



CRM Changes with Implementation of Zinier

10/2/2023

be certain.

As part of the transition from Click to Zinier, the following changes will be made in the way we process orders in CRM.

- The following *activity specific* headers in CRM will be retired and replaced by a single header code;
ServiceXX (OP, NO, IC)
 - CalibrationXX
 - RoutineXX
 - RepairXX
 - ConsultXX
 - TrainingXX

All service activities and/or parts normally entered using one of these old headers will be allowed under this new header code.

Zinier Implementation- CRM Changes



Example:

Click:

E...	Ref	Item	Product ID	Qty	Unit
		10	TRAVELXP	1	EA
	10	11	TRVZONE	9	PU
	10	12	TRVADD	30	PU
		20	CALIBRATIONOP	1	EA
	20	21	CALSTDFEE	1	PU
	20	22	CALFLXTST49440	128	EA
	20	23	CLVDTA	21	EA
	20	24	C20KAA	13	EA
	20	25	C100KAA	2	EA
	20	26	CHALFCARAB	1	EA
	20	27	CRVDT	2	EA
	20	28	C60KTA	4	EA
		30	ROUTINEOP	1	EA
	30	31	MRMHOUR	1.000	H
	30	32	FFCPCONSULT	6	PU
	30	33	100188132	7	EA
		40	REPAIOP	1	EA
	40	41	RSMEXPFSADV	48.000	H
	40	42	100030199	6	EA
	40	43	52957901	8	EA
	40	44	52957501	1	EA
	40	45	52957701	2	EA
	40	46	52957801	1	EA
	40	47	100216412	2	EA

Zinier:

E...	Ref	Item	Product ID	Qty	Unit
		10	TRAVELXP	1	EA
	10	11	TRVZONE	9	PU
	10	12	TRVADD	30	PU
		20	SERVICEOP	1	EA
	20	21	CALSTDFEE	1	PU
	20	22	CALFLXTST49440	128	EA
	20	23	CLVDTA	21	EA
	20	24	C20KAA	13	EA
	20	25	C100KAA	2	EA
	20	26	CHALFCARAB	1	EA
	20	27	CRVDT	2	EA
	20	28	C60KTA	4	EA
	20	29	FFCPCONSULT	6	PU
	20	30	100188132	7	EA
	20	31	RSMEXPFSADV	48.000	H
	20	32	100030199	6	EA
	20	33	52957901	8	EA
	20	34	52957501	1	EA
	20	35	52957701	2	EA
	20	36	52957801	1	EA
	20	37	100216412	1	EA

- A unique task will be created in Zinier for each service listed on the CRM order.
 - If the service has a quantity of >1, multiple tasks will be created in Zinier; 1 for each
 - Example: C20KAA, Qty 3 in the CRM order will result in 3 separate C20KAA tasks in Zinier for the FSE to complete*
 - If an FSE will not perform a task (incorrect, cell broken, etc.), they will *Cancel* the task in Zinier with notes.
 - Once all tasks for a single CRM line item are either Completed or Cancelled, the line item will move to **Complete** status in the CRM order.
- Once an order is released to scheduling in CRM, the quantity of the line item cannot be changed until the order moves to Ready for Billing Review status. If additional activities need to be added to the order, they will need to be entered as new line items.
- The assigned FSE party listed in the service order must be an FSE/SIE employee of the same Sales Org as the order. Therefore, if you create an inter-company order, or if you are performing services at a site owned by a different sales org, you will need to update the AFSE record to reflect an employee in that Sales Org.
- Service Reports will no longer be triggered from CRM (*unless the order was completed in Click*). They will be emailed directly from Z-Web and can be viewed at any time.

Zinier Implementation- CRM Changes



- Needs Action status will no longer be used:
 - Usage data (labor hours, number of calcs performed, etc.) will be updated in CRM based on the data entered by the FSE in Zinier.
 - ISCs will need to confirm/update data in the order before the billing confirmation is created.
 - FSEs will use email to communicate with ISC when needing things like parts, additional service activities, etc. until a new feature is created in Zinier to create internal ISC Tasks. (Q1?)

- Activity Confirmations will only be created in CRM for Parts.
 - ISCs will need to review the confirmations to confirm parts used and any additional parts (from stock or purchased) that may need to be added to the order

- Acceptance reports will no longer load to POND automatically *(There is currently an open ticket automate)*
 - The Closeout Package will need to be downloaded from Zinier and placed in POND folder manually.

- **SIEs** will be scheduled and complete their order activities directly through Zinier. Therefore, all SIE consulting work should be entered under the SERVICEOP header (*IC for inter-company*).
- SFDC opportunities for SIE consulting work should always reference the SIE who will be doing the work.
- Once the order has been released to Zinier, the ISC should manually reassign the consulting related task(s) to the defined SIE.
- If no SIE was defined (required in Europe), request Sales to provide this information before releasing the order.
- If the SIE is located in a *different Sales Org* than the order was placed:
 - use the SERVICEIC header and create a follow-up ZISV order in the Sales Org of the delivering SIE. Update the AFSE party in the ZISV order to the SIE who will be delivering the work, update the header line to optimized, and set status of the order to Released/Sent to Scheduling
- North America: If no SIE was designated or the SIE designated isn't on Mitch's team (i.e. engineer), reassign the task(s) in Zinier to Mitch Gilomen.

Suggested Daily Activity: Filter all Consulting Tasks in Zinier to ensure they have been reassigned to an SIE. This way you can address any that may have been missed.

Zinier Implementation- CRM Changes



- The billing confirmation will not allow billing of a line item if the quantity listed does not match the *used quantity* submitted by the FSE.

The screenshot shows a SAP 'Follow-Up - Select Items' window. The table contains the following data:

Tra	Transaction Type	Transaction ID	Item No.	Product ID	Product	Quantity	Un
[i]	Standard Field Se...	810094571	10	TRAVELXP	H- TRAVEL & ADMIN	1	EA
[i]	Standard Field Se...	810094571	11	TRVZONE	ZONE CHARGE	1	PU
[i]	Standard Field Se...	810094571	20	SERVICEOP	H-Service Optimized	1	EA
[!]	Standard Field Se...	810094571	21	C20KAA	20 KIP_100KN AXL_SH ...	3	EA
[i]	Standard Field Se...	810094571	22	MRMHOUR	ROUTINE MAINTENAN...	4.000	H
[i]	Standard Field Se...	810094571	23	100188132	FLUID SAMPLE BOTTL...	1	EA
[i]	Standard Field Se...	810094571	24	39075103	TRANSDUCER-LVDT 6...	2	EA

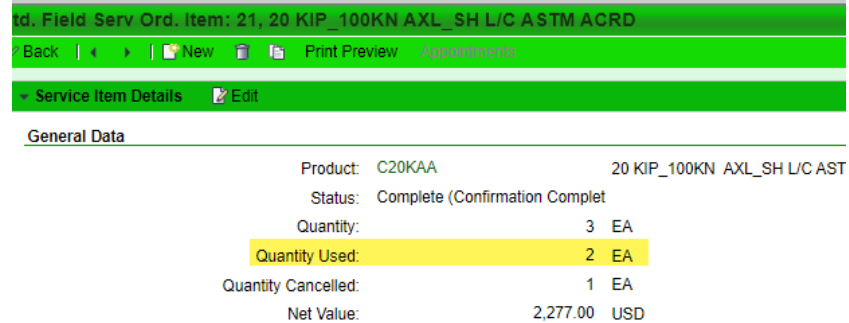
- ISC will need to review the line item to see planned –vs- used values and update the values as appropriate.
- ISC will need to review all activity confirmations to confirm all parts were used and/or if any additional parts need to be added to the order for invoicing.
- ISC will contact the FSE with any questions or clarifications needed.

Zinier Implementation- CRM Changes



Examples:

- C20KAA planned for Qty 3 but only Qty 2 performed, you will update the Qty of the line item to reflect Qty 2



Std. Field Serv Ord. Item: 21, 20 KIP_100KN AXL_SH L/C ASTM ACRD

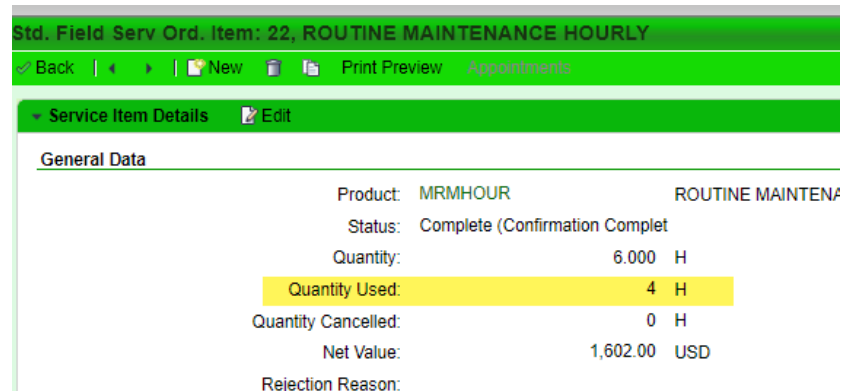
Back | < | > | New | Print Preview | Appointments

Service Item Details | Edit

General Data

Product:	C20KAA	20 KIP_100KN AXL_SH L/C ASTM
Status:	Complete (Confirmation Complet	
Quantity:	3	EA
Quantity Used:	2	EA
Quantity Cancelled:	1	EA
Net Value:	2,277.00	USD

- MRMHOUR planned for Qty 6 but only Qty 4 used, you will update the Qty of the line item to reflect Qty 4



Std. Field Serv Ord. Item: 22, ROUTINE MAINTENANCE HOURLY

Back | < | > | New | Print Preview | Appointments

Service Item Details | Edit

General Data

Product:	MRMHOUR	ROUTINE MAINTENAN
Status:	Complete (Confirmation Complet	
Quantity:	6.000	H
Quantity Used:	4	H
Quantity Cancelled:	0	H
Net Value:	1,602.00	USD
Rejection Reason:		

- STDRPRHRGEN planned for Qty 4 (per-call order with 4 hour minimum) but only 3 hours used, you would update the **“used”** Qty to 4 to allow billing of the 4-hour minimum