SMART PARTS INSTRUCTIONS

Upon the initial launch of the new app, the SmartPart ordering will be turned off. You will still see the part availability within your office, but not from Marcone. To enable the ordering feature, please email your FC to request that it is turned on. Marcone will need to change a couple of settings on their end, then we will make some setting changes on our end. There are several new settings for you to be aware of regarding SmartParts.

SETTING CHANGES

GENERAL SETTING

- Employee Options
  - MobileChangeLaborHours
    - Setting this option to "False" prevents the technician from adjusting the labor hours charged on the iPad.
    - This option defaults to "True" to allow the technician to adjust the labor hours on the iPad.

SMARTPARTS SETTINGS

- Employee Options
  - MobileDefaultShipTo
    - This option tells the iPad what the default Ship To location should be for parts auto-ordered through Marcone. The selections are Customer, Office and Employee.
      - Customer – ships to customer address
      - Office – ships to the primary address for the franchisee
      - Employee – ships to the technician's primary address.
  - MobileShipToLock
    - This option prevents the tech from changing the default Ship to Location.

Employee Options

Options	Name	Description	Type	Default	Value	Active
✎	MobileChangeLaborHours	Allow employee to change labor hours for a task on iPad	Boolean	true		☐
✎	MobileDefaultShipTo	Default Ship-To Location for SmartParts Ordering on iPad - Options: customer, office, employee	String	customer		☐
✎	MobileDripShowWorkOrdersCount_Employee	Mobile Drip: show this many Work Orders	Integer		2	☑
✎	MobileShipToLock	Do not allow employee to change Ship-To Location for SmartParts Ordering on iPad	Boolean	false		☐
mobile					1 - 4 displayed , 4 in total	

- Franchise Setup Options
  - Territories
    - Once the SmartParts integration has been enabled, there will be 3 more fields in the Territories section: Marcone Username, Marcone Password, Shipping Method
    - After Marcone has been notified to turn on the integration, they will create a new login to be used with SmartParts. This login and password is still tied to your main account, but will only be used by the iPad. Your regular login will be used for any manual ordering.
    - An address must be selected in the Office Inventory Location in order to Select Office Ship To on the iPad.

  - Allow Back Ordering of Parts
    - This setting will determine if a part order is automatically placed, even if one or more of the parts is coming from a different Marcone warehouse location.
      - If true – the part order will be placed with Marcone. The estimated delivery date given to the tech will be one day later than the parts coming from the main location.
      - If false – the part order will not be placed with Marcone. The PO will come back to the office with an Open status and the office will need to place the order on the Marcone site manually. This option allows the office to make the decision on whether to ship the part from its current location for fastest delivery or wait for the part to be available at the main warehouse.

SMARTPARTS ON THE IPAD

Using SmartParts allows the technician to order parts directly from Marcone from the iPad, eliminating the need for office staff to perform that task.

PART AVAILABILITY SCREEN
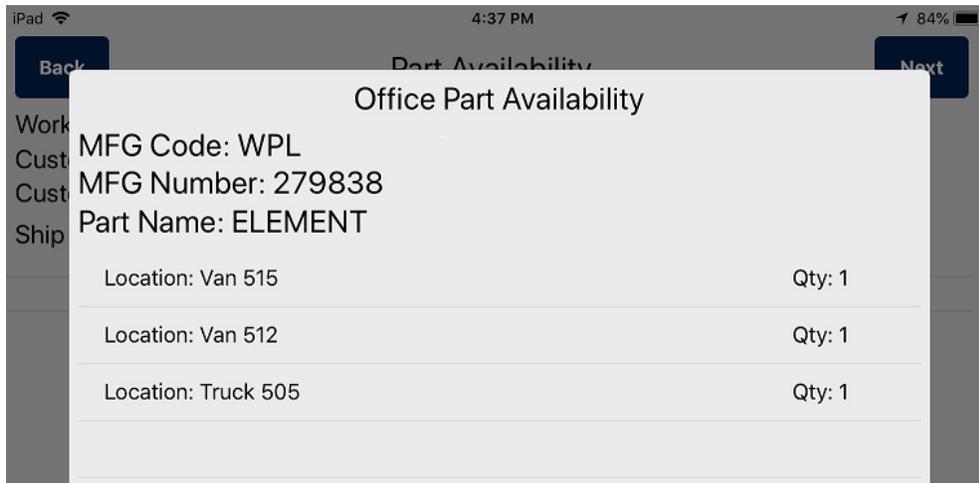
CHECKING AVAILABILITY IN THE OFFICE

After parts are added to the work order on the iPad and the tech presses 'Next', the Part Availability screen is opened. This screen allows the tech to check the availability of the parts both within the office and from Marcone.

Upon opening, the Part Availability screen shows all the parts on the work order and availability of the parts within the office. This screen is designed to show where the parts are and when they will be available before getting authorization from the customer to assist with the decision-making process.
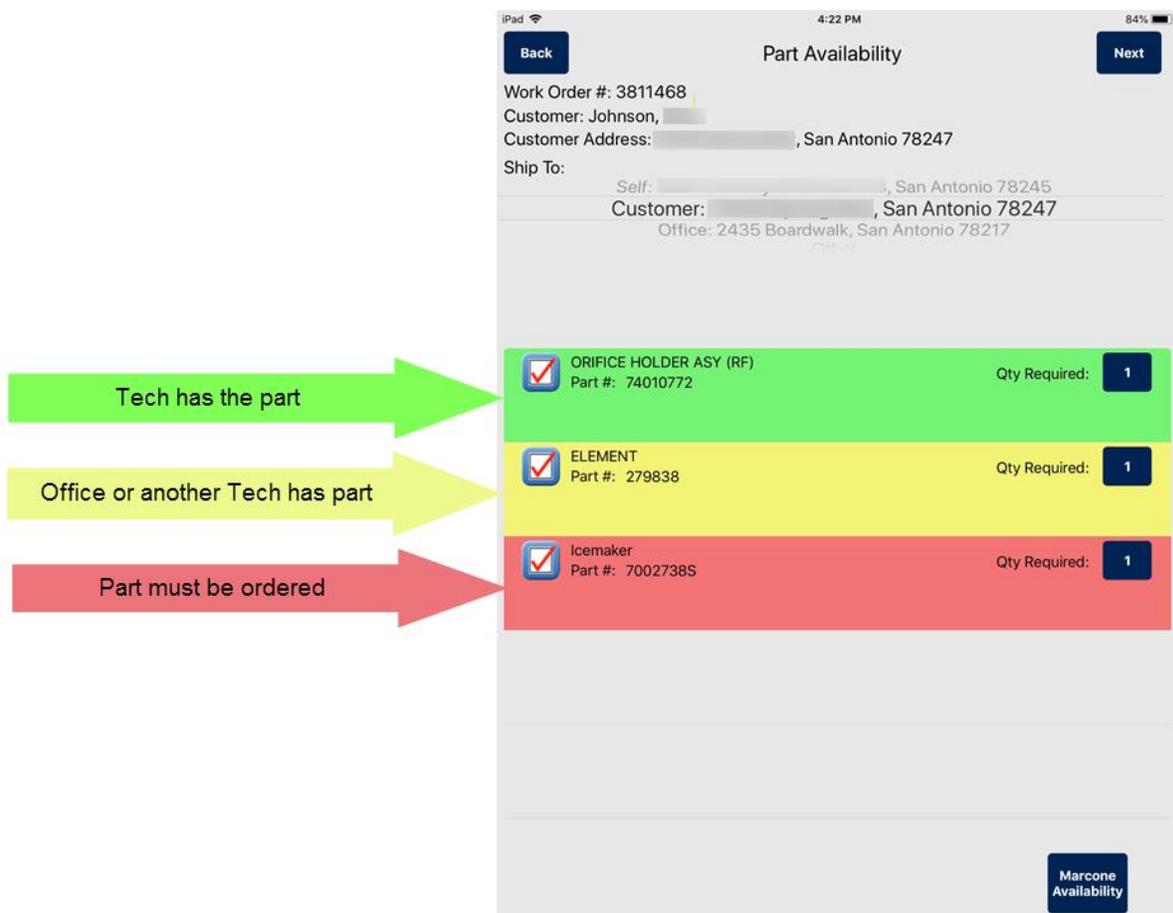
- If the part is highlighted in green, the part is on the tech's location.

- If the part is highlighted in yellow, the part is NOT on the tech's location, but it IS on another location within the office. It could be in the office or on another tech's location. Clicking on the qty required in the blue box opens the Office Part Availability screen. This screen lists the locations that have the part.

- If the part is highlighted in red, it must be ordered and is not in any of the Office locations.

CHECKING AVAILABILITY FROM MARCONE

- Pressing the Marcone Availability button calls the Marcone website to see if and when the parts are available.

- The system will check availability for all parts that are checked. The boxes default to checked according to the PO creation setting in SW. If the setting is turned on to order all parts, even if it is in stock, all boxes will be checked. If the setting is not turned on, only parts that are not in the tech's location will be checked. Any of the boxes can be checked and unchecked manually.

- When the availability is checked, a cart is created for the available parts on the Marcone website. If the order is not placed, the cart is emptied automatically.

- The expected Delivery Date is listed below the Part#.

- If there are multiple parts on the work order, and they are available on different days, the iPad will show the latest expected date.

- After checking availability, press 'Next' to advance to the next screen (Recommended Repairs or Quote).

Back   Part Availability   **Next**

Work Order #: 3811468
Customer: Johnson, Alan
Customer Address: 15219 Spring Mist, San Antonio 78247
Ship To:

Self: 9605 US Hwy 90 W Lot 373, San Antonio 78245

Customer: 15219 Spring Mist, San Antonio 78247

Office: 2435 Boardwalk, San Antonio 78217

☑ ORIFICE HOLDER ASY (RF) Part #: 74010772	Qty Required:	**1**
Expected Delivery: Tuesday, Nov 6, 2018	Qty Available:	1

☑ ELEMENT Part #: 279838	Qty Required:	**1**
Expected Delivery: Monday, Nov 5, 2018	Qty Available:	1

☑ Icemaker Part #: 7002738S	Qty Required:	**1**
Expected Delivery: Not provided	Qty Available:	0

Part is not available from Marcone. Allow office to order parts by clicking 'Next' on the Avail...

Expected Delivery: Tuesday, Nov 6, 2018

Marcone
Availability

WORK AUTHORIZATION SCREEN

The Authorize button has been replaced with 2 buttons. These buttons will be available after the customer signs.

- The Complete Job button is always the same and returns to the Work Order when selected. From the Work Order the tech will select the Finish button to access payment screens.
- The second button will say "Schedule Return Visit" if no parts are on the work order. If there are parts, it will say "Order Parts"
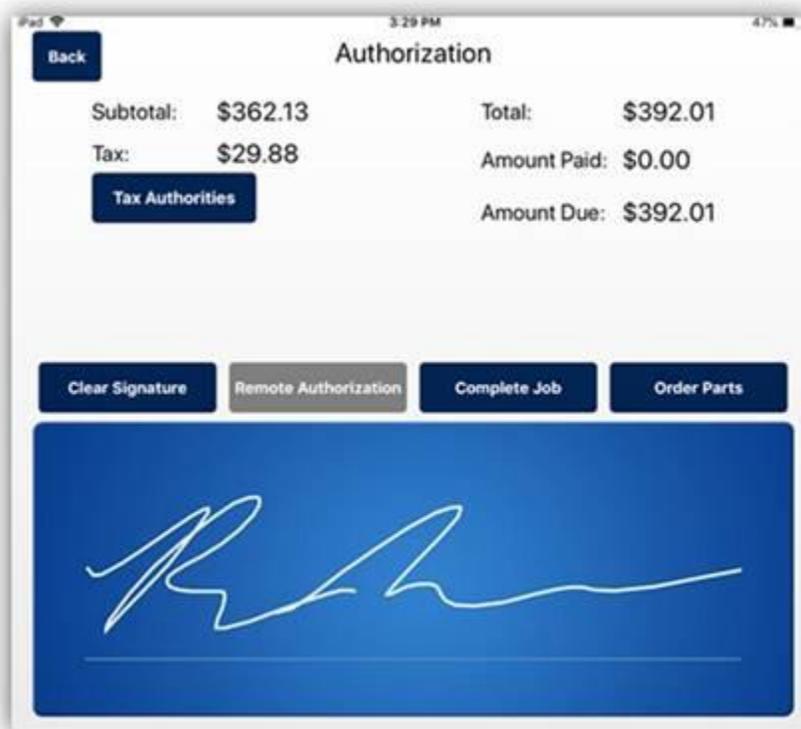
COMPLETE JOB BUTTON

The "Complete Job" button should be used if the job will be Completed on the same day, i.e. either no parts are required, the tech has the part, or the tech is going to pick up the part and return the same day. Pressing this button brings the tech back to the work order to finish the job and add any notes.

SCHEDULE RETURN VISIT

The "Schedule Return Visit" button is only available if there are no parts on the work order. Most of the time, in this situation, the tech will complete the job. However, there may be instances when the tech needs to schedule a return visit without completing the job:

1. A new job is created for DVC and schedule for a future date
2. Additional research is needed for Diagnosis

Pressing this button opens the payment screen, then the email confirmation screen, then the Job Status screen so the return visit can be scheduled with the "Promised" button.

REVIEW PART ORDER

The "Review Part Order" button is only available if there are parts on the work order. Pressing this button opens the payment screen, so the payment can be taken before placing the order. After the payment has been taken, the "Review Part Order" screen is opened.

PART ORDERING SCREEN

The "Ship To" Address is Defaulted according to the setup option, but can be changed manually (unless the option to prevent it is turned on).

SHIPPING CHARGES

Shipping will be charged to the franchisee for each different "Ship To" address that is used and each different warehouse location the part is shipped from.

Examples:

- Ticket# 1 – 3 parts – all are shipped to the Office, but 2 come from Atlanta and one comes from Dallas. Shipping charges will be $15.00. $7.50 for each warehouse, but going to same address.
- Ticket# 2 – 2 parts – both shipped to Office, both come from Atlanta. No additional shipping will apply. The order is consolidated into Ticket #1 which has the same ship to location and the same warehouse.
- Ticket# 3 – 1 part – shipped to Customer, comes from Dallas. Shipping charges are $7.50 because it is going to a separate address from the other tickets.
- Ticket# 4 – 2 parts – shipped to Office, both from Atlanta. No additional shipping will apply. The order is consolidated with Ticket#2, which has the same Ship To location and the same warehouse.

Total shipping for all 4 tickets is $22.50.
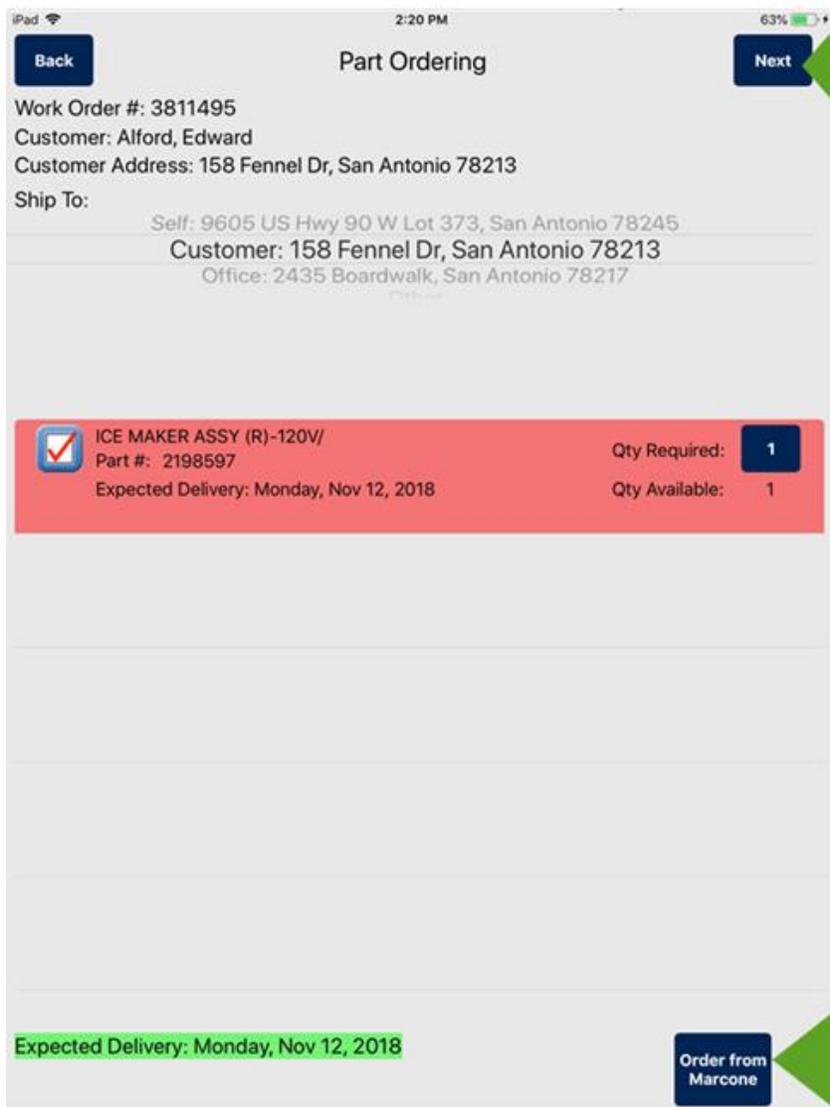
If the SmartParts integration is turned off, the Order from Marcone button is disabled. Everything else on the app is the same. The PO will come back to SW with all the parts on the wrok order or just the parts that are not in the Tech's inventory, according to the setup selection in Franchise Setup.

All parts that are checked will either be placed on order with Marcone if the "Order from Marcone" button is pushed.

PARTS SHIPPED FROM MULTIPLE WAREHOUSE LOCATIONS

When a part must be shipped from a warehouse location that is not the Primary location selected by Marcone, Marcone calls it a "Back Ordered" part, even though it may just be one day behind the other parts. This is where the options for "Back Ordering Parts" comes in.

- **Allow Back Ordering:** Some franchisees may choose to always let the tech order the part even though there will be an additional shipping charge for it coming from a different location in order to get the part more quickly. In this case, the option will be turned on and the expected Delivery date given will be one business day later than the parts from the main warehouse.

- **Prevent Back Ordering:** Some franchisees will want the decision making process of how to manage the parts coming from other warehouse location in the office. In this case, the option to allow back ordering will be turned off. The tech will proceed as normal, but will not be shown an expected delivery date. The tech still pushed the Order from Marcone button, but the PO is sent back as Open so the office will see it and place the order manually.
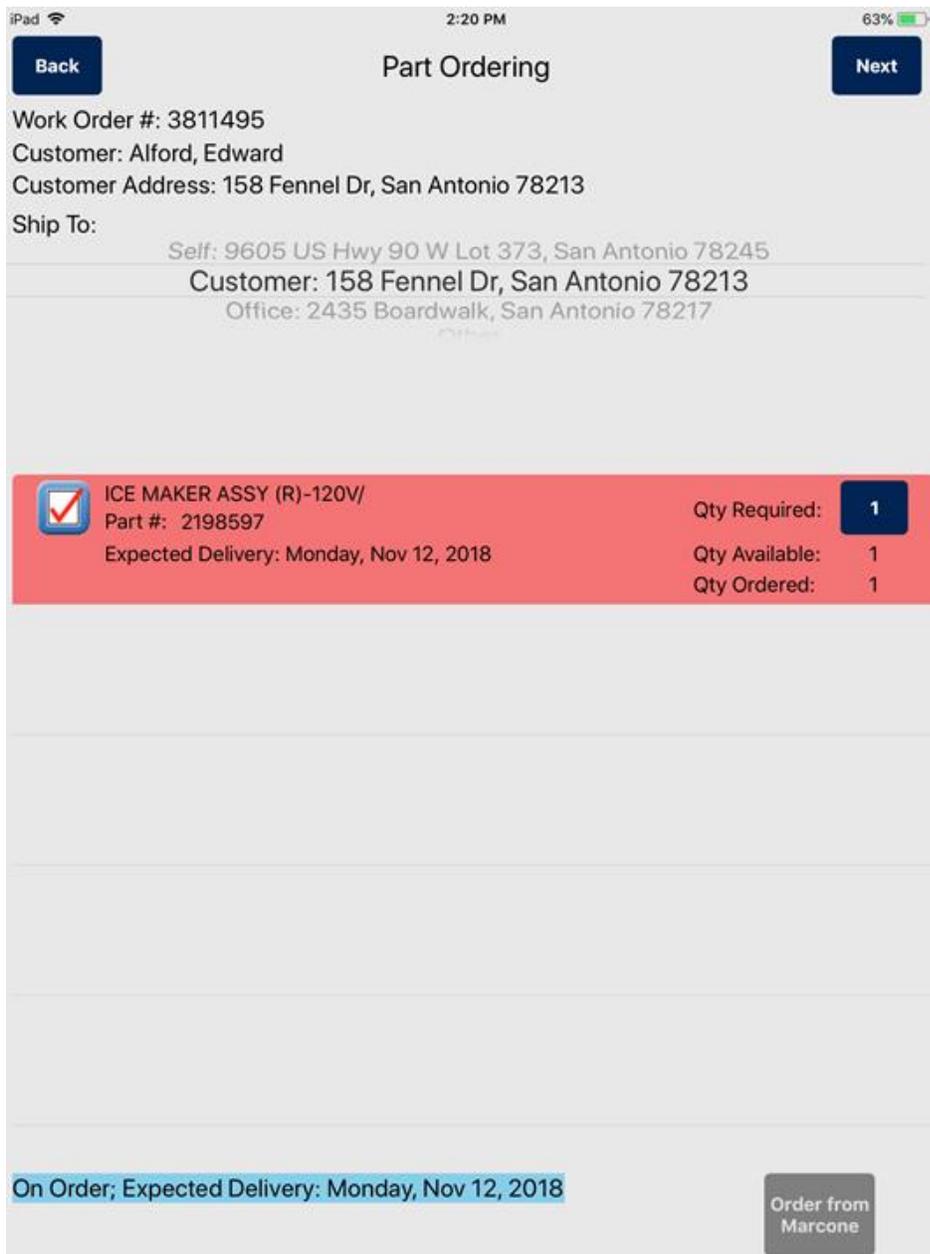
Once the order is placed with Marcone, the "Order from Marcone" button is disabled. The tech presses "Next" to move to the "Job Status" selection screen.

JOB STATUS SELECTION SCREEN

 "Reschedule" has been renamed as "Office Schedule" to more accurately describe its purpose.

The date after the expected delivery date, if using the SmartParts integration, is highlighted in green. The tech should not choose a date prior to the highlighted date.

SMARTPARTS IN THE OFFICE

When SP is used on the iPad, the PO is returned to the Office as On-Order. That means the work order will NOT be in the Follow-Up tab, unless it is sent back with the Office Schedule option. It will be in the Appts tab if the tech scheduled the job for a future date.

The following information is filled out automatically thru the auto-ordering process: