

WORKING GOOGLE DOC - Guide for how we use this in JJ AUTO PARTS-

Updated BRAD 20/06/2024

[LINK/LOOP TO ZOHU](#)

WORKING GOOGLE DOC is a description we use @ JJ for a google document that we use and share as a link
WARRANTY WORKING DOCS - is a warranty working doc

OVERVIEW

WHY DO WE USE THEM ?

The working docs are used when we have lots of notes (plus 3 lines) to describe explain a situation/action required we note the action/next steps in the google doc so we have clear statement of what has occurred , what is the current status and who and when will take next steps

these are useful when we have multiple people actioning an item and some staff will have access only via pinnacle but other staff have access via ticketing system

We use the working docs so we don't have to remember what happened if/when we are asked later
We use the working docs so other staff can see the status when we aren't there or so they don't have to interrupt us

WHEN DO WE USE "WORKING DOCS"

2 main areas

- 1. when notes are between tickets and pinnacle in different departments

I.e

for an item issue we have sales staff - who don't have access to zendesk accounts tickets

Working /actioning an issue and discussing with accounts staff who use zendesk tickets

- 2. When we have multiple lines of actions to resolve this issue notes to be added to a single invoice/rma then its easier to just make a working doc and then add all the information in there

If admin staff who action things via tickets are actioning/checking an item for sales then its easier to simply have a working doc

- 3. when we the **think** the item will become complex i.e plus 3 steps

[VIDEO GUIDE](#)

we can use a working doc inside as the google document can be edited and "kept tidy " easily

Note even if single question now ,

if we know we are asking others and they reply and then we advise customer then in that case we add a working doc

Cause by then its 3 steps and stages already

I.e every time sales asks sales manager as regards item/invoice issue it should be a working doc

SET UP

- 1. Have google docs shortcut bookmarked to your computer

[LINK TO GENERAL GUIDE ABOUT GOGGLE DOCS](#)

- 2. SET UP GUIDE FOR FILES TO SAVE TO DRIVE AND LINK IN A WORKING DOC
AAA WORKING DOC MISC FILES

[LINK TO VIDEO GUIDE](#)

- 3. Have your google docs page to be tabloid size and font to be 14 as default so can read easily

[VIDEO FOR GOOGLE DOCS PAGE SET UP](#)

STEPS- HOW DO WE USE WORKING DOCS @ JJ

1. just open a google doc from your own google account (doesn't have to be the master account)

name the document appropriately

i.e

the invoice number ,rma number etc

2. Screenshot the invoice/work order/credit note etc on the 1st page of working doc
if invoice/ work order is multiple pages - ADD A SCREENSHOT OF ALL THE PAGES IF MULTIPLE

[LINK TO VIDEO GUIDE](#)

3. IN ORDER HISTORY IN PINNACLE - ADD NOTE " USE WORKING DOC "

On the next line

paste the link into the history of pinnacle and in the ticket

we do it like that as it's much easier to get the link open again if its on separate line

or if in a ticket just paste the link there

or paste into RMA notes

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reminder : make sure to put share settings as all having edit access "

Once we have started a working doc then put **all** subsequent actions inside that doc

Put a line — in between steps ----

When you add note -

Note your name - date added - highlight that

The comment of action, all details

THE LIST LINE ON THE BOTTOM OF THE DOC

On last line of your note - advise the the next steps - who and when

Example for JJ staff to follow up

"BRAD TO FOLLOW UP (whatever the reason is) NAME DATE"

If it is in customers hands that is the next steps

"CUSTOMER TO ADVISE (whatever the reason is) NAME DATE"

CUSTOMER IS GETTING DIAGNOSTIC REPORT - JJS DO NOT NEED TO FOLLOW UP - BRAD 21/06

THEN HIGHLIGHT THE LAST LINE

DO NOT ADD COMMENTS OUTSIDE OF THE WORKING DOC

ADD ALL INFORMATION TO THE WORKING DOC

i.e

DO NOT add to pinnacle - IT ALL SHOULD BE INSIDE THE WORKING DOC

<https://docs.google.com/document/d/1U6tGeP6E71hu-Az9Lcyr9hFB87QEkgqYXEfH7Kg>
CONTACTED CUST VIA SMS - CUST ADVISED THAT HE CANT PICK UP THE PART DUE

DO NOT add to email and working doc

DO NOT add to ticket and working doc

Hi Brad,

Savannah called and was asking on why they only received \$80 and not full refund. Please advise. Thanks

<https://docs.google.com/document/d/1cY4NE9-sVtuwKZJfCOX9Hiunxr9rjT6CICPen85yoIE/edit>

ALL INFORMATION & DETAILS IS TO BE IN THE WORKING DOC!

-
If in a ticket

Reply to say - doc updated with link

-
The user would just need to go the the bottom of the doc and read the last section added to see your notes

GUIDES - "one deal- one doc "

its one deal for one working doc

otherwise the deals go in all different directions and you can't keep together

if it's the "one deal " i.e a replacement so its 2 invoices but a related deal then yes in that case we would put in one working doc but otherwise keep it simple and one deal one doc

like it's one ticket for one item

ADDING IN EMAILS sent/received as part of WORKING DOCS -KEEP POINT - Add the details fully

If you are sending /receiving emails as part of issue/working doc

The include the complete email with details of who received from / who sent to

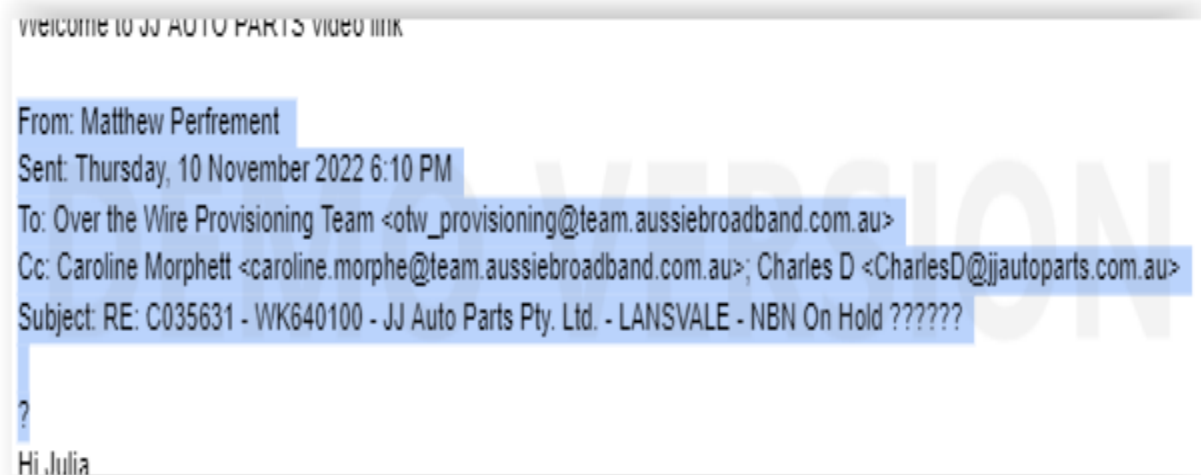
As screenshot

i.e

DO LIKE THIS

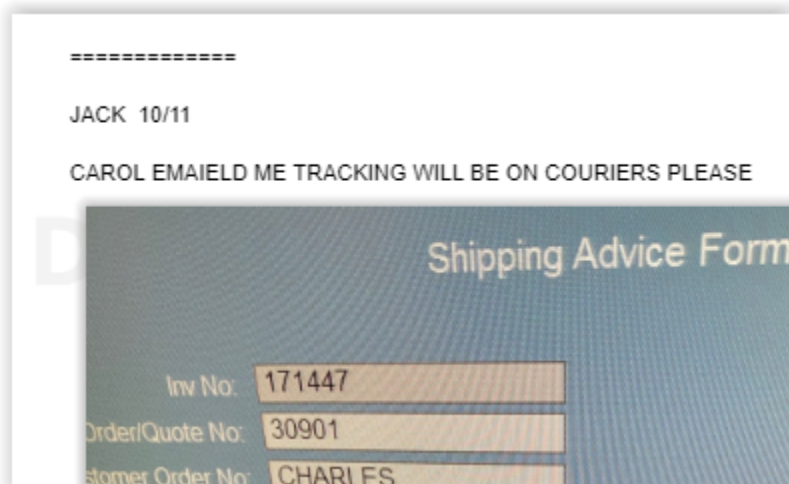
This below show FULL details who sent to , EXACTLY when , who was ic CC

So if follow up required , we can efficiently get all details from this email , others can take over as they know the email address



DON'T DO LIKE THIS

If others to take over , they don't have carol email address, what exactly and fully did carol say



GUIDES FOR WORKING DOCS - ATTACHMENTS

[Link to video guide](#)

At times we will have Files that we need to note in the working doc

We can save the file in a drive an then put it as a link in the working doc

To do this we ended to have done set up

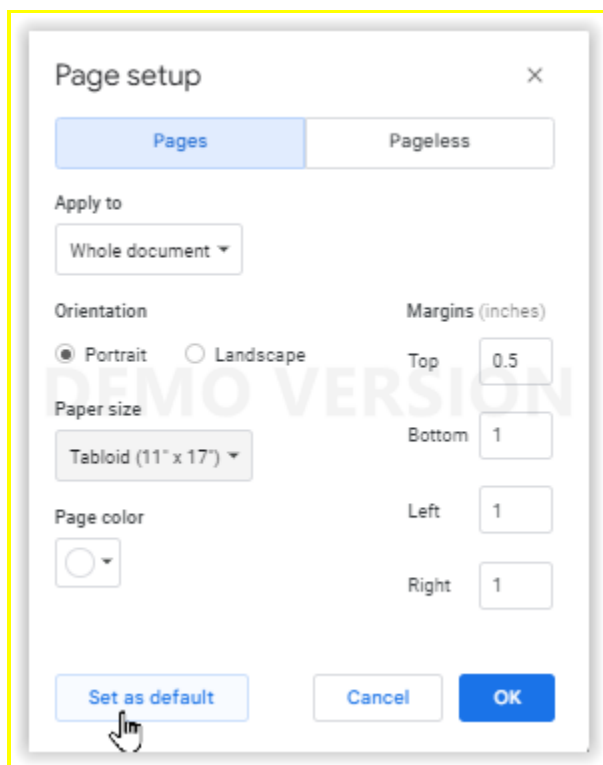
See link reminder fo that

GUIDES FOR WORKING DOCS - ATTACHMENTS -MAKE PAGE BIGGER

If adding Screen shots make doc tabloid view so can view the screen shot

[VIDEO GUIDE](#)

Note you can set this as a default



SET UP GUIDE FOR FILES TO SAVE TO DRIVE AND LINK IN A WORKING DOC

AAA WORKING DOC MISC FILES

[LINK TO VIDEO GUIDE](#)

STEPS

Have the working doc open

Save the file that we want to link into the working doc to desktop or downloads

Open up your AA misc working docs drive - if you have this setup this is easy

Add /download that file

Add open access

Copy link back to google doc

NOTE

You can just leave field in your AAA WORKING DOCS FOLDER - No need to clear out

FAQs

How to attach a file into a working doc?

See and follow [THIS GUIDE](#)