

Device Magic - Updating Customer Machine Build and Contact Details

How to update the details for customers, build numbers and email contact details on the Device Magic forms

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Information from this point is not relevant from Nov 2023

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Version Information

This procedure simplifies and standardises the background resources for the forms data and supersedes any procedures before 16/11/2020. The form data is now stored on a Google Sheet that is simple to maintain and update

 ...From November 2023, a zapier system has been added to keep the customer and build number data in the Google Sheet updated automatically. Do not attempt to update the sheet manually as it is now indexed with id numbers that relate directly to Monday items

Form Data Location -Google Sheet

The data is located here

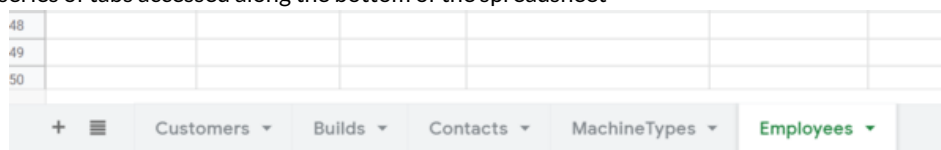
Device Magic Data v2

The sheet is password protected by Google account, so you need to be logged on to Google as stugaservice@gmail.com. the password for this account is available from the service coordinators. The easiest way to be logged on is to ensure you have Chrome installed, and log onto chrome with the stugaservice account.

If you are clicking the above link, you will need to ensure it is then opened in Google chrome.

There are lots and lots of variations on the process of being logged in, but **the main point is that you will have to be recognised as stugaservice@gmail.com to be able to edit any of the data.**

The data is stored on a series of tabs accessed along the bottom of the spreadsheet



Information from this point is not relevant from Nov 2023



Customers Tab


The first tab is a list of the customers.


Customer Tasks

Task	Notes
Add a new customer	Insert into the list in alphabetical order
Change a Customer name	If the name is changed on this tab, you MUST update the associated fields on the Builds and Contacts Tabs
Add a default email address	Add the email address for the default recipient at this customer - a copy of the report will always be sent to this address



Builds Tab

The builds tab lists the fleet of machinery that Stuga looks after and should be identical to the "Machines" board in the Monday system. This link is made here between the Customer who owns the machine and the machine type.

 ...The machine Type is important because this dictates the steps of the Planned Maintenance form


 ...Note that the Machine Type and Customer columns have a little triangle at the end denoting a drop-down list. This is crucial in maintaining the accuracy of the data for the device magic app

Builds Tasks

Task	Notes
Adding a new machine build	First, copy a line that is there already to <u>maintain the dropdown list integrity</u> Insert / Add the copied line in the list of machines in the correct ordered position. - For a new ZX5 build, you will be adding it to the end <ol style="list-style-type: none">1. Update the Build Number2. Update the Machine type3. Update the customer <p> ...If this is a new customer, you will have to add them to the Customer Tab first</p>
Moving a machine from one owner to another	<ol style="list-style-type: none">1. Find the build number in the list2. Update the customer <p> ...If this is a new customer, you will have to add them to the Customer Tab first. If the machine has been bought by Stuga, change the customer to "Stuga Machinery LIMITED"</p>


Contacts Tab

The contacts lists the names and email addresses of the onsite contacts for the device magic form. These are vital shortcuts so the engineers do not have to keep adding the same contact names and email addresses at each customer site

 ...Note that the Customer column has a little triangle at the end denoting a drop-down list. This is crucial in maintaining the accuracy of the data for the device magic app

Contacts Tasks

Task	Notes
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Adding a new contact for a customer site	<p>First, copy a line that is there already to maintain the dropdown list integrity Insert / Add the copied line in the list of contacts in with the other contacts for this customer and add the details</p> <p> ...There is a spreadsheet column called "Default". Adding "Yes" defines this contact as a default email address that the site emails get sent to if the signee of the form does not have / does not know an email address</p>
Deleting a contact	Simply delete the row from the database
Changing contact details	The customer contact details can be readily changed to update spelling mistakes or change of email addresses

Other Tabs

The other tabs will generally be maintained by GG or JW

Tab	Used For
Machine Types	Listing the different machine types
Employees	Listing the service engineer details Placing Yes in the Service engineer column means their details will be called up on the service visit forms