

How to Create a Service Request

Web Application

Step 1 Service Request Page

Navigate to the Service Request module









Step 2 Locate the Asset

Note: There are two types of assets

- **Cataloged Assets:** Individual pieces of equipment that have been cataloged, often with a display photo & Make / Model / Serial number (if ID Plate is available).
 - Examples: Hot & Cold side cooking equipment, Hoods, Heating & Air Conditioning, etc
- **General Assets:** General work order categories such as Plumbing, Electrical, Flooring, Walls, etc

Manage Service Request

| Photo | Asset Name | Asset Type | Store | Model Number | Serial Number | Action |
|--|---------------|-------------------|-------|--------------|---------------|---|
|  | Blender | Cooking Equipment | 1013 | BT X0999 | 999 2015 888 |   |
|  | Bottle Cooler | Refrigeration | 1013 | GDM-23 SS LH | 7403139 |   |

- A. **Asset Type Filter:** Use the 'Asset Type' filter to show/hide assets based on their asset type (Refrigeration, Cooking Equipment, HVAC, etc).
- B. **Location Filter:** If you are assigned to multiple locations, use the 'Location Filter' to select the corresponding store location.
- C. **Search Filter:** You can search for a specific asset by typing the name into the 'Search' field
- D. **Column Show / Hide:** Show or hide columns (Asset Name, Asset Type, Store, Model Number, etc) to display information that will assist in finding the asset.
- E. **Create Service Request:** Click the 'Create Service Request' icon to create a Work Order for the asset selected.

Step 3

Create the Service Request

Once located, tap on the Asset to create the Service Request and fill out the required information

1. Select a *Problem Type*

- If the *Problem Type* you need is not present, send an email to facilities.

2. Select a *Service Provider*

- By default, the Rank 1 Service Provider will be selected.
- To adjust this, tap the Service Provider name in order to select another Service Provider if needed.

3. Select a *Priority Type*

- A default Priority Type is in place per Asset Type
- To adjust this, tap the Priority Type in order to adjust
- Note: L1 Emergency will auto select the Over Time Approved box

4. Enter your name


5. Enter a description to better define the problem you are experiencing.

6. Take a photo of the problem.

7. Click Submit

- Once you have clicked submit, you will see a confirmation pop up that the Service Request has been placed.
- You can follow up on the Work Order progress in the Work Order Module.

Place a Service Request for Asset:

| | |
|--|---|
| Select Location* : | Location X , 001 |
| Select Asset Type* : | Plumbing |
| Select Asset Name* : | Plumbing |
| Select Problem Type* : | Drain - Front of House |
| Trade Type : | Plumber |
| Select Service Provider : | <input checked="" type="radio"/> Plumbing - Test <input type="radio"/> Handyman - Test |
| Select Priority Type* : | L3 - 24 Hours |
| Over Time Approved : | <input type="checkbox"/> |
| Requested By* : | John Smith |
| Description* : (Max. 1000 characters) | The drain in the FOH seems to be clogged. It is taking forever to drain |
| Upload : |  Click or Drag to Upload File (DOC, DOCX, PDF, XLS, XLSX, XML, XMLSX, MP4, WEBM, JPEG, PNG, JPG, GIF, OGG Only) |
| | <input type="button" value="Submit"/> |