



Field Service UAT/Sandbox Training Guide

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Field Service UAT/Sandbox Access Information

Note: To access a link, **press and hold the Ctrl button** while clicking the link.

UAT/Sandbox Links

- Using Google Chrome, access:
 - Club/Fleet Dispatcher experience: [REMOVED FOR MASKING](#)
 - Facility/Community Dispatcher experience: [REMOVED FOR MASKING](#)

Username and Passwords

- Open the list of UAT accounts available in **MS Teams Field Service Training → General → Files → Field Service UAT Information:**

[REMOVED FOR MASKING](#)

Note: If the document opens in SharePoint and you make edits, they will appear in MS Teams. If you open the document in MS Teams and make edits, they will appear in SharePoint.

Logging In to Field Service UAT/Sandbox

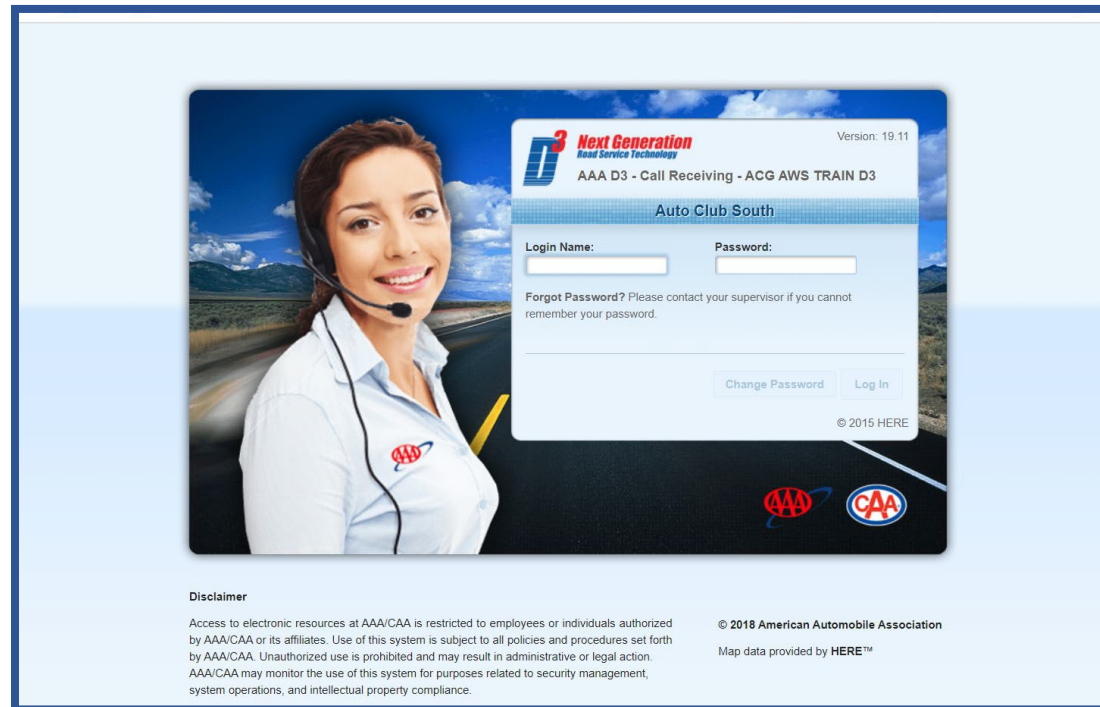
- Select the desired dispatcher account from the list and login.

Note: Some passwords may be expired. Some accounts may not work at all. If that happens try a different account. If prompted to create a new password, please **update it on the list indicating the date it was changed.**

Field Service UAT/Sandbox D3 Call Dispatching

D3 Call Receiving Link

- Log in to the D3 CR Training environment the same as you do Prod: [REMOVED FOR MASKING](#)



Stations to Use

- Create a call for any of the following facilities (you can force spot to one of these facilities if needed):
 - Orlando: 9117, 9193, 9198
 - Omaha: N6000
 - Chicago: C6, C2378

Searching for a Member

45, 11:52 AM N/A N/A N/A

014 Auto Club South (866) 519-4894

Doe, Jane

Start here!

Search Criteria:

- * member number - (16-digit, 9-digit)
- * phone number
- * last name, first name
- * last name, first name, address, city, state
- * last name, zip code
- * email
- * call id (example: #0001) - live calls only

Call Start: None
Elapsed Time: 00:00:00

Once you have logged into the D3 CR Training environment, you can type a name of your choosing and click **Enter**.

Be sure to enter the Last Name, First Name in the search field.

45, 11:52 AM N/A N/A N/A

014 Auto Club South (866) 519-4894

Doe, Jane

Status	Member Number	Name	Address	Contact Info
A	4290146929257701	DOE, JANE	7335 Mitchell Ranch Rd New Port Richey, FL 34655-3233	(222) 222-2222 RHETTSDOE@GMAIL.COM
A	4290146976643017	DOE, JANET	196 Bluff View Dr Belleair Bluffs, FL 33770-1343	(714) 848-6105
A	4290146711935017	DOEBERL, JANET	18002 Loretta Ln Lutz, FL 33548-4503	(813) 297-9043
A	4290141808870108	DOERFLER, JANET	606 Page Cir Mount Juliet, TN 37122-3417	(678) 548-1395 DJTKBSAZ@COMCAST.NET
A	4290146511753008	DOES, JANE	Apt 8702, 4600 Middleton Park Cir Jacksonville, FL 32224-3651	(904) 992-3974 ANALUMINARROAD@GMAIL.COM
A	4290141281340805	DOESCHER, JANE	15410 Kibmie Dr Fort Myers, FL 33912-2423	(239) 561-2361 WIENER_OSU@BRIGHTOK.NET

Call Start: None
Elapsed Time: 00:00:00

Choose a member with a status of **A** by clicking on their **Member Number**.

Completing the Member Tab in D3

Member: JANE DOE
 Membership Number: 4290146922957701
 Level: Plus
 Type: N/A
 Expiration: 08/01/2021
 Status: Active

Phone Number	Ext.	Type	Prim	SMS	Notes	Temp	Del
(222) 222-2222		Business	<input type="radio"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
(727) 271-8884			<input type="radio"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

The member's account will open. Fill in the **ERS Fee**, **Photo ID?**, and **Phone Number** fields.

ERS Fee: n/a

Photo ID?: Photo ID Available

Phone Number: 2222222222 and select the Primary button

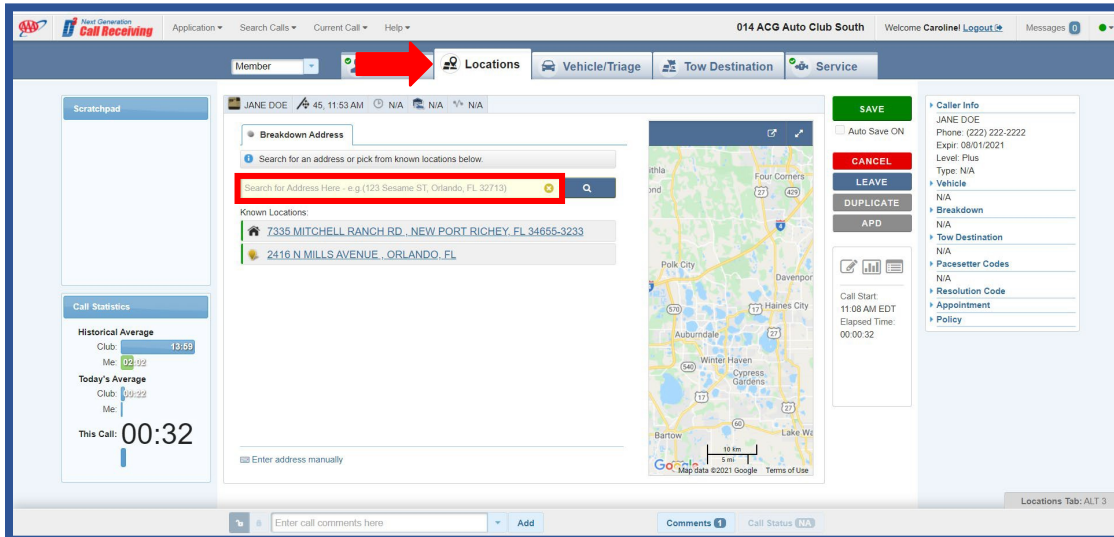
Member: JANE DOE
 Membership Number: 4290146922957701
 Level: Plus
 Type: N/A
 Expiration: 08/01/2021
 Status: Active

ERS Fee: n/a
 Photo ID?: Photo ID available

Phone Number	Ext.	Type	Prim	SMS	Notes	Temp	Del
(222) 222-2222		Business	<input checked="" type="radio"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
(727) 271-8884			<input type="radio"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

The page is complete when the **Member Tab** has a green checkmark.

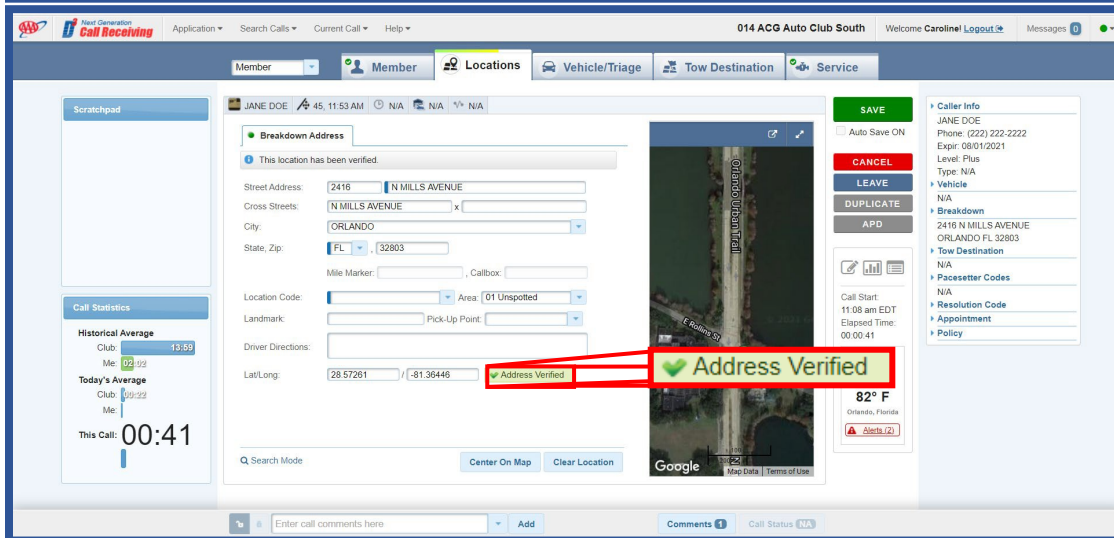
Location Tab in D3



Click the **Location Tab**.

In the search field, enter an address within the **Field Service Station Service Territory**.

Click **Enter** on the keyboard.



*The green **Address Verified** text needs to be present in order for **D3** to properly locate the call.*

The screenshot shows the Salesforce Field Service interface for a call with member JANE DOE. The 'Vehicle/Triage' tab is selected. A red arrow points to this tab. A red box highlights the 'Location Code' dropdown menu, which is open, showing several options. The 'PL Parking Lot' option is currently selected. The interface also displays a map of the location, call statistics, and caller information.

Select a **Location Code** from the dropdown menu.

Once the **Location Code** is selected, click the **Vehicle/Triage Tab**.

Vehicle and Triage in D3

The screenshot shows the Salesforce Field Service interface for the same call. The 'Vehicle/Triage' tab is selected. A red box highlights a list of vehicles: '2021 HONDA CIVIC (White)' and '2020 VOLKSWAGEN JETTA (Gray)'. A blue arrow points to the 'Begin Triage Here!' section, which prompts the user to select a tab from the left and answer related questions to set a pacesetter code. The interface also displays call statistics and caller information.

Select an existing vehicle from the list. If there are no vehicles listed, enter the details for a type of vehicle.

Search Tips

- ★ Enter year make model in any order, (ex: 02 honda civic)
- ★ Enter as much or as little info as you have available.
- ★ Use partial words if you can't spell the word.
- ★ Enter range of years (ex: 99-06) (ex: 99 01 03)
- ★ Enter multiple makes (ex: honda scion)
- ★ Enter multiple models (ex: escort escape)

Selected Pacesetter Codes:

Note: There are currently no pacesetter codes selected.

Enter the year and make or model of the vehicle.

Click **Search**.

Begin Triage Here!

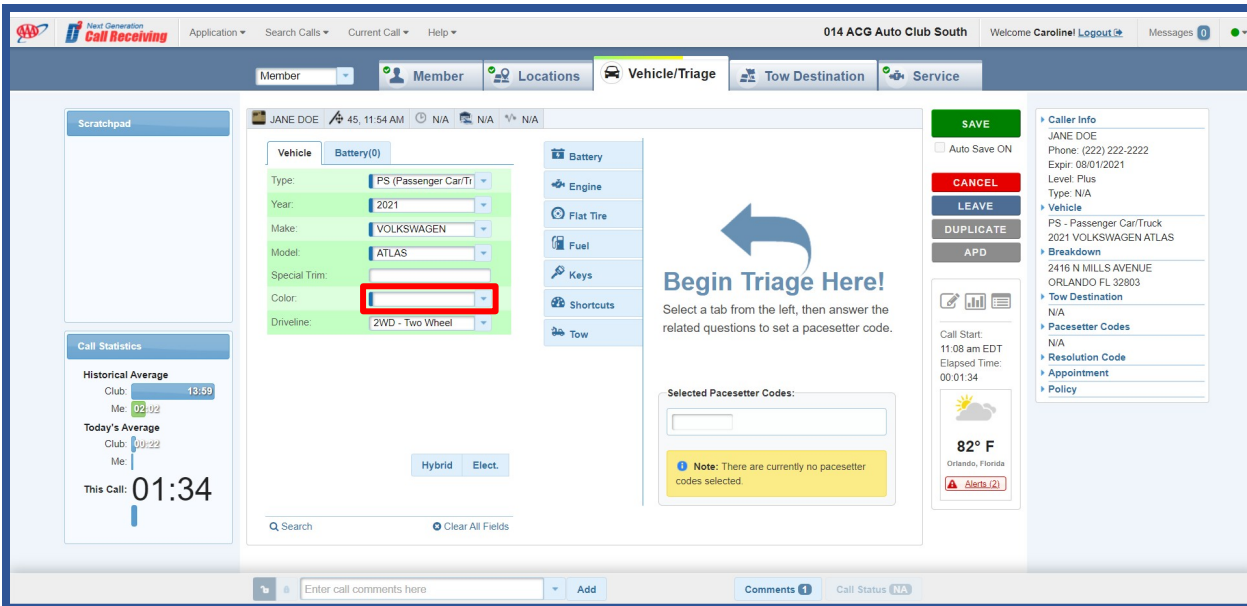
Select a tab from the left, then answer the related questions to set a pacesetter code.

Selected Pacesetter Codes:

Note: There are currently no pacesetter codes selected.

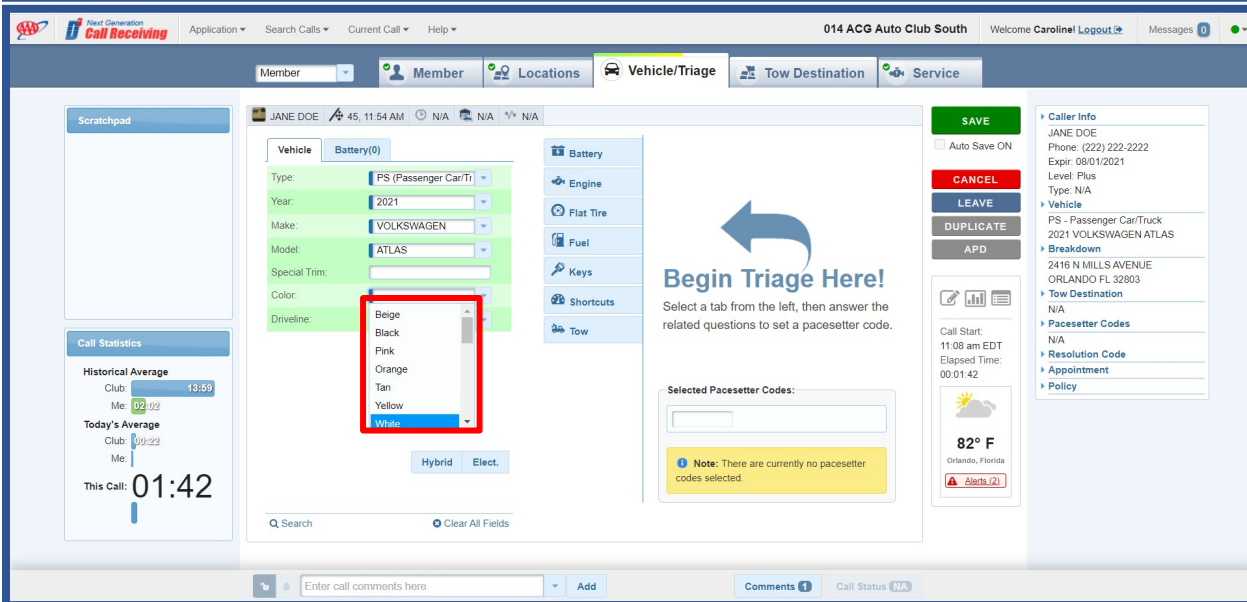
Year	Make/Model	Drive	Fuel
2021	VOLKSWAGEN ATLAS	2WD	GAS
2021	VOLKSWAGEN ATLAS	AWD	GAS
2021	VOLKSWAGEN ATLAS	AWD	GAS
2021	VOLKSWAGEN ATLAS	CROSS SPORT	GAS
2021	VOLKSWAGEN ATLAS	2WD	GAS
2021	VOLKSWAGEN ATLAS	CROSS SPORT	GAS

Click the **Make/Model** link to select the vehicle.



Fill in the required field indicated by a blue bar.

*On this screen, it is usually just **Color**.*



Select the color of the vehicle from the dropdown menu.

From the menu on the right, select the type of service.

Follow the prompts until a **Pacesetter Code** appears in the **Selected Pacesetter Codes** field.

A COVID prompt will appear.

Select the **NO** button.

*The purple box in the lower right-hand corner will indicate the call will be dispatched to **Field Service**.*

Once the **Vehicle/Triage** Tab has a green checkmark, proceed to the **Service** Tab.

Service Tab

In the **Spotted Facility** Field, check the facility to verify it will be sent to a **Field Service** station.

Member: JANE DOE | 180, 4:56 PM | N/A | 9193 | N/A

Call Type: [Dropdown] | Cash | Red Flag

Facility Preferences: [Prefer] [Avoid]

Spotting: Spot To: [Input] | Spot | Clear

Spotted Facility: 9193 | Details

AAA NORTH ORLANDO SERVICE VEHICLE
1996 W. NEW HAMPSHIRE ST
ORLANDO, FL 32804
407-646-8542

Facility Type: Mobile battery service
Spotting Level: 0

Special Services: N/A

Special Equipment: [Dropdown]

Callback Request: [Dropdown]

Priority: [Dropdown]

Hold Call: [Appointment]

Call Start: 01:56 pm EDT
Elapsed Time: 00:01:04

Caller Info: JANE DOE | Phone: (222) 222-2222 | Expir: 08/01/2021 | Level: Plus | Type: N/A

Vehicle: PS - Passenger Car/Truck | 2021 VOLKSWAGEN ATLAS

Breakdown: 2416 N MILLS AVENUE | ORLANDO FL 32803

Tow Destination: N/A

Pacesetter Codes: L101 Flat Tire w/spare | T1 Flat Tire Service

Resolution Code

Appointment

Policy

Comments: [Add] | Call Status: NA

Enter call comments here | Add

Enter a call note in the comment field stating:
This is a practice call.
Click add.

Member: JANE DOE | 180, 2:10 PM | N/A | 9193 | N/A

Call Information: Call Number: 5001 | Call Date: 2021-07-06 | Spot Facility: 9193 | Zone: N/A | PTA: 07/06/2021 2:10:43 PM

Auto-Calculated Wait Times (PTA): Super: Override 130 | Today's Trend: N/A | Recent Trend: N/A

Scripts: If the member is safe at home DO NOT QUOTE PTA IN SYSTEM - Please read the following script. "The service arrival window for members who are safe at home is 60 - 90 minutes." IF NOT SAFE AT HOME, FOLLOW NORMAL PTA/ETA PROCESS. IF ETA is available, say: "Mr./Ms./Mrs. DOE, the service provider will arrive by (ETA). We will contact you with any updates. I hope the rest of your day goes better. Good bye." IF ETA is NOT available, say: "Mr./Ms./Mrs. DOE, the service provider will arrive by 2:10 PM (PTA). We will contact you with any updates. I hope the rest of your day goes better. Good bye."

Remain in Call | Print | Close Call

Alerts (2)

Enter call comments here | Add

Comments | Call Status: SP

Click the **Save** button on the right side of the screen.

A confirmation box will appear.

You can now close the call.

Force Spotting

The screenshot shows the 'Spot' dropdown menu in the Force Spotting interface. The menu is open, displaying a list of service stations. A red box highlights the 'Spot' field and the dropdown list. The list includes the following stations:

- 9117 - ELITE AUTO SERVICES OF ORLANDO LLC
- 91170 - AAR OCOEE TIRE & SERVICE
- WX9117 - IRVINGTON GARAGE
- N9117 - RIVERCITY LOCKSMITH
- CX9117 - A-1 SUBURBAN TOTAL SECURITY
- ND9117 - AMERICAN TIRE SOUTH
- NX9117 - RIVERCITY LOCKSMITH
- 48-8542

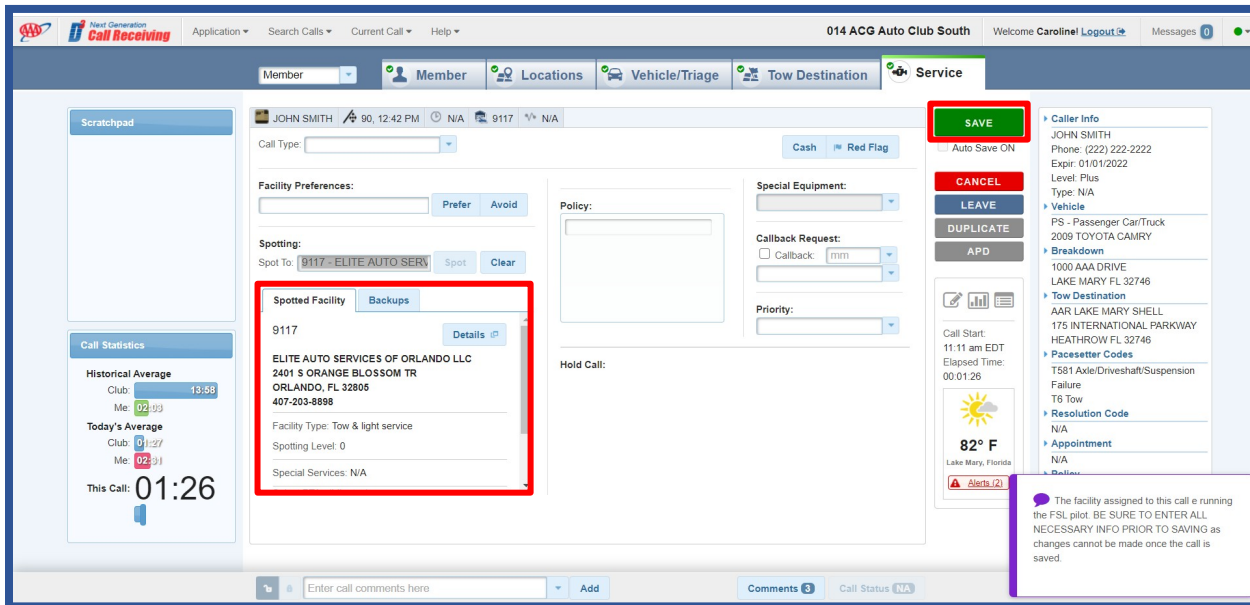
The 'Spot' field is currently set to '9117'. The 'Clear' button is visible next to the field.

If **D3** does not assign the call to a **Field Service** station, force spot the call by entering the station number in the **Spot To** field.

Click the desired station from the drop down list that appears.

The screenshot shows the 'Spot' button highlighted in the Force Spotting interface. The 'Spot To' field is set to '9117 - ELITE AUTO SER'. The 'Spot' button is highlighted with a red box. The 'Clear' button is also visible next to the field.

Click the **Spot** button next to the **Spot To** field.



The **Spotted Facility** box will reflect the newly spotted station. Click the **Save** button.

The call will appear in **Field Service**.

After Saving in D3

- After saving a call spotted to one of these facilities, the call should appear in **Field Service** in a few seconds (less than a minute).

Note: The facility spotted to the call in **D3** may not be the same facility scheduled to the call in **Field Service**. If you're logged into **Field Service** as a specific facility dispatcher but the call doesn't schedule to that same facility in **Field Service**, you won't see it appear (since it scheduled to a different provider.)

Field Service UAT/Sandbox Training Activities

Setting-Up the Activity

- Create 3 calls in D3 Call Receiving Train that dispatches to a Field Service UAT station.
 - At least one light service call and one tow call.

Note: This activity sheet will help you get to know **Field Service** and learn to locate information, work calls, and troubleshoot inside **Field Service**.

Training Activities

1. Change your task list filter to **To Do**
 - a. Sort the task list by **In Jeopardy** ascending (hint: arrow points up)
2. Open the filter for the **GANTT**
 - a. Adjust your **GANTT** view to show 3 hours before and after the current time.
 - b. On the **Resources** tab, filter your **GANTT** view by **Active Resources Only**.
 - c. On the **GANTT**, what **Service Territory/Facility** is listed first? _____
 - d. What **Service Resource/Driver** is listed 5th down? _____
3. Find the light service appointment you dispatched _____
 - a. What **Service Resource** is assigned? _____
 - b. Open the expanded **Service Appointment** page. Paste the **Glympse** Link here: _____

- c. Update the status to **En Route**
 - d. What is the **Parent Record ID**? _____
 - e. What is the **ETA**? _____
 - f. What is the **Work Type**? _____
4. Find the tow call you dispatched _____
- a. What is the **Service Territory**? _____
 - b. Update the **Tow Destination** to a new address in the area
 - i. Orlando - 3704 Ibis Dr, Orlando, FL 32803
 - ii. Omaha - 12356 Ballpark Way, Papillion, NE 68046
 - iii. Chicago - 1932 W Division St, Chicago, IL 60622
 - c. What is the **Scheduled End Time**? _____
 - d. Update the call status to **In Tow**
 - e. Post a comment to the **Work Order Feed**
 - f. Add \$3.75 in highway tolls as a **Service Line Item**.
 - g. Add **Resolution Code** N201 to close the call.
5. Find a **Service Resource** _____

- a. Change their truck _____
 - b. Update their **Operating Hours** to show them working today from 2pm-8pm.
 - c. List their last 3 **Service Appointments** _____
6. Find **D3 Call ID** 5001 _____
- a. What color is that vehicle? _____
 - b. Where is the breakdown location? _____
 - c. What is the **Service Resource's** name? _____
7. Go to the 3rd call in the **To Do List**.
- a. What is the **Service Appointment** number _____
 - b. What is the **Scheduling Priority**? _____
 - c. What is the **In Jeopardy Reason**? _____
 - d. How do you resolve that **In Jeopardy Reason**? _____
 - e. Has the member opted to receive SMS messaging? _____