017.
- Arthur Roberts**: From 10:06 AM to 11:06 AM. Address: 780 Confederate Avenue Southeast, Atlanta, Georgia, USA. Phone: 1-555-252-246. Email: mark.roberts@... Task: Install Internet and TV. WO #00140793/2017.

The bottom section, 'Inventory', has two tabs: 'Needed for today' and 'Current inventory'. The 'Needed for today' tab is active, showing a table:

EQUIPMENT	NEEDED
Ethernet Cable CAT5e-50 FT/15 M - White	22
KVM & Networking Cat 5E UTP Patch Cable	36

Below the table is a button that says 'Call Darlene J. Shockley' with a phone icon.

Service Engineer or Technician Request equipment's/assets or Materials for Repair

Stores Issues Assets or Materials based on certain rules. Every Technician or Sales Engineer is considered stores. Store simply do stock transfer. Liability of returning unused materials and assets lies on Technician or Service Engineer

Technicians current inventory is updated



STEP 9: POST5 Service Engineer moves ticket to inprogress and starts work after reaching customer location if field service or starts work inhouse for repair or maintenance etc.

MobileERP CRM Offer Industry Sales Purchase Store MFG HR Finance Masters Boards HelpDesk SofiRobot Logout

POST5 -Narendra Singh PLAN WORK BACKLOG DASHBOARD SCOREBOARD

New < ToDo < InProgress < Completed < Reports >

3 is Ticket No

3.Ticket work done?
WHOLESALE DEALER
Delay: 0 days-[DO_WORK](#)
[Complete](#)

TICKET
[You have 7 messages today](#)
[Dashboard/Discuss](#)

Click on DOWORK to update your service report

Click on Complete once your work is completed

Auto email sent to customer

Message sent to everybody in service group

STEP 10: POST5 Service Engineer asks customer to fill feedback form and handover OTP Generated on customer mobile phone to mark as service completed in system.

Customer satisfaction/feedback form is customized form different for each client generated after requirement study

Sample form

What will technician see on their mobiles?.

Services Installed

- Install Telephone
- Deliver Mobile Phone

Installed Equipment

NAME	ITEM CODE	QUANTITY
IP Phone - Wireless - Handheld	435	0
iPhone 5c 16GB Cell Phone - Green (AT&T)	441	0
NETGEAR GSM GPRS Signal Strength Test Me	698	0

(Signature) [Clear Signature](#)

[Approve Work Order](#)

Customer Feedback

WO #00140787/2017 - Upgrade Phone

How do you rate the service performed by the technician ?

1 2 3 4 5 6 7 8 9 10

How readily would you recommend the services from Play4Telco ?

1 2 3 4 5 6 7 8 9 10

How would you rate your overall experience with Play4Telco so far ?

1 2 3 4 5 6 7 8 9 10

Do you have any additional feedback you wish to give us ?

Enter Customer SMS OTP: 7899

[Submit Feedback](#)

Thank you for your feedback

As a valued customer, what you think is important to us.

By giving us your feedback, you are helping us to understand what we do well, and what we need to focus on improving. We are constantly monitoring this feedback, and will follow up with you to address any issue you may have raised.

PLAY4TELCO
Play4Telco Customer Satisfaction Team

[Close](#)

STEP 11: POST5 Service Engineer moves ticket to complete when work done

MobileERP CRM Offer Industry Sales Purchase Store MFG HR Finance Masters Boards HelpDesk SoftRobot Logout

POST5 -Narendra Singh PLAN WORK BACKLOG DASHBOARD SCOREBOARD

New < ToDo < InProgress < **Completed** < Reports >

3.Ticket work done?

WHOLESALE DEALER

Plan: 1 Days 2 Hrs - Actual: 3 Hrs

Start: 14/10/2019 13:07:01

End: 14/10/2019 16:47:11

COST:100

TICKET

You have 8 messages today

[Dashboard/Discuss](#)

Actual Cost is calculated which company has incurred to provide service

It took 3 hours to complete the service against planned 2 hours

MobileERP CRM Offer Industry Sales Purchase Store MFG HR Finance Masters Boards HelpDesk SoftRobot Logout

POST5 -Narendra Singh PLAN WORK BACKLOG DASHBOARD SCOREBOARD

My Work Forecast for Month: Year **MY WORK**

ID	PREVID	PROCESS	TASK	LOCATION	DID	DAYS	HRS	STATUSID	PLANSTART	PLANEND	ACTSTART	ACTEND	ACTHRS	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18												
Narendra Singh Attendance														FD	FD	FD	FD	FD	S	FD	H	FD	FD	FD	FD	S	FD	A	A	A	A												
32	0	Ticket	Ticket work done?	At Client Site	5737	1	2	3	14/10/2019	14/10/2019	14/10/2019 13:07:01	14/10/2019 16:47:11	3														2																

STEP 12: POST5 Service Engineer informs work complete ticket closed

MobileERP CRM Offer Industry Sales Purchase Store MFG HR Finance Masters Boards HelpDesk SoftRobot Logout

POST5 -Narendra Singh PLAN WORK BACKLOG **DASHBOARD** SCOREBOARD

Home / Folder / Page

Tickets Past Due

4

New Tickets Today

659

Tickets Closed Today

456

Ticket Due Times

- Overdue: 4
- Today: 6
- Tomorrow: 5
- This Week: 6
- Next Week: 6
- Later: 7

Open Tickets

- High: 40
- Medium: 15
- Low: 10

Sourcewise Tickets

- Email
- Chat
- Call
- Billboards
- Social
- Web

Total Tickets v/s Closed Tickets

Last 30 days

6785	Total Tickets	100%
6085	Total Tickets	94%

Dashboard

Record ADD on 14/10/2019 12:47:36

Record DETADD on 14/10/2019 12:48:54

Record EDIT on 14/10/2019 12:50:27

Record EDIT on 14/10/2019 12:50:56

Record APPROVE on 14/10/2019 13:07:01

POST10 -Durgesh Sureshchandra Verma

Lets try to solve this ticket tomorrow on 14/10/2019 15:43:55

POST5 -Narendra Singh

I am doing work today on 14/10/2019 16:20:38

POST5 -Narendra Singh

Work Done on 14/10/2019 16:47:32

Work Done

Powered by [SoftRobot biz](#) and [Mobileerp.in](#)

STEP 13: Sales or Service Engineer creates invoices whenever required

POST8 -Pradeep Jadhav MY SCHEDULE MY WORK 50

Hydro Filtsep Technologies Pvt. Ltd.
 20-21, 3rd floor, Darshanam Arise, Gotri Sevasi Road, Vadodara - 390021 , Gujarat, India
 Email: marketing@hydrofiltsep.com Phone: 0265-2373244 / 09925036244

GSTIN :24AACCH1778D1ZU
 PANNO:AACCH1778D

Original
 Duplicate
 Triplicate

Invoice No:SI/1/19-20
 Invoice Date:07/10/2019 11:27:56 (issued under sub-section (1) of Section 31 of the CGST/SGST Act, 2017 read with Rule 46 of CGST Rules,2017)

TAX INVOICE
 Transportation Mode: Own Vehicle
 LR No./Veh.No : GJ 06 6666
 Date of Supply: 07/10/2019 11:27:56
 Place of Supply:

Details of Receiver (Billed to)				Details of Consignee (Shipped to)			
Name:CITY HEART HOSPITAL Address: State: State Code:XX GSTIN Number:				Name:CITY HEART HOSPITAL Address:CITY HEART HOSPITAL - B124, HATHI COMPLEX, RAOPURA ROAD, VADODARA State: State Code:XX GSTIN Number:			

Sr.No.	Description of Goods	HSN / SAC	Qty	UOM	Rate	Total	Discount	Other Charges	TaxableValue	CGST /UTGST	SGST	IGST	TOTAL				
									Rate %	Amount	Rate %	Amount	Rate %	Amount	Tax	Amount	
1	Reverse Osmosis Plant-250 LPH	90189041	1	NOs	800,000.00	800,000.00	0.00	0.00	800,000.00	6	48,000.00	6	48,000.00	0	0.00	96,000.00	896,000.00
Total					1	800,000.00	0.00	0.00	800,000.00	48,000.00	48,000.00	0.00	96,000.00	896,000.00			

Invoice Value (In Words): Eight Lakh Ninety Six Thousand Only
 TOTAL ₹ 896,000.00

Terms and Condition of sales
 PAYMENT TERMS:Against Document Through Bank
 Please send your payments to:
 BANK NAME: Axis Bank Limited
 BRANCH: Vardhman Complex, Racecourse, Baroda
 ACCOUNT NO: 013010200057798
 IFSC CODE: UTIB0000013
 Goods Once Sold will not be taken back.
 Subject to Vadodara Jurisdiction

Electronic Reference Number
 Certified that the Particulars given above are true and correct
 For Hydro Filtsep Technologies Pvt. Ltd.
 Company Seal
 Authorized Signatory

Print this page

Print [X]

General Options

Select Printer

- Microsoft Print to PDF Send To OneNote 2013
- Microsoft XPS Document Writer Snagit 11
- OneNote

Status: Ready Print to file Preferences

Location: Find Printer...

Comment:

Page Range

All Selection Current Page

Pages:

Number of copies: Collate

Enter either a single page number or a single page range. For example, 5-12

1 2 3

Customized Top Management Dashboards



EmployeeName
CompanyName
April 1, 1988

My Alerts

Work Escalation

20 Items below ROP Level
10 customer complains received

Approvals Pending

10 Sales Orders to Approve
3 Quotations to Approve
6 Invoice to Approve

Data Entry Pending

120 orders to deliver
128 invoice to create

Party Pending

30 orders without PO
34 invoice payments

Performance Failure

30 orders delayed
20 orders cancelled

Work Efficiency

Avg Order to Invoice 3 days
Avg Order to Cash 30 days

My Work

[Trading Sales](#)
[Manufacturing Sales](#)
[Project Sales](#)
[Service Sales](#)
[Field Service Sales](#)
[Real Estate Sales](#)
[Email Management](#)

My Discussions

[Quotation](#)
[SalesOrder](#)
[Sales Invoice](#)

[My SelfService](#)
[My Settings](#)

My social media.

[f](#) [@](#) [P](#) [T](#) [in](#)

Todo: I would like to have with

Write what you want to do or get it done...

Post

\$ 340k

34 Quotes

\$ 300k

10 Orders

\$ 298k

9 Delivery

\$ 298k

9 Invoice

Major Outstanding



Customer1
200000



Customer2
400000



Customer3
700000

KPI Parameters	Period	Previous	Current	Growth/Trends
1 Leads	This Month vs Last Month	20,000	22,400	12.0%
2 Offers	This Month vs Last Month	30,000	27,000	-10%
3 Sales	This Month vs Last Month	20,000	20,000	0%
4 Invoice	This Month vs Last Month	40,000	32,000	-20%
5 Receipts	This Month vs Last Month	10,000	15,000	50.0%

6Sigma Parameters	Target Baseline	Defects	Opportunities	DPMO	Defect%	Yield%	Sigma
1 24/7 Inquiry response	Complete in 1 day	110	1,850	6,000	6	94	3.25
2 OA response	Complete in 2 day	22	720	9,000	3	97	4.1
3 Ontime Delivery	Delays < 1 day	11	185	60,000	6	94	3.25
4 Customer rejections	Max 10 per month	1	185	600	1	99	6

Top ROI - Cost Savings

Reduced Inventory costs 40L
Reduced Travelling costs 30L
Reduced Manpower costs 25L
Reduced Scrap costs 20L
Reduced Production costs 15L
Reduced Misc Expenses 5L

Top Chatbot Performance

Customer Support 450
Claims Processes 400
Order Processed 320
Training Given 250
Leave Processed 160
Recruited/Interviewed 23

Top 5 Profitable Projects

Project A with 20% Profit 30L
Project B with 18% Profit 20L
Project C with 10% Profit 15L
Project D with 08% Profit 10L
Project E with 07% Profit 5L

Last 5 Profitable Projects

Project P with 10% Loss 10L
Project Q with 08% Loss 8L
Project R with 07% Loss 7L
Project S with 06% Loss 6L
Project T with 05% Loss 5L

Particulars	16-17	17-18	18-19	Q1	Q2	Q3	Q4	Total
Attendance Avg/day	351	258	293	284	276	268	254	270Avg

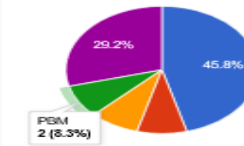
Announcement

Company releasing 10% dividend this year

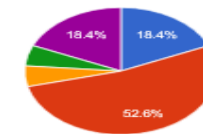


Target:100

Top 5 Customers.... 20% Customer giving 80% Sales



Top 5 products.... 20% Products giving 80% Sales



Best Automation:

590 Accounting Entries
200 Payroll Processing
120 Payment Reminders
70 Material Movements
5 Bank Reconciliation
3 Party Reconciliation

Best Employees



Employee A
Employee B
Employee C