

# Retail Connect



FIXZONE (UK) LTD

# Training Manual

**April 2013**

## Version History

Date	Version	Details
14/2/2013	1.0	Document created
18/4/2013	1.0.9	Document Updated
3/6/2016	1.1	Document Updated

Version History.....	1
Logging into Retail Connect for the First Time .....	2
Homepage View.....	3
Booking in a repair .....	4
Searching for a repair .....	13

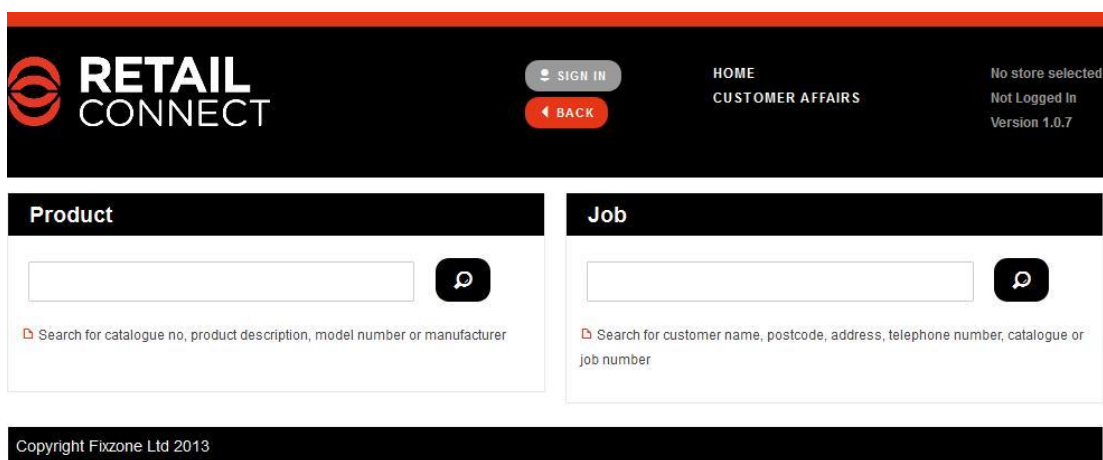
## Logging into Retail Connect for the First Time

When logging into Retail Connect for the first time if you already have been assigned a userID and password, you can skip the password setup and proceed to log straight in with the assigned userID and password.

However, if you have only been assigned a userID, please follow the steps below to complete your login.


Before you can start using Retail Connect you will need to sign in using your username and set up a password. Your username will be given to you by your manager or will have been mailed to you.

1. Open the web browser and go to <http://connect.fieldengineer.co.uk>



The screenshot shows the Retail Connect homepage. At the top, there is a navigation bar with the 'RETAIL CONNECT' logo on the left, a 'SIGN IN' button and a 'BACK' button in the center, and links for 'HOME' and 'CUSTOMER AFFAIRS' on the right. Below the navigation bar, there are two main search sections: 'Product' and 'Job'. Each section has a search input field and a magnifying glass icon. The 'Product' section has a placeholder text: 'Search for catalogue no, product description, model number or manufacturer'. The 'Job' section has a placeholder text: 'Search for customer name, postcode, address, telephone number, catalogue or job number'. At the bottom of the page, there is a footer that reads 'Copyright Fixzone Ltd 2013'.

2. Click the "Sign In" button
3. Type in your user name and then click on "Sign In"



The screenshot shows the 'Sign in' page. It has a black header with the text 'Sign in' in white. Below the header, there are two input fields: 'User ID' and 'Password'. The 'User ID' field contains the text 'fixcat'. Below the 'Password' field, there is a link that says 'Forgotten password?'. At the bottom right of the page, there is a red 'SIGN IN' button.

4. Put in your date of birth then click on "Next"

**Input date of birthday**

Enter your date of birth (DD/MM/YYYY):

1	/	1	/	2000
---	---	---	---	------

**NEXT**

Copyright Fixzone Ltd 2013

5. Input your desired password and memorable question with answer. Take care to note this down at this stage, remembering using capitals and numbers mixed into the password.

**Personal details**

Password	.....
Confirm Password	.....
Memorable Question	What is the air-speed velocity of an unladen swallow
Answer	African or European

**SAVE**

Copyright Fixzone Ltd 2013

6. Click on Save, it will bring the log in page back up.

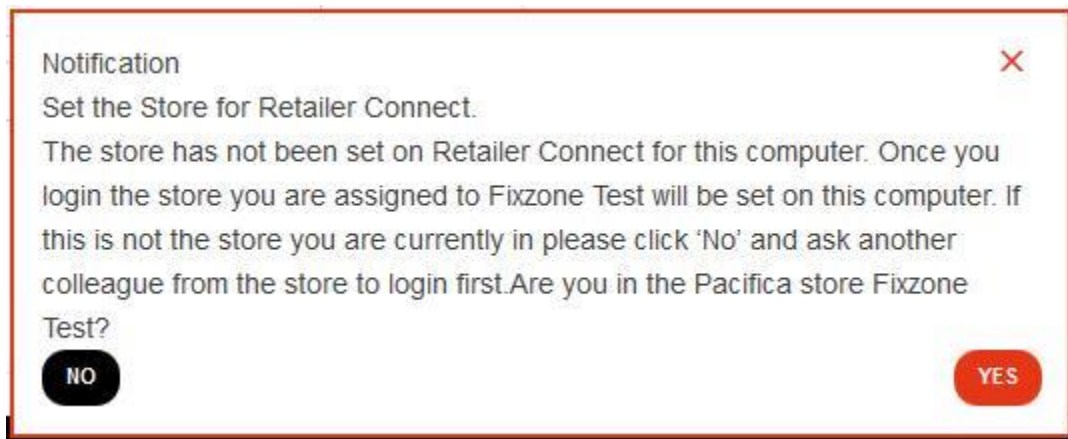
**Sign in**

User ID	
Password	

[Forgotten password?](#)

**SIGN IN**

7. Put in the username and password you have just set up. Click on the 'Sign In' button to proceed.

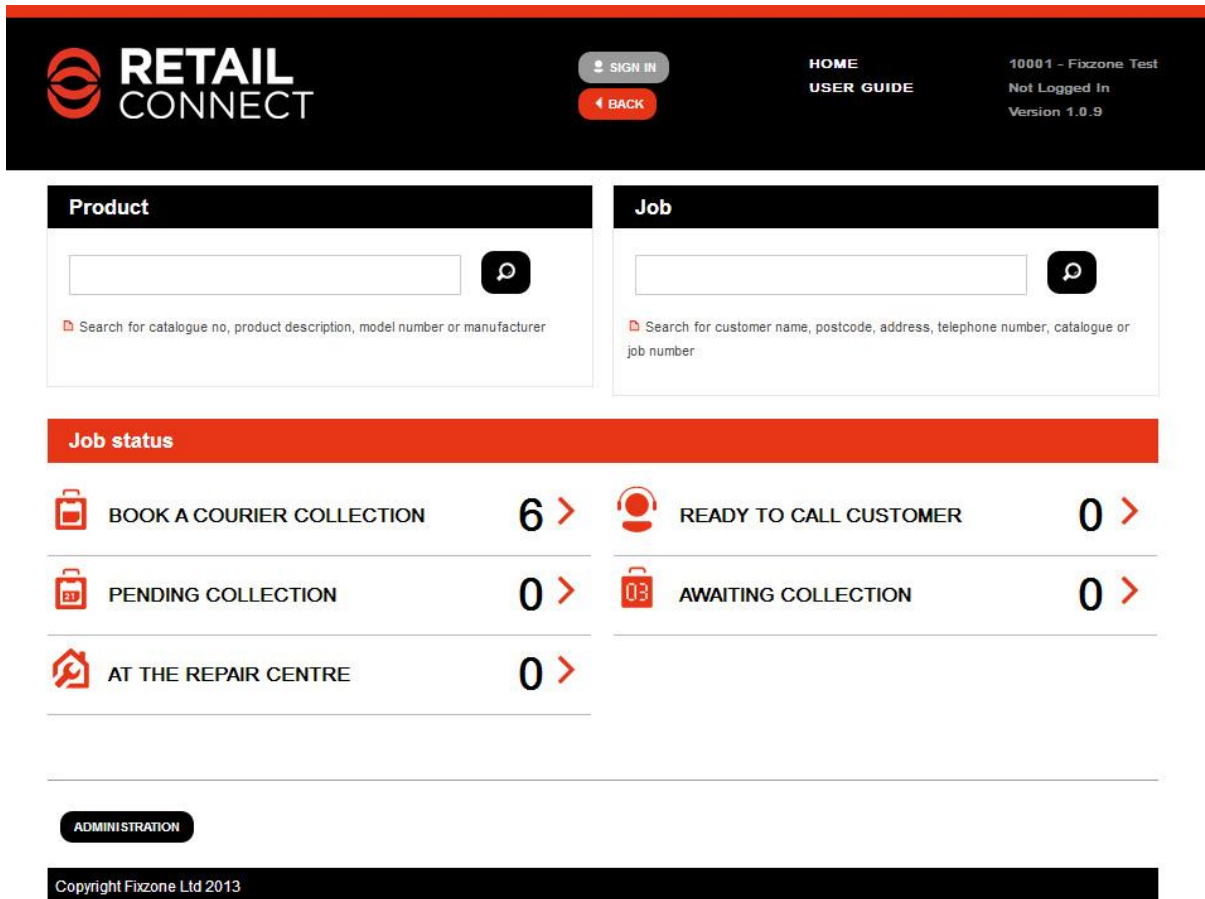


7. If the store is correct when you log in, click on yes to enter the site.
8. Otherwise click n and contact support. **DO NOT** confirm store if not your correct store location.

Once logged in, you will be presented with the home page as shown on the next page.

## Homepage - -

This is the Retail Connect homepage. On the homepage you will find your store name and userID displayed in the top right hand, next to the links to return to the homepage and to access the user guide.



The screenshot shows the Retail Connect homepage. At the top, there is a black header bar with the 'RETAIL CONNECT' logo on the left. In the center, there are two buttons: 'SIGN IN' (grey) and 'BACK' (orange). On the right, there are links for 'HOME' and 'USER GUIDE', and a status area showing '10001 - Fixzone Test', 'Not Logged In', and 'Version 1.0.9'.

Below the header, there are two main sections: 'Product' and 'Job'. Each section has a search bar and a magnifying glass icon. The 'Product' search bar has a hint: 'Search for catalogue no, product description, model number or manufacturer'. The 'Job' search bar has a hint: 'Search for customer name, postcode, address, telephone number, catalogue or job number'.

Below these sections is a 'Job status' section with a red header. It contains three rows of job status information, each with an icon, a description, a count, and a right arrow:

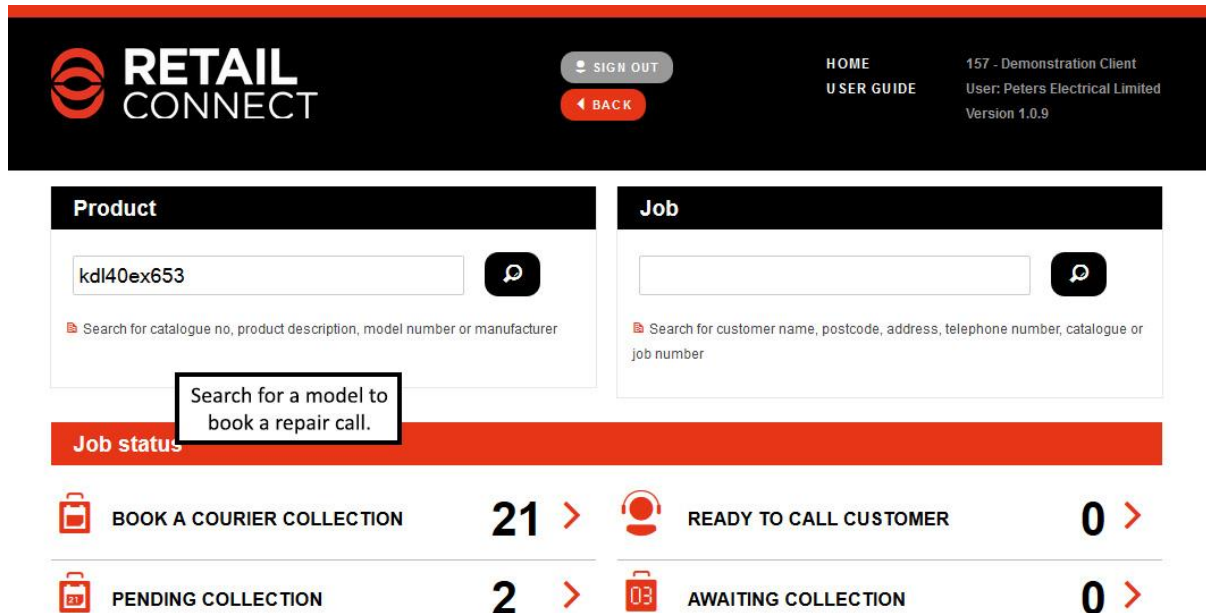
Icon	Description	Count	Action
	BOOK A COURIER COLLECTION	6	>
	READY TO CALL CUSTOMER	0	>
	PENDING COLLECTION	0	>
	AWAITING COLLECTION	0	>
	AT THE REPAIR CENTRE	0	>

At the bottom of the page, there is an 'ADMINISTRATION' button and a footer bar with the text 'Copyright Fixzone Ltd 2013'.

From this page you can book in a repair call and search for any existing repair calls within the system.

## Booking in a Repair Call - -

To start booking in a repair call, simply enter in to the search box 'Product' either a model number, catalogue number or a product description.



**RETAIL CONNECT** SIGN OUT BACK HOME USER GUIDE 157 - Demonstration Client User: Peters Electrical Limited Version 1.0.9

**Product**


Search for catalogue no, product description, model number or manufacturer

**Job**

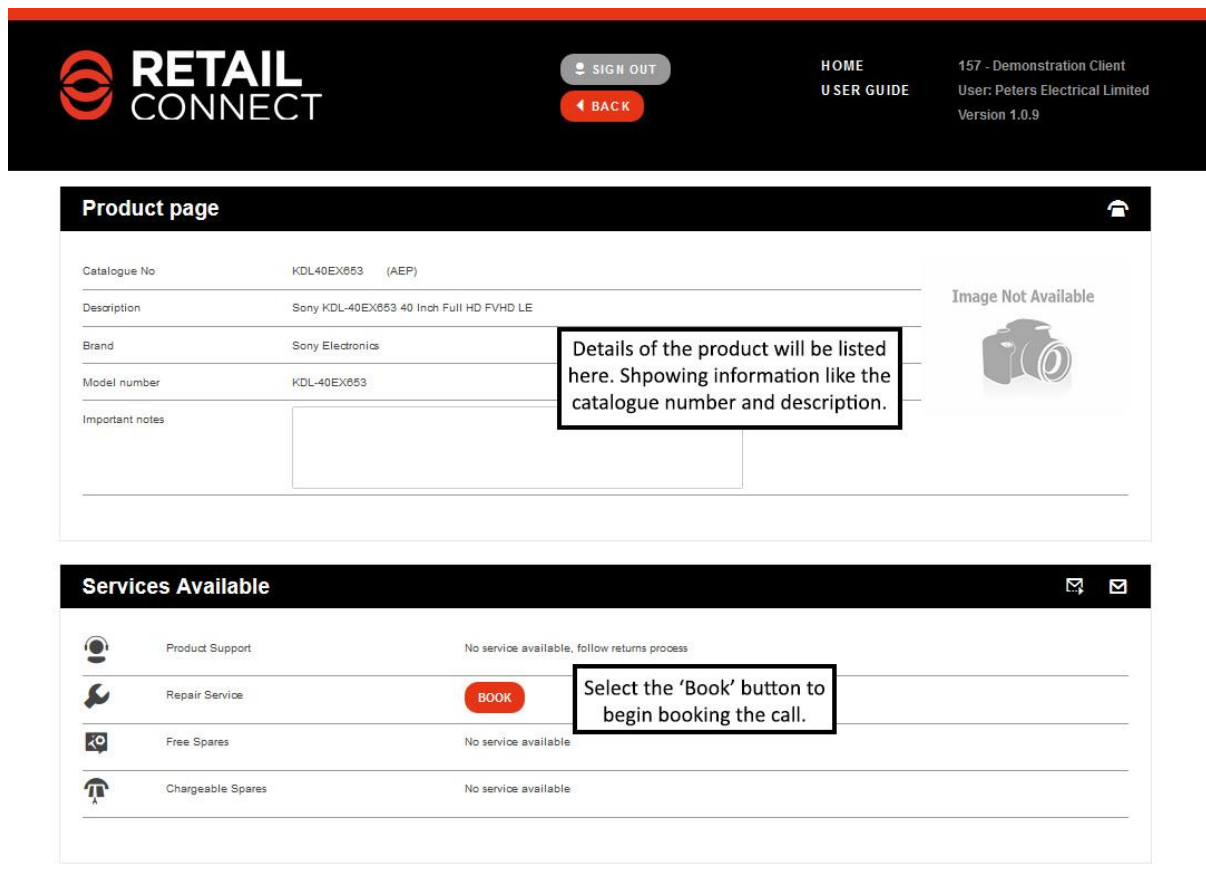

Search for customer name, postcode, address, telephone number, catalogue or job number

Search for a model to book a repair call.

**Job status**

BOOK A COURIER COLLECTION	<b>21</b> >	READY TO CALL CUSTOMER	<b>0</b> >
PENDING COLLECTION	<b>2</b> >	AWAITING COLLECTION	<b>0</b> >

Once you've entered and conducted a search, finding the product, will display a product page. This page will provide a brief description of the product.



**RETAIL CONNECT** SIGN OUT BACK HOME USER GUIDE 157 - Demonstration Client User: Peters Electrical Limited Version 1.0.9

**Product page**

Catalogue No	KDL40EX653 (AEP)
Description	Sony KDL-40EX653 40 Inch Full HD FVHD LE
Brand	Sony Electronics
Model number	KDL-40EX653
Important notes	

Image Not Available

Details of the product will be listed here. Showing information like the catalogue number and description.

**Services Available**

Product Support	No service available, follow returns process
Repair Service	<b>BOOK</b>
Free Spares	No service available
Chargeable Spares	No service available

Select the 'Book' button to begin booking the call.

Selecting the 'Book' button will step through to the first page of booking procedure.

On this page you will be asked to fill out the various details about the customer. Inputting the postcode and using the 'Find Address' feature will auto-populate the address fields, but please take care to select the correct house/flat number from the drop-down menu.

**Book standard repair**

<b>Customer</b> <small>all fields are mandatory</small>	<b>Title</b> <div style="border: 1px solid #ccc; padding: 2px;">Miss</div>	
	<b>Forename</b> <div style="border: 1px solid #ccc; padding: 2px;">Jason</div>	
	<b>Surname</b> <div style="border: 1px solid #ccc; padding: 2px;">Test</div>	
<b>Address</b> <small>all fields are mandatory</small>	<b>Postcode</b> <div style="border: 1px solid #ccc; padding: 2px;">KT6 6PL</div>	<div style="background-color: red; color: white; padding: 2px 5px; border-radius: 3px;">FIND ADDRESS</div>
	<div style="border: 1px solid #ccc; padding: 2px;">FLAT 3 3 CORKRAN ROAD</div>	<div style="border: 1px solid #ccc; padding: 2px;">FLAT 3</div>
	<b>Address line 1</b>	<b>Address line 2</b> <div style="border: 1px solid #ccc; padding: 2px;">3 CORKRAN ROAD</div>
	<b>Address line 3</b> <div style="border: 1px solid #ccc; padding: 2px;"></div>	
	<b>Town</b> <div style="border: 1px solid #ccc; padding: 2px;">SURBITON</div>	
	<b>County</b> <div style="border: 1px solid #ccc; padding: 2px;"></div>	
<b>Contact</b> <small>at least one field</small>	<b>Mobile number</b> <div style="border: 1px solid #ccc; padding: 2px;"></div>	
	<b>Landline number</b> <div style="border: 1px solid #ccc; padding: 2px;">020812345678</div>	
	<b>Email address</b> <div style="border: 1px solid #ccc; padding: 2px;"></div>	
	<b>Preferred method</b> <div style="border: 1px solid #ccc; padding: 2px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span>Telephone</span> <span>▼</span> </div> <div style="background-color: white; border: 1px solid #ccc; padding: 2px; margin-top: 2px;"> <div style="background-color: #f0f0f0; padding: 2px;">Email</div> <div style="background-color: #e0e0e0; padding: 2px;">SMS</div> <div style="background-color: #a0c0ff; padding: 2px;">Telephone</div> </div> </div>	<div style="background-color: red; color: white; padding: 2px 5px; border-radius: 3px;">NEXT</div>

Use the dropdown menu to select the correct house/flat no.

Make sure to select the matching 'Preferred Method' to your input contact details.

Copyright Fixzone Ltd 2013

At least one field within the contact details must be completed in order to proceed with the booking. Take care to make sure that the input field matches the selected 'Preferred method' from the drop-down.

Once all the details have been entered, click on the 'next' to proceed to the next stage.



The next page you will be presented with is the 'Product Info' page. This page again needs completing, taking care to input as much detail as possible to assist the engineer when he/she goes to deal with the repair.

The first section will display the Model Number, selected at the beginning of the booking and the category of that particular model.

Input the Serial Number, if know, as any information entered ere will pool over into the engineer's portal later in the booking process. Also make a note of the condition of the item, noting if any accessories are being returned with it.

Book standard repair	
<b>Product</b> <small>not all fields are mandatory</small>	<b>Model Number</b> <input type="text" value="KDL-40EX653"/> (AEP)
	<b>Product category</b> <input 45"="" to="" type="text" up="" value="LCD TV &gt; 30"/>
	<b>Serial number</b> <input type="text" value="1234-5678-90"/>
	<b>Item Condition and Accessories</b> <input type="text" value="Good, remote included"/>

Inputting a Serial number is optional at this stage

Input the correct warranty status by selecting from the drop-down menu, making sure to enter in a valid date to match.

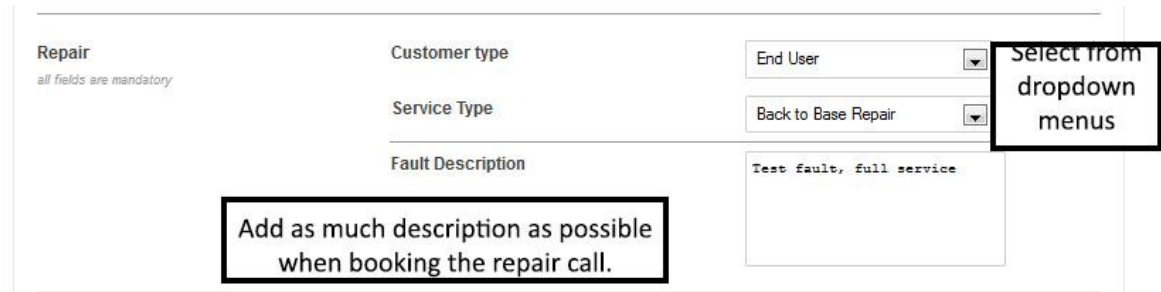
*NB. When selecting the warranty types 'Out of Warranty' and 'Maintenance' please enter today's date.*

*When selecting 'Stock' – the fields Retailer Name, Retail Reference and Retailer Invoice Date must be completed in order to proceed.*

<b>Date of purchase</b> <small>all fields are mandatory</small>	<b>Unit warranty status</b> <input type="text" value="In Warranty 1 Year"/>
	<b>dd/mm/yyyy</b> <input type="text" value="05/05/2012"/>
<b>Proof of Purchase</b> <small>not mandatory</small>	<b>Proof of Purchase</b> <input type="text" value="Receipt"/>
	<b>Policy Number</b> <input type="text" value="987-654"/>
	<b>Retailer Name</b> <input type="text"/>
	<b>Retailer Reference</b> <input type="text"/>
	<b>Retailer Invoice Date</b> <b>dd/mm/yyyy</b> <input type="text"/>
	<b>Retailer Address</b> <input type="text"/>

The fields within the Proof of Purchase section are optional, but some fields will become mandatory depending on the warranty type selected.

The section under 'Repair' requires all fields to be input. Start by selecting the Customer Type from the drop-down and the Service Type. There are currently four different Service Types, the 'In Home' and 'Back to Base' repairs are self explanatory, while the 'Bulk Repair' and 'AEP' are specific service calls and should only be used if you are sure.



**Repair**  
all fields are mandatory

Customer type

Service Type

End User

Back to Base Repair

Fault Description

Test fault, full service

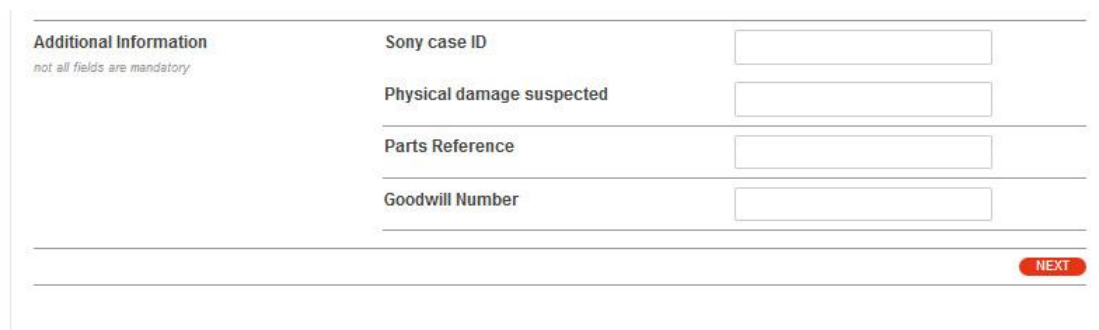
Select from dropdown menus

Add as much description as possible when booking the repair call.

Finally in this section, add as much detail as possible about the actual fault of the model.

*NB. The more information provided here, the more information that can be passed onto the engineer prior to arriving at the job. Include all details on fault.*

And the final section of the 'Product Info' page are optional fields for inputting various additional data.



**Additional Information**  
not all fields are mandatory

Sony case ID

Physical damage suspected

Parts Reference

Goodwill Number

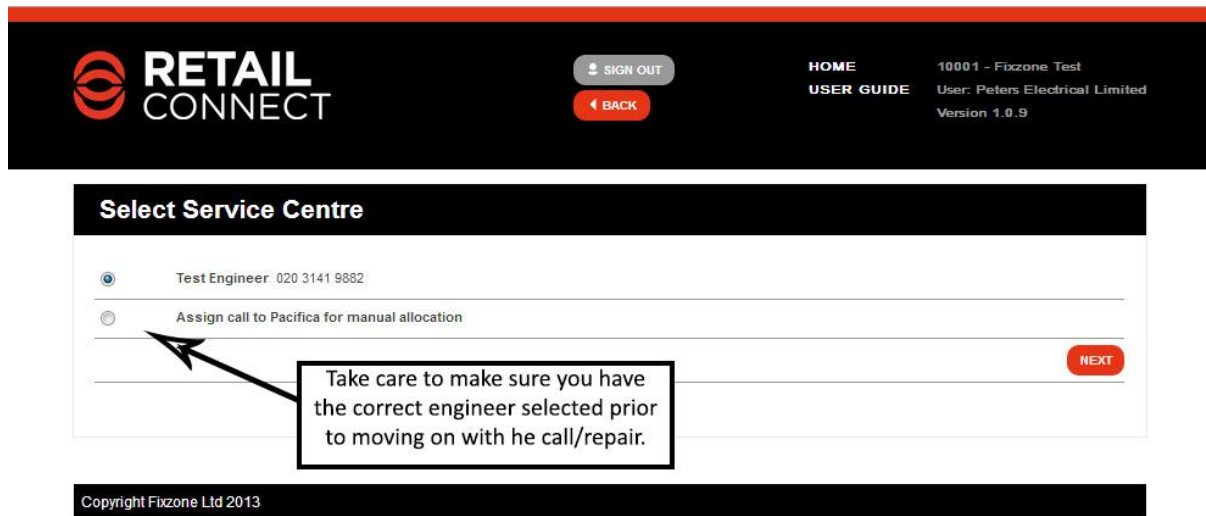
NEXT

Copyright Fixzone Ltd 2013

Please fill out any additional information into the relevant boxes.

Once completed select the 'Next' button to move forward.

This will then present you with the engineer selection page, from here select the desired engineer to have this repair call sent too. For most users you will only see yourself and the default Pacifica service desk, but take care to make sure you select the correct option.



Select 'Next' to move forward.

The system will then display a page displaying all the input details of the booking in brief. ( As seen on the following page).

Browse over these to make sure there are no obvious mistakes. Go back and change any details that appear wrong.

Otherwise, go ahead and confirm the booking by selecting the 'Confirm Booking' button in the bottom right of the page.

### Customer Information

Customer name	Jason Test
Address 1	FLAT 3,
Address 2	3 CORKRAN ROAD
Address 3	
Post code	kt6 6pl

## Product Information

Catalogue No	KDL-40EX524
Description	SONY LCD COLOR TV
Original condition	
Serial number	
Retailer invoice Date	
Date of purchase	05/05/2012

### Repair Agent Information

Name	Test Engineer
Address	5a Surbiton Hill Road  SURBITON Surrey KT6 4TW
Telephone number	
Opening hours	
Extra information	


### Collection information

**CONFIRM BOOKING**

Once selected and confirmed, using the 'Confirm Booking' button, a new screen will be displayed with a 'Repair CallSheet'.

This is a printable sheet that has all the important details on of the booking and can be printed for your own use, giving a copy to the customer and even as a reference sheet to be sent with any parts being couriered.

*NB. Make sure to note down the Customer Repair Number quoted. Give this as a reference to the customer, but also keep a record of this for your own files, as it will allow tracking on this job, should it not appear within your selected engineer's web-portal.*




[SIGN OUT](#)  
[BACK](#)

**HOME** 10001 - Fixzone Test  
**USER GUIDE** User: Peters Electrical Limited  
 Version 1.0.9

Repair booked

Customer repair number

FZ2074




**SONY AFTER SALES**  
**Product Repair Instructions - Repair Agent Copy**  
**Repair Ref: FZ2074**

**Collection and Packaging Instructions**  
 This item will be sent to the repair agent by None.  
 Please ensure a collection has been booked.  
 The repair must be suitably packaged in a sealed box or postal bag, not using the correct packaging may result in the collection being refused.

**Repair Agent Details**  
 Name     Test Engineer  
 Address    5a Surbiton Hill Road  

SURBITON



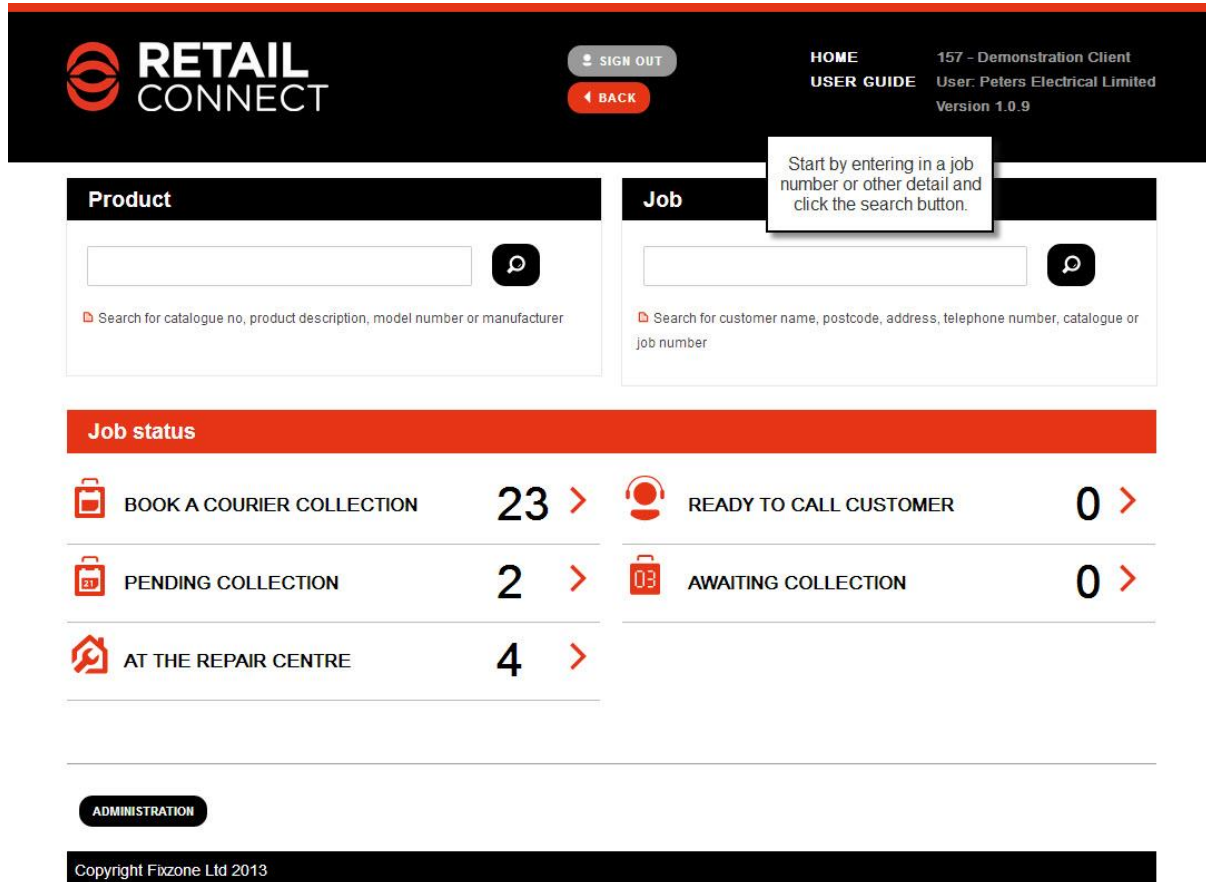
Next Steps

Copyright Fixzone Ltd 2013

Congratulations, you have now booked in a repair.

## Searching for a Job - -

To search for a repair booking, you can manually go through the different status bars on the homepage, such as 'Pending Collection' or 'Ready to Call Customer', but the quickest and most effective way is to use the in-built job search.








**RETAIL CONNECT** SIGN OUT BACK HOME USER GUIDE 157 - Demonstration Client User: Peters Electrical Limited Version 1.0.9

**Product** Search for catalogue no, product description, model number or manufacturer

**Job** Start by entering in a job number or other detail and click the search button. Search for customer name, postcode, address, telephone number, catalogue or job number

**Job status**

 BOOK A COURIER COLLECTION	23 >	 READY TO CALL CUSTOMER	0 >
 PENDING COLLECTION	2 >	 AWAITING COLLECTION	0 >
 AT THE REPAIR CENTRE	4 >		


ADMINISTRATION

Copyright Fixzone Ltd 2013

To do this, simply input the repairs reference number, a customer's name, or any of the various fields listed. Then click the search icon to conduct a search of your bookings.

*NB. This will only search any calls booked under the current Store location and user. Other users within the same store can search each other's calls, but only calls related to the same store.*

The search function will either return the exact job, giving you the calls job page straight away or (more commonly) will return a list of matching jobs, as seen below.





[SIGN OUT](#)  
[BACK](#)

[HOME](#)  
[USER GUIDE](#)

157 - Demonstration Client  
User: Peters Electrical Limited  
Version 1.0.9

**Job**



 Search for customer name, postcode, address, telephone number, catalogue or job number

Repair No	Logged	Customer Name	Postcode	Description	Store No	Lead Time
<a href="#">FZ2886</a>	14/05/13	Test Testq	KT6 4TW	Sony BRAVIA KDL19BX200BU 19 Inch HD Read	Demonstration Client (157)"	
<a href="#">FZ2909</a>	14/05/13	Test Test	KT6 4TW	SONY LCD COLOR TV	Demonstration Client (157)"	
<a href="#">FZ2074</a>	22/04/13	Jason Test	kt6 6pl	SONY LCD COLOR TV	Fixzone Test (10001)"	
<a href="#">FZ1088</a>	28/03/13	Jason Test	kt6 6pl	Sony KDL-40EX653 40 Inch Full HD FVHD LE	Demonstration Client (157)"	
<a href="#">FZ1078</a>			Wa15 8lq	SONY LCD COLOR TV	Edinburgh Sony Centre (18)"	
<a href="#">FZ965</a>			kt66pl	Sony KDL-40EX653 40 Inch Full HD FVHD LE	Demonstration Client (157)"	
<a href="#">FZ964</a>	25/03/13	Jason Test	kt66pl	Sony KDL-40EX653 40 Inch Full HD FVHD LE	Demonstration Client (157)"	
<a href="#">FZ963</a>	25/03/13	Jason Test	kt6 6pl	Sony KDL-40EX653 40 Inch Full HD FVHD LE	Demonstration Client (157)"	
<a href="#">FZ962</a>	25/03/13	Jason Test	kt66pl	Sony KDL-40EX653 40 Inch Full HD FVHD LE	Demonstration Client (157)"	
<a href="#">FZ953</a>	25/03/13	Jason Test	kt6 6pl	Sony KDL-40EX653 40 Inch Full HD FVHD LE	Demonstration Client (157)"	


Showing items 1-10 (35)
[NEXT PAGE](#)


Copyright Fixzone Ltd 2013


To view a particular calls details select it by clicking on the jobs repair number listed down the side.

Doing this will then bring up the calls 'Job Page' as seen on the next page.

This 'Job Page' will display a formatted sheet of information related to the call. Showing details such as the customer's name and address, but also the product information, repair details, additional notes and comments like job notes.

Some of these fields are editable from this sheet by clicking the  icon, any changeable fields will become available for editing.

Also, you can view details about the engineer assigned to the call by clicking on the  icon.

*NB. For details on the additional pop-up information selected by clicking the  icon, please see the following page.*

**Job Page FZ2074 Fixzone Test (0)**

Click this icon to open up a number of additional information pop-ups. Select from the drop-down menu to change.

### Customer Information

Customer name

Address 1

Address 2

Address 3

Post code

County

Town

Click here to edit fields within each section

### Contact information

Email address

Mobile number

Landline number

Preferred method

Repair Agent

Repair Instruction

Repair Note

Repair Outcome

Closest store map

Product Details

### Job status:

The calls status is displayed here

Repair Accepted Courier Booked Item Collected With Repair Agent Agent Dispatched Ready For Collection Customer Contacted Job Closed

### Product Information

Model Number

Description

Original condition

Serial number

Proof of Purchase

Unit Warranty Status

Date of purchase

### Repair Information

Service Type

Fault description

Repair agent

Repair cost

Repair cost paid?(Y/N)

Customer Type

Selecting the icon here will bring up the engineers details

### Additional Job Information

Retailer Invoice Date (dd/mm/yyyy)

Retailer Name

Retailer Reference

Sony ID

Policy Number

Physical damage suspected

Retailer Address

Parts Reference

Goodwill Number

High Cost Authorisation Code

Domestic and General Reference Number

Click here to edit fields within each section

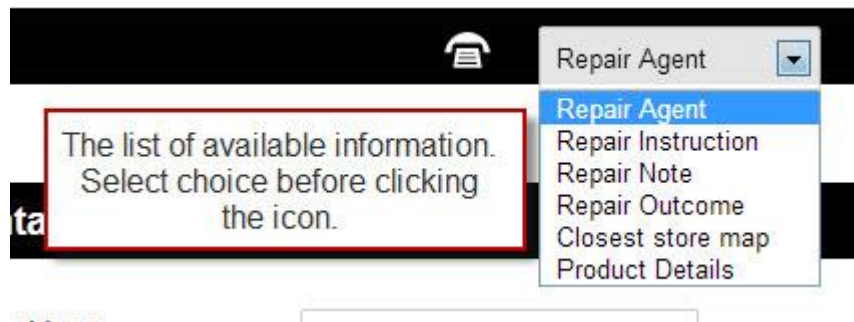
### Job notes

21/03/2013 15:05 Peters Electrical Limited The job is created

Enter in a new note, then click on the icon to save it



The full choice of available information can be seen here in this picture. Each option will retrieve a small pop-up window, often in a printable form.



The 'Repair Agent' returns a copy of the dispatched courier receipt, showing information on the agent it has been sent too.



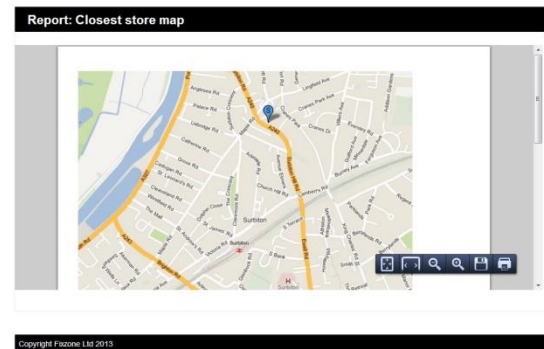
The 'Repair Instruction' displays a printable report of the instructions in regards to the repair, including the repair notes for the customer and store.

The 'Repair Note' option, simply displays a repair note. Again printable or saveable.

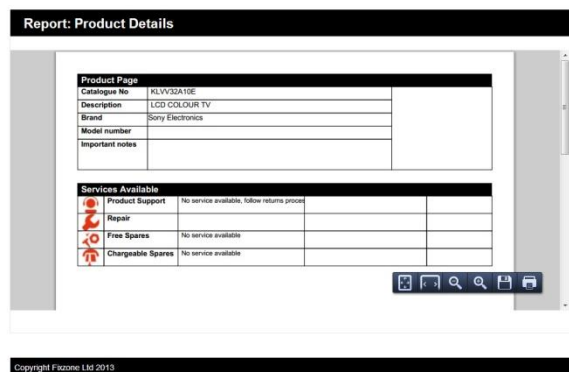


The 'Repair Outcome' will display a report detailing problems found and what actions were taken. Again this is printable/saveable.

The 'Closest Store Map' does exactly that, it will display a pop-up map showing the nearest store to the input customer's postcode.



The 'Product Details' will again display a brief overview of the product booked in for repair.



For any more assistance in regards to the web-portal please feel free to contact us directly either by email at [support@fixzone.com](mailto:support@fixzone.com) or by telephone on 0203 141 9882 .