Tech Tip Tuesday—June 2, 2015

by Chip Bowman

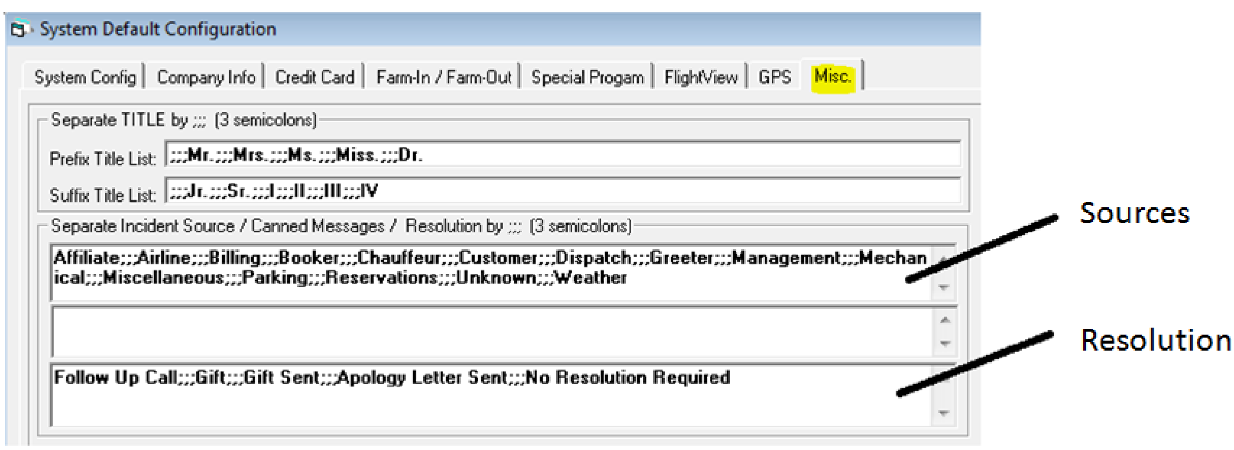
Incident Reporting – Part 1

An essential part of any quality assurance program is a system for tracking and reporting service errors. Of course all the information in the world won't help you improve your quality unless the information is communicated and used in a proper manner. With Livery Coach's Incident Reporting function you have all of these tools at your fingertips, so read on if you're ready to take your company to the next level.

When I think of incidents, my focus tends to be on the negative; something that caused the customer pain, or to get less that the desired service. But there are other types of incidents that, while no customer harm may have been done, that you still care about and want to document. In fact, tracking these types of incidents and correcting the behavior is a critical proactive step in quality management. So before you move on to setting up the system, meet with your team and decide what types of service issues, if not all, will be recorded as incidents.

Once you've decided which issues will be recorded, it's almost time to start using the system to keep track of them, but there are a few quick setup tasks that need to be reviewed—incident sources, and incident resolutions.

In Maintenance, open up system default configuration and select the MISC tab.

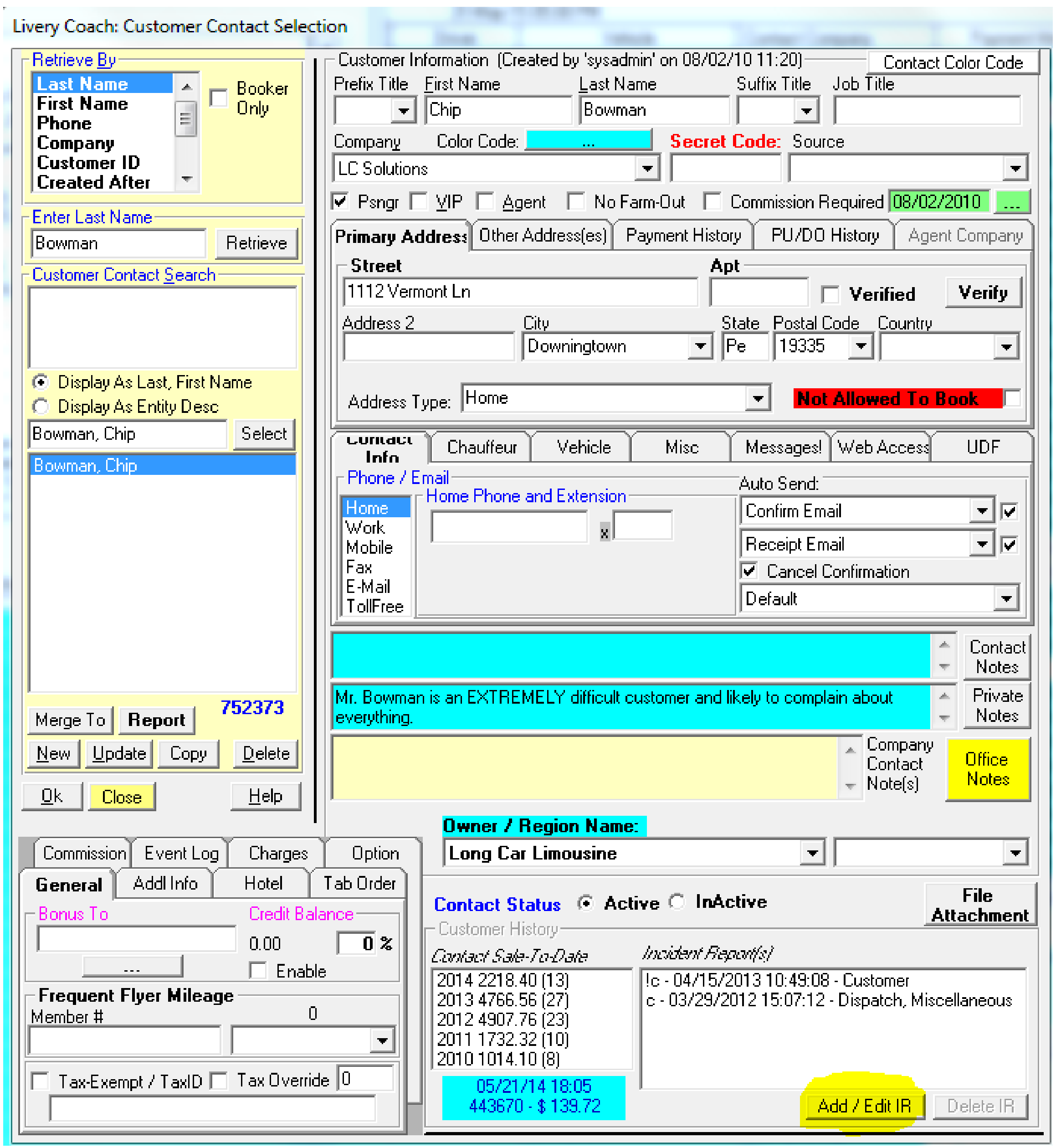


An incident "source" is the cause of the issue. Incidents could be caused by any number of things, including humans, machines or things that are out of your control, like the weather. Add/edit or delete sources from the menu, separating each source with three semicolons ;;;

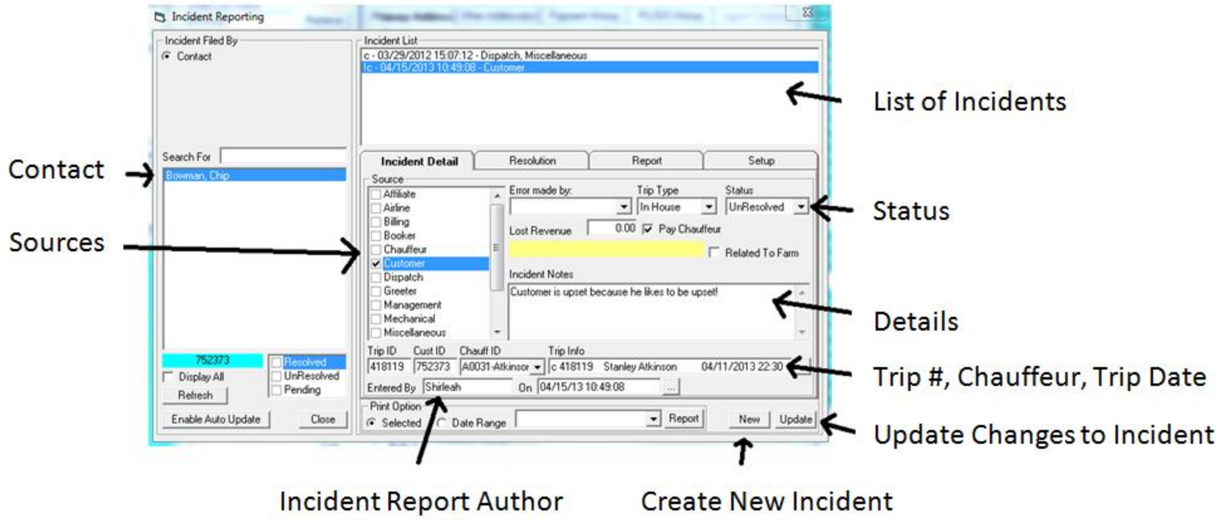
"Resolutions" are what you did to make it better. Resolutions can be as simple as a call to the customer, or as complicated as ordering the chauffeur to mow their lawn in his wife's Sunday finest.

Note: The system will permit you to add more than one source and more than one resolution.

To create an incident related to a trip, simply open the trip, click on the booker (contact record) of that trip, and look for the incident button at the bottom of the screen.

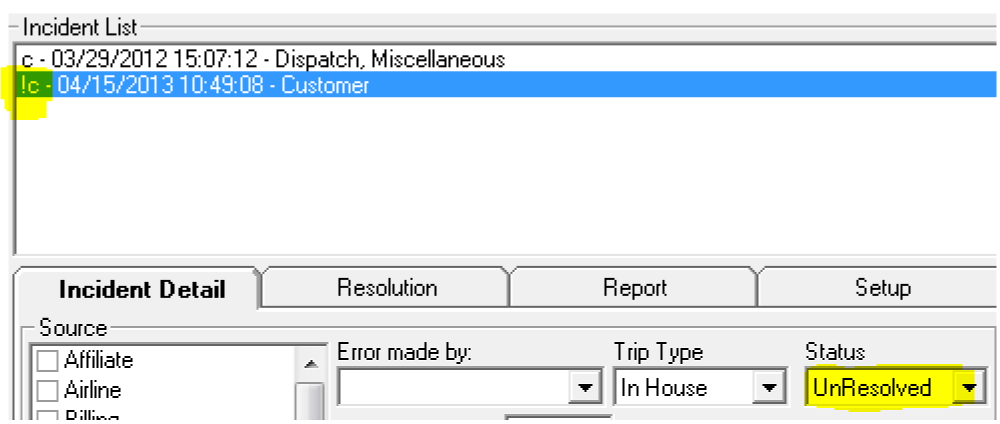


Click the Add/Edit IR button.



The incident reporting window has several sections. On the left hand side we see the selected contact, in the uppermost right window we see a list of incidents, and the lower right quadrant list various details about the selected incident.

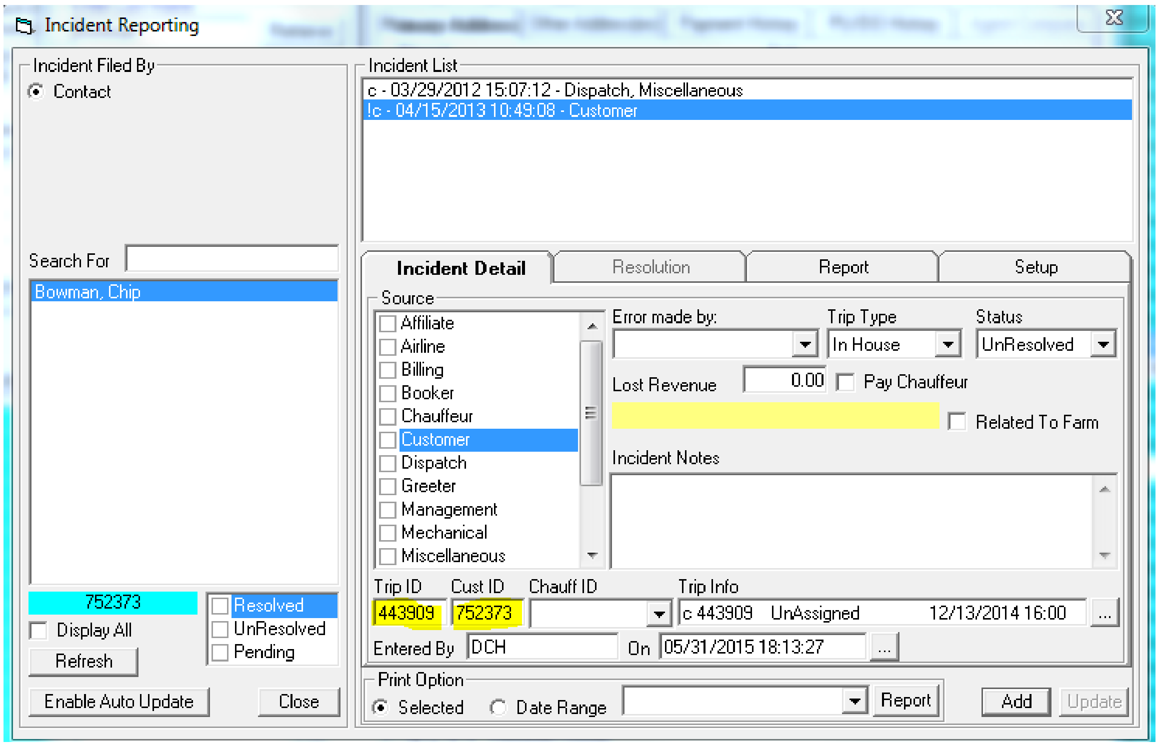
Moving back to the incident list, if you look carefully you'll notice that the selected incident has an exclamation point at the beginning. This indicates that the incident is currently open/unresolved. While the indicator makes it easy to see unresolved incidents, you can also filter the list to show only unresolved incidents by selecting the "unresolved" option in the lower left corner of the screen.



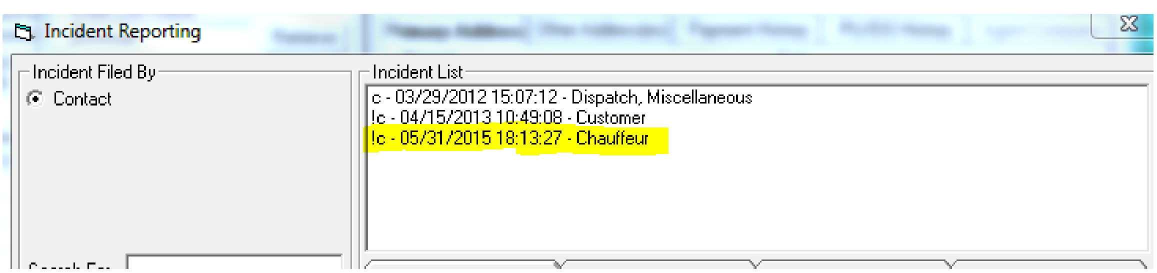
Note: If an incident is unresolved and associated with a trip you will not be able to close the trip until the incident status is set to resolved.

We're getting a little ahead of ourselves, so lets step back and start by creating a new incident..

Clicking the new button at the bottom of the screen clears the form, then loads the current trip.



As you can see from the highlighted section, the trip number and customer ID filled in automatically. Now select the incident source, add your comments, and click add.



Congratulations, you've just created your first incident. Observe that it now appears in the incident list. Now close the window and look at the trip summary.

Observe that there is now a deep red IR button visible.

Click on the IR button to go back into the incident, mark it resolved, click update and return to the trip summary.

Note that the IR button is still present, but colored green.

In a future tech tip we'll discuss how to run reports on incidents. If you're already a user of incident reporting, please feel free to share your ideas in our Facebook group.