

PLANNING - ACTION REQUIRED

What is Action Required?

The Action Required section helps track and manage visits that need further attention. This can occur due to various reasons, such as incomplete visits or part requests.

Restricted Access

This area requires a **Planning** or **Finance** license to access.

Users, Super Users, Owners and **Internal Users** can view and update the data within this area.

Navigating Action Required

In SmartVend, under the **Planning** header, you can access the **Action Required** screen. This feature allows you to track visits that need further action.

You can **filter** the visits by various criteria such as:

- **Visit Type:** Helps you focus on specific types of visits (e.g., stock, service, or ad-hoc).
- **Users:** Filter visits based on the assigned operator or engineer.
- **Sites:** Focus on visits associated with a particular site or set of locations.
- **Machines:** Narrow down the list based on specific machines requiring attention.

Within the **Action Required** table, you can access key information for each visit:

- **Visit Reference:** This column contains a hyperlink for each visit, allowing you to click on it and be directed to the specific visit sheet for further details.
- **Visit Type:** This column indicates the type of visit, such as:
 - **Stock:** For restocking products in machines.
 - **Service:** For resolving machine issues or performing maintenance.
 - **Ad-Hoc:** For unplanned or miscellaneous visits.

This setup allows you to quickly identify and access visits that require further action.

Visit Reference	Visit Type	Status
VRVIADEMO4042	Stock	On-Hold
VRVIADEMO4046	Stock	On-Hold
VRVIADEMO4084	Service	Awaiting Allocation
VRVIADEMO4085	Service	Awaiting Allocation
VRVIADEMO4093	Stock	On-Hold
VRVIADEMO4094	Stock	On-Hold
VRVIADEMO418	Stock	On-Hold
VRVIADEMO537	Service	Awaiting Parts

The **Status** column provides information about the current state of each visit. There are three possible statuses that can be displayed:

1. **On-Hold:** This status appears when a visit has not been completed on the scheduled date and requires someone to reassign the visit.
2. **Awaiting Allocation:** This status is shown when a Part Maintenance ticket and visit have been raised, but the task has not yet been allocated.
3. **Awaiting Parts:** This status is displayed when a service visit includes a part action marked as 'Request Part', indicating that the part is needed before the visit can proceed.

Training Note

Visits with a status of '**Awaiting Allocation**' will only appear in the **Action Required** table if the following conditions are met:

1. The machine has a **default operator or engineer** assigned.
2. The setting for **Auto-Raise Visits for Part Maintenance Tickets** is enabled. This setting can be found under:
 - a. **Manage Account** → **System Configuration** → **Ticket Dashboard Settings:** "**Auto-Raise Visits for Part Maintenance Tickets**" must be enabled.
 - b. Under "**Enable ticket creation for the following types**", the option for "**Part Maintenance**" must also be enabled.



These settings ensure that part maintenance tickets automatically generate visits that are assigned based on the default operator or engineer for that machine.

Navigating Action Required

Within the **Action Required** table, you can view the following details for each visit:

- **Site Name:** The name of the site where the visit is required.
- **Postcode:** The postcode associated with the site.
- **Machine Reference:** A unique reference code identifying the machine.
- **Machine Name:** The name or designation of the machine at the site.

These details help to easily identify the location and machine involved in each visit that appears in the list.

Site Name	Post Code	Machine Reference	Machine Name
Vianet Site 04	TS24 7QS	VNET003	Vianet Machine 003
Vianet Site 04	TS24 7QS	VNET003	Vianet Machine 003
Vianet Site 04	TS24 7QS	VNET003	Vianet Machine 003

For each visit in the **Action Required** table, you can view the following additional options:

- **Date Raised Column:** Displays when the visit was initially raised.
- **Operator/Engineer Dropdown:** Allows you to select the operator or engineer to whom the visit should be allocated, this defaults to the Operator/Engineer who was originally scheduled for the visit.
- **Date Scheduled Box:** Opens a date-picker, enabling you to select the exact date and time you want the visit to be scheduled.

These tools make it easy to assign visits and plan them for the appropriate date and time.

Date Raised	Operator / Engineer	Date Scheduled	
22/05/2023 09:52	Training Mobile User		Allocate
22/05/2023 09:52	Training Mobile User		Allocate
24/05/2023 00:30	Training Mobile User		Allocate

Once you have updated the **Operator/Engineer** and **Date Scheduled** fields as needed, the **Allocate** button will become enabled. By selecting this button, the visit will be assigned to the operator's route for the specified day, ensuring the visit is scheduled appropriately.

Training Note

You can allocate a visit for a historic date; however, when you attempt to do so, a notification will appear advising that the scheduled date is in the past. At this point, you will have the option to either confirm that this is the date you wish to set or cancel the action and return to the **Action Required** screen to make adjustments.

