SM Plus Software

Navigate to the SM Plus software, and follow the steps outlined below.	
1	• Ensure no one else is logged into the Buc-ees customer portal before proceeding. Locate the store's address number and zip code found in the customer request email.
2	On the *Service Console* page in the *Primary Criteria* tab, enter the store's address number surrounded by asterisks (*) into the *address* field.
3	Enter the store's zip code surrounded by asterisks (*) into the *Postal/Zip* field.
4	Click **Refresh**.
5	From the results populated at the bottom of the page, double-click the correct store. • The *Service Console* page will appear. • Ensure the customer site address matches in the customer request email and in the customer portal.
6	Click **X-Ref** to review open calls.
7	Click **View site history** to view all the calls. • If there is a duplicate, view the details.
8	Click **Enter New Call**. • The *Quick Incident Create* page will appear.
9	Ensure the Work Order (WO) number matches the WO number found in the customer portal.
10	Enter information from the customer request email into the appropriate fields. • Priority code • Not To Exceed (NTE) • Service type – refrigeration or HVAC • Customer Purchase Order (PO) – ensure this matches the customer portal • General reason • Specific reason • Description • Contact

SM Plus Software Continued	
11	In the *Work Order Notes* section, enter information from designated sources (i.e., email and customer portal) as outlined below. • WO description – (email) • Interactive Voice Response (IVR) – (email) • Priority – (email) • Do Not Exceed (DNE) – (email) • Trade – (email) • Asset information – (email) • Expected to arrive within – (email) • Completion date – (portal) • Estimated Time Arrival (ETA) – (portal) • Contact – Store Manager – (email)
12	Click **OK**.
13	Click **X-Ref**. • The *Work Orders* tab will appear.

14	Enter information into the appropriate fields.
	• Account Manager - House
	• Bill to
	• Dispatcher – (also used for the *Partner* field)
	• Division
	  ○ If the *Division* field does not follow the PDXX formatting, follow the steps below.
	1. Email Data Management and Customer Service with the proper code.
	  ○ Refer to the **CheatSheet_DivisionCodes** document.
	2. Click **Schedule**.
	3. In the *Partner* field, input the dispatcher information.
	  ○ Send a Teams message to the appropriate area if you manually entered the 25-pending status due to division inaccuracy.

15	Click **Save**.

SM Plus Software Continued	
16	On the *Work Orders* page, click the *Billing* tab. • In the *Corporate Customer* field, ensure the billing code is correct. ○ Refer to the **CheatSheet_BillingCodes** document. • If the billing code is not correct, the *Division* field will likely be incorrect too, which warrants an email to Data Management and Customer Service.
17	Right-click anywhere on the screen and select **Save**.
18	Right-click anywhere on the screen and select **Refresh**.

Customer Portal

Navigate to the customer portal, and follow the steps outlined below.	
19	Click **Pending Work Orders**. • The results will appear below.
20	Double-click the desired WO.
21	Click **Accept**. • An *Accept Dispatch* pop-up screen will appear.
22	From the customer request email, locate the scheduled date and scheduled time information.
23	Add the scheduled date and schedule time information into the appropriate fields of the *Accept Dispatch* pop-up screen.
24	Click **Confirm**.