

How a global instrumentation and controls company implemented Sage X3 customization for better efficiency and service quality.

The client is a global instrumentation and controls company with an outstanding reputation for quality and safety. They would like to enhance their Service Request screen in Sage EM such that there is a new button in the Right Contextual Menu that when pressed will automatically create a Service Response Record for each Installed Based Line associated with the Service Request and launch the Service Response function to the record(s) created against the service request.



The reason for this change is that there could be many installed baselines on a service request and having to both add the base items to the service request and create individual service responses for each of them will impact productivity for the service department.

Example scenario

The customer has 50 instruments that are set up as installed base products in X3. The customer truck stops by and drops off the 50 instruments, wanting each to be serviced (calibration, cleaning, etc.). The intake person receives the 50 products and writes up a service request, adding the 50 base items to the request.

Instead of the technician assigned to each instrument creating their own service response, the intake person presses a button on the right side of the service request and a service response is created for each instrument automatically (50 total) to save data entry time.

Solution

As per standard, where the user must go to the service request page and create a service response for each baseline item.



GerminIT's X3 consultants analyzed the business process, understood the organization's core values and philosophy and identified the roadblocks to be solved. GerminIT will provide Sage X3 enhancements that will allow the client to leverage their current investment in Sage X3, utilize the X3 toolset, and incorporate the bulk service response in their current environment. The steps to accomplish this are highlighted in the business process design outlined in the User Story.

Step 1 – Open a specific service request with multiple baseline items associated with it.

Step 2 – Users will be navigated to the Bulk service response creation screen. In this screen, the user will see all the items displayed (1 for each consumption item in the baseline items) for the given service request. The site, service request. and customer details will be preloaded based on the service request number. If a user wants to generate service responses then he can change the service request number and click on the ‘Search’ button in the right context menu. Users can search data for any combination of three fields (Site, Service request no, Customer) and if data is available for that combination it will display the line items. Users can even search data for a single field as well.

There are few context menu buttons available on this new screen

- **Search:** Search is used for searching the data based on the criteria (such as a combination of Site, Service request no. and customer). This filter criteria also filters the baseline items which are already having service responses.
- **Select All:** It selects all the lines in the details tab
- **Deselect All:** It deselects all the lines in the details tab
- **Bulk Service Response:** It will generate the service responses for each baseline item which are selected in the details tab. It will use the data of the baseline in the service request while creating responses.



Scenario – 1	
<i>As a user, I should be able to generate 50 service responses which will have only one consumption (cleaning) so that I can avoid manually creating responses for all the items.</i>	
Criteria	Description
<input type="checkbox"/>	User creates a service request with 50 baseline items.
<input type="checkbox"/>	User assigns a person to the consumption line
<input type="checkbox"/>	User clicks on the Bulk service response button.
<input type="checkbox"/>	User should be navigated to the Bulk service response creation screen
<input type="checkbox"/>	Service request number, customer and site should be prepopulated. For each consumption line in the baseline, there should be an item displayed in the details table.
<input type="checkbox"/>	User clicks on the ‘Select All’ button in the right context menu. All the checkboxes in the table should be selected
<input type="checkbox"/>	User clicks on the ‘Create Service Responses’ button. All the service responses should be created and the log with the status should be displayed

<input type="checkbox"/>	When the user closes the log, it should navigate the user back to the service request screen.
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Scenario 2: Bulk service response for some of the baseline items

Stephen receives 20 instruments that are to be serviced. He creates a service request with all 20 items as baselines in the service request. He wanted to create a response for only 10 items for now. He will click on Bulk service response once a service request is created and want to generate 10 service responses.

Acceptance Criteria

Scenario – 2	
<i>As a user, I should be able to generate only a few service responses for a service request so that I can avoid manually creating responses for the items and avoid creating all responses.</i>	
Criteria	Description
<input type="checkbox"/>	User creates a service request with 20 baseline items.
<input type="checkbox"/>	User assigns a person to the consumption line
<input type="checkbox"/>	User clicks on the Bulk service response button.
<input type="checkbox"/>	User should be navigated to the Bulk service response creation screen
<input type="checkbox"/>	Service request number, customer and site should be prepopulated. For each consumption line in the baseline, there should be an item displayed in the details table.
<input type="checkbox"/>	User selects 10 consumption lines in the details table for which responses to be created.
<input type="checkbox"/>	User clicks on the 'Create Service Responses' button. All the 10 service responses should be created and the log with the status should be displayed
<input type="checkbox"/>	When the user closes the log, it should navigate the user back to the service request screen.

Scenario 3: Bulk service response for some of the baseline items and filtering consumption lines which are already having service response

Stephen receives 20 instruments that are to be serviced. He creates a service request with all 20 items as baselines in the service request. He created responses for only 10 items earlier. Now, he wants to create a service responsible for the remaining 10 items. He will click on Bulk service response once a service request is created and want to generate 10 service responses.

Acceptance Criteria

Scenario – 3	
<i>As a user, I should be able to generate only a few service responses for a service request so that I can avoid manually creating responses for the items and avoid creating all responses.</i>	
Criteria	Description
<input type="checkbox"/>	User selects a service request with 20 baseline items for which some responses have already been created.
<input type="checkbox"/>	User clicks on the Bulk service response button.
<input type="checkbox"/>	User should be navigated to the Bulk service response creation screen
<input type="checkbox"/>	Service request number, customer and site should be pre-populated. For each consumption line in the baseline, there should be an item displayed in the details table. It should display only 10 items in the below table for which no service response was created.
<input type="checkbox"/>	User selects 10 consumption lines in the details table for which responses to be created.
<input type="checkbox"/>	User clicks on the ‘Create Service Responses’ button. All the 10 service responses should be created and the log with the status should be displayed
<input type="checkbox"/>	When the user closes the log, it should navigate the user back to the service request screen.

Key Outcomes and Benefits

Sage X3 integrated customization helped the client to-

1. Save time to create the transactions manually.
2. After the customization, the client uses the 3rd party application to create the different transaction data.
3. The customization helped the client to save time, earlier the client was spending 75 hrs. in the entire work process after the Sage X3 customization, and the efficiency increased by 150%.



Do you have any such business process customization to suit your organization’s strategy and vision? We can help you with a holistic solution approach. Reach out to us at info@germinit.com