

Hobart Equipment Service Portal

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Introduction

The “Equipment Service Portal” is used to communicate/coordinate the delivery of Commercial Sales equipment to customers through a Hobart Service Office. This portal will provide Hobart Service users (including install teams) the ability to:

- Track customer orders that will be shipped into a Service Office’s Service area
- Track customer shipments flagged as being delivered by a specific Service Office
- Track Transfer Orders moving inventory into a Service Office
- Receive Transfer Orders (i.e., tagged to a specific customer and customer roll outs) into a Service Office
- Manage/Coordinate the delivery of inventoried equipment marked for customers
- Report delivery of equipment for customer orders

Access Portal

- Users, given Portal rights, will access via www.hobartcorp.com or www.hobartservice.com by clicking **Sign In**

Hobart Equipment Service Portal

http://www.hobartcorp.com/

Commercial Kitchen Equipment, Commercial Food Equi...

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Hobart, where equipment and service join together in support of you. Hobart makes a full line of equipment for the foodservice and food retail industries, including cooking, food machines, warewashers, weigh/wrap and Traulsen refrigeration. We support our customers when and where it counts the most. In the field, at your place. With nearly 200 locations and 1,700 factory-trained service representatives across the country, we're always close by to install, maintain and service your equipment.

News and Offers

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Authorized Service

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WITTCO **TRAULSEN**
Berkel **traulsen**
Hatco **Baker's** **LUCKS***
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MANNHART **OLIVER** **Hubbell**
Service **Extra Helpers**

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Hobart Equipment Service Portal

- The **Hobart Service Equipment Portal** will be the default when clicking on **Sign In**
- You can also access the **Hobart Service** home page or the **Resource Center** by clicking on the respective links

The screenshot shows the top navigation bar with 'HOBART SERVICE', 'RESOURCE CENTER', and 'PORTAL HELP' links. Below the logos for Hobart, Baxter, and Traulsen, a welcome message reads 'Welcome Wilma Desselle to the Equipment Service Portal'. A 'Select Office:' dropdown menu is set to 'Winston Salem, NC'. An 'Export To Excel' button is visible. The main content area displays a table titled 'Transfer Sales Orders' with columns for Transfer Order, Order Num, Status, Plant, Qty, Part Num, and Need By Date. The table lists several pending orders from the FEG Covington DC plant.

Transfer Order	Order Num	Status	Plant	Qty	Part Num	Need By Date
29-000020	134	Pending	29 - 29 FEG Covington DC	1	HPX3-5	02/12/2010
29-000021	134	Pending	29 - 29 FEG Covington DC	1	HM1200-1	02/12/2010
29-000024	141	Pending	29 - 29 FEG Covington DC	1	HCM61-1	02/09/2010
29-000025	141	Pending	29 - 29 FEG Covington DC	10	HLX-RFID	02/09/2010

- Office location will default to users' home branch. For those users that have been defined as needing multiple office locations, select location from the **Select Office** drop down box
- Category pages can be accessed by clicking on the name in the Category Window (Side Menu)

This screenshot is similar to the previous one but includes red annotations. A red box highlights the 'Select Office:' dropdown menu, and a red arrow points to it from the right. Another red box highlights the 'Sales Acknowledgement' link in the left-hand side menu. The 'Transfer Sales Orders' table is expanded to show more rows, including orders with quantities of 5 and 1.

Transfer Order	Order Num	Status	Plant	Qty	Part Num	Need By Date
29-000020	134	Pending	29 - 29 FEG Covington DC	1	HPX3-5	02/12/2010
29-000021	134	Pending	29 - 29 FEG Covington DC	1	HM1200-1	02/12/2010
29-000024	141	Pending	29 - 29 FEG Covington DC	1	HCM61-1	02/09/2010
29-000025	141	Pending	29 - 29 FEG Covington DC	10	HLX-RFID	02/09/2010
29-000026	141	Pending	29 - 29 FEG Covington DC	5	HLX-RFID	02/09/2010
29-000027	141	Pending	29 - 29 FEG Covington DC	1	HCM61-1	02/26/2010
29-000029	143	Pending	29 - 29 FEG Covington DC	1	HCM61-1	02/12/2010
29-000030	147	Pending	29 - 29 FEG Covington DC	1	HLX-RFID	02/12/2010
29-000031	147	Pending	29 - 29 FEG Covington DC	1	HLX-RFID	02/11/2010
29-000032	147	Pending	29 - 29 FEG Covington DC	1	HLX-RFID	02/12/2010

- Categories that will be utilized will be:
 1. **Sales Acknowledgement** – Displays the Customer orders that are designated to a Hobart Service office's servicing area based on the order's delivery destination

Hobart Equipment Service Portal

2. ***On-Hand Inventory*** – Displays the “On-Hand” quantity of Commercial Sales equipment located in the Hobart Service office’s equipment inventory
3. ***Transfer Sales Orders*** – Displays the Transfer Orders that have been created and used to move the ordered equipment from the Commercial Equipment’s warehouse or plant to the Hobart Service office.
4. ***Shipment Receipt*** – Once a transfer order shipment has arrived at the Hobart office, it must be received into inventory from this page.
5. ***Pending Delivery*** – Displays the Sales Order/Line/Releases that are “candidates” for being delivered
6. ***Report Delivery*** – Displays all of the Delivery Receipts a Hobart Service office has created, and is a gateway to the screen that is used to print a Delivery Receipt, void a Delivery Receipt, or report that the equipment on a Delivery Receipt has been delivered.
7. ***Print Blank Delivery Receipt*** – Used to print a blank Delivery Receipt, which can be used to deliver items not tracked on the Portal

Sales Acknowledgement

- The ***Sales Acknowledgment*** page displays the Customer orders that are designated to a Hobart Service office’s servicing area based on the order’s delivery destination.
 1. Replaces the Order Acknowledgements and Open Order Report received via mail.
 2. Can be used as a tool to track pending installations
 3. Columns may be sorted by clicking on the blue bold heading name at the top of each column.

Hobart Equipment Service Portal

HOBART BAXTER Traulsen Welcome Wilma Desselle to the Equipment Service Portal **HOBART SERVICE**

Sales Acknowledgement
 On-Hand Inventory
 Transfer Sales Orders
 Shipment Receipt
 Pending Delivery
 Report Delivery
 Print Blank Delivery Receipt
 User Profile
 My Sites

Select Office: Albany, NY Branch (01610)

Status: All Days to View: 90

Export To Excel

Sales Order	TO Pack ID	Part Num	Qty	Ship To Name	Sold To Name	End User	City	State	Zip	Need By Date	Status	Ship Date	Carrier	BOL	PRO
108/ 1/ 1	66/ 1	2612-1	1	B & G Foodservice Equipment & Supply	B & G Foodservice Equipment & Supply	B & G Foodservice Equipment & Supply	Albany	NY	12214	01/22/2010	Delivered	02/25/2010	19 ABF		0
111/ 1/ 1		SMALL-OVERRIDE	1	Golub Corporation	Golub Corporation	Golub Corporation	Schenectady	NY	12306	01/22/2010	Open				
109/ 1/ 1		2612-1	1	B & G Foodservice Equipment & Supply	B & G Foodservice Equipment & Supply	B & G Foodservice Equipment & Supply	Albany	NY	12007	01/29/2010	Open				
110/ 1/ 1		2712PHS-1	1	B & G Foodservice Equipment & Supply	B & G Foodservice Equipment & Supply	B & G Foodservice Equipment & Supply	Albany	NY	12007	01/29/2010	Open				
112/ 1/ 1		2G-G22010	1	Dunkin Donuts/Paramount Rest	Dunkin Donuts/Paramount Rest	Dunkin Donuts/Paramount Rest	Warren	RI	01229	01/29/2010	Open				
112/ 2/ 1		2612-1	1	Dunkin Donuts/Paramount Rest	Dunkin Donuts/Paramount Rest	Dunkin Donuts/Paramount Rest	Warren	RI	01229	01/29/2010	Open				
112/ 3/ 1		HLX-1	1	Dunkin Donuts/Paramount Rest	Dunkin Donuts/Paramount Rest	Dunkin Donuts/Paramount Rest	Warren	RI	01229	01/29/2010	Open				
113/ 1/ 1		2612-1	1	Paramount Rest Supply Corp	Paramount Rest Supply Corp	Paramount Rest Supply Corp	Warren	RI	12860	02/24/2010	Open				
113/ 2/ 1		2612-2	1	Paramount Rest Supply Corp	Paramount Rest Supply Corp	Paramount Rest Supply Corp	Warren	RI	12860	02/24/2010	Open				
113/ 3/ 1		2712PHS-1	1	Paramount Rest Supply Corp	Paramount Rest Supply Corp	Paramount Rest Supply Corp	Warren	RI	12860	02/24/2010	Open				
113/ 4/ 1		2G-G22010	1	Paramount Rest Supply Corp	Paramount Rest Supply Corp	Paramount Rest Supply Corp	Warren	RI	12860	02/24/2010	Open				
113/ 5/ 1		2612-2	1	Paramount Rest Supply Corp	Paramount Rest Supply Corp	Paramount Rest Supply Corp	Warren	RI	12860	02/24/2010	Open				

Today's Date: 2/25/2010

- This page can be filtered by **“status”** and number of **“days to view”**

Select Office:

Status: All Days to View: 90

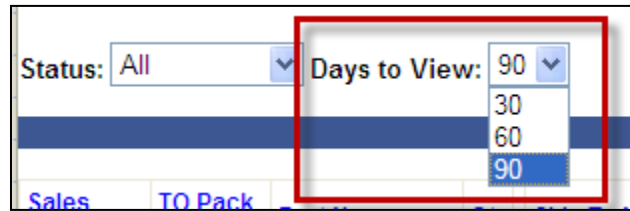
All
 Open
 Shpd Direct
 Delivered

Sales Order	TO Pack ID	Part Num	Qty	Ship To Name
108/ 1/ 1		2612-1	1	B & G Foodse Supply

- **Status Codes:**
 1. **“All”** displays all status types
 2. **“Open”** - Sales Order/Lines/Release to be delivered by the Hobart Service Office
 3. **“Shpd Direct”** - Sales Order/Line Release will be or has been shipped directly to the customer’s destination
 4. **“Delivered”** - Hobart Service office has delivered
- **Days to View:**

Hobart Equipment Service Portal

1. Allows a look back at orders starting from current date and in increments of 30, 60 and 90 days



- On the **Sales Acknowledgement** page, the **Sales Order** number under the **Sales Order** column is a hyperlink to the **Sales Order Acknowledgement Detail** page. Click on hyperlink to open page

A screenshot of the 'Sales Order Acknowledgements' page. At the top, there are filters for 'Status: All' and 'Days to View: 90'. Below this is a table with the following columns: Sales Order, TO Pack ID, Part Num, Qty, Ship To Name, Sold To Name, and End User. The first row shows a Sales Order of 108/ 1/ 1, TO Pack ID, Part Num 2612-1, Qty 1, Ship To Name B & G Foodservice Equipment & Supply, Sold To Name B & G Foodservice Equipment & Supply, and End User B & G Foodservice Equipment & Supply. The second row shows a Sales Order of 111/ 1/ 1, TO Pack ID, Part Num SMALL-..., Qty 1, Ship To Name Golub Corporation, Sold To Name Golub Corporation, and End User Golub Corporation. A red box highlights the 'Sales Order' column header, and a red arrow points to the first row's Sales Order value.

Sales Order	TO Pack ID	Part Num	Qty	Ship To Name	Sold To Name	End User
108/ 1/ 1		2612-1	1	B & G Foodservice Equipment & Supply	B & G Foodservice Equipment & Supply	B & G Foodservice Equipment & Supply
111/ 1/ 1		SMALL-...	1	Golub Corporation	Golub Corporation	Golub Corporation

- The **Sales Order Acknowledgement Detail** page allows a Hobart Service office to review **Order Header** and **Order Line History** comments
- Allows you to select the type of History Text that displays on the page. You can either select "All" to show all types, or select a specific type. The types of History Text include:
 - Installation
 - Change
 - History Text
 - Plant/Scheduler Memo
 - Pricing
- Allows a Hobart Service office to "enter" **Order History Text** of type BRAG/Installation
 1. Enter a description (ex. Installation, etc.) in the **Memo Description** box
 2. Enter comments in the **Memo Text** box
 3. Click on the **Create New Installation Memo** button
 4. History text will appear when screen is refreshed

Hobart Equipment Service Portal

- Click on the **Back** button to return to the **Sales Acknowledgement** window

Sales Order Acknowledgements Detail											
Sales Order	TO Pack ID	Part Num	Qty	Ship To Name	Sold To Name	End User	City	State	Zip	Need By Date	status
112/ 1/ 1		2G-G22010	1	Dunkin Donuts/Paramount Rest	Dunkin Donuts/Paramount Rest	Dunkin Donuts/Paramount Rest	Warren RI		01229	01/29/2010	Open
112/ 2/ 1		2612-1	1	Dunkin Donuts/Paramount Rest	Dunkin Donuts/Paramount Rest	Dunkin Donuts/Paramount Rest	Warren RI		01229	01/29/2010	Open
112/ 3/ 1		HLX-1	1	Dunkin Donuts/Paramount Rest	Dunkin Donuts/Paramount Rest	Dunkin Donuts/Paramount Rest	Warren RI		01229	01/29/2010	Open

Order Header History Comment
There are no Comments for this order.

Order Line History Comment
There are no Order Line Comments for this order.

Order History Text

Select History Text Category: All ← Select Type of History Text to Display

Userid	Memo Date	Category	Memo Desc	Memo Text
sysbrag	02/26/2010	BRAG / INSTALLATION	Test Create Memo 2	grimesa - Create Memo Test 2

Previously entered Text → Memo Description: ← Enter Description Here

Memo Text:

Enter Memo Text in This Box

- On the **Sales Acknowledgement** page, the **Part Num** (model #) under the **Part Num** column is a hyperlink to the part's (model #) description. Click on the hyperlink to open the page

NOTE: Model #'s are referred to as Part Num is the portal

Export To Excel						
Status: All	Days to View: 90					
Sales Order Acknowledgements						
Sales Order	TO Pack ID	Part Num	Qty	Ship To Name	Sold To Name	End User
108/ 1/ 1		2612-1	1	B & G Foodservice Equipment & Supply	B & G Foodservice Equipment & Supply	B & G Foodservice Equipment & Supply
111/ 1/ 1		SMALL-OVERRIDE	1	Golub Corporation	Golub Corporation	Golub Corporation

Hobart Equipment Service Portal

- Displays description of **Part Num** (Model #)
- Click on the **Back** to return to the **Sales Acknowledgement** page

Part Number Description	
Part:	2612-1
Part Description:	SLICER W/CARRIAGE TRAY 120/60/1 DOMESTIC STANDARD THICKNESS 1" 
Customer Part Description:	
<div style="border: 1px solid red; padding: 5px; display: inline-block;">Back</div>	

The Sales Order Acknowledgment page also allows you to see Carrier information and allows you to link to the Carrier's Website to track shipments (note: you may have to use the scroll bar at the bottom of your browser and scroll to the right to see this information). Clicking on the links in the BOL and/or PRO columns will open the Carrier's Website to their shipment tracking page.

Sales Order Acknowledgements												
Click Links to Track Shipments on Carrier Website												
Qty	Ship To Name	Sold To Name	End User	City	State	Zip	Need By Date	Status	Ship Date	Carrier	BOL	PRO
1	B & G Foodservice Equipment & Supply	B & G Foodservice Equipment & Supply	B & G Foodservice Equipment & Supply	Albany	NY	12214	01/22/2010	Delivered	02/25/2010	19 ABF	C290548280	067858742
1	Golub Corporation	Golub Corporation	Golub Corporation	Schenectady	NY	12306	01/22/2010	Open				
1	B & G Foodservice Equipment & Supply	B & G Foodservice Equipment & Supply	B & G Foodservice Equipment & Supply	Albany	NY	12007	01/29/2010	Delivered	02/25/2010	ROUTING GUIDE CARRIER		

ABF Freight System, Inc. Trace Shipment



Bill of Lading # C290548280

'YOUR SHIPMENT WAS DELIVERED ON 01/04/10 1115 (DEL SIG= SEAN TAYLOR).'

Origin [067]

Destination [070]

Pickup: 30-Dec-2009, WED

Pieces: 9

Weight: 2500

Delivery Signature: TAYLOR, SEAN

[Print Page](#)

Hobart Equipment Service Portal

On-Hand Inventory

- The **On-Hand Inventory** page displays the on-hand quantity of Commercial Sales equipment located in the Hobart Service office's equipment inventory

HOBERT BAXTER Traulsen Welcome Wilma Desselle to the Equipment Service Portal HOBERT SERVICE

Select Office: Winston Salem, NC [REDACTED]

Export To Excel

Warehouse on Hand Inventory

Part Num	On Hand Qty
HCM61-1	0
HLX-1SS	1
HLX-ELEDIS	1
HLX-RFID	0
HM1200-1	1
HPX3-5	1

Today's Date: 2/11/2010

NOTE: Model #'s are referred to as Part Num in this portal

- The **Part Num** is a hyperlink to the **Part Num Detail** window. Click on the hyperlink to open the page

HOBERT BAXTER Traulsen Welcome Wilma Desselle to the Equipment Service Portal HOBERT SERVICE

Select Office: Winston Salem, NC [REDACTED]

Export To Excel

Warehouse on Hand Inventory

Part Num	On Hand Qty
HCM61-1	0
HLX-1SS	1
HLX-ELEDIS	1
HLX-RFID	0
HM1200-1	1
HPX3-5	1

Today's Date: 2/11/2010

- Details for the selected **Part Num** will be displayed.
- Click on the **Back** button to return to the **On-Hand Inventory** window

Hobart Equipment Service Portal

Warehouse on Hand Inventory Detail				
Part: HLX-1SS				
Serial Number	Ship To Name	Sales Order	TO Pack ID	Delivery Report ID
4511111111	Abrys Store 123	132/ 1/ 1	17/ 1	7390 - 1/ 1

[Back](#)

Transfer Sales Orders

- The **Transfer Sales Orders** page displays the Transfer Orders that have been created and used to move the ordered equipment from the Commercial Equipment's warehouse or plant to the Hobart Service office

Sales Acknowledgement On-Hand Inventory Transfer Sales Orders ← Shipment Receipt Pending Delivery Report Delivery Print Blank Delivery Receipt User Profile My Sites		Select Office: <input type="text" value="Winston Salem, NC"/>		Export To Excel			
Transfer Sales Orders							
Transfer Order	Order Num	Status	Plant	Qty	Part Num	Need By Date	
29-000020	134	Pending	29 - 29 FEG Covington DC	1	HPX3-5	02/12/2010	
29-000021	134	Pending	29 - 29 FEG Covington DC	1	HM1200-1	02/12/2010	
29-000024	141	Pending	29 - 29 FEG Covington DC	1	HCM61-1	02/09/2010	
29-000025	141	Pending	29 - 29 FEG Covington DC	10	HLX-RFID	02/09/2010	
29-000026	141	Pending	29 - 29 FEG Covington DC	5	HLX-RFID	02/09/2010	
29-000027	141	Pending	29 - 29 FEG Covington DC	1	HCM61-1	02/26/2010	
29-000029	143	Pending	29 - 29 FEG Covington DC	1	HCM61-1	02/12/2010	
29-000030	147	Pending	29 - 29 FEG Covington DC	1	HLX-RFID	02/12/2010	
29-000031	147	Pending	29 - 29 FEG Covington DC	1	HLX-RFID	02/11/2010	
29-000032	147	Pending	29 - 29 FEG Covington DC	1	HLX-RFID	02/12/2010	
29-000033	148	Pending	29 - 29 FEG Covington DC	1	HCM61-1	02/12/2010	
29-000034	147	Pending	29 - 29 FEG Covington DC	1	HLX-RFID	02/11/2010	
29-000035	155	Pending	29 - 29 FEG Covington DC	1	HCM61-1	02/12/2010	

Today's Date: 2/11/2010

- Status Codes:**
 - "Pending"** - Transfer Order has been created but has not been shipped
 - "In-Transit"** - Transfer Order has been physically shipped and is on its way to the Hobart Service office
- Clicking on a **Transfer Order** number will display its detail

Hobart Equipment Service Portal

Transfer Sales Orders						
Transfer Order	Order Num	Status	Plant	Qty	Part Num	Need By Date
29-000020	134	Pending	29 - 29 FEG Covington DC	1	HPX3-5	02/12/2010
29-000021	134	Pending	29 - 29 FEG Covington DC	1	HM1200-1	02/12/2010
29-000024	141	Pending	29 - 29 FEG Covington DC	1	HCM61-1	02/09/2010
29-000025	141	Pending	29 - 29 FEG Covington DC	10	HLX-RFID	02/09/2010
29-000026	141	Pending	29 - 29 FEG Covington DC	5	HLX-RFID	02/09/2010
29-000027	141	Pending	29 - 29 FEG Covington DC	1	HCM61-1	02/26/2010
29-000029	143	Pending	29 - 29 FEG Covington DC	1	HCM61-1	02/12/2010
29-000030	147	Pending	29 - 29 FEG Covington DC	1	HLX-RFID	02/12/2010

- The **Transfer Sales Orders Detail** page will display
- Click on the **Back** button to return to the **Transfer Sales Order** page

Transfer Sales Orders Detail

Transfer Order Num:	29-000020
Transfer Order Line:	1
Plant:	29 - 29 FEG Covington DC
Part:	HPX3-5
Part Description:	ELE COUNTER CONVECTION STEAMER *STANDARD CONSTRUCTION 208/60/1/3 *4" ADJUSTABLE LEGS
Qty:	1
Need By Date:	2/12/2010
Sales Order Num:	134
Sales Order Line:	1
Sales Order Release:	1

Back


- The Transfer Sales Orders page also allows you to see Carrier information and allows you to link to the Carrier's Website to track shipments (note: you may have to use the scroll bar at the bottom of your browser and scroll to the right to see this information). Clicking on the links in the BOL and/or PRO columns will open the Carrier's Website to their shipment tracking page.

Transfer Sales Orders							Click Links to Track Shipments on Carrier's Website	
Order Num	Status	Plant	Qty	Part Num	Need By Date	Carrier	BOL	PRO
12	In-Transit	29 - 29 FEG Covington DC	1	2G-G22010	02/17/2010	19 ABF	C190547874	071227932
12	In-Transit	29 - 29 FEG Covington DC	1	HLX-1	01/12/2010	19 ABF	C190547874	071227932
13	In-Transit	29 - 29 FEG Covington DC	1	2612-2	02/16/2010	19 ABF TIMEKEEPER	C190547874	071227932
13	In-Transit	29 - 29 FEG Covington DC	1	2712PHS-1	01/27/2010	19 ABF	C190547874	071227932


Hobart Equipment Service Portal

Shipment Receipts

- Once a **Transfer Order Shipment** has arrived at the Hobart Service office, it must be received into the inventory
- The **Shipment Receipts** page allows a Hobart Service office to receive a **Transfer Order**

Transfer Sales Orders	Export To Excel							
Shipment Receipt 	Shipment Receipt							
Pending Delivery								
Report Delivery								
Print Blank Delivery Receipt	TO Pack ID	Transfer Order	Order Num	Part Num	Qty	Req Date	Need By Date	BOL
User Profile	18/1	29-000022	135	HM1200-1	1	02/15/2010	02/12/2010	0
My Sites	18/1	29-000022	135	HM1200-1	1	02/15/2010	02/12/2010	0
	18/2	29-000023	135	HPX3-5	1	02/15/2010	02/12/2010	0
	18/2	29-000023	135	HPX3-5	1	02/15/2010	02/12/2010	0
Today's Date: 2/11/2010								

- Use the **Transfer Order Packing** list attached to the freight as the document for performing the **Shipment Receipt**
- Identify the **Transfer Order** line to receive and click on the **TO Pack ID** number link to open the **Shipment Receipt Detail** window

Shipment Receipt								
TO Pack ID	Transfer Order	Order Num	Part Num	Qty	Req Date	Need By Date	BOL	
18/1 	29-000022	135	HM1200-1	1	02/15/2010	02/12/2010		0
18/1	29-000022	135	HM1200-1	1	02/15/2010	02/12/2010		0
18/2	29-000023	135	HPX3-5	1	02/15/2010	02/12/2010		0
18/2	29-000023	135	HPX3-5	1	02/15/2010	02/12/2010		0

- The **Shipment Receipt Detail** window will open

Hobart Equipment Service Portal

Shipment Receipt Detail

TO Pack ID:	18/ 1
Requested Qty:	1
Shipped Qty:	1
Part:	HM1200-1
Part Description:	HOBART MICROWAVE OVEN
Request Date:	2/15/2010
Need By Date:	2/12/2010
Ship Via:	ABF
Ship Date:	2/8/2010

Update Receipt Transaction Date:

Received Shipment

Serial Number(s)	Sales Order
AS11111111	135/ 1/ 1
AS11111111	135/ 1/ 1

- All Serial #'s for the **Transfer Order** will appear on the **Shipment Receipt Detail** page
- Receipt Date can be changed by Clicking on the **View Calendar** button and selecting the appropriate date
- Click on the **Received Shipment** button to receive equipment after which the **Shipment Receipt** page will be displayed

- NOTE:**
1. The portal will not handle shortages/overages
 2. The entire Transfer Order must be received
 3. An incorrect serial number cannot be changed
 4. Discrepancies must be reported to Troy Customer Care

- The received equipment will now appear on the **Pending Delivery** screen

Pending Deliveries											
yellow = not received red = order on hold green = available to pick from stock											
	Sales Order	Need By	Customer	Cust City	Cust State	Cust Zip	Model	Qty	On-Hand	TO Pack ID	Serial Num
<input type="checkbox"/>	132/ 2/ 1	2/12/2010	Abrys Store 123	Winston Salem	NC	27103	HLX-ELEDIS	1	1	17/2	
<input type="checkbox"/>	134/ 1/ 1	2/15/2010	Applebees Store 12	Winston Salem	NC	27103	HPX3-5	1	1		
<input type="checkbox"/>	134/ 2/ 1	2/15/2010	Applebees Store 12	Winston Salem	NC	27103	HM1200-1	1	1		
<input checked="" type="checkbox"/>	135/ 1/ 1	2/16/2010	Ruth Chris Steakhouse	Winston Salem	NC	27103-6703	HM1200-1	1	1	18/1	AS11111111
<input type="checkbox"/>	135/ 1/ 1	2/16/2010	Ruth Chris Steakhouse	Winston Salem	NC	27103-6703	HM1200-1	1	1	18/1	
<input type="checkbox"/>	135/ 1/ 1	2/16/2010	Ruth Chris Steakhouse	Winston Salem	NC	27103-6703	HM1200-1	1	1	18/1	
<input type="checkbox"/>	135/ 2/ 1	2/16/2010	Ruth Chris Steakhouse	Winston Salem	NC	27103-6703	HPX3-5	1	1	18/2	AP11111111
<input type="checkbox"/>	135/ 2/ 1	2/16/2010	Ruth Chris Steakhouse	Winston Salem	NC	27103-6703	HPX3-5	1	1	18/2	
<input type="checkbox"/>	135/ 2/ 1	2/16/2010	Ruth Chris Steakhouse	Winston Salem	NC	27103-6703	HPX3-5	1	1	18/2	

Hobart Equipment Service Portal

Pending Delivery

- The **Pending Delivery** page displays the Sales Order/Line/Releases that are “candidates” for being delivered
- This page is used to manage /coordinate/plan delivery of equipment to customers

The screenshot shows the Hobart Equipment Service Portal interface. At the top, there are logos for HOBART, BAXTER, and Truelsen. A welcome message reads "Welcome Wilma Desselle to the Equipment Service Portal". Below the logos, there is a "Select Office:" dropdown menu set to "Winston Salem, NC". The main content area is titled "Pending Deliveries" and contains a table with columns: Sales Order, Need By, Customer, Cust City, Cust State, Cust Zip, Model, Qty, On-Hand, and TO Pack. The table lists various sales orders with their respective details. A legend above the table indicates: yellow = not received, red = order on hold, green = available to pick from stock. A red arrow points to the "Pending Delivery" option in the left-hand navigation menu.

Sales Order	Need By	Customer	Cust City	Cust State	Cust Zip	Model	Qty	On-Hand	TO Pack
132/ 1/ 1	2/12/2010	Abrys Store 123	Winston Salem	NC	27103	HLX-1SS	1	1	
132/ 2/ 1	2/12/2010	Abrys Store 123	Winston Salem	NC	27103	HLX-ELEDIS	1	1	
134/ 1/ 1	2/15/2010	Applebees Store 12	Winston Salem	NC	27103	HPX3-5	1	1	
134/ 2/ 1	2/15/2010	Applebees Store 12	Winston Salem	NC	27103	HM1200-1	1	1	
135/ 1/ 1	2/16/2010	Ruth Chris Steakhouse	Winston Salem	NC	27103-6703	HM1200-1	1	1	
135/ 1/ 1	2/16/2010	Ruth Chris Steakhouse	Winston Salem	NC	27103-6703	HM1200-1	1	1	
135/ 1/ 1	2/16/2010	Ruth Chris Steakhouse	Winston Salem	NC	27103-6703	HM1200-1	1	1	
135/ 2/ 1	2/16/2010	Ruth Chris Steakhouse	Winston Salem	NC	27103-6703	HPX3-5	1	1	
135/ 2/ 1	2/16/2010	Ruth Chris Steakhouse	Winston Salem	NC	27103-6703	HPX3-5	1	1	
141/ 1/ 1	2/9/2010	Red Robin/Trimark Foodcraft	Winston Salem	NC	27103-6703	HCM61-1	1	0	
141/ 2/ 1	2/9/2010	Red Robin/Trimark Foodcraft	Winston Salem	NC	27103-6703	HLX-RFID	10	0	
141/ 3/ 1	2/9/2010	Red Robin/Trimark Foodcraft	Winston Salem	NC	27103-6703	HLX-RFID	5	0	
141/ 4/ 1	2/9/2010	Red Robin/Trimark Foodcraft	Winston Salem	NC	27103-6703	HCM61-1	1	0	
143/ 1/ 1	2/12/2010	Curran Taylor Inc	Canonsburg	PA	15317	HCM61-1	1	0	
147/ 1/ 1	2/12/2010	Bonefish Grill/Trimark Foodcraft	Winston Salem	NC	27103-6703	HLX-RFID	1	0	

- The **Pending Delivery** page is color coded:
 1. **“Black”** – Ready for delivery. Meaning that inventory has been received and assigned “specifically” to the Sales Order/Line/Release
 2. **“Red”** – Has been flagged “Hold” and not available to be delivered. Troy Customer Care has placed the Sales Order on hold for whatever reason. Contact Troy Customer Care for disposition at 800-333-7447
 3. **“Yellow”** – Indicates that a **Transfer Order** has been created to ship the equipment to the Hobart Service office but the equipment has not yet been physically received. Or it has been physically received but has not been entered into the inventory via the **Shipment Receipt** function
 4. **“Green”** – Indicates that inventory has been received and assigned “specifically” to a Sales Order but the Hobart Service office has enough stock to perform a delivery

Hobart Equipment Service Portal

- For those Sales Orders available for delivery, a checkbox will be displayed
- More than one Sales Order may be selected as long as Ship to Address is the same. Selecting Sales Orders with different Ship to Addresses will result in a pop-up message indicating so

There Is Currently No Data To Display

Error - You have selected Order Lines for multiple customers

- Check the box in front of the Sales Order you wish to deliver
- Click on the **Create Delivery Receipt** button resulting in the **Delivery Receipt Detail** page to open

Pending Deliveries											
yellow = not received red = order on hold green = available to pick from stock											
	<u>Sales Order</u>	<u>Need By</u>	<u>Customer</u>	<u>Cust City</u>	<u>Cust State</u>	<u>Cust Zip</u>	<u>Model</u>	<u>Qty</u>	<u>On-Hand</u>	<u>TO Pack ID</u>	<u>Serial Num</u>
<input type="checkbox"/>	132/ 1/ 1	2/12/2010	Abrys Store 123	Winston Salem	NC	27103	HLX-1SS	1	1	17/1	4511111111
<input type="checkbox"/>	132/ 2/ 1	2/12/2010	Abrys Store 123	Winston Salem	NC	27103	HLX-ELEDIS	1	1	17/2	
<input type="checkbox"/>	134/ 1/ 1	2/15/2010	Applebees Store 12	Winston Salem	NC	27103	HPX3-5	1	1		
<input type="checkbox"/>	134/ 2/ 1	2/15/2010	Applebees Store 12	Winston Salem	NC	27103	HM1200-1	1	1		
<input type="checkbox"/>	135/ 1/ 1	2/16/2010	Ruth Chris Steakhouse	Winston Salem	NC	27103-6703	HM1200-1	1	1	18/1	AS1111111111
<input type="checkbox"/>	135/ 1/ 1	2/16/2010	Ruth Chris Steakhouse	Winston Salem	NC	27103-6703	HM1200-1	1	1	18/1	
<input type="checkbox"/>	135/ 1/ 1	2/16/2010	Ruth Chris Steakhouse	Winston Salem	NC	27103-6703	HM1200-1	1	1	18/1	
<input type="checkbox"/>	135/ 2/ 1	2/16/2010	Ruth Chris Steakhouse	Winston Salem	NC	27103-6703	HPX3-5	1	1	18/2	AP1111111111
<input type="checkbox"/>	135/ 2/ 1	2/16/2010	Ruth Chris Steakhouse	Winston Salem	NC	27103-6703	HPX3-5	1	1	18/2	
<input type="checkbox"/>	135/ 2/ 1	2/16/2010	Ruth Chris Steakhouse	Winston Salem	NC	27103-6703	HPX3-5	1	1	18/2	
	141/ 1/ 1	2/9/2010	Red Robin/Trimark Foodcraft	Winston Salem	NC	27103-6703	HCM61-1	1	0		
	141/ 2/ 1	2/9/2010	Red Robin/Trimark Foodcraft	Winston Salem	NC	27103-6703	HLX-RFD	10	0		
	141/ 3/ 1	2/9/2010	Red Robin/Trimark Foodcraft	Winston Salem	NC	27103-6703	HLX-RFD	5	0		
	141/ 4/ 1	2/9/2010	Red Robin/Trimark Foodcraft	Winston Salem	NC	27103-6703	HCM61-1	1	0		
	143/ 1/ 1	2/12/2010	Curran Taylor Inc	Canonsburg	PA	15317	HCM61-1	1	0		
	147/ 1/ 1	2/12/2010	Bonefish Grill/Trimark Foodcraft	Winston Salem	NC	27103-6703	HLX-RFD	1	0		
	147/ 3/ 1	2/12/2010	Bonefish Grill/Trimark Foodcraft	Winston Salem	NC	27103-6703	HLX-RFD	1	0		
	147/ 4/ 1	2/12/2010	Bonefish Grill/Trimark Foodcraft	Winston Salem	NC	27103-6703	HLX-RFD	1	0		
	147/ 5/ 1	2/12/2010	Bonefish Grill/Trimark Foodcraft	Winston Salem	NC	27103-6703	HLX-RFD	1	0		
	147/ 6/ 1	2/12/2010	Bonefish Grill/Trimark Foodcraft	Winston Salem	NC	27103-6703	HLX-RFD	1	0		
	148/ 1/ 1	2/12/2010	Change me				HCM61-1	1	0		
	155/ 1/ 1	2/12/2010	Curran Taylor Inc	Canonsburg	PA	15317	HCM61-1	1	0		
	157/ 1/ 1	2/12/2010	Red Robin/Trimark Foodcraft	Winston Salem	NC	27103-6703	HCM61-1	1	0		

- **Delivery Receipt** page will open
- Click the **Print Delivery Receipt** button to display Delivery Receipt (replaces CMR) to print for equipment delivery

Hobart Equipment Service Portal

Print Delivery Receipt

Delivery Receipt Number:	01610-3
Customer Name:	B & G Foodservice Equipment & Supply
Address:	60 Commerce Ave
City:	Albany
State:	NY
Zip:	12216
Status:	Pending
Created By:	grimesa
Date Created:	2/1/2010 4:42:00 PM
Customer Signature:	
Comments:	<div style="border: 1px solid gray; height: 60px; width: 100%;"></div>

Hobart Food Equipment Group <small>Representing these premier brands</small>				Delivery Receipt		Receipt #: 01610-3 Print Date: 2/26/2010
<input checked="" type="checkbox"/> Ship/Deliver To: B & G Foodservice Equipment & Supply 60 Commerce Ave Albany, NY 12216						
<input type="checkbox"/> Release To: _____						
Sales Order	PO Number	Model	Serial Number	Description	Notes/Comments	
108/ 1/ 1	DJR TEST Portal 1	2612-1		SLICER W/CARRIAGE TRAY 120/60/1 DOMESTIC STANDARD THICKNESS 1"		
Delivered By (please print):			Date	Customer Name (please print):		Date
Delivered By Signature:				Customer Signature:		
Print						

Important Note: Print 2 copies- 1 to leave with customer and 1 to be retained by branch

Report Delivery

- The **Report Delivery** page lists all of the Delivery Receipts a Hobart office has created

Hobart Equipment Service Portal

- Status could be **Pending** (in process of delivering to customer or delivered but Delivery Receipt has not been updated), **Delivered**, or **Voided**
- **Delivery Receipt** number is a link which opens the **Delivery Receipt** page

Sales Acknowledgement
On-Hand Inventory
Transfer Sales Orders
Shipment Receipt
Pending Delivery
Report Delivery
Print Blank Delivery Receipt
User Profile
My Sites

Select Office: Winston Salem, NC

Delivery Reporting

Status: Pending

Delivery Receipt Number	Customer Name	City	State	Date Created
07390-1	Abrys Store 123	Winston Salem	NC	02/08/2010

- The **Delivery Receipt** page is where a Hobart Service office would:
 1. Print a Delivery Receipt (CMR)
 2. Void a Delivery Receipt
 3. Report that the equipment on a Delivery Report was delivered

Print Delivery Receipt

Delivery Receipt Number:	07390-1
Customer Name:	Abrys Store 123
Address:	2601 Hope Church Rd
City:	Winston Salem
State:	NC
Zip:	27103
Status:	Pending
Created By:	shindje
Date Created:	2/8/2010 5:08:00 PM
Customer Signature:	
Comments:	

Edit


Void Delivery Receipt

- Click **Print Delivery Receipt** button to display the **Delivery Receipt** (CMR) in order to print

Hobart Equipment Service Portal

- If needed click on **Print** or **Ctrl P** to print the **Delivery Receipt** (CMR). This **Delivery Receipt** replaces the Consigned Machine Release (CMR) Print 2 copies- 1 to leave with customer and 1 to be retained by branch
- The customer will sign the **Delivery Receipt** upon equipment delivery

Hobart Food Equipment Group
Representing these premier brands



Delivery Receipt

Receipt #: 07390-1
Print Date: 2/12/2010

Ship/Deliver To: Abrys Store 123
2601 Hope Church Rd
Winston Salem, NC 27103

Release To: _____

Sales Order	PO Number	Model	Serial Number	Description	Notes/Comments
132/ 1/ 1	jon1	HLX-1SS	4511111111	HLX SCALE/PRINTER HLX COMTCP RF10NO WGHLS CASWID CFD1GB LANENG ML-029309-JR	
132/ 2/ 1	jon1	HLX-ELEDIS		ELEVATED DISPLAY ASSY.	

Delivered By (please print): _____ Date: _____

Delivered By Signature: _____

Customer Name (please print): _____ Date: _____

Customer Signature: _____

[Print](#)

- Equipment must be reported delivered after the delivery is complete
- Open the **Delivery Receipt** by clicking on the **Delivery Receipt** number from the **Report Delivery** page.

- Sales Acknowledgement
- On-Hand Inventory
- Transfer Sales Orders
- Shipment Receipt
- Pending Delivery
- Report Delivery ←
- Print Blank Delivery Receipt
- User Profile
- My Sites

Select Office: Winston Salem, NC

Delivery Reporting

Status: Pending

Delivery Receipt Number	Customer Name	City	State	Date Created
07390-1 ←	Abrys Store 123	Winston Salem	NC	02/08/2010

Hobart Equipment Service Portal

- Click on the **Edit** button on the **Delivery Receipt** screen

Print Delivery Receipt	
Delivery Receipt Number:	07390-1
Customer Name:	Abrys Store 123
Address:	2601 Hope Church Rd
City:	Winston Salem
State:	NC
Zip:	27103
Status:	Pending
Created By:	shindje
Date Created:	2/8/2010 5:08:00 PM
Customer Signature:	
Comments:	

Edit

Void Delivery Receipt

- If after creating and printing the **Delivery Receipt**, you are unable to deliver; click on the **Void Delivery Receipt** button and the Sales Order will be removed from the **Report Delivery** page and appear on the **Pending Delivery** page
- When ready to deliver the equipment that was on the voided **Delivery Receipt**, a new **Delivery Receipt** needs to be created from the **Pending Delivery** page. (See **Pending Delivery** script instructions if needed)
- The Delivery Receipt has a **Header** and **Line** Section
 1. In the **Header** section enter the Customer's name receiving the equipment and enter any comments about the delivery
 2. Click the **Update** button to save the Header information that was entered.
 3. In the **Line** section:

Hobart Equipment Service Portal

- Click the **Edit** button on the line you wish to update
- Enter the date the equipment was delivered
- Can change the serial number that was actually delivered if different than originally assigned to order
- Click the **Update** button to save the information you entered
- If you need to remove a line from the Delivery Receipt, click on the **Remove** button

Header Section

Delivery Receipt Number:	07390-1
Customer Name:	Abrys Store 123
Address:	2601 Hope Church Rd
City:	Winston Salem
State:	NC
Zip:	27103
Status:	Pending
Created By:	shindje
Date Created:	2/8/2010 5:08:00 PM
Customer Signature:	<input type="text" value="John Smith"/>
Comments:	<input type="text"/>
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	

Line Section

<input type="checkbox"/>		Part Num	Part Description	Serial Number	Quantity	Sales Order	Status	Delivery Date
<input type="checkbox"/>	<input type="button" value="Edit"/> <input type="button" value="Remove"/>	HLX-1SS	HLX SCALE/PRINTER HLX COMTCP RF10NO WGHLS CASWID CFD1GB LANENG ML-029309-JR	4511111111	1	132 / 1 / 1	Pending	
<input type="checkbox"/>	<input type="button" value="Edit"/> <input type="button" value="Remove"/>	HLX-ELEDIS	ELEVATED DISPLAY ASSY.		1	132 / 2 / 1	Pending	

Hobart Equipment Service Portal

Serial # and Date may be selected from drop down box

<input type="checkbox"/>	Part Num	Part Description	Serial Number	Quantity	Sales Order	Status	Delivery Date																																																	
<input type="checkbox"/>	HLX-1SS	HLX SCALE/PRINTER HLX COMTCP RF10NO WGHLBS CASWID CFD1GB LANENG ML- 029309-JR	<input type="text" value="4511111111"/>	1	132 / 1 / 1	Pending	<div style="border: 1px solid gray; padding: 2px;"> <p style="text-align: center; margin: 0;">February 2010</p> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th>Su</th><th>Mo</th><th>Tu</th><th>We</th><th>Th</th><th>Fr</th><th>Sa</th> </tr> </thead> <tbody> <tr> <td>31</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td> </tr> <tr> <td>7</td><td>8</td><td>9</td><td style="background-color: #e0e0e0;">10</td><td>11</td><td>12</td><td>13</td> </tr> <tr> <td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td> </tr> <tr> <td>21</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td> </tr> <tr> <td>28</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td> </tr> <tr> <td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td> </tr> </tbody> </table> </div>	Su	Mo	Tu	We	Th	Fr	Sa	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	1	2	3	4	5	6	7	8	9	10	11	12	13
Su	Mo	Tu	We	Th	Fr	Sa																																																		
31	1	2	3	4	5	6																																																		
7	8	9	10	11	12	13																																																		
14	15	16	17	18	19	20																																																		
21	22	23	24	25	26	27																																																		
28	1	2	3	4	5	6																																																		
7	8	9	10	11	12	13																																																		

- To report lines from the Delivery Receipt as Delivered:
 - Check the box on the line of the equipment to be delivered
 - Click on the **Report Delivered** box

<input type="checkbox"/>	Part Num	Part Description	Serial Number	Quantity	Sales Order	Status	Delivery Date
<input checked="" type="checkbox"/>	HLX-1SS	HLX SCALE/PRINTER HLX COMTCP RF10NO WGHLBS CASWID CFD1GB LANENG ML-029309-JR	4511111111	1	132 / 1 / 1	Pending	

<input type="checkbox"/>	Part Num	Part Description	Serial Number	Quantity	Sales Order	Status	Delivery Date
<input checked="" type="checkbox"/>	HLX-1SS	HLX SCALE/PRINTER HLX COMTCP RF10NO WGHLBS CASWID CFD1GB LANENG ML-029309-JR	4511111111	1	132 / 1 / 1	Delivered	2/12/2010

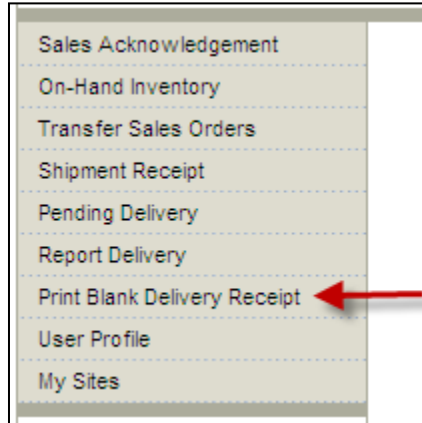
- The **Delivery Receipt Detail** will indicate equipment has been delivered

[Print Blank Delivery Receipt](#)

- The **Delivery Receipt** replaces the Consigned Machine Release (CMR)

Hobart Equipment Service Portal

- Demos or Loaners will require a **Delivery Receipt** be completed and signed by the customer upon receipt of equipment delivery
- Click on **Print Blank Delivery Receipt** from the Category window



- The **Delivery Receipt** page will open. Click on **Print**
- Print 2 copies- 1 to leave with customer and 1 to be retained by branch

Hobart Food Equipment Group						Receipt #:
Representing these premier brands						Print Date:
<input type="checkbox"/> Ship/Deliver To: _____						
<input type="checkbox"/> Release To: _____						
Sales Order	PO Number	Model	Serial Number	Description	Notes/Comments	
Delivered By (please print):			Date	Customer Name (please print):		Date
Delivered By Signature:			Customer Signature:			
Print						

Hobart Equipment Service Portal

Service Charges

Sales Acknowledgement
On-Hand Inventory
Transfer Sales Orders
Shipment Receipt
Pending Delivery
Report Delivery
Print Blank Delivery Receipt
Service Charges
User Profile
My Sites

Select Office: Winston Salem, NC Agency (07390)

Days to View: 90
30
60
90

Export To Excel

Order	Part Num	Qty	Charge Type	Charge Amount	Ship To Name	Sold To Name
51850/ 1	UHT60-ZCF-LR	1	INSTALLATION	\$849.00	CHICK FIL A 700	Chick Fil A/Strategic/
53798/ 1	4732-18	1	INSTALLATION	\$88.00	Lowes Food Store 245	Lowes Food Stores I
54654/ 16	BRIDGE-DPCBJQ	5	INSTALLATION	\$525.00	BJS WHOLESALE CLUB 118	BJ's Wholesale Club
55665/ 1	FMS20NH-U1N1	1	INSTALLATION	\$72.00	Lowes Food Store 245	Lowes Food Stores I
55669/ 1	403-1	1	INSTALLATION	\$61.00	Lowes Food Store 245	Lowes Food Stores I

Today's Date: 7/15/2010

"Service Charges" screen displays Installation and/or 2nd Year Warranty credits received on a Order

Important Numbers

Customer Care: 800-333-7447

Help Desk: 937-332-2263