

Create contract & Pre-Fill SLA Based on Contract not Activity Type

Last updated by | David Mishler Gomocha | May 13, 2025 at 12:58 PM GMT+2



Create contract & Pre-Fill SLA Based on Contract not Activity type + Automatically assign contract with order if there is only 1 contract assignable

Use Case Scenario:

- Company X serves both residential and industrial customers.
- The standard Emergency Response Call (E-Call) SLA for Company X is 8 hours.
- Customer A, an industrial client, requires an E-Call SLA of 1 hour.
- With Gomocha FSP Company X can create a customized contract for Customer A, setting a specific SLA duration/response time based on the contract rather than the type of activity.

For this example we will use the Activity Type - E-Call (emergency call) seen below

Administration > Master Data > Activity Type: **E-Call has an SLA Response time of 480 min (8 Hours)**

The screenshot displays the 'Gomocha FSP Portal - GoDavid' interface. The left sidebar contains navigation options such as Dashboard, Analytics, Customer management, Planboard, Service center, Service orders, Field quotes, Timekeeping, Service agreements, Resource management, Asset management, Material management, Purchase Management, Message center, Configurators, Administration, App groups, and Device Management. The main content area is titled 'Master data manage' and shows a table of master data items. The table has columns for Id, Description, Billable, and a status icon. The 'E-Call' item is highlighted. To the right of the table is a form for creating or editing an item. The form includes fields for Id, Description, Duration, Response time, Billable, Flow definition, Color, Finishingactor, Allow create in App, Is project, Is bundle, Skill, and Property definitions. The 'Response time' field is highlighted with a green box and contains the value '480'. Below the table and form are buttons for 'SAVE ITEM' and 'ARCHIVE ITEM'.

Id	Description	Billable	
Maintenance	Maintenance	1	
Failure	Failure	1	
Installation	Installation	1	
Meeting	Meeting	0	
Lunch	Lunch	0	
TravelHome	Travel home	0	
Test Activity	Test Activity	0	
Preventative Maint...	Preventative Maint...	1	
Project	Project	1	
E-Call	Emergency Call	1	

E-Call Order Creation Without Contract

E-Call order creation with SLA duration based on activity type, no contract

Order Registrations Customer Questionnaire Status history

Order Data **Address and contact data** **Order Planning**

Order Number 2483639 : 1

Assets Coffee 20 Coffee Machine X

Status Created

Customer Gomocha

Reported time 5/13/2025, 11:44 AM

Contract -

Type* Emergency Call

Priority -

Skills Select Some Options

Status date and time 5/13/2025, 11:44 AM

Characteristics -

Project Number

Remark -

Reason -

Name -

Remark

Street Achterweg

House Number 38

House number addition

City Waardenburg

Zip Code 4181AE

Region* Default

Country Netherlands

State

Additional Address Info-

Latitude 51.83256

Longitude 5.24827

SELECT LOCATION

Asset number -

Maintenance Data -

Engineer group Engineer group

Override auto-added skills

Engineers Select Some Options

Default warehouse for engineer

Recurring order No

Appointment Fixed?

Engineer Fixed?

Scheduled start date & time 5/13/2025, 11:49 AM

Scheduled end date & time 5/13/2025, 12:49 PM

Duration 000.01.00

Must be in days.hours:minutes

SLA start date & time 5/13/2025, 11:49 AM

SLA end date & time 5/13/2025, 7:49 PM

SLA duration 000.08.00

Must be in days.hours:minutes

Is planned by a customer? No

Preferred engineer -

Problem -

Cause -

Solution -

CANCEL SAVE AND SAVE AND PLAN

Configure E-Call Order Creation Based on Contract

- Add contract to customer asset
- Call Intake (**Service Center** in new portal menu) > Customer > Customer Asset > Asset Details Screen > +Add (contract)

The screenshot shows the 'Call Intake' interface. On the left is the 'SELECT' panel with a search bar and a table of assets. The 'Coffee Machine' asset is highlighted. On the right is the 'EDIT ASSET' panel for a coffee machine, showing fields for name, type, serial number, location, and inspection details. A 'Contracts' section at the bottom has a '+ ADD' button highlighted with a red arrow.

Fill out details of contract, specifically Type, Duration, Priority > Save

- **Note:** To add an "Activity Type with Default SLA Duration and Priority," the user must first **create and save the contract**, then **edit the contract** to access and add that field

This screenshot shows the 'Edit Contract' form for an 'Emergency Response Call'. The 'Contract Details' section is highlighted with a green box. It includes fields for ID, description, type, start/end dates, customer, and skills.

This screenshot shows the 'Activity type' section of the 'Edit Contract' form. The 'Activity type with default SLA duration and priority' is highlighted with a green box. A red box highlights the 'Emergency Call' activity type, and a red arrow points to the 'SAVE' button.

Contact now Visible on customer asset details screen

EDIT ASSET

Serial number* 20 State [] High/Low* Interval 1 High/Low* Interval unit: Days []

Project number [] Additional Address Info [] Installation date 6/30/2019

Customer reference [] Region* Default Running hours [] Production date []

Maintenance Code [] Latitude 51.83256 Longitude 5.24827

Skills [] Project name [] **SELECT LOCATION** Type approval []

Preferred engineer [] Type approved []

SLA response time [] Type approved asset []

Asset Actions [] Batch number []

Id	Type	Customer	Asset description	Start	Commands
E-Call	Failure	Gomocho	Coffee	5/13/2025	[] [] []

Contracts

Contact

CONTACT CANCEL SAVE

Contract Details

Contract Details

Id [] Description Emergency Response Call

SLA Number [] Name []

Type [] Service Interval []

Start [] End []

Customer [] Asset Coffee, Coffee

Skills []

Amount []

Custom fields

Contract Group [] Customer Name []

Auto-create maintenance order

Auto-creates maintenance order activity status type [] Customer name []

SLA maintenance plan in days [] SLA maintenance plan in days []

Asset type with auto-create order details

Asset type	Activity type	Activity type with default SLA duration and priority	Maintenance Interval (in days)	Order Duration (SLA/Hours)	Priority
Emergency Call	SLA duration (in hours)	Emergency Call	1	Critical	Critical

Orders related to contract

Order number	Status	Customer name	Type	Planned start date	Planned start date (with...)	Planned SLA end	Description	On...
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Adjust System Settings

System Settings > Call intake (**Service Center** in new portal menu) related order settings > Select boxes seen in image > Save

Administration > System settings

General settings

General settings | Map settings | Notifications | Connectors | Email | SMS | Password Policy | Report settings | Passphrase | Quote | License settings | Payment settings

General settings

Call intake related order settings

Technical order settings

Asset related settings

Planning settings

Attachment settings

Materials

Experimental features

Prefill SLA duration when creating an order based on the contract, instead of activity type

Automatically assign contract with order if there is only 1 contract assignable

Create linked multiple orders

SAVE

Call Intake (Service Center in New Portal Menu)

- Select activity type contract was created on, E-Call > Priority and SLA duration now prefilled
- SLA duration and priority are based on contract and not Activity type

Call Intake COLLAPSE SELECT EXPAND FULL SELECT

SELECT

Customers Assets

Quick search

Default +

Advanced +

Custom fields +

Saved searches

+ ADD CUSTOMER + CREATE NEW

Name	Number	Location
Ajax FC	AFC	Borchlan
Asa Ablay	Asa 1	60 Macp
Cannon Business Center	CBC	Van de R
Gomocha	ParksonAdmin9ae6ba194334...	Achterw

Id	Serial number	Descrip
ParksonAdmin9ae6ba1943...	10	Dishwa
Coffee Machine	20	Coffee
abcs	30	Sliding
Revolving_doors	40	revolvir
Mobile_device	50	Mobile

50 items per page Reset grid state

Order Registrations Customer Questionnaire Status history

Order Data

Order Number: 2483670 : 1

Assets: Coffee 20 Coffee Machine

Status: Created

Customer: Gomocha

Reported time: 5/13/2025, 12:45 PM

Contract: E-Call - Emergency Response Call

Type: Emergency Call

Priority: Critical

Status date and time: 5/13/2025, 12:45 PM

Project Number:

Remark:

Reason:

Name:

Remark:

Address and contact data

Street: Achterweg

House Number: 38

City: Waardenburg

Zip Code: 4181AE

Country: Netherlands

Latitude: 51.83256

Longitude: 5.24827

SELECT LOCATION

Order Planning

Asset number: -

Maintenance Data: -

Engineer group: Engineer group

Override auto-added skills:

Engineers: Select Some Options

Default warehouse for engineer: -

Recurring order: No

Appointment Fixed?

Engineer Fixed?

Scheduled start date & time: 5/13/2025, 12:50 PM

Scheduled end date & time: 5/13/2025, 1:50 PM

Duration: 000.01.00

SLA start date & time: 5/13/2025, 12:50 PM

SLA end date & time: 5/13/2025, 1:50 PM

SLA duration: 000.01.00

Is planned by a customer:

Preferred engineer: -

Problem: -

Cause: -

Solution: -

CANCEL SAVE AND SAVE AND PLAN