Adventureworks Client Contact Form and Process

Inputs

- Web visitor uses **WEB online form**(s)
- Staff creates record using **WEB online form**, or, in case of initial interview, using the **ADMIN online form**. (There might not be an initial interview, since a phone call might come in when no appropriate staff is available, so the entry might be nothing but name and phone number. By using the same online form, the answering staff can ensure the default staff assigned to NEW will be notified and can follow up.)

> AUTOMATIC_ACTION: **WEB online form** creates new record (w/ status=NEW) and notifies (email?) the default staff assigned (to NEW records).

Record update - interview by staff

This step requires ADMIN online form. (This is either an edit to an existing record, or creation of new record.)

Information likely input here:

- Staffer making entry (value list ?)
- Date/time (timestamp? ~~but should allow edit)~~
- Name (should we have first/last?) **Yes**
- Group/company name
- Phone
- Email
- Additional contact info (might be street address(es), other contacts in same group, alternate phones, email, whatever)
- Type of group (from a value list *)
- Type of program (should we have value list?)
- Date requested for program
- Time frame/duration for program
- Location desired for program
- Number of participants anticipated
- Estimated total cost
- Notes
- Assigned to (from a value list *)

Message (the incoming, from the online form)

Please clarify. Old form didn't have this. Is there a point for this? Might be better/easier w/ simple text field?

Is it possible these fields can be basis for INITIAL and FINAL values?

BUT we'll need another field for PRICE, when it's established.

Will we track Facilitators? Do we want value list table (so names are in a list, for choosing), or simple text field for entry?

> Record STATUS may be altered at this point (NEW, WARM, UNDERWAY, CONFIRMED, BUILDING, DELIVERED, COMPLETED, TRANSFER, PURGE)
>
> Status would be set to PURGE if, for example, it was determined contact was not a good fit, or if the issue was not related to a program or other service appropriate for this workflow.
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> ---
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>
> From here on, **if the status is WARM**, the record enters a **Program Workflow**, with **milestones** as listed below.

Program Workflow

> Each step here should provide for dating and signing. Normal workflow would require only entry of date and **sign**. In some cases, there may be reason to provide for some notes.
>
> Record's status would be altered at **trip points** in the workflow, as noted.

- Fax Packet sent
- Interview (w/ Notes)
  - **Status=**UNDERWAY
- Proposal in progress (w/ option to re-assign)
- Proposal sent
- Followup (w/ Notes; could incl emails and/or phone calls)
- Contract received
- Deposit received
  - **Status=** CONFIRMED
- Program on calendar (acquires **Job Name**)
  - Job packet created with **Job Name**, name and location noted here
  - **Status=** BUILDING
- Program staffed
  - List staffers, pay, roles
  - Confirm staffing
  - Connect lead staff and client's contact person
- Program Resources acquired
  - Location(s)

- Meals, snacks
- Materials

- Final client check-in (what is this?)
- **Program delivered**
    - **Status=**DELIVERED
- Program followup
    - Final payment received
    - Summary to office
    - Summary to client
        - **Status=**COMPLETED

Record path

After program workflow reaches the end, a record's status becomes COMPLETED. The record could be removed from the active set, and moved into a permanent (?) CLIENTS set.

At any time during the Program Workflow, circumstances might indicate the record status be PURGE (if no future contact is desired); or TRANSFER, if it's determined it should be put in a hold, or compost, or revisit set.

Reporting

- Show all active reports by date modified
    - Incl. Status=NEW, WARM, UNDERWAY (?: CONFIRMED, BUILDING)
    - Either show record abstracts in report or links to records
- Show WARM records more than NN_Days old (user enters range)
- Show active records (or records of particular Status) by Staff Assigned
- Show records with Status= DELIVERED
    - This should find outstanding receivables and incomplete Summaries
- Show upcoming Programs
    - Find future-scheduled programs (need term?)
- General purpose FIND
    - Allow for searching for text string (user input) in various fields (e.g., Name, Group/Company, Status, RecordCreationDate, ...)