HotSOS

Service Orders Module

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Service Orders Module

Introduction

Welcome to HotSOS Service Orders (SO) Module. HotSOS is the next generation of work flow management for mobile devices including tablets and smartphones. Much thought and innovation has been put in to making HotSOS a robust and versatile tool for users, teams and leaders alike. Information, critical to the efficient operation of all departments within the hotel, is at the fingertips of all team members from the mobile devices.

This document focuses primarily on how a team member will use HotSOS Service Orders module to perform daily tasks: from rapid guest response to fellow staff requests to Preventive Maintenance and Inspections.

In addition to discussing in detail how to work with the Service Orders, we will review working with teams.

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Service Orders List

From this module, team members and team managers will manage the workload. The Service Orders module is designed for the team members who respond to guest and staff calls and perform Preventive Maintenance and Inspections. HotSOS tracks and records response- resolution time, labor involved, parts used in addition to permitting remarks and images to be attached.

HotSOS Service Orders module puts necessary information at the fingertips of the team members and leadership. Directors and Managers can be untethered from a desktop PC, while keeping their finger on the pulse of the department.

This document assumes you've read the HotSOS Basics and understand the essential navigation of HotSOS. Though the SO Module is available for both tablet and smartphones, this document uses the smartphone format.

Navigate to the Service Orders module:

— Tap the List

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Service Orders At-a-Glance

The premise behind all HotSOS modules is to present the user with as much information as possible in a concise manner. Using icons clearly presents the information without cluttering the view with unnecessary words.

Service Order List - Up Close:

Upon initially opening the Service Order list this is what the user sees:

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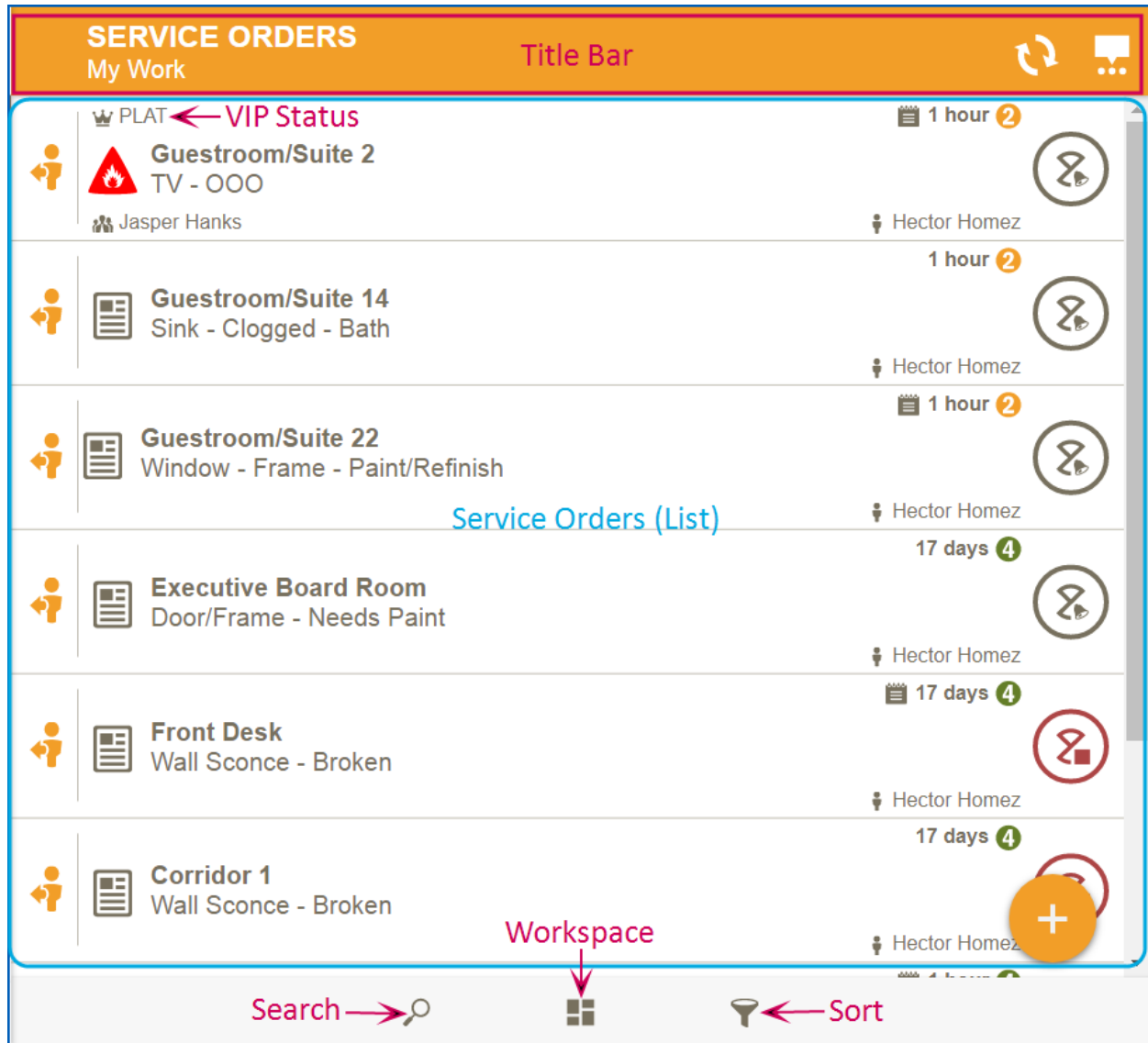
- — Title Bar Left
  - • The open module

  - • Level displayed

  - EXAMPLE:

    In this view the Title Bar indicates we are in the Service Orders Module displaying 'All Work'.

- — Title Bar Right

  - • Refresh button
    - • Tap to bring in Service Orders assigned since last refresh

  - • New Work indicator:
    - - The exclamation bubble lets the HotSOS respondent know new work has been assigned

  - • Action Center icon
    - • Number bubble indicates there are 4 unread notifications

- — Service Orders (List)
  - • Lists all Service Orders based on search, workspace and/or sort criteria set

- — Search/Workspace/Sort
  - • Search (see Basics)

  - • Workspace - the tiles presented are dependent on the user's assignment.

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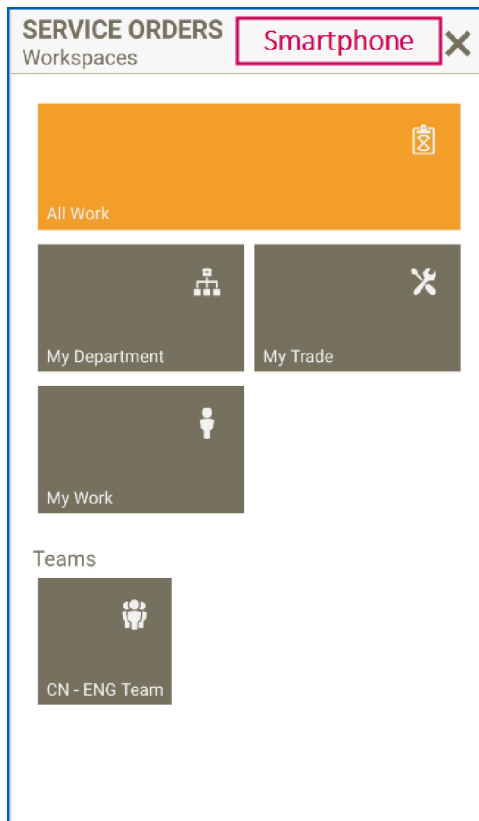
> ℹ By *default*, HotSOS displays only Service Orders with No Attention, Notified, Started and Stopped service status, for all workspaces presented.

— All Work
All Service Orders; all departments. Viewable to users with either of the following roles:

- QA Manager

- Unit Team Manager

— My Department
Display only Service Orders with issues having the same department as the logged in user

— My Trade
Display only Service Orders with issues that have the same trade as the logged in user

— My Work
Display Service Orders assigned to or which have been 'pulled' by the logged in user

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	Display work for all teams to which the logged in user is a member.
— Teams	

Service Order Info at Your Fingertips

— Tap workspace tile to display Service Orders

Without opening a Service Order, vital information is presented:

Let's take a closer look at each of these items starting on the left:

Pull/Release icon:

There are three icons in the Pull/Release functionality in HotSOS:

Gold icon - SO 'Pulled' into a user's 'My Work'.

Black icon - SO available to be 'pulled' into 'My Work'

Gray icon - SO another user has 'pulled in to their 'My Work'

Issue Type:

HotSOS has five issue types:

Icon	Issue Type
	Fire icon = Incident. Incidents are always guest-related
	Magnifying glass = Inspection
	Gear = PM (Preventive Maintenance) Order
	Work Ticket = Service Order

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Two-way Arrows = Transportation

Location:

The 'where' of the reported issue: room, office, meeting area, piece of equipment

Issue:

Task to be addressed, the problem reported

Guest:

A name here refers to the guest reporting the incident most often pulled from the Property Management System (PMS)

Additional icons:

A Service order has had at least one of three costs applied:

— Parts

— Recovery

— Labor

The paperclip icon means at least one image is attached

Notepad icon means at least one remark or memo has been added to this Service Order

Age:

The length of time the Service Order has been open since it was created

Priority:

Established in database for this issue to indicate urgency or importance based on property's decision

Assigned:

The staff member responsible for addressing this SO

Service Order Status icons:

Action icons available for current SO status

Notified

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Start

Stop

Complete

Deferred

Void

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Service Order Filters

The key to working effectively with HotSOS Service Order module is understanding the filter options, what they do and how to use them. These filters are designed to get you to the information you need as quickly as possible

Sort By:

— Tap the down arrow to the right of the 'Sort By' entry

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Last Update:8/2/2017

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— Tap to select the desired option

Order:

— Tap the down arrow to the right of the 'Order' entry

ⓔ ASC

⊜ DESC
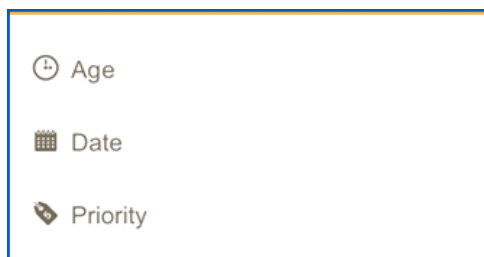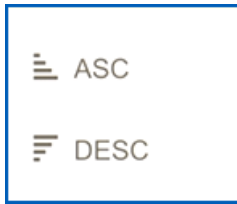
— Tap the desired option

Date Range:

Date From/Date To

See HS Basics manual for selecting Dates
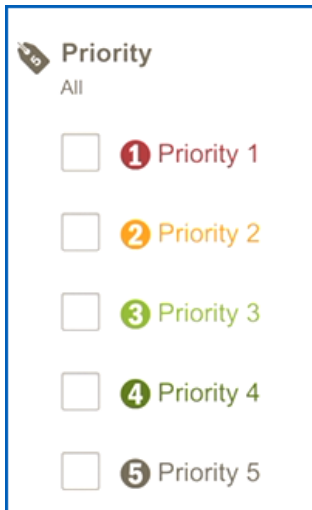
Guest Related:

— Tap to select/deselect the check box.
- Selected means the guest reported the issue and the guest name is with the Service Order

Escalated:

— Tap to select/deselect the check box
- When selected, Service Orders will only be displayed if they meet Business Rule criteria for escalating
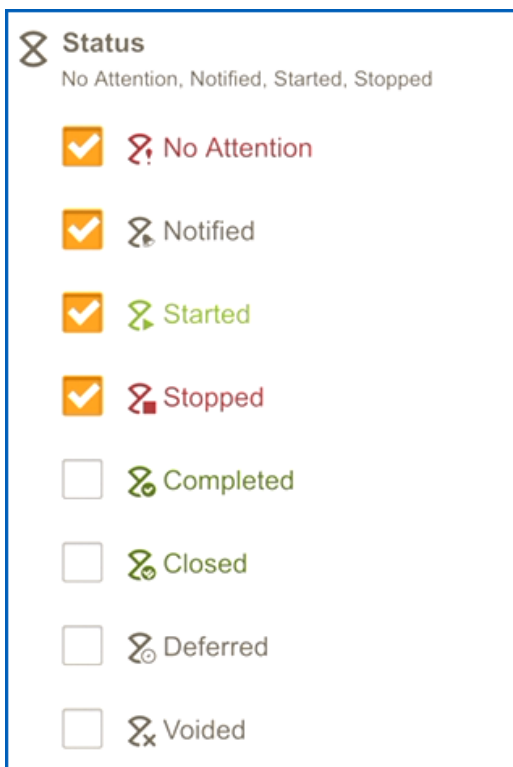
Priority:

— Tap 'Priority' for all options:

— Tap the check box to the left of the desired 'Priority'
  • Select more than one if needed
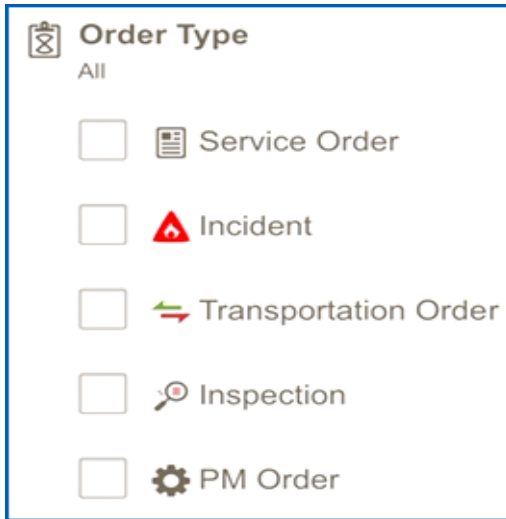
Status:

— Tap 'Status' for all options

— Tap the check box to the left of the desired 'Status'
  • Select more than one if needed

Order Type:

— Tap 'Order Type' for all options

— Tap the check box to the left of the desired 'Order Type'
   • Select more than one if needed

— When satisfied with selections, tap:

   • ✔ Apply to apply filter selections

   • ✗ Clear to cancel the filter action

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SO Details

— Tap to Open desired SO. The details of the Service Order are presented:

— As you can see, the 'cards' are clearly delineated for easy reference. Each card will be discussed as well as the functionality within:

Issue Card:

- — Issue

- — Issue Type

- — Department (responsible)

- — Labor (estimated)

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— Trade (of Issue)

— Priority
  • 1-5.
    • 1 most urgent (typically guest-related, life safety)
    • 3, 4, 5 - how they are used is defined by the property, but generally, these are not time sensitive.

— Status (see prev)

— Age

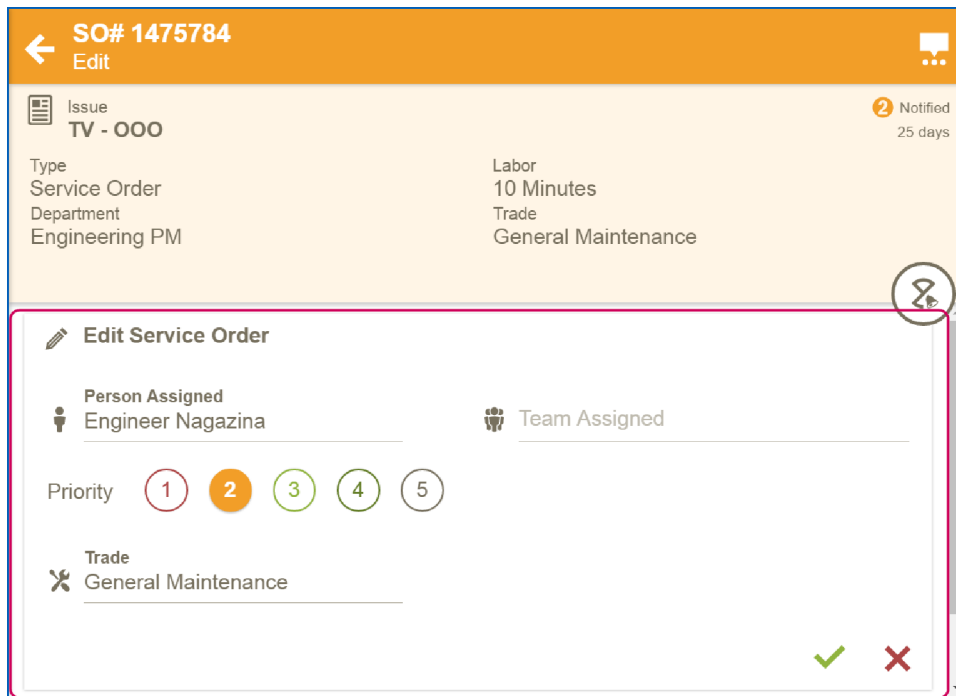In the upper right corner of the Issue Card, there is an eilipsis:

Ellipsis - tap for additional options

• Options:

Edit:
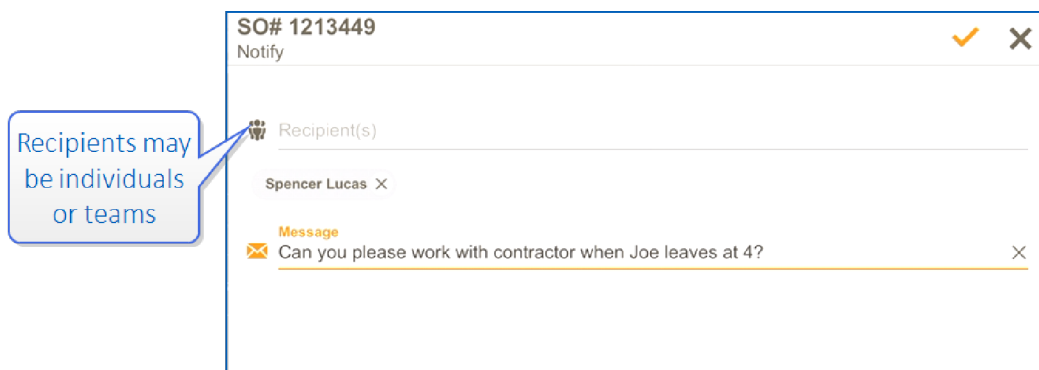
When selected, HotSOS will open the editable details:

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When changes are complete

- Tap ✔ to save

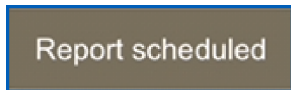- Tap X to cancel action

Notify:

Tap 'Notify' to display this next screen:

Recipients may be individuals or teams

- Enter recipient(s)

- Add optional remarks

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- Tap ✔ to send notification

- Tap **X** to cancel action

PDF

When PDF is tapped, the following pop-up (toast) will appear at the bottom of the screen:

Report scheduled

The user will receive an alert to indicate HotSOS has generated a PDF Work Order Form of the Service Order.

Tap 'view' on the notification. HotSOS will open the Work Order Form report in Messages:

Location Card

Identifies where the issue has occurred. When tapped opens for more details:

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- Housekeeping Details
    - Guest Room Housekeeping information will be supplied:
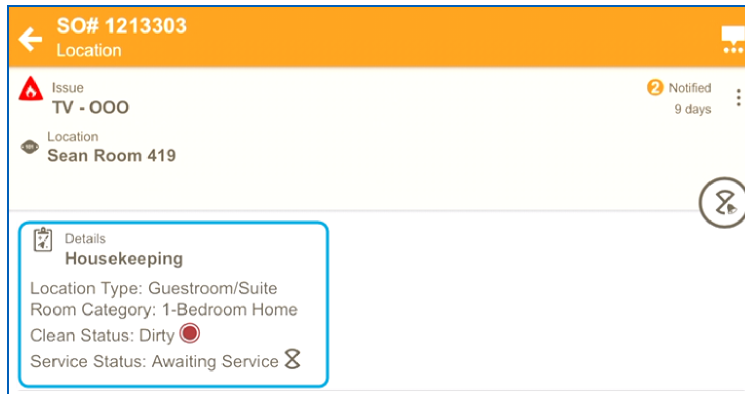
Tap the in the title bar to return to the previous screen

- Fields Details
    - Most often associated with equipment, fields with values will be presented:
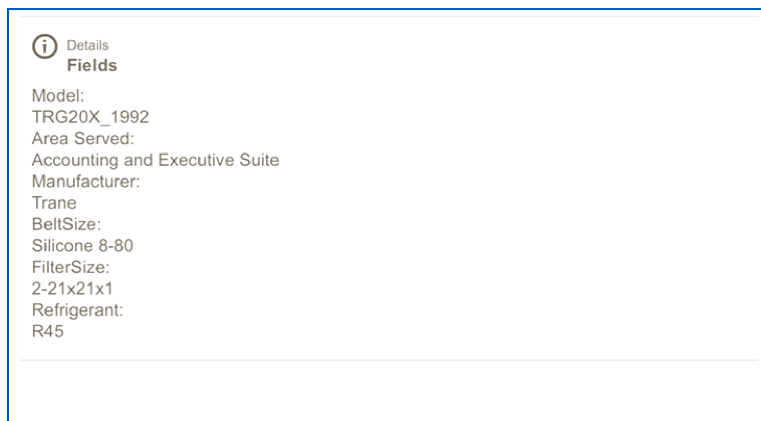
Personnel Card

The Personnel Card displays the 'who' of the Service Order:

- Reporter: who initiated the Service Order

- Assigned: name of staff who has been assigned to take care of this Sc

This card does not 'open' when tapped, however, actions can be taken using the icons to the lower right of the card:

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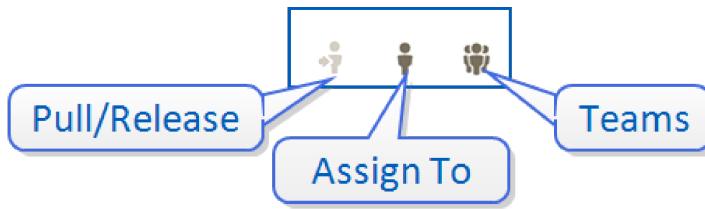
- Pull/Release
    - To pull SO into 'My Work'

    - To release SO back to 'All Work'

- When either action is taken, HotSOS will present pop-ups (toast) to let the user know the action was completed:
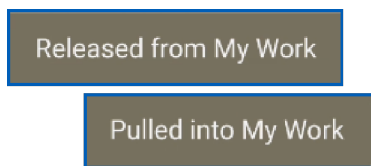
- Assign To
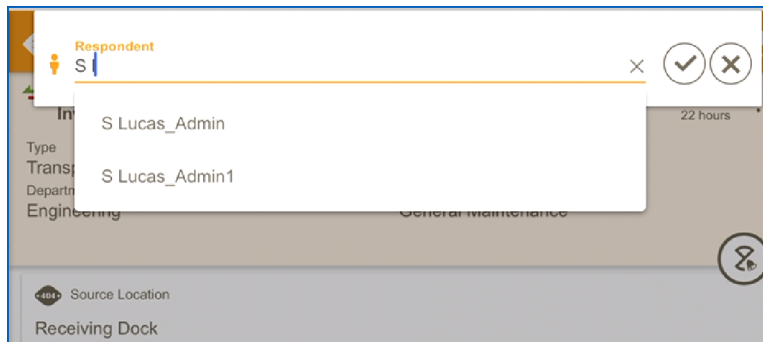
— When the icon is tapped, a Respondent box is presented

— Begin entering Respondent name
    - Select from resulting list

- Teams

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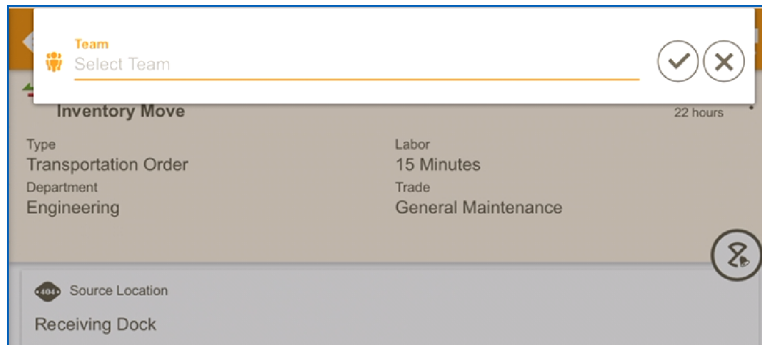
- When the icon is tapped, the Team box is presented

- Begin entering Team name
  - Select from resulting list

As changes are made, the Personnel Card is updates accordingly:
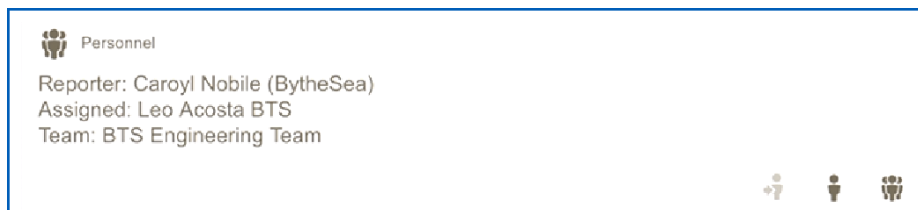
Remarks Card

The Remarks Card will display the most recent remark added.

- Tap to expand card to display all remarks:

- Additional remark options are found at the bottom of the screen along with the Remarks option:
  - Action

  - System

Actions:

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— Records actions (both user(s) and System) performed while working with the SO such as:

- Create

- Assign

- Pull/Release

- Stop, Start, Complete, Void

- Defer, etc

System:

— Actions the System processes:

- Business Rules

- Escalations

- Assign to Team

- Direct to Team
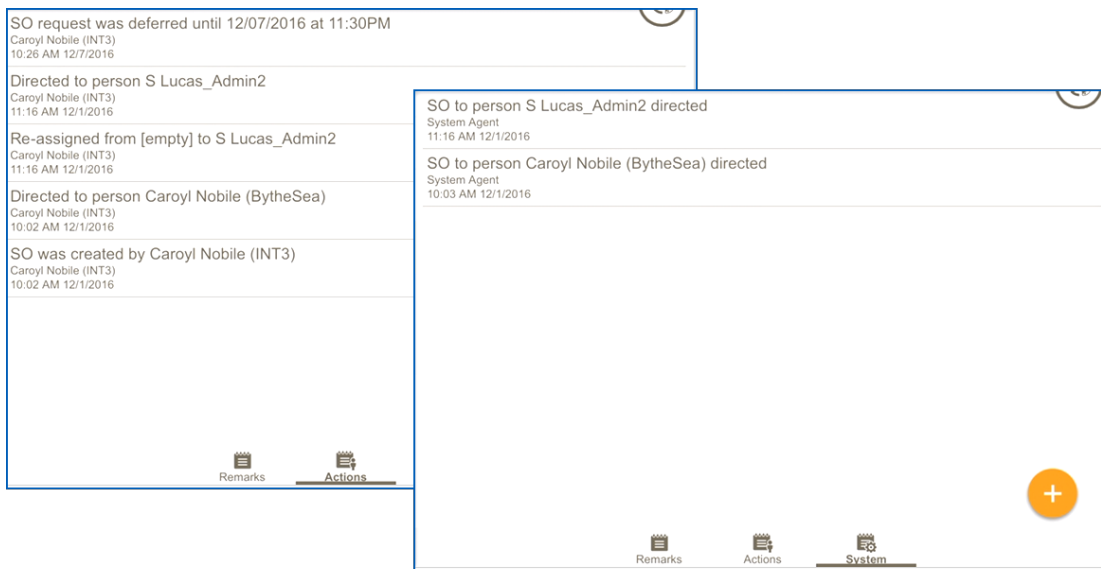
Tap the ← in the title bar to return to the previous screen

ℹ️ Notice the underscore indicating which Remark option you are viewing.

> Actions applied to a schedule, such as Skip, Generate etc, and Remarks entered in the Schedules Module will be included in the Actions and Remarks tabs of the Service Order created as a result of a schedule.

Attachment Card

A very effective feature in HotSOS is the ability for attachments to accompany Service Orders. While the most common attachment is an image or picture, it could also be a document or other file type. A single picture may better describe the issue than any remarks that might be added.

The Attachment card indicates how many attachments are associated with this SO:
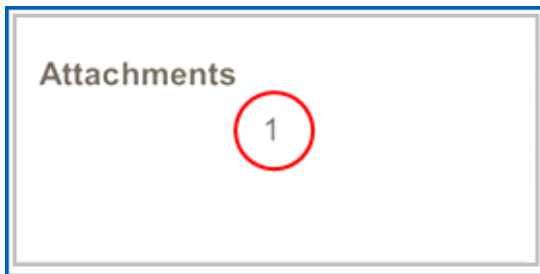
> A maximum of 6 images or 10MB may be attached to each Service Order

— Tap the Attachments card to view attachments:
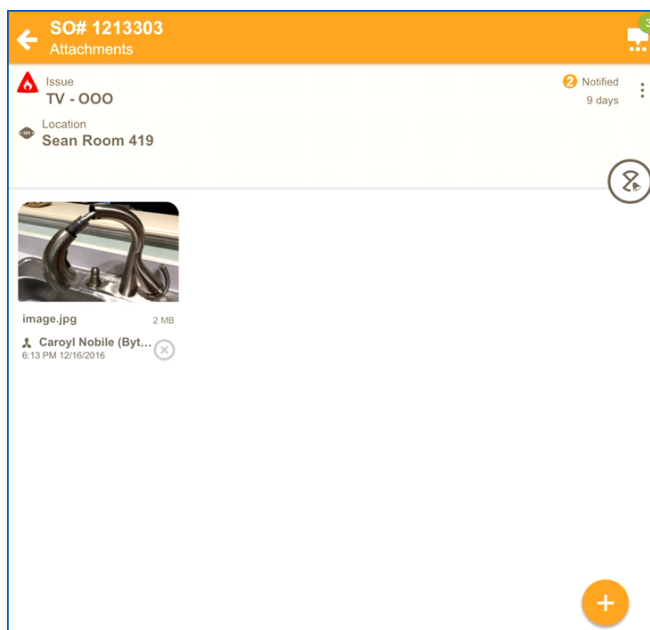
Images/files can be attached by taking pictures using device camera or loading an existing file. Adding attachments will be covered in 'Applying Actions'.

Steps Card

The Steps card displays the number of steps an issue has defined in the Issues database:

— Typically Inspections and PM Orders, as seen here, have steps, but any issue may have steps added, especially where safety and/or protocol are important.
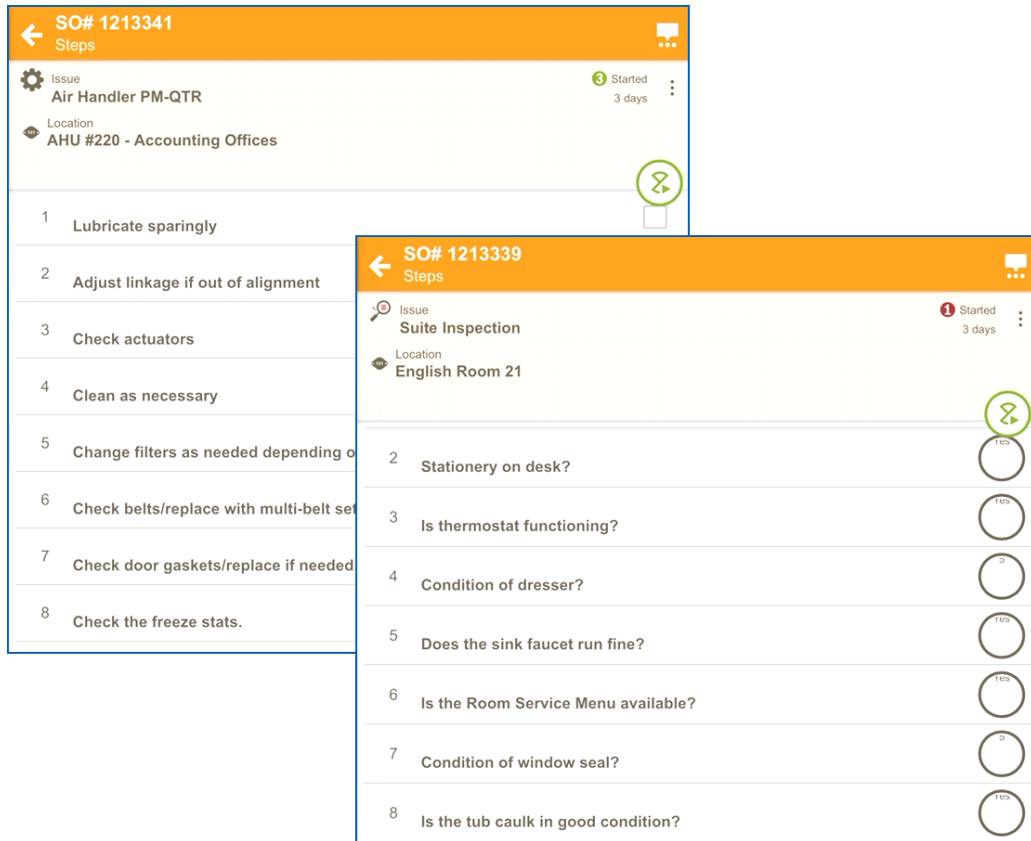
Steps may include hyperlinks providing the user with specific information to perform the

task:
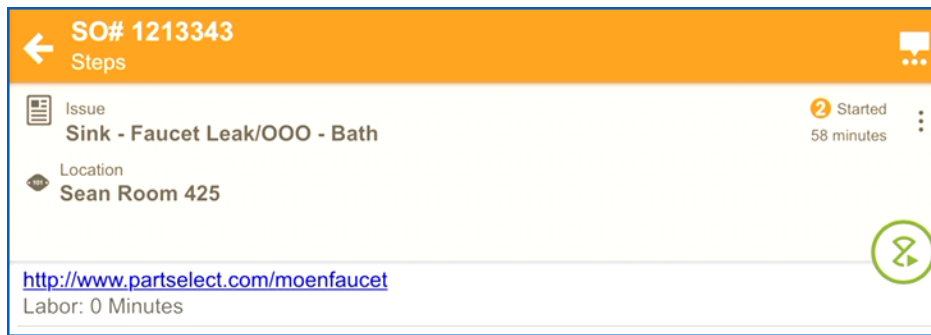
Cost Card

— The Cost card is designed to record costs incurred as a result of the Service Order. There are three categories of costs:

- Parts

- Recovery

- Labor

— **Parts:** If Parts have been defined in the database:
  - HotSOS Thick Client(Cost Management/Predefined Parts)

  - Morten Bay **

  - Birchstreet **

They can be added to a Service Order to accurately reflect the costs incurred.

** Integration Partners with inventory solutions interfacing with HotSOS

— **Recovery:** If Recovery items have been defined in the database:
  - HotSOS Thick Client(Cost Management/Predefined Recovery)

Items defined to recover guest loyalty can be added here, providing an accurate account of what it cost to address a guest issue.

— **Labor:** HotSOS records all labor associated with completing the Service Order:
  - Labor is calculated from the time a user taps 'Start' until the user taps 'Complete'

  - If a user 'Stops' a Service Order (perhaps waiting for a part to arrive), the labor will be calculated from the 'start' to 'Stop'. When the user restarts the Service Order,

the labor will be calculated from the 'Restart' to the 'Complete' . HotSOS will track the total labor.

- Labor will be reflected upon 'Complementary' of a Service

EXAMPLE:

1:00pm	Start SO	
1:10pm	Stop(pick up part)	10 min labor
3:00pm	Start SO	
3:30pm	Complete	30 min labor
	Total Labor:	40 min

EXAMPLE: Single User:

EXAMPLE: Multiple Users:

- HotSOS will track and record labor when a Service Order requires more than one user to work on it:

Additionally, if an hourly rate has been entered in HotSOS Thick Client (Data Managment/Trades), HotSOS will calculate the dollar amount of the labor expended for the Service Order.

Working with Service Order List

The Service Orders module will hold all the Service Orders assigned/directed to you or any team(s) to which you belong. This is where you will work from over the course of the day whether regardless of the department for which you work.

Applying Actions to a Service Order

This will reference Service Orders and Incidents. Performing an Inspection and Preventive Maintenance will be in their respective sections.

The Respondent will most often be in 'My Work' workspace, however, the actions discussed here can be applied from any of the workspaces available to the logged in respondent.

Start a Service Order

When ready to begin working with a Service Order:

— In the SO List, tap the Service Order Status icon
  • Or tap anywhere on the Service Order to open it

  • Tap the Service Status button

— Tap the 'Start' icon

— The Service Order is updated to reflect it has been started:

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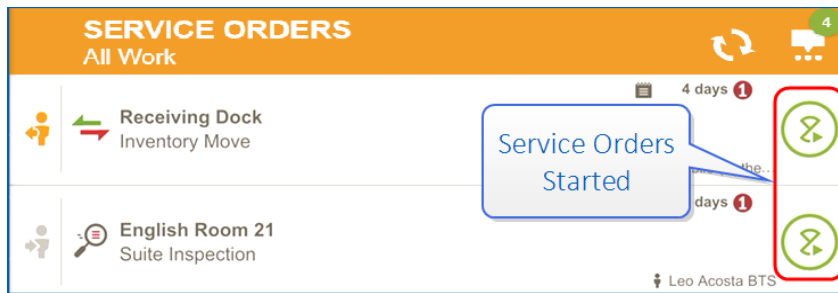
Stop a Service Order

Why might a Service Order need to be stopped?

A few reasons to stop a Service Order:

— Need Parts

— Need some assistance

— The job requires an outside contractor or expert in the field

— You are called away for something more important or urgent

— It's the end of the day

> Whatever the reason, *before* you Stop the Service Order, we suggest you add a remark to the Service Order so others will know why it was stopped. See Adding a Memo'

— In the SO List, tap the Service Status button
  - Or tap anywhere on the Service Order to open it
  - Tap the Service Status button

— Tap the 'Stop' icon

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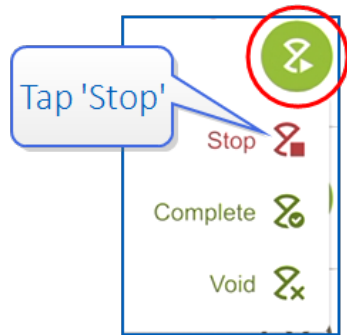
— The Service Order is updated to reflect it has been stopped:
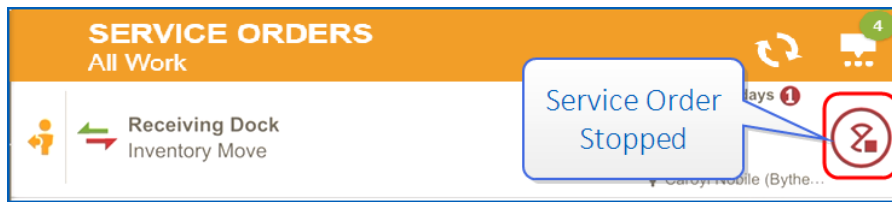
Complete a Service Order

When the work the Service Order referenced is finished, 'Complete' the Service Order.

— In the SO List, tap the Service Status button

  • Or tap anywhere on the Service Order to open it

  • Tap the Service Status button

— Tap the 'Complete' icon

When the 'Complete' is selected, a drop-down is presented, providing the opportunity to change the issue:

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SERVICE ORDER
Complete SO # 1213302?   ✓   ✕

    Issue
📄 Coffee Decaf - Requested

Location: 👁Sean Room 416

👤❓ Why would an issue need to be changed?

🧑‍💼 Great question!

An issue might need to be changed to more accurately reflect the problem. For instance, a SO indicates the TV is not working, but the real problem is a remote not working. HotSOS let's you update the issue:

In the drop-down:

SERVICE ORDER
Complete SO # 1213302?   ✓   ✕

    Issue
📄 Coffee Decaf - Requested

Location: 👁Sean Room 416

— Tap the Issue field

— Backspace to clear the current issue field

— Enter a keyword for the desired issue

— Tap to select from the resulting list

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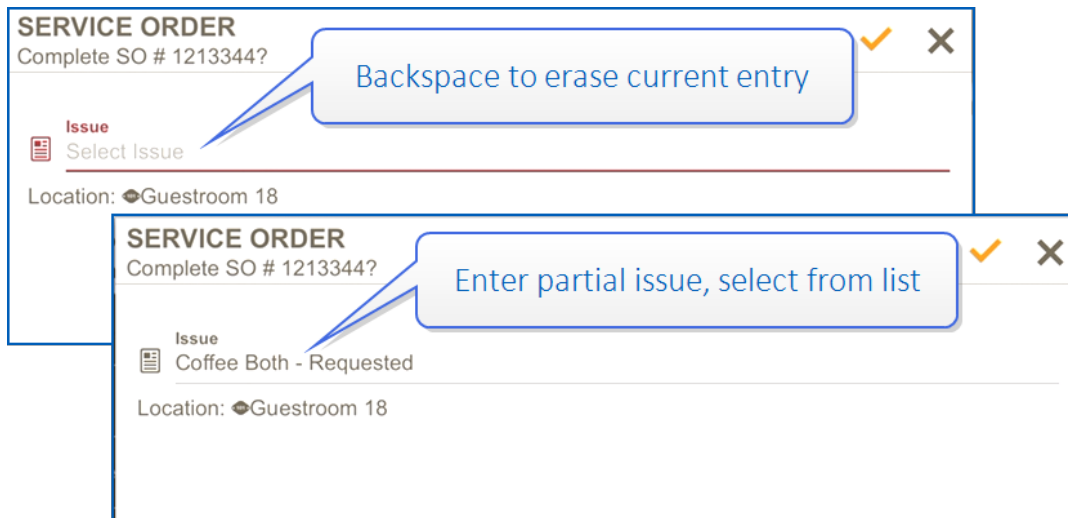
— The Service Order is updated to reflect it has been completed:

Pull/Release

No More SO in 'My Work'

I completed all the SO in 'My Work'. How do I populate 'My Work' with more Service Orders?

The premise behind HotSOS is to permit the end user to manage their own workload. When one task is done, the Respondent can 'Pull' another (or several):

— Tap the   at the bottom of the 'My Work' screen

— Tap the appropriate workspace:
- All Work

- My Trade

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- My Department
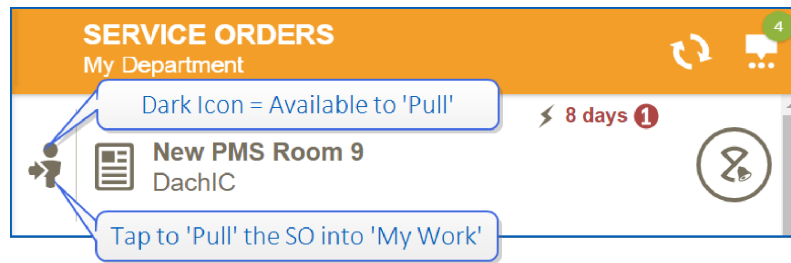
Notice the arrow in the icon pointing 'right' or 'in'. Pull the SO 'in' to 'My Work'

It is the end of the day and I have Service Orders I couldn't get to. I want to put them back in 'All Work' so the team on the next shift can take care of them. How do I do that?

To the left of the SO,
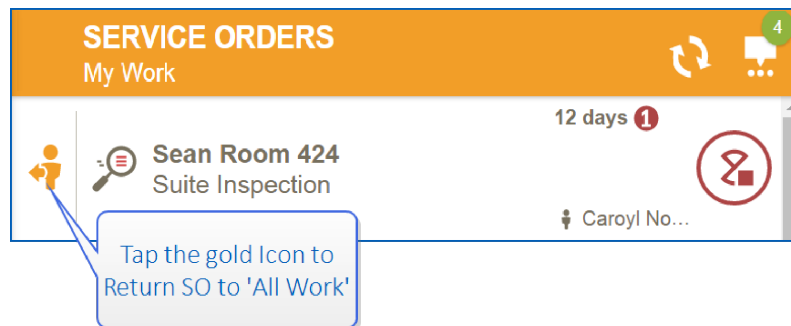
Notice the arrow in the icon in pointing 'left' or 'back'. Release the SO 'back' to 'All Work'. It will be available for another Respondent to 'Pull' or have the work assigned.

Void a Service Order

A Service Order may be voided if there is information that is incorrect, such as wrong room (finger-check) or issue. Most likely these will be caught by the person generating them and you will receive the void notification. But you may also get to a guestroom to assist a guest and have them tell you the issue resolved itself or they've changed their minds - the SO you have on your device is not valid and should be Voided – NOT Completed.

> ℹ️ Remember, when a SO is voided, it is removed from the statistics gathered so work can be accurately reported.

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— In the SO List, tap the Service Order Status icon
  • Or tap anywhere on the Service Order to open it

  • Tap the Service Status button

— Tap the 'Void' icon
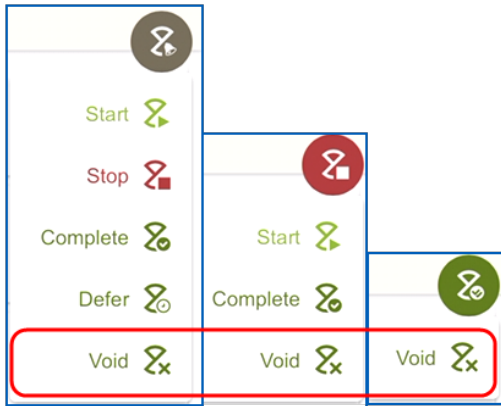
— In the drop-down presented next:
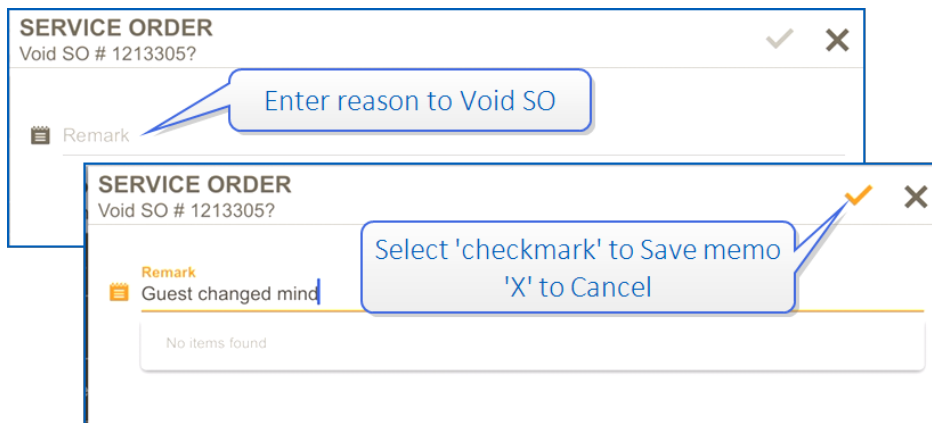
— Enter a remark (required) in the Remark field that presented - why is this SO being voided?

— Tap ✔ to save the Void remark

— Tap X to cancel action

Void Notification

As mentioned earlier, when a Service Order is voided, HotSOS will send notification to the original recipients. It may appear on the device like this:

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— An alert should sound

— A message should pop-up on the device screen:

Hotsos

System Message: Order #1213338
(Issue: Inventory Move, Location:
Receiving Dock) voided.

Cancel   View
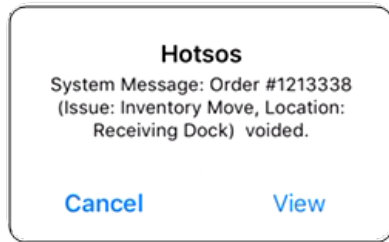
— The user may View it or Cancel it

— The Void notification will be in Messages Module:

MESSAGES
System Agent

System Message: Order #1213454 (Issue: Pillowcase - Queen - Requested,
Location: Guestroom 12) voided.
4:45 PM 3/10/2017
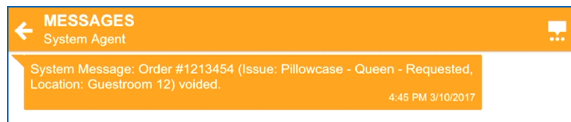
Add an Attachment

As you work with a Service Order task you may find it necessary to document either the condition you find something in or the condition after you've completed the work. Rather than spending valuable time describing it in a remark, take a picture and add an attachment instead. Follow these simple steps:

To add an attachment:

— Tap to open the Service Order

— Tap the add/create button ➕ to the right of the SO
  • Select the 'Add Attachment'

— Or tap the Attachment Card to open

  • Tap the ➕ button

— Tap to select:

Take Photo or Video 📷

Photo Library 🖼

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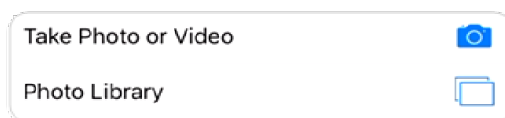
— Select to use the camera
  - Snap the photo

  - Follow the camera prompts for saving/using or discarding the photo(s)
    - To save might be: 'Use Photo' or 'OK' or 'Done'

    - To take another photo: 'Retry' or 'Retake'

    - To take no photo: 'Cancel'

— Once the appropriate action is taken, the image is attached:
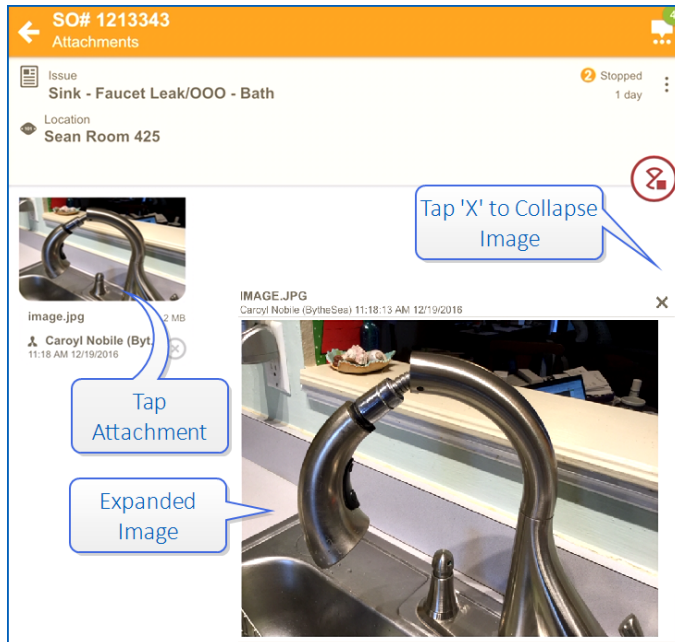
> ℹ️ Notice both the image attachment and the expanded image have the name of the user who took the image and a date/time stamp of when.

— Add an existing image.
  - Tap 'Photo Library', 'Album', 'Gallery' or 'Documents' (Devices will vary in their presentation).

    EXAMPLE:
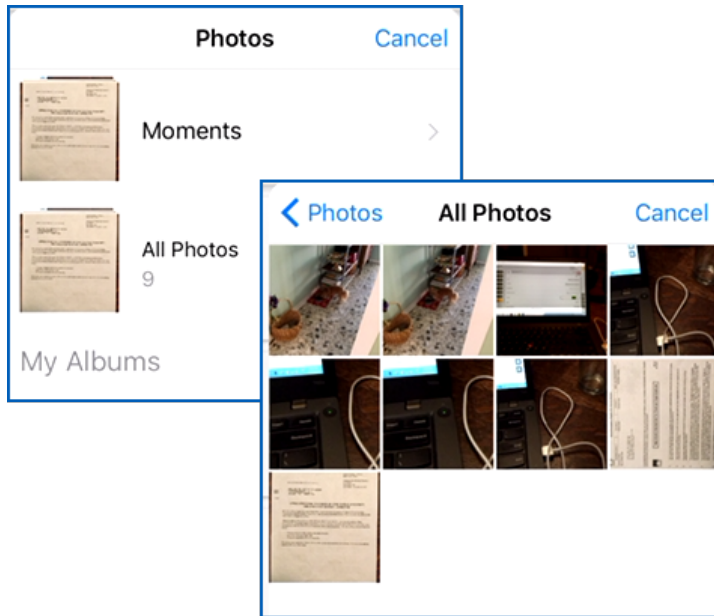
— Tap the image to be attached

HotSOS: Total Attachment Storage - 50GB per hotel.

HotSOS Mild: Total Attahcment Storage: 5GB per hotel

Reaching/Exceeding Storage Limit

Should an attachment exceed the defined storage limits for your property, HotSOS will generate a warning:
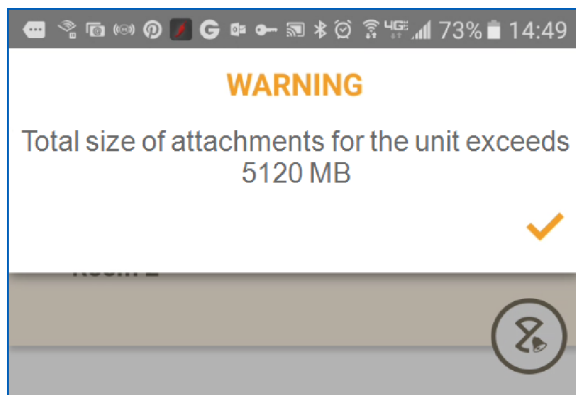
Delete Attachments:

— A user may delete any attachments he/she added

— A user with the role of Unit Personnel Manager may delete any attachments

Adding Cost to Service Order

The steps required for applying Recovery, Parts and Labor costs to a Service Order are outlined on the following pages. Not all properties choose to implement this feature. Contact your HSM Administrators for policies and procedures applicable to your site.

Tracking cost for Parts, Labor and Recovery is not available in HotSOS Mild.
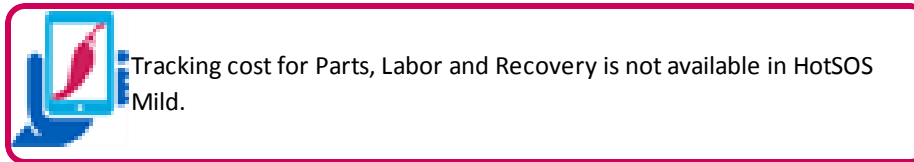
Parts

This feature assumes set up has been completed in HotSOS Thick Client(Cost Management/Predefined Part) or the property has an interface with either Birchstreet or Morten Bay.

— Tap the desired SO to open the details

— Tap the ⊕ to produce the Cost Options:
  • Select 'Add Costs'
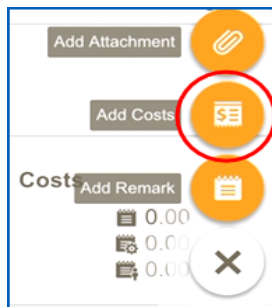
In the drop-down

— Cost Type:

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— Tap the Cost Type field

— Tap to select 'Part'

— Under Cost Details:
  - In Name field
    - Enter full or partial name of desired part
    - Tap to select 'Part' name
  - Quantity:
    - Use '+' and/or '-' to adjust quantity of part used in this Service Order

- Amount
    - The amount will be pulled from the database (Based on third party vendor).
    - HotSOS will adjust the cost based on the quantity of the item used
— Tap ✔ to apply the Part information

— Tap ✗ to cancel action

Repeat the steps until all parts used to resolve this Service Order have been added

Review 'Parts'

To review 'Parts' cost after parts have been added:

— Tap to open the Service Order

— Tap the Cost card

— Tap the 'Part' icon at the bottom of the screen

    Details of the part(s) added will be displayed:
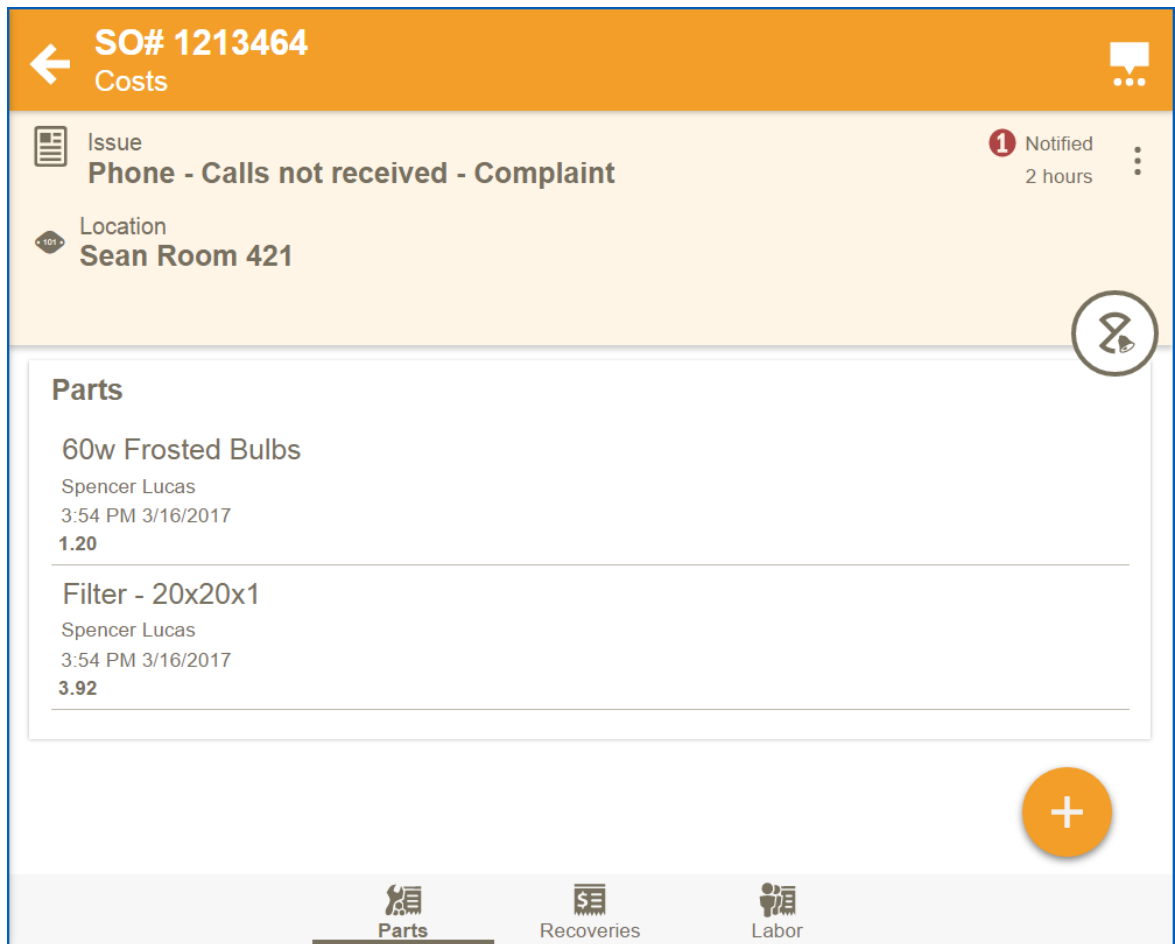
— Delete the Part:

- In the Service Order details

  - Tap the Cost Card

  - Select 'Parts' (bottom of screen)

  - Tap the Part to be deleted

  - Tap the 'trash can' in the lower left corner:

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- A 'Remove Part' confirmation drop-down screen is displayed:

— Tap ✔ to delete Part

— Tap ✗ to cancel action

Recovery

Recovery is associated with a complaint or concern expressed by a guest. To recover the guest's satisfaction and confidence in the property and therefore the guest's loyalty, some form of compensation may be offered. Some typical recoveries are:

— % discount for night's stay

— Local event tickets

— Free drinks at one of the hotel dining options

— Free in-room movie

— Amenity

Should your property empower its team members to offer recovery to a guest, it will be done in the Service Order:

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— Tap the desired SO to open the details

— Tap the to produce the Cost Options:

- Select 'Add Costs'
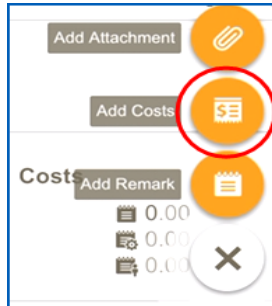
— Tap Cost Type

— Select 'Recovery'
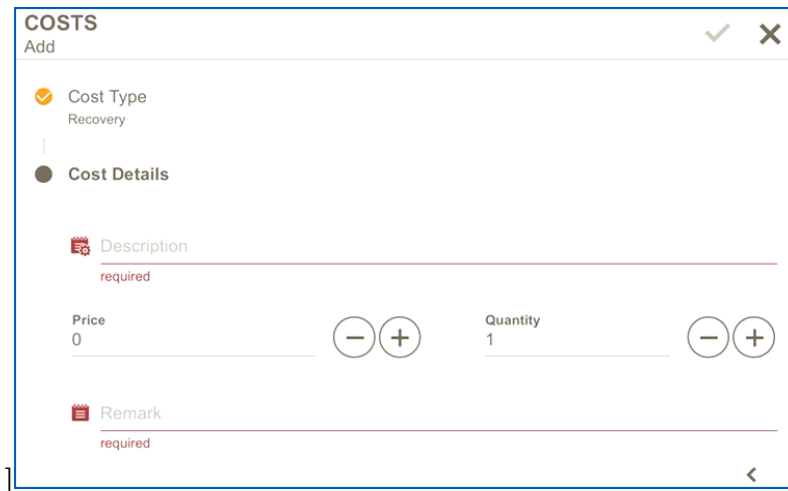
— Under Cost Details:

- In Description field

    - Enter full or partial name of desired recovery

    - Tap to select 'Recovery' from list presented

- Price:

    Most often Recoveries will be assigned an acceptable dollar amount in the database, however, the amount can be adjusted as necessary:

- Tap the 'Price' field and use the keyboard to enter the value

- Quantity:
    - Use '+' and/or '-' to adjust dollar amount of part used in this Service Order

    - HotSOS will adjust the cost based on the quantity of the item used

- Remarks
    - Add remarks regarding the reason for offering Recovery. Follow company pro-tocol.

— Tap ✔ to apply the Recovery information

— Tap ✗ to cancel action

Repeat the steps until all Recovery applicable to this Service Order has been added.

— Delete Recovery

— In the Service Order details
    — Tap the Cost Card

    — Select 'Recovery' (bottom of screen)

    — Tap the Recovery to be deleted

    — Tap the 'trash can' in the lower left corner:

RECOVERY
Details   ✓   ✕

Description
Champagne

Time Stamp
4:10 PM 3/16/2017

Quantity
1   —   +

Price
100   —   +

Amount
100.00

Entered by
Spencer Lucas

Cost Code
ENG800 | Engineering

🗑
Delete

- A 'Remove Recovery' confirmation drop-down screen is displayed:

REMOVE RECOVERY

Are you sure?

✓   ✕

— Tap ✔ to delete Recovery

— Tap ✗ to cancel action

Labor

As mentioned earlier in this manual, HotSOS tracks labor based on the Start->Stop->Start->Complete. Users with the role of Unit Cost Manager will be able to make manual adjustments as necessary.

If HotSOS tracks labor automatically, why would we need to manually add labor?

— Additional labor may need to be manually recorded to accurately reflect the amount of time involved in resolving an issue (i.e. contractors, skilled trade, outside vendors).

— Or when a user forgets to start a SO, so there is no recorded labor.

— For properties that manage purchased units, such as timeshares

and vacation ownership, there may be a flat fee charge for any maintenance work done. This can be easily added as necessary

— Tap the desired SO to open the details

— Tap the ⊕ to produce the Cost Options:
  • Select 'Add Costs'
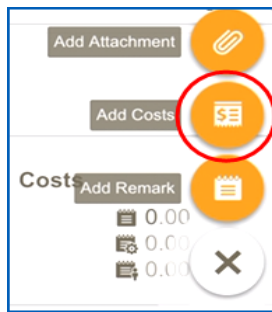
— Tap Cost Type

  • Select 'Labor'

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— Cost Details:
- Responder
  - Tap field
  - Enter Responder name (full or partial)
  - Select from resulting list
- Start Time
  - Set Start Time
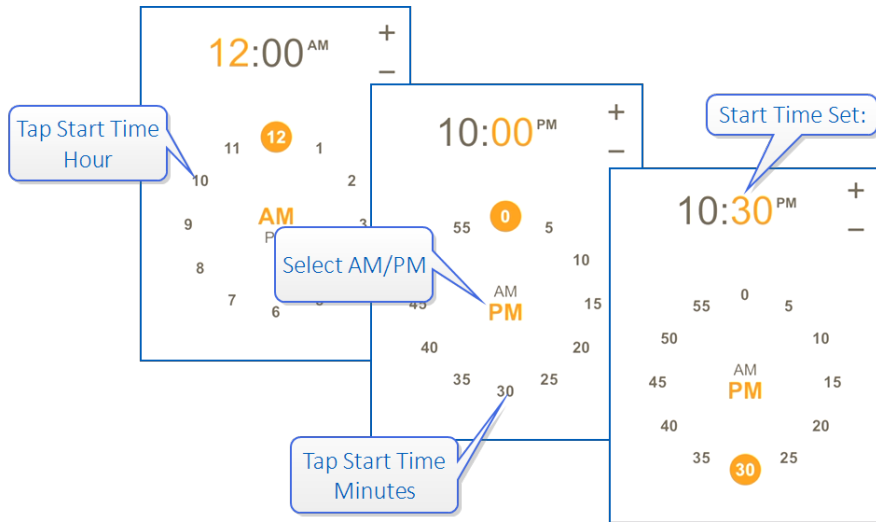
— Set Start Date
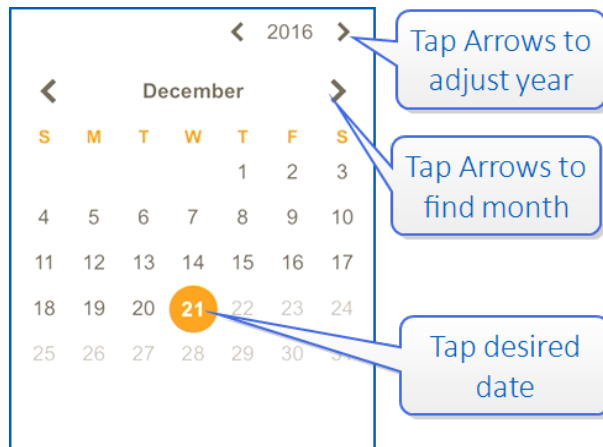
- Cost Code (defined in Cost Management/Cost Codes). Follow company protocol.

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- — Tap ✔ to apply the Labor

- — Tap **X** to cancel action

— Delete Labor

— In the Service Order details
- — Tap the Cost Card

- — Select 'Labor' (bottom of screen)

- — Tap the Labor to be deleted

- — Tap the 'trash can' in the lower left corner:

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RECOVERY
Details

Description
Champagne

Time Stamp
4:10 PM 3/16/2017

Quantity
1   —   +

Price
100   —   +

Amount
100.00

Entered by
Spencer Lucas

Cost Code
ENG800 | Engineering

🗑
Delete

- A 'Remove Labor' confirmation drop-down screen is displayed:

REMOVE LABOR

Are you sure?

✔   ✗

— Tap ✔ to delete Labor

— Tap ✗ to cancel action

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Anatomy of a Service Order

The Service Order is the heart of HotSOS. There are two basic parts that define a Service Order:

— **Issue** – explains the task to be addressed, the request to be filled
  - Guest wants towels

  - Light out

  - Sink leak

  - Luggage Pick Up

— **Location** – answers the 'where'
  - A guestroom

  - Common Area

  - Back of House

  - Piece of equipment

These form the foundation for a Service Order. In fact, a Service Order *requires* both.

Create a Service Order

— Tap **Add** (+)

— From the list presented
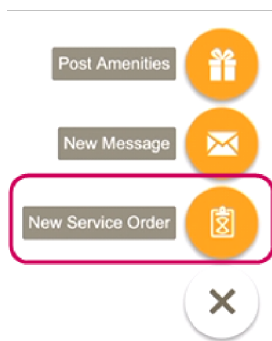
— Select New Service Order

Location (Required *)

Location: Tap the field

— Enter full/partial location keyword

— Select desired location from resulting list
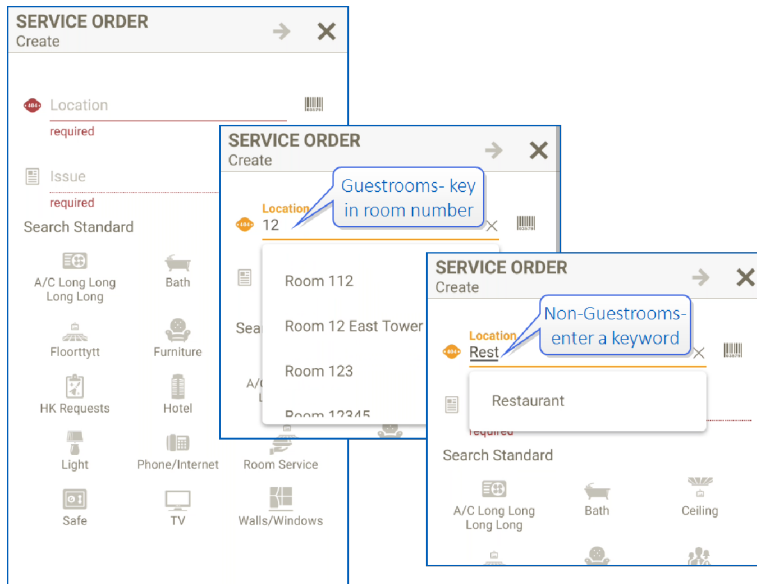
> When creating Service Orders from the Housekeeping Attendant Module, HotSOS will automatically enter the guestroom if the SO is created from a room that is open in the Housekeeping device. The same is true if in the Service Order Module with an open Service Order. When the New Service Order button is tapped, HotSOS will automatically populate with the Location of the open Service Order.

Issue (Required *)

— Select the Issue by keying in partial name

— Select from the resulting List
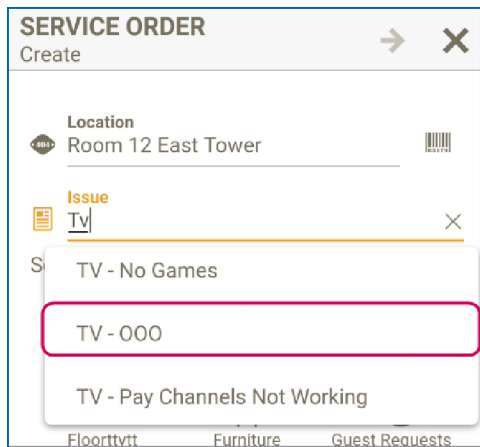
Or

— Tap the appropriate standard category

— Select the issue from the list presented
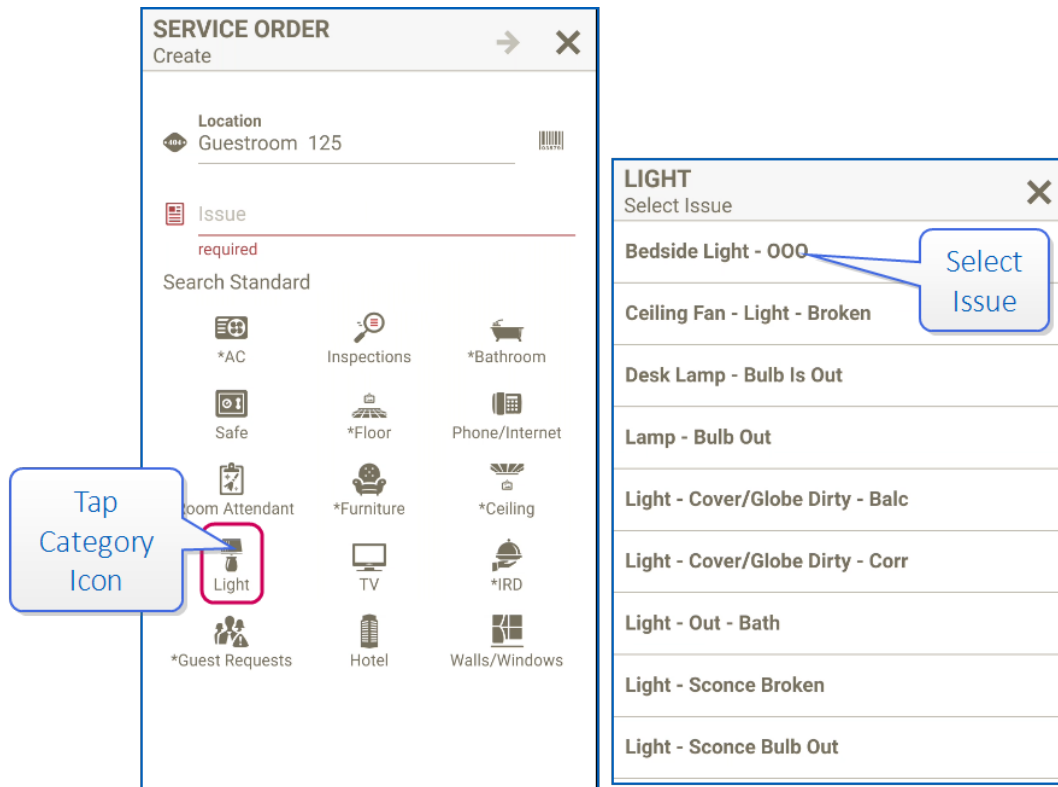
Once the Issue is selected, the checkmark at the top will become active. The Location and the Issue are the two *required* components of a Service Order.

— Tap ✔ to create the Service Order
  • Tap **X** to cancel action

Additional Fields (Optional)

— Remarks: Key in desired memo. Keep it simple. This is not the time to write your first novel.

> If the Issue and Location clearly identify what needs to be done and where, no remarks are necessary. Use only to lend clarification. **EXAMPLE:** A TV not working might not be clear enough if there are more than one TV. The remarks could further indicate *which* TV is to be addressed: guest bedroom; living room, etc

The remaining fields may or may not be available to Requesters depending on the roles assigned.

— **Guest Related (Optional)**: If the guest has reported this issue, their name should be associated with the Service Order. In most cases the PMS will interface with HotSOS, so the guest name will be readily available when the slide button is activated.

  — Tap the slide button to activate

  — Tap the active slide button to inactivate

— City or Non-Hotel Guest

  What is a city guest?

  A city guest is someone who is at the hotel or resort, but who is not a registered guest: a conference attendee, a restaurant or spa patron or perhaps someone visiting a hotel guest.

— Tap the '+' to the right of the 'Guest Name'

— Enter first, last name

— Fill out any other pertinent information

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— Tap ✔ to save guest information
  • Tap **X** to cancel action

HotSOS will generate a temporary 'reservation' until day's end unless Arrival/Departure dates are defined.

> HotSOS Mild does not interface with PMS. Any hotel guest will be considered a 'city guest' requiring the name to be manually entered.

Guest Related Service Orders created in HotSOS Attendant

For Room Attendants, the guest option has been streamlined and simplified ensuring accuracy and ease when reporting:

Typically, a Service Order is considered 'Guest Related' when the guest approaches the staff member, in this case the RA, and asks them to specifically report a problem on the guest's behalf.

For the benefit of the Room Attendant, HotSOS 3.0 has simplified the presentation and will insert the guest name if a reservation is active for the room, when the RA taps the Guest Related slide button:
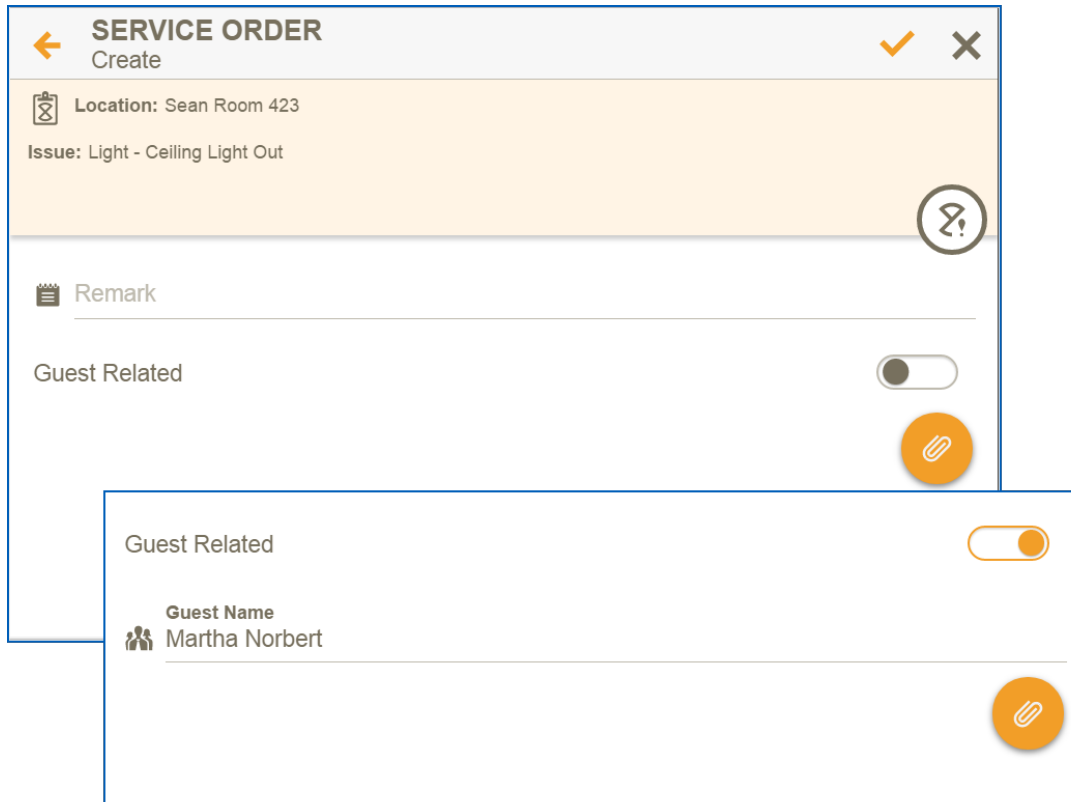
— **Start After Create**
  • If you are the person who will attend to this Service Order, tap the Status button:
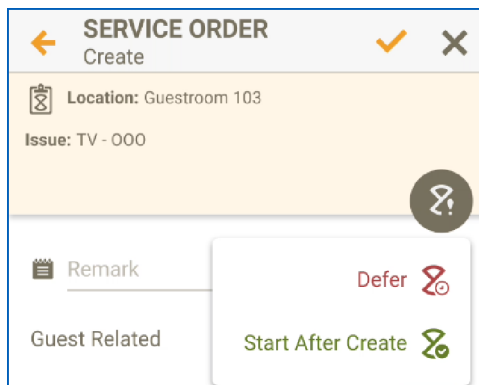
— Tap 'Start After Create'

— Status icon turns green

- — Defer SO
    - Tap Status button

    - Tap 'Defer'
        - Set Time and/or Date in future

        - Tap ✔ to apply
            - Tap X to cancel action

- — Attachments

    - Attach images   (see Applying an Action)

Advanced Options

- — Tap the down arrow to the right to expand

- — HotSOS presents additional options (available vased on roles)

- — Priority
    - Adjust as necessary

        - 1 & 2 – Most urgent (guest related, life-safety)

        - 3, 4, & 5 – Important but not urgent

- — Assign (Optional): **
    - Person:

        - Tap   to assign this Service Order to a specific individual
            - Tap the 'Person Assigned' field

            - Key in the respondent's name (full/partial)

            - Select name from resulting list

    - Team:

        - Tap   to assign this Service Order to a team
            - Tap 'Select Team'

            - Enter team name (full/partial)

            - Select team from resulting list

** This will put the work in the respondent's 'My Work' list, but it will NOT send an audible alert. To the right of 'Notify' for either person or team, tap the checkbox . Audible notification will be sent with the Service Order.

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— **Notify (Optional):** This option lets notification be sent to an additional person, for instance the Chief Engineer, Director of Housekeeping etc. It is a way to keep the right people informed

When you are satisfied with the selections,

— Tap ✔ to create a Service Order
   • Toast will pop-up with Service Order number:

   •

   • Or HotSOS may display an error message:
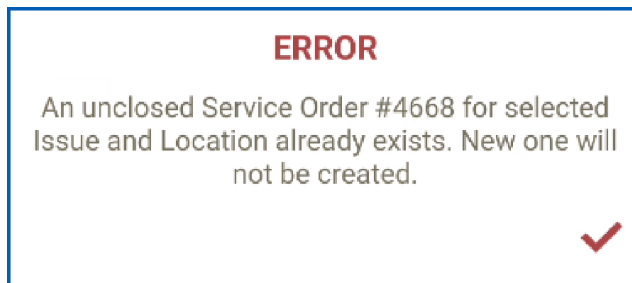
OK, New

The OK, New feature was introduced in HotSOS Thick Client and to streamline the process when creating multiple Service Orders for the same location. This feature is now included in HotSOS 3.0. You may have already guessed by the toast pop-up displayed in the previous section when a Service Order is created.

Notice the word 'New' after the vertical line:
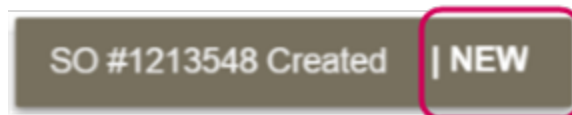
— The toast will remain for 5 seconds
   • If 'New' is tapped within the 5 seconds, HotSOS will display a new Service Order pre-populated with the current location.

Add a URL in Remarks

When creating or updating a Service Order, a URL may be entered in the Remarks field. In HotSOS Mobile, on the Service Order Remarks, the added URL will be an active link that will

open when selected.

In Remarks: When the link is tapped, it will open in HotSOS Mobile:

As many manufacturers put their Service Manuals online, this is a great way to deliver the appropriate document to the Engineering team.

The URL may also be added from the **HotSOS Thick Client**.

— If the full URL is keyed in, that is prefaced with http://, the link will appear as active in HotSOS Thick Client in the Memos tab.

— If the URL is added beginning with the 'www….com', the link will appear as inactive in HotSOS Thick Client in the Memos. (Rest assured it will be active on the HotSOS device).
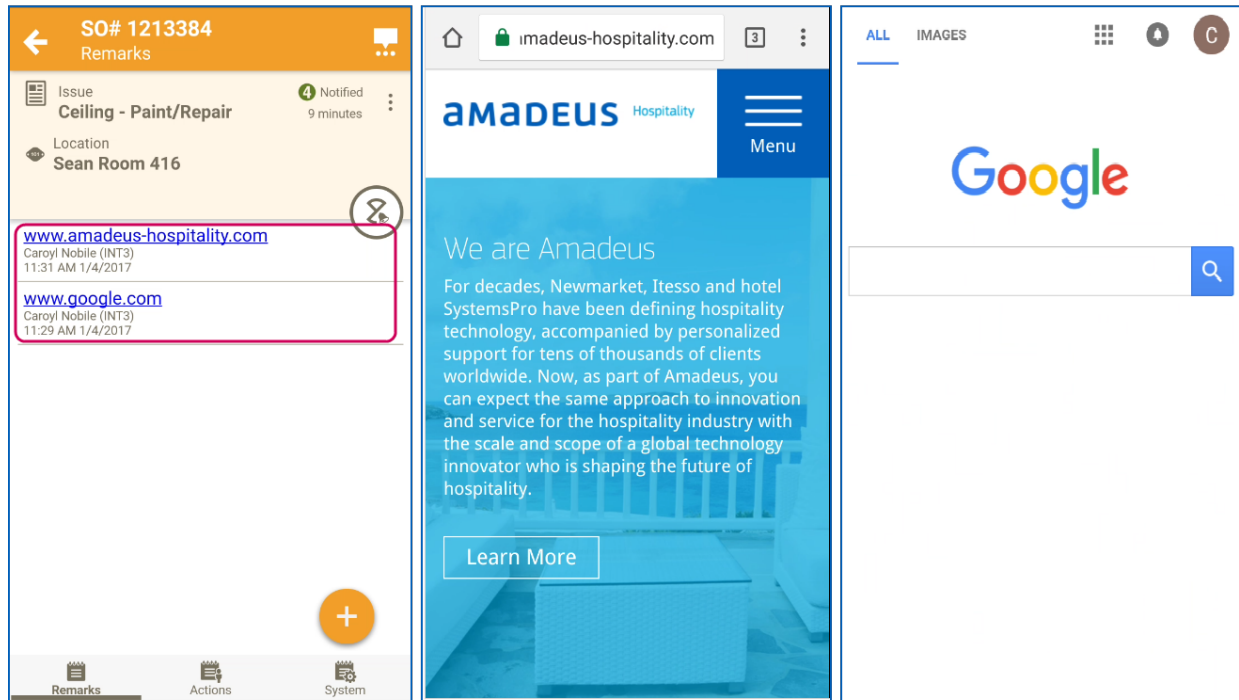
Call Back – Re-issue a Service Order

Many properties have a practice in place to call a guest who has made a request or reported a problem in order to confirm with the guest that their concern has been resolved. This is a 'Call Back'.

In the event, the issue remains unresolved the HotSOS user, with QA Manager role, can 're-issue' the Service Order. HotSOS will track and record a SO re-issue until resolution has been found. (No matter how many times a re-issue is performed on a single issue occurrence, HotSOS will link back to all previous SO associated).

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> Service Order re-issue is not available in HotSOS Mild

Perform a Guest Call Back

If guest Call Back has been put into place, that is, the Set CB Business Rule has been set up; users with the role, QA Manager, may follow this process:

— Service Orders in HotSOS with the single check mark ⊗ Status icon means the Service Order has been completed by the staff member, but is awaiting a call back (follow-up call to the guest) to confirm the request or reported issue has been resolved.
  - Call the Guest – follow property protocol for leaving voice message, etc

  - Tap the Service Order Status icon

  - Select the 'Closed' button ⊗

— In the event the reported issue has not been resolved, the person doing the call back may have to 'Recover' the guest loyalty (See Recovery).

Re-issue a Service Order

— If the person responsible for performing the Call Back to the guest determines the original issue has not yet been resolved, he/she can set the Service Order to be reissued by following these steps:
  - Filter on Completed Service Orders
    - Select Service Order to be re-issued

    - Tap the Status button

    - Select the 'Closed' option

    - Tap 'Reissue' the re-issue slide to activate
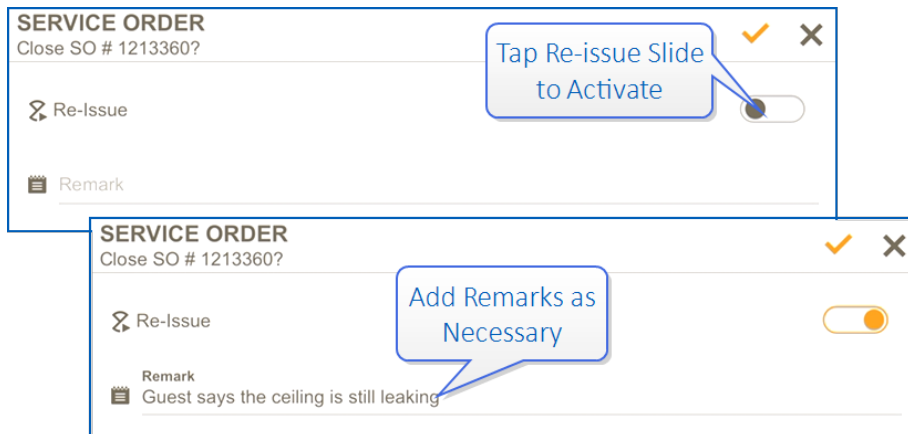
> Once remark is added, checkmark at the top will become active

- Tap ✔ to confirm action
    - Tap ✗ to cancel action

- HotSOS will display a drop-down:
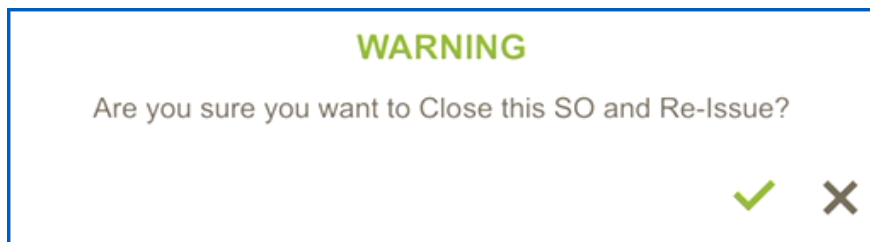
- Tap ✔ to confirm reissue
    - Tap ✗ to cancel action

Re-issued Service Order

HotSOS ensures the user has access to the re-issued Service Order(s)

— Tap to open the new SO (#1213362)

— In the re-issue card indicates which Service Order created the current one

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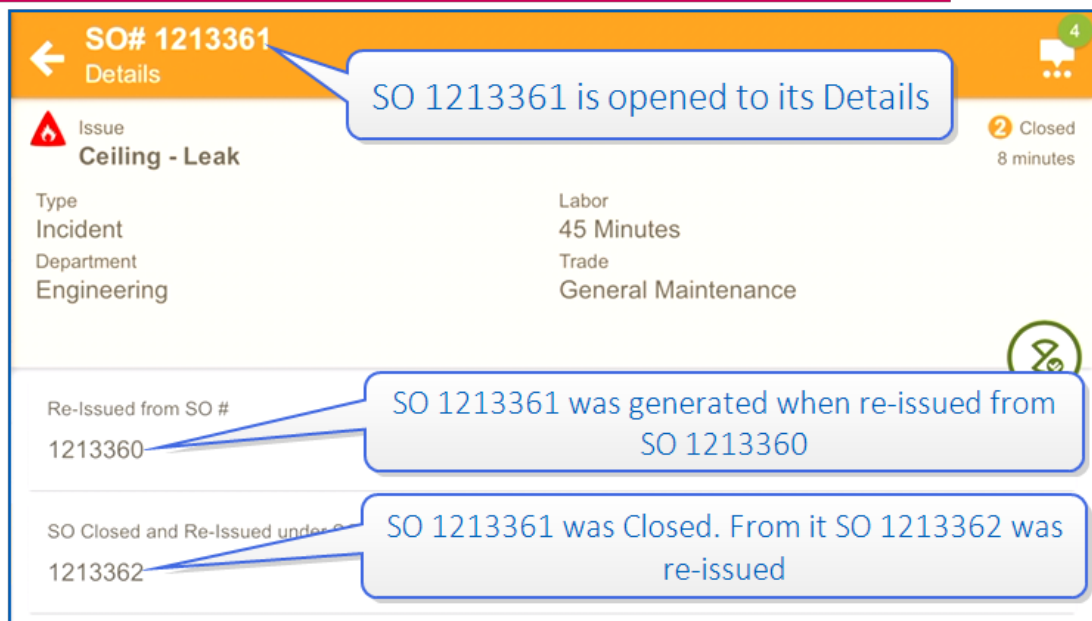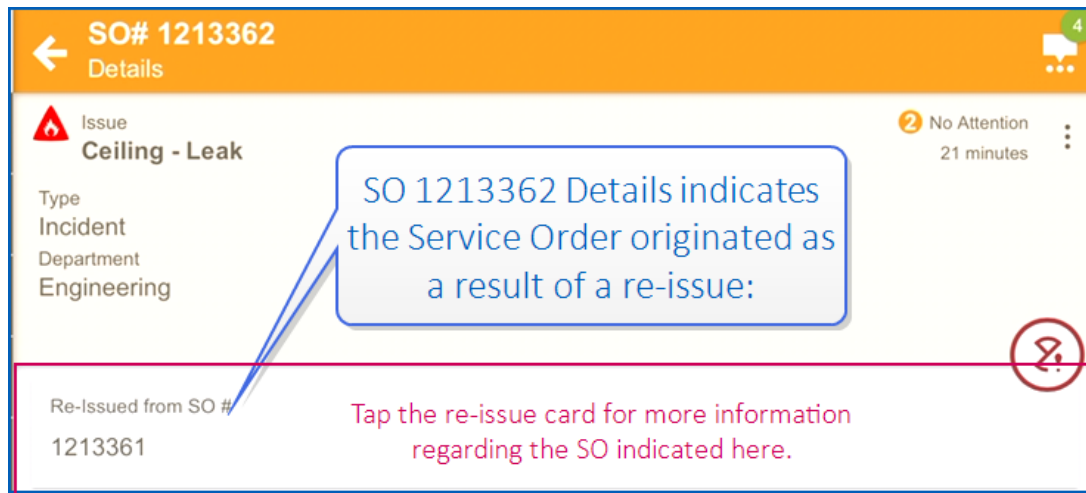
— The respondent can tap to open additional re-issue cards as they are presented
   • See who responded previously

   • Read remarks:
      • Guest

      • Requester/Respondent

      • Action/System

— To return to the current SO, do one of the following:
   • Tap 'SO Closed and Re-issued under SO #' to return to the re-issued SO

   • Tap the ◄ in the title bar to return to the previous screen

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Inspection Service Orders

Most often HotSOS Mobile Inspections are associated with a guestroom and Housekeeping, how-ever, HotSOS Mobile Inspections are so robust and versatile, they can be created for any type of Inspection:

— Showrooms

— Meeting Rooms

— Public Areas

— Kitchen Health Inspection Test Run

— And the list goes on

Create an Inspection Service Order

Follow the instructions regarding how to create a SO in the SO Module. Ad hoc Inspections may or may not be associated with the Standard 'Inspections' in the Issue Standards presented.

> ℹ️ If Inspection desired is not in the Issues Standard 'Inspections', enter a keyword in the issue field and select the desired Inspection from the resulting list

Select location:

— Tap Location field

— Enter partial or full keyword

— Select desired location

— Tap 'Start After Create' slide button if you are executing the inspection immediately. Otherwise:

Fill any remaining fields as necessary.

— Tap ✔ to create the Inspection SO
  • Tap X to cancel action

Perform an Inspection

— Tap 'Start' (if 'Start after create' was not selected)

— If Steps are not presented, tap the 'Step' card for the inspection questions

> ℹ️ If 'Start after Create' has been selected, the SO 'Step' card will open upon creation.

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— Person under Inspection. If there is a specific person being inspected:

   • Begin to key in the name

   • Select the Inspectee from the list presented

— Below the Inspectee, the Steps will be displayed

   • The steps are typically presented in a logical order designed by the property's HotSOS administrator

Inspection Order Step Responses

— Each step has two possible responses:

—   • 'Yes/No'

   • 'Grade Scale' - 1 [lowest score] through 5[highest score]

> For efficiency, the 'Yes/No' and 'Grade Scale' are set to 'Yes' and '5' respectively as default, so the person performing a PM only has to attend to those steps that fall outside a 'Pass'

Set the Answer

If the response is something other than the default:

— Tap icon to the right of the question

    — Yes/No:

    — Grade Scale:

Remarks and Attachments

In the event the inspector wants to add a message or attach an image to a step in addition to completing the step, this can be easily done:

— Tap the Inspection question itself

— A drop-down is presented with additional options:

Failed Inspection Steps/Post Jobs

When a 'Yes/No' or 'Grade Scale' step fails, the Inspector has the option to initiate a 'Post Job'. A 'Post Job' is a Service Order with an issue designed to correct a deficiency currently causing the step to fail.

How does HotSOS define 'Fail' with regards to steps?

HotSOS considers a step to 'Fail' when either of these conditions exist:

1. Yes/No step receives a 'No'

2. Grade Scale step receives '1'

> **ⓘ** Additionally, if a Grade Scale question receives a 2, or 3, the respondent will have the option to trigger the Post Job

Scroll down through the Inspection Steps responding to those questions that do not meet the default:

— If the job 'fails', a drop-down will be presented:

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STEP #4   ✓ ✕

Condition of dresser?

Set Answer   'Failed' Step ➔ ❶ ② ③ ④ ⑤

📋 Remark

Post Job Details

📧 Post Job

Issue: Dresser - Drawers Broken

Create Post Job   🔘

📋 Remark

STEP #5   ✓ ✕

Does the sink faucet run fine?

Set Answer   'Failed' Step ➔ No N/A Yes

📋 Remark

Post Job Details

📧 Post Job

Issue: Sink - Faucet - Won't Shut Off

Create Post Job   🔘

📋 Remark

- — Create Post Job
  - Tap the slide button to activate and generate a Post Job SO when the PM Order is completed
  - Remarks added here will be attached to the Post Job SO
  - Attachments added here will be sent with the Post Job SO
- — Tap ✔ to confirm
  - Tap **X** to cancel action

When Inspection is complete:

- — Tap status icon

- — Select Complete icon

Inspection Order Summary

Once the Inspection Order is completed, the summary screen will be displayed:
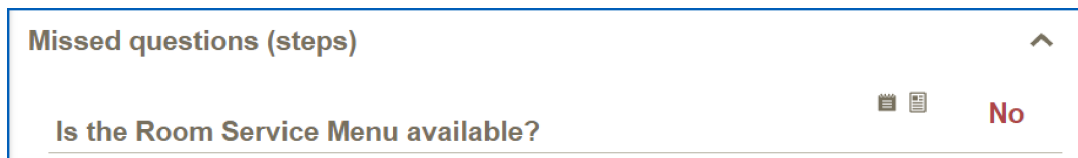
aMaDEUS
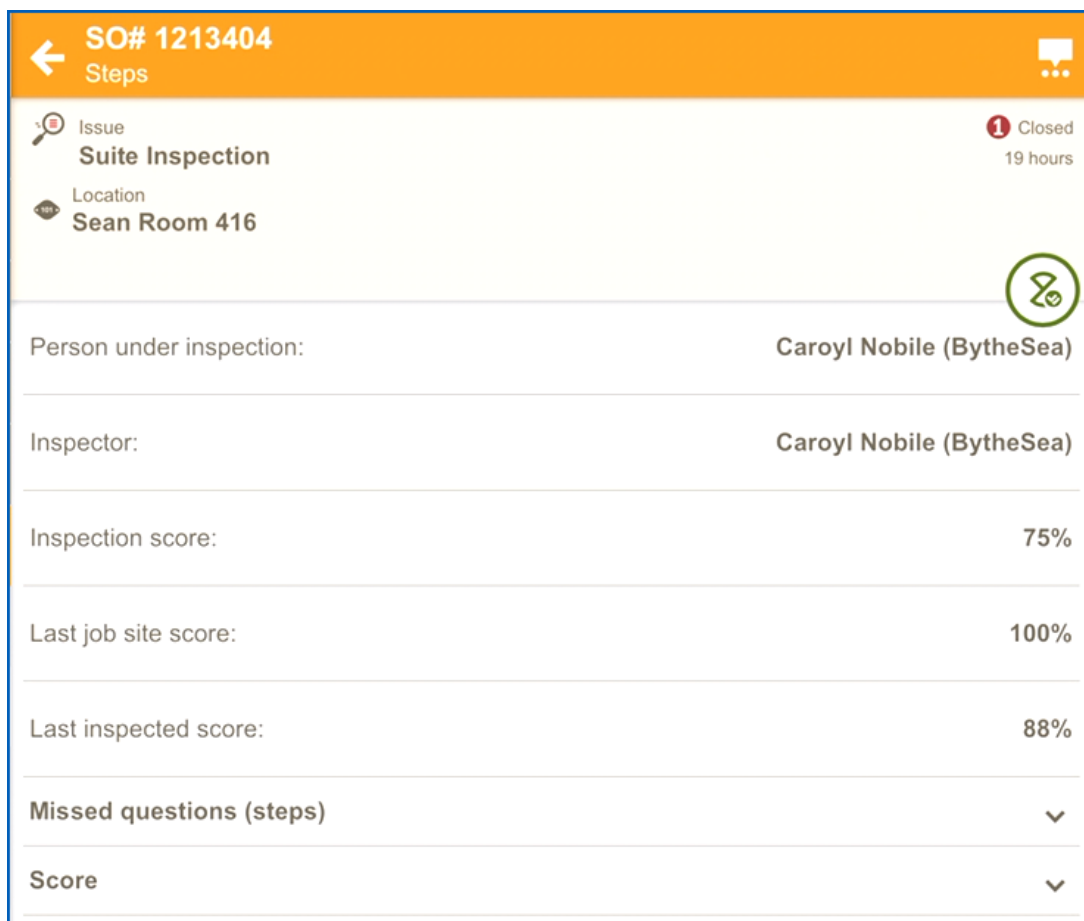
Summary Details

— Inspectee

— Inspector

— *Score* Inspectee received for this Inspection

— Last Inspection *Score* the room received

— Last *Score* Inspectee received prior to this room inspection

Missed questions (steps):

— Tap the ⌄ to expand:

Missed questions (steps)   ⌃

          📅 📄

Is the Room Service Menu available?   **No**

— Tap ⌃ to collapse

Score:

— Tap the ⌄ to expand:

Presents a list of all questions in their order in the Inspection and the response received.

Any steps *not* passing will so indicate, when tapped HotSOS will present the Post Job along with any notes and/or attachments that have been added

> ℹ️ Even after the Inspection Order is closed the step information is available. Simply open the completed Inspection Order, and navigate to the Step card. Tap to open.

Stop an Inspection

In the event an Inspector is called away during an inspection, the Inspection can be stopped.

— Tap the status icon

— Select 'Stop'

— When ready to resume Inspection, tap the status icon

— Select 'Start' to continue on with the Inspection

PM Orders

PM (Preventive Maintenance - also referred to as Scheduled Maintenance) is most often associated with equipment, such as Air Handlers, Cooling Towers, Kitchen Equipment, etc. The staff

in the department responsible for addressing the PM will find the PM Orders in their Service Order module workspace awaiting action. While similar to Inspection Orders, the PM Orders have some unique features.

Working with PM Orders

By their nature, PM Orders are scheduled to occur at a certain predetermined time: Daily, Weekly, Monthly, Quarterly etc. The robust nature of HotSOS provides numerous configurations to meet the requirements of the property.

The end user, most often an engineer, need not be concerned with creating a PM Order, but in working with the PM Order and performing the necessary steps to complete the proper PM.

— Navigate to the Service Order List
- Tap to open the PM Order to be worked on

- Tap 'Start'

- The PM Steps will be displayed
  - The steps are presented in the order the PM is to be performed
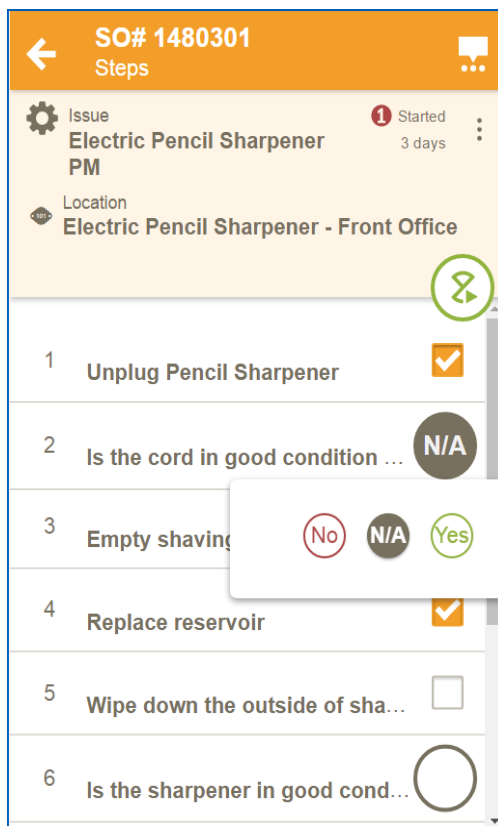
PM Order Responses:

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— PMS Steps have three possible responses:
  - 'Complete'
  - 'Yes/No'
  - 'Grade Scale' - 1 [lowest score] through 5[highest score]

> ℹ️ For efficiency, the 'Yes/No' and 'Grade Scale' are set to 'Yes' and '5' respectively as default, so the person performing a PM only has to attend to those steps that fall outside a 'Pass'

Set the Answer

— When finished with the activity required by a step, update the step in HotSOS:
  - Tap icon to the right of the question

  - Completed: A checkmark will be placed in the box

  - Yes/No: Tap the 'button' to the right
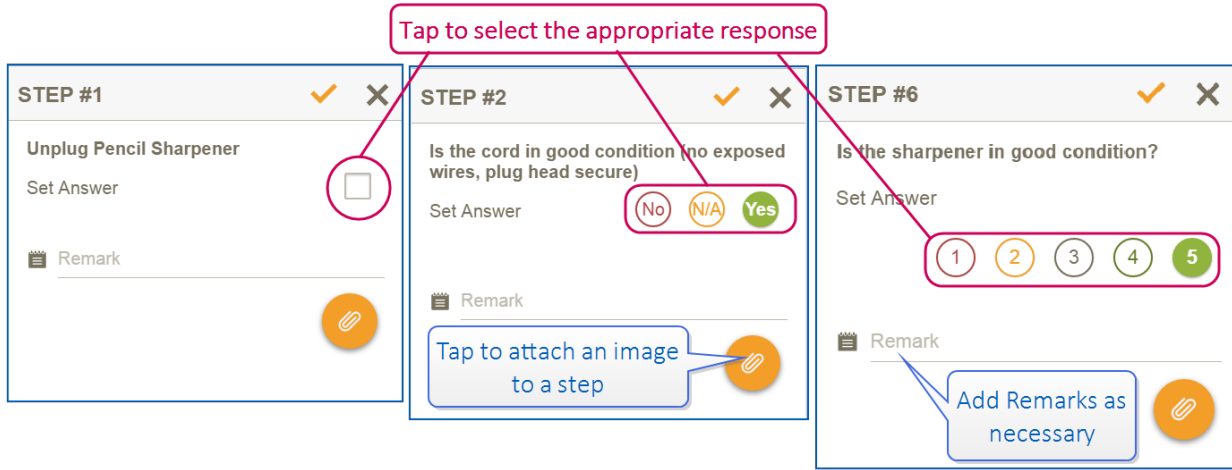   - Make selection if other than the default:

  - Grade Scale: Tap the button to the right
    - Make selection if other than default:
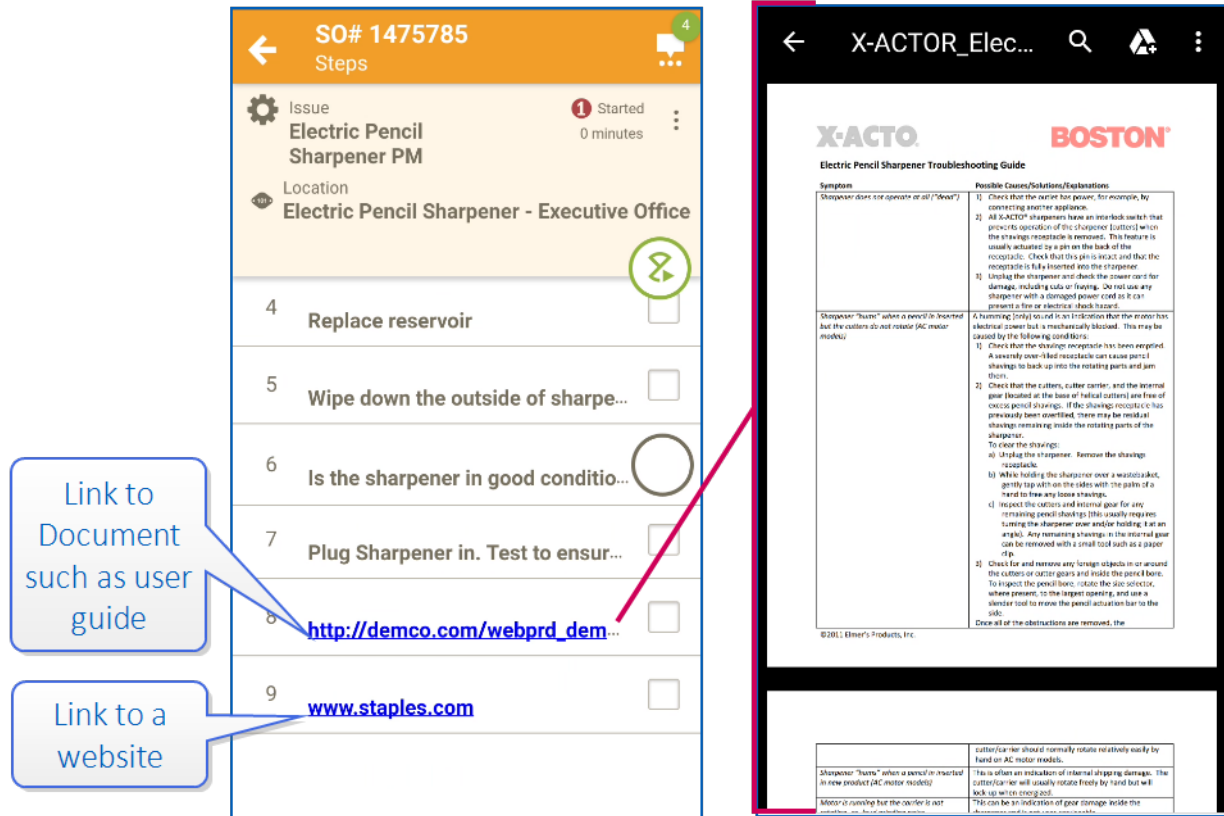

Remarks and Attachments

In the event the respondent wants to add a message or attach an image to a step in addition to completing the step, this can be easily done:

— Tap the step description itself

— A drop-down is presented with additional options:

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Tap to select the appropriate response

STEP #1 ✓ ✗	STEP #2 ✓ ✗	STEP #6 ✓ ✗
Unplug Pencil Sharpener	**Is the cord in good condition (no exposed wires, plug head secure)**	**Is the sharpener in good condition?**
Set Answer ☐	Set Answer (No) (N/A) (Yes)	Set Answer (1)(2)(3)(4)(5)
🗓 Remark	🗓 Remark	🗓 Remark

Tap to attach an image to a step

Add Remarks as necessary

Steps with Links

Some steps may have links:

Link to Document such as user guide

Link to a website

These 'steps' are there for the convenience of the Respondent; to have pertinent information readily accessible. Even though the step will have a checkbox, it isn't necessary to check it. These steps will be recorded as 'Skipped' on the summary.

Failed Steps/Post Jobs

When a 'Yes/No' or 'Grade Scale' step fails, the respondent has the option to initiate a 'Post Job'. A 'Post Job' is a Service Order with an issue designed to correct a deficiency currently causing the step to fail.

How does HotSOS define '**Fail**' with regards to steps?

HotSOS considers a step to '**Fail**' when either of these conditions exist:

1. Yes/No step receives a 'No'

2. Grade Scale step receives '1'

> ℹ️ Additionally, if a Grade Scale question receives a 2, or 3, the respondent will have the option to trigger the Post Job

Generate Post Job

— If the job 'Fails', a drop-down will be presented:

— Create Post Job

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- — Tap the slide button ⬤〇 to activate

- — Tap the active slide button 〇⬤ to inactivate

- — Tap the slide button to activate and generate a Post Job SO when the PM Order is completed

- — Remarks added here will be attached to the Post Job SO

- — Attachments added here will be sent with the Post Job SO

- — Tap ✔ to confirm
  - • Tap X to cancel action

When PM steps have been completed,

- — Tap the Service Status icon
  - • Tap the Complete icon

Unfinished Steps: if there are any steps that were not completed, HotSOS will display this dropdown reminder:

THERE ARE UNFINISHED STEPS

Complete Anyway?

✔ ✕
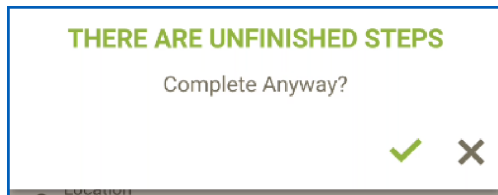
- — Tap ✔ to confirm it is OK to leave unfinished steps
 - • Tap X to cancel action and complete the unfinished steps

> ℹ Skipping a step is not necessarily a mistake. There may be steps that are dependent upon a certain condition of a previous step. If that condition does not exist, this step may correctly be skipped. Always follow protocol established by your department.

- — Complete the SO
  - • Tap ✔ to confirm issue and complete SO
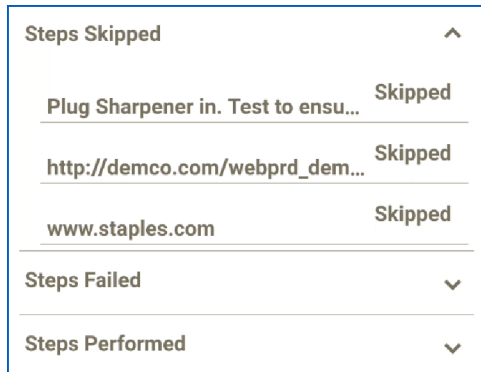   - • Tap X to cancel action

PM Order Summary

Once the PM Order is completed, the summary screen will be displayed:
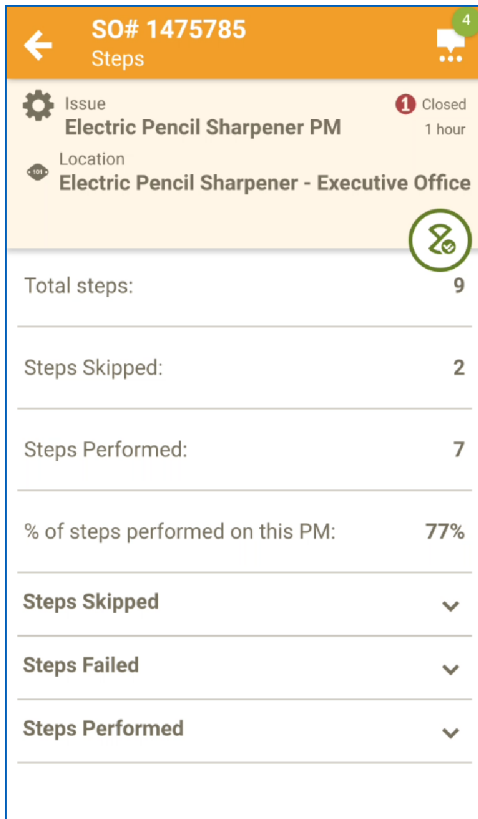
Summary Details:

— Steps Skipped - Tap the ⌄ to expand:

Tap ⌃ to collapse

— Steps Failed - Tap the ⌄ to expand:

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Steps Skipped ⌄

Steps Failed ⌃

Is the cord in good condition (no e...   **No**

Is the sharpener in good condition?   **1**

Steps Performed ⌄

Tap ⌃ to collapse

— Steps Performed - Tap the ⌄ to expand:

Steps Skipped ⌄

Steps Failed ⌄

Steps Performed ⌃

Unplug Pencil Sharpener ✓

Is the cord in good condition (no e...   **No**

Empty shavings reservoir. ✓

Replace reservoir ✓

Wipe down the outside of sharpen... ✓

Is the sharpener in good condition?   **1**

Tap ⌃ to collapse

ⓘ   Even after the PM Order is closed the step information is available. Simply open the completed PM Order, and navigate to the Step card. Tap to open.

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SO Personnel List Introduction

The SO Personnel List provides an easy way to follow the progress of staff over the course of the day. A manager or supervisor can quickly determine who is on or off duty, who is working on a SO, who is idle (available for work) and where the team member is currently working . All this at a glance.

As with other HotSOS 3.0 modules, the Service Order Personnel List has filters to help the managers or administrator quickly find the person, team, department etc being sought.

HotSOS users with either of the following roles will have SO Personnel Module available:

— Unit Personnel Manager: View only users in their department

> ℹ️ A Bell Captain would only be able to see Users associated with his department (Front Office): Bellmen, Doormen, Valet, etc.

— Unit Department Manager: View all HotSOS users with Respondent role

> ℹ️ To work with Teams, the user must have 'Unit Team Manager' role and be a member of corresponding team(s).

The SO Personnel module is view/read only.

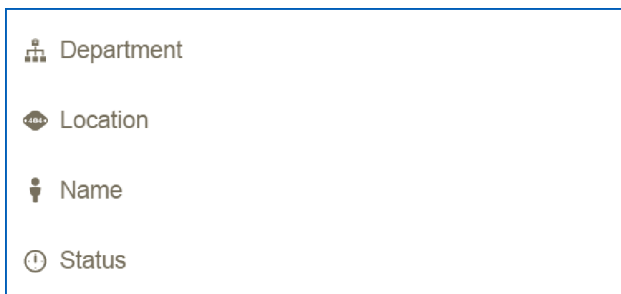**aMaDEUS**

Personnel List Details

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Personnel List Filters

As with other HotSOS 3.0 modules, the Service Order Personnel List has filters to help the managers or administrator quickly find the person, team, department etc being sought.
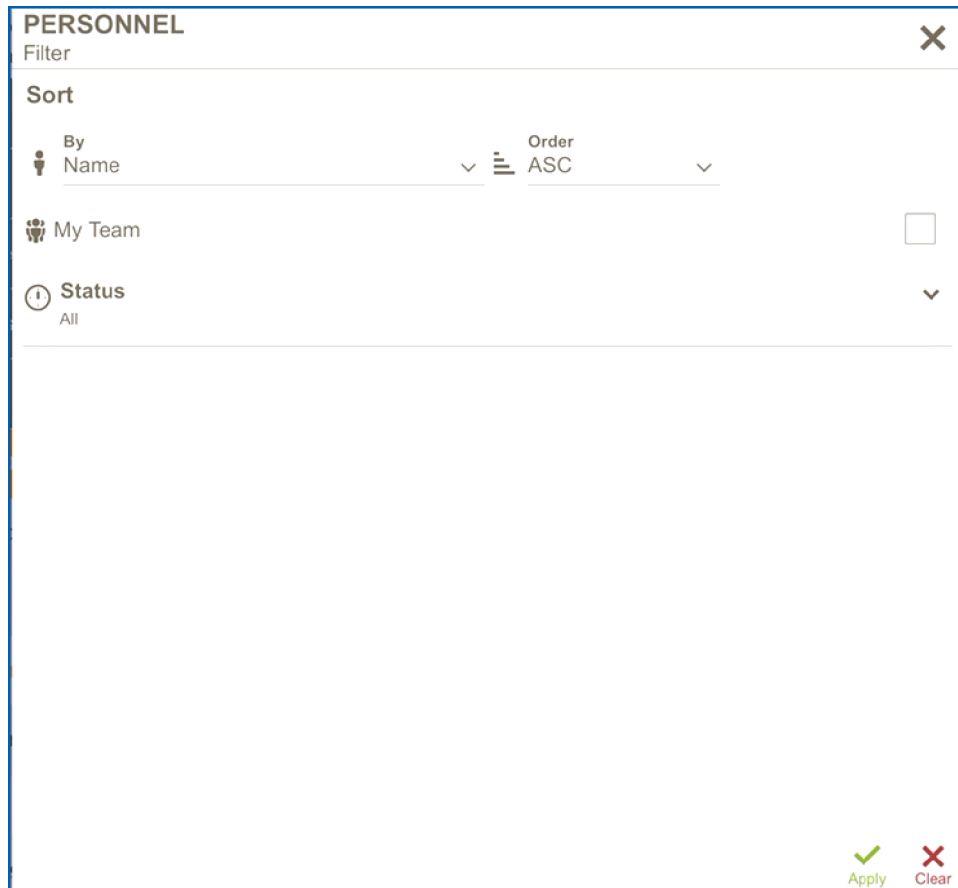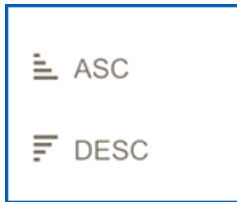

Sort By:

— Tap the down arrow to the right of the 'Sort By' entry

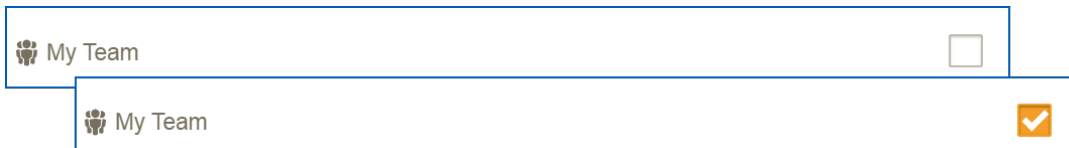
— Tap to select the desired option

Order:

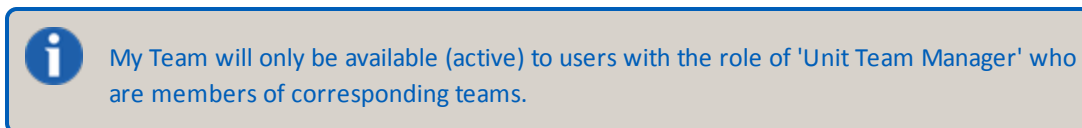— Tap the down arrow to the right of the 'Order' entry

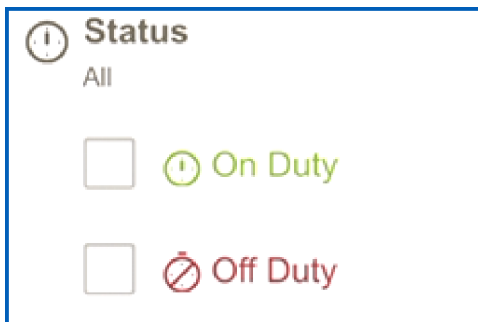— Tap the desired option

My Team:

— Tap the checkbox to select

Results will display all members of My Team(s)

> ℹ️ My Team will only be available (active) to users with the role of 'Unit Team Manager' who are members of corresponding teams.

Status:

— On Duty/Off Duty

— Tap the check box to the left of the desired 'Order Type'
  • Select more than one if needed

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— When satisfied with selections, tap:

- ✔
  Apply to apply filter selections

- ✘
  Clear to cancel the filter action