

Web Based Service System
Retailer User Manual

Web Based Service System Retail Manual

WBSS Retail Manual

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Chapter 1 - Getting Started

- 1) Type your application URL into your browser.
- 2) Enter your User Name and Password.
- 3) Click OK

Chapter 2 - Work Orders

2.1 Search for Existing Customers

2.1.1 Search for Customer by Equipment Information

- 1) Enter Phone number or Serial number
- 2) Select 'Search' Button
- 3) The system will search for a matching pre-existing non-major account contact.

The screenshot shows the top navigation bar with 'Work Orders' and 'Contacts' tabs. Below the navigation bar, there are links for 'Work Order', 'Create New Work Order', and 'Quick Repair Price Lookup'. The 'Retailer' tab is selected. The main heading is 'Create New Work Order'. Below this, there is a section titled 'Search for Customer by Equipment Information' which is circled in orange. This section contains three input fields: 'Cell Phone Number' (with a format of () -), 'Serial Number', and a 'Search' button.

2.1.2 Search for Customer by Salutation, First Name, Last Name

- 1) Enter data in the salutation, first name and last name fields.

The screenshot shows the top navigation bar with 'Work Orders', 'Contacts', 'Inventory', and 'PO' tabs. Below the navigation bar, there are links for 'Job Order Search', 'Create New Work Order', and 'Quick Repa'. The 'Create New Work Order' form is displayed. The search section, which is circled in orange, includes a 'Salutation' dropdown menu, 'First Name', 'Last Name', 'Company Name', and 'Address' input fields. To the right of the search section, there is a 'Search for Custom' button and a 'Search' button.

- 2) Once you leave the last name field, the system will search for a matching pre-existing non-major account contact.

2.1.3 Search for Major Account Customer

- 1) Select Corporate Account from dropdown under 'Major Accounts'

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- 2) The system will search for a matching pre-existing contact from the major account selected.

2.2 Select Existing Customer or Create New Customer

Customer Name	Salutation	Address	Day Phone	Night Phone	Email	Retailer
Create New	Mr.	Create new customer entry				
Simpson, Dave	Mr.	123 Street Name, CityName, Ontario L0L9K9	613-555-4444,,	--,,		Retailer HQ
Radema, Ted	Dr.	, , Ontario	--,,	--,,		Retailer HQ
Contact, Retail	Mr.	Address, City, Ontario K1H 6S3	--,,	--,,		Retailer HQ

- 1) Click on the correct customer name or "Create New" if there are no matches.
- 2) All available customer data will be entered into the Create Work Order fields.

2.3 Update Customer Record

Updating any field on the Work Order will automatically update the customer record when the Work Order is created. In the case of a major account contact, address information is tied to the billing site of that major account, and must be updated via the site details screen (Go to Contacts, Find Company, Select the Company, Select the Site).

2.4 Create Work Order

- 1) Select the sales rep associated with the sale from the dropdown list.
- 2) Click "Create Work Order".
- 3) The Work Order Detail page is automatically displayed. Verify that all information is correct.
- 4) Select 'Phone Fault Description', 'Parts Sale', 'Loaner' or 'Radio Fault Description' to add a job to the work order. Work Orders must have at least one job in order to be completed. To cancel the work order, click "Cancel this work order" in the top right corner.

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Work Order Details

[Cancel this work order](#)

Work Order #	144	Created Date	Aug 05 2004 17:15 pm
Status	Created	Company Name	Techdata
Name	Michael O'Brian	Address	123 Address
City		Province	Ontario
Postal Code		Day Phone	
Night Phone		Fax	--
Pager		Email	
GST Exemption #		Customer PO #	
PST Exemption #		Sales Rep	John Billington

Click one of the buttons above to add a job to this work order.

2.5 Create Phone Fault Description Job Order

You can cancel a job order at any time by clicking the "Cancel this job order" link in the top right hand corner.

2.5.1 Cell Number Search

- 1) Enter a cell number.
- 2) If there is no matching cell phone in the system, the screen will automatically 'refresh' and present you with next option. If the cell phone number has been entered into the system previously, the system will automatically fill in serial number, make and model and owner-on-file information for you. If there are several matches, you can choose which match is most appropriate, or create a new record for the item to be repaired.

Create New Job Order

[Cancel this job order](#)

Cell Number -

2.5.2 Serial Number Search

- 1) Enter a serial number
- 2) If there is no matching serial number in the system, the screen will automatically 'refresh' and present you with next option. If the serial number has been entered into the system previously, the system will automatically fill in make and model information for you.

Create New Job Order

[Cancel this job order](#)

Cell Number (613) 222 - 2222
Serial Number 1111111

2.5.3 Enter Job Order Information

Create New Job Order

[Cancel this job order](#)

Cell Number (613) 222 - 2222
Serial Number 1111111
Manufacturer Motorola
Model Startac 3000
Phone Owner First Name Bill
Phone Owner Last Name Smith
Fault Code -Select-

- 1) Enter Manufacturer, Model and Phone Owner name if not already filled out.
- 2) Fault Codes applicable to the Manufacturer and Model will be returned.
- 3) Select appropriate Fault Code

Create New Job Order

[Cancel this job order](#)

Cell Number (613) 222 - 2222
Serial Number 1111111
Manufacturer Motorola
Model Startac 3000
Phone Owner First Name Bill
Phone Owner Last Name Smith
Fault Code Antenna is broken or missing
Additional comments about the problem
Warranty Proof of Purchase (Attached)
Estimated Repair Price \$29.00

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- 6) The Estimated Price that corresponds to selected 'Fault Code' will automatically be entered. If the fault code has no standard repair estimate, the price will be "t.b.d", or "to be determined".
- 7) Select the 'Create Job Order' button.

2.5.4 Indicate Included Accessories

Accessory Check

Battery Included?

Other Accessories?

Details:

- 1) If a battery is included with the phone, check the Battery Included box.
- 2) If other accessories are included with the phone, check the Other Accessories box and type a brief description in the details box.
- 3) If no accessories are included, leave both boxes unchecked.
- 4) Select the "next" button.

2.5.5 Add Another Job to the Work Order

- 1) Select "Yes" to return to the top of the 'Create New Job Order Details' page

Add another job to this work order?

- 2) Select "No" to continue

2.5.6 Add Loaner to the Work Order

- 1) Select "Yes" to create a Loaner Job (See section 2.6)

Loaner Applicable?

- 2) Select "No" to continue

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2.5.7 Print Work Order

1) Select "Yes" to go to the printed Work Order page. This function can be accessed from the Work Order Details page and the Job Order Details page at any time.

Print Work Order?

2) Select "No" to return to the 'Work Order Details' page.

2.6 Create Loaner Job Order

ID	Serial #	Manufacturer / Model / Part	Add to Job
73	12223123	Motorola : 120C : Phone	<input type="checkbox"/>
			<input type="button" value="Add"/>

2.7 Find Existing Work Order or Job

1) Enter the criteria desired to find the Work Order or Job. To search for multiple Work Order IDs or Job Order IDs, separate each Work Order with a comma.

Job Order Search

Work Order ID	<input type="text" value="38"/>	Invoice Number	<input type="text"/>
Job Order ID	<input type="text"/>	Company Name	<input type="text"/>
Retailer	-All-	Customer Name	<input type="text"/>
Start Date	2004 07 05	Address	<input type="text"/>
End Date	-All- -All- -All-	City	<input type="text"/>
Work Order Status	-All-	Province	-All-
Job Status	-All-	Postal Code	<input type="text"/> Find Postal Code
Created By	-All-	Day Phone Contact	() - - ,
Sales Rep	-None-	Night Phone Contact	() - - ,
Serial Number	<input type="text"/>	Fax	() - -
Cell Phone	() - -	Email	<input type="text"/>
Waybill	<input type="text"/>	Phone Owner Name	<input type="text"/>
View Work Orders	<input type="checkbox"/>		

2) Matching Job Orders will be returned. If you select "View Work Orders" as an option on the search screen, Work Orders will be displayed instead.

Find Existing Work Order

Work Order ID	Status	Customer Name	Created By	Created Date
38	Created	Fred Smith	First1 Last	28 Jan 2003 12:53 pm

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2.8 Using the Quick Repair Price Lookup

You can check the estimated price of a repair prior to entering Work Order and Job Order information.

- 1) Select a manufacturer from dropdown
- 2) The screen will automatically 'refresh' and present you with next option

The screenshot shows the top navigation bar with links for Work Orders, Contacts, Find Existing Work Order, Create New Work Order, and Quick Repair Price. Below the navigation is the 'Retailer' logo and the title 'Quick Repair Price Lookup'. The form includes a 'Manufacturer' dropdown menu set to 'All' and a 'Search' button.

- 3) Selecting 'Search' will offer a view of all parts and prices associated with that model of phone

The screenshot shows the same navigation bar and 'Retailer' logo. The 'Manufacturer' dropdown is now set to 'Qualcomm' and the 'Model' dropdown is set to '2700'. The 'Search' button is highlighted. Below the form is a table with the following data:

Problem Description	Price \$
Battery doesn't last as long as it should	47.50
Antenna is broken or missing	29.00
Plastic housing of phone is damaged (Other than back housing)	47.50
Charger is damaged	29.00
Phone doesn't charge battery fully or at all	47.50
Phone doesn't power up	47.50
Electronic display is completely or partly blank	47.50
Electronic display is cracked, or black spot, chipping, or distorted	47.50

Chapter 3 – Contacts

3.1 Find Existing Customers

This section allows the user to search all the customers entered by your store who are not associated with a major account. Editing of these customers is done via the create work order screen when selecting a customer.

3.1.2 Search For a Customer

- 1) Use any number of criteria to search for existing Customers.

Quick search by last name

A|B|C|D|E|F|G|H|I|J|K|L|M|N|O|P|Q|R|S|T|U|V|W|X|Y|Z|...|

Salutation

Last Name

First Name

Company Name

Address

City

Province

Postal Code [Find Postal Code](#)

Day Phone

Night Phone

Fax

Pager

Email

- 2) All matching customers will be returned. Select the customer name to view customer details.

Customer Name	Company	Address	Day Phone	Night Phone	Email
Billington, John	First Communications	1568 Carling Avenue, Ottawa, Ontario K1Z 7M3			3453434264655
Shipman, John Mr.	Test July 2nd	652 Browning, Ottawa, Ontario K9u7h6	613-234-2345		
Smith, John Dr.	Toys 'r' Us	123 Street, Funville, Ontario funfun	123-333-3333		
Thompson, John Mr.	toys 'R' Us	234234 street, Ottawa, Ontario	112-343-2222		

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3.2.3 Edit Customer Details

Client Record

ID: 457 SyncContactID:

Salutation

Last Name

First Name

Company Name

Address

City

Province

Postal Code [Find Postal Code](#)

Day Phone

Night Phone

Fax

Pager

Email

Add Contact Event (Non-WO Related)

Date:

Public Notes:

Private Notes:

[Create New Work Order](#)

3.2 Find Existing Companies

This section allows the user to view or edit major account details and search all the customers entered by your store who are associated with a major account.

3.2.1 Search for a Company

- 1) List of Major Accounts displayed by default.
- 2) Access the Company Details view by clicking on the major account name.

Find Company

A|B|C|D|E|F|G|H|I|J|K|L|M|N|O|P|Q|R|S|T|U|V|W|X|Y|Z|...

Name
John's Cheap Phones
Mary and Brendan's Phone Shop

3.2.2 Edit Company Details

- 1) Change the company name by editing the company name field.
- 2) Add a note for the company - to change simply edit the field.
- 3) Upload a logo (must be .gif format, ideally 140x77 in dimension) for retailers or major accounts that will have their own log-on and wish to have their logo displayed on work orders given to their own customers.

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3.2.3 Create New Site

- 1) Add New Site for major accounts by clicking 'Create Site' in the Major Account Company Details page.

EDIT COMPANY DETAILS **ADD NEW SITE**

Company Name:

Company Notes:

UPLOAD LOGO

- 2) Enter data into all fields.
- 3) Select Billing Site
- 4) You must enter in Main Contact information.
- 5) Click on 'Create New Site'

Site Details

Site Name

Credit Account Retailer Vendor

Commission %
(if Retailer)

Billing Site

Site Address

Address

City

Province

Postal Code [Find Postal Code](#)

Country

Main Site Contact

Salutation

First Name

Last Name

Day Phone

Evening Phone

Fax

Pager/Other

Email

3.2.4 Edit Site Details

- 1) By clicking Name on 'Site List' you can view Site Details page.
- 2) Make changes to Site details and click 'Update Site'

Company [John's Cheap Phones](#)

Site Name

Address

City

Province

Postal Code [Find Postal Code](#)

Country

Status Headquarters Site

Billing Site

PST Exemption Number

Main Site Contact

Salutation Mr.

First Name John

Last Name Thompson

Day Phone 613-742-0918,,

Evening Phone --,,

Fax --

Pager/Other

Email jthompson@itdepartment.com

Chapter 4 – User Management

4.1 Create New User

4.1.1 Site and Login Selection

- 1) Select new User Site
- 2) Enter 'Desired User Login'. Selection of Login will check to ensure no duplicates are chosen. If you select a login name that is already in use, the following error message will be displayed:

‘Sorry, that user login is already in use. Please select another user login.’

User Management

Site that the new user belongs to	Retailer HQ ▾
Desired User Login	<input type="text"/>
Select site and check login availability	

- 3) Click "Select site and check login availability" to continue.

4.1.2 Enter Contact Information

- 1) Enter First Name, Last Name, Email and Desired Password.
- 2) User Login cannot be changed.
- 3) All values can be edited at a later time.

Create New User

Site that the new user belongs to	Retailer HQ		
First Name	<input type="text"/>	Last Name	<input type="text"/>
Login Info	User Login: NewLogin	Email	<input type="text"/>
	Password	<input type="text"/>	

4.1.3 Set User Restrictions

User Group	Retailer ▾	Language Preference	English ▾
Sales Rep?	<input type="checkbox"/>	Technician?	<input type="checkbox"/>
Enable Work Orders	<input type="checkbox"/>	Enable Contacts	<input type="checkbox"/>
Create New Major Accounts	<input type="checkbox"/>	Add Major Accounts to Work Orders	<input checked="" type="checkbox"/>
Add Inventory or Loaner Management	<input type="checkbox"/>	Enable Job Types	Cellular <input type="checkbox"/> Parts Sale <input type="checkbox"/> Loaners <input type="checkbox"/>
Enable User Management	<input type="checkbox"/>	Fault Code Management	<input type="checkbox"/>
Purchase Order Access	<input type="checkbox"/>	Payments	<input type="checkbox"/>
Access to Reports	<input type="checkbox"/>	Gross Profit by Retailer Report	<input type="checkbox"/>
Create New User			

- 1) If the site selected in step 4.1.1 is a major account, the user group should be set to Corp.
- 2) The logged in user will only have the option to edit the user based on the privileges he or she has him or herself. In other words, if the currently logged in user cannot create new

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major accounts, he or she cannot create a new user with the ability to create major accounts.

- 3) See Section 4.2 for a detailed description of each user restriction.

4.2 Edit User Details

- 1) Access user details screen by clicking on the name of the user listed on the User Management screen.

Edit User Details

First Name	First	Last Name	Last
Login Info	User Login: retailer	Email	
	Password: retailer		
User Group	retailer	Language Preference	English
Sales Rep?	<input type="checkbox"/>	Technician?	
Enable Work Orders	<input checked="" type="checkbox"/>	Enable Contacts	<input checked="" type="checkbox"/>
Create New Major Accounts	<input checked="" type="checkbox"/>	Add Major Accounts to Work Orders	<input checked="" type="checkbox"/>
Add Inventory or Loaner Management	<input checked="" type="checkbox"/>	Enable Job Types	Cellular <input checked="" type="checkbox"/> Parts Sale <input checked="" type="checkbox"/> Loaners <input checked="" type="checkbox"/>
Enable User Management	<input checked="" type="checkbox"/>	Fault Code Management	
Purchase Order Access		Payments	
Access to Reports		Gross Profit by Retailer Report	

- 2) Edit user details by changing the form values and clicking "Update User".

4.2.1 Set as Sales Rep

Setting a user to be a sales rep will place their name as an option in the sales rep dropdown box available on the Create Work Order Screen.

4.2.2 Set as Technician

This option is not available for retail users.

4.2.3 Enable Work Orders

- 1) In order to use the Work Order section, at least one Job type must be enabled, Cellular, Parts Sale or Loaner.
- 2) Once enabled user will have 'Work Orders' choice on main menu bar and be able to view/create Jobs of the type(s) enabled.

4.2.4 Enable Contacts

Once enabled user will have 'Contacts' choice on main menu bar.



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4.2.5 Create New Major Accounts

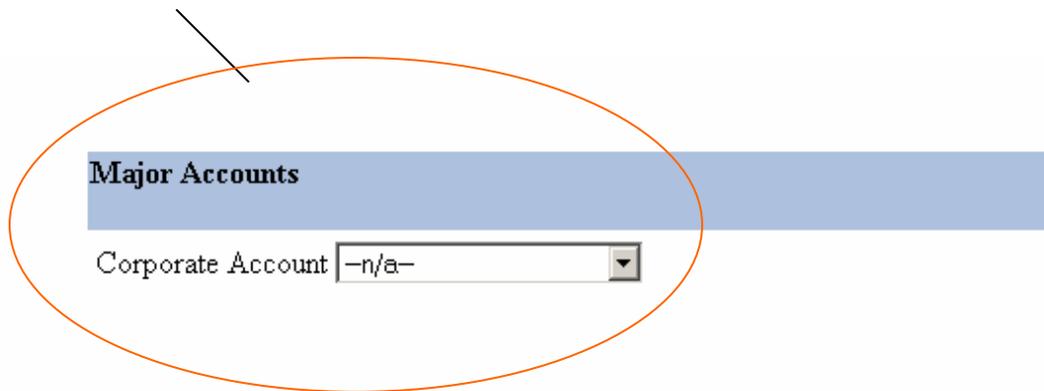
- 1) User has rights to create new corporate accounts
- 2) They will be available from dropdown under 'Major Accounts' when creating Work Order. See Section 4.2.6 to enable this option.



A screenshot of a web interface showing a blue header bar with the text "Major Accounts". Below the header, there is a dropdown menu labeled "Corporate Account" with the selected option "John's Cheap Phones". The entire dropdown menu is circled in orange.

4.2.6 Add Major Accounts to Work Orders

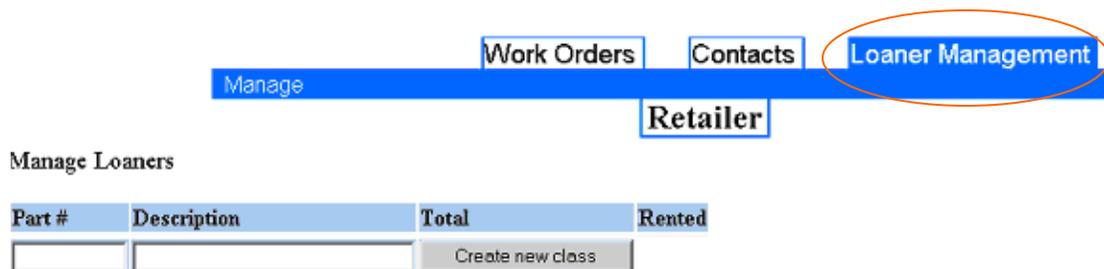
Once enabled user will have 'Major Accounts' choice on 'Create Work Order'.



A screenshot of a web interface showing a blue header bar with the text "Major Accounts". Below the header, there is a dropdown menu labeled "Corporate Account" with the selected option "-n/a-". The entire dropdown menu is circled in orange.

4.2.7 Add Inventory or Loaner Management

- 1) Once enabled user will have 'Loaner Management' choice on main menu bar.
- 2) User can now enter new Loaner phones or manage existing Loaner Inventory.



A screenshot of a web interface showing a main menu bar with three items: "Work Orders", "Contacts", and "Loaner Management". The "Loaner Management" item is circled in orange. Below the menu bar, there is a blue header bar with the text "Manage Loaners". Below this header, there is a table with four columns: "Part #", "Description", "Total", and "Rented". The "Total" column contains the text "Create new class".

Part #	Description	Total	Rented
		Create new class	

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4.2.8 Enable User Management

Once enabled user will have a 'User Management' choice on main menu bar under Contacts.



4.2.9 Purchase Order Access

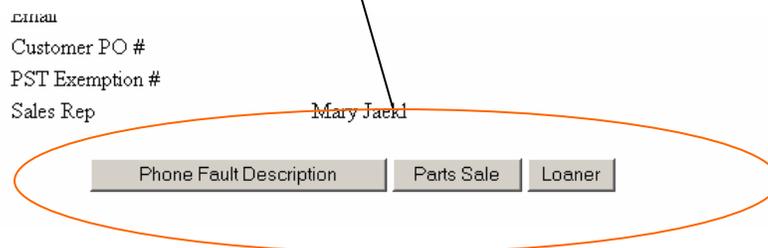
This Option is not available to Retailers.

4.2.10 Access To Reports

This Option is not currently available to Retailers.

4.2.11 Enable Job Types

These Checkboxes are visible on the 'View Work Order Detail'. They correspond to one of the buttons below; these buttons will be activated or deactivated accordingly.



4.2.12 Fault Code Management

This Option is not available to Retailers.

4.2.13 Payments

This Option is not available to Retailers.

4.2.14 Gross Profit By Retailer Report

This Option is not currently available to Retailers.

Chapter 5 – Loaner Management

5.1 Create New Loaner Class

- 1) Enter a Part #
- 2) Enter the Class Description. The class description is the name that will show on the Loaner job. (See Section 2.6)
- 3) Select 'Create new class'.

Manage Loaners

Part #	Description	Total	Rented
		Create new class	

5.2 Add New Phones to Loaner Database

- 1) Enter the loaner phone serial number.
- 2) Enter the Manufacturer.
- 3) Enter the Model
- 4) Select 'Create New item'

Part #: 234

Description: Phone

Serial #	Manufacturer	Model	Rented	
12223123	Motorola	120C	<input type="checkbox"/>	Update item
			Create new item	

5.3 Mark Loaner Phone as 'Rented'

- 1) Check the Rented box next to the loaner item.
- 2) Select 'Update item'.