# Pacifica Group

Customer Portal



Technical Specification

|  |  |
| --- | --- |
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Part

1

System Overview

Overall system structure

# Introduction

This document describes the database structures and technical structure contained within the Customer Portal.

## System Overview

A new portal is being created for service guarantee customers. This portal will allow customers to raise new service requests on selected guarantee and service contract products. This online facility will also include two-way communications with the service desk and provide live information on service requests progress. The portal will dynamically re-orientate the display to suit the device being used. The interface will be touch friendly, mobile optimised and will work just as well on mobile phones, tablets and standard browsers.

All service requests registered via the customer portal that are accepted or declined will be downloaded in Pacifica’s own service request administration systems to enable invoicing. This will include service requests satisfied through soft service fix.

## System Technology

The system runs on Microsoft SQL Database server 2012. The web application is written using Microsoft .NET application framework. All information will be live regardless of which channel updated the data.

Using CSS Style sheets the website will be dynamically branded with the client branding dependent on the customer relationship. The Customer Portal will be branded for both Littlewoods and Very including but not limited to logo, fonts, buttons, styling etc.

Embarcadero RAD Studio is used to execute and monitor all system web services.

The web portal will operate on Chrome, versions 49+, Internet explorer, version 10+, Safari, version 7+, Firefox, version 41+

All page responses should be within one second from the server side. *NB. This may be longer if the client connection is slow.*

The online solution will be available 24 hrs per day/7 days per week/365 days per year.

## Database Structure

The database is held in discrete database tables with a table for the data, the indexes and the dynamic data.

The codebase is multi-tenant with an enforced Tenant ID used to separate clients.

## Referenced Documents

The following documents accompany the specification:

* Screenshots - TBC

# Customer Portal Overview

The portal has been designed around the customer appliance as the customer’s main focus. Each appliance assigned to the customer is displayed on an individual listing. Functions are then available on each appliance.

The portal provides the following functions:

* View appliance and service guarantee information. Additionally, obtain terms & conditions, appliance product manuals, setup services, tips and health check
* Report a fault and book a repair online.
* Provide written two-way communication with the service desk via the in-built notes system.
* Provide repair information for customers under guarantee.
* Provide and manage repair and courier booking for customers under guarantee where available.

# Customer Portal Account Creation

Due to legacy SD brands being migrated over time this has crated scenarios where by 1 email address is associated to more than one SD account and those SD accounts are in the names of two different people.

In order to address these scenarios SD policy data will be aggregated in to Portal Accounts using a combination of customer email and SD account number as per the process flow below.

## Portal Account Creation Process



If a customer has both branded accounts they should only be able to see their Very policies on Very and vice versa.

Part

2

Functional Specification

This section describes the functional aspects of the system.

# Customer Enrolment

## Enrolment Process Map



## Enrolment Process

### Enrolment Link Email

On successful receipt of the service guarantee file from Shop Direct **(see section 28 for the file details)** by UK Warranty, the Service Guarantee holders will be emailed a link to the customer portal to enable them to enrol.

When a new customer is received in the service guarantee upload file an enrolment email will automatically be generated. A customer will be considered unique by their SD account number. If a portal account has previously been created additional SG’s will be added. **(Please see section 5.2.4 for further details on Additional SG service plans)**

For the avoidance of doubt it is expected that the initial file transfer will include all existing Shop Direct Service Guarantee holders.

The URL that facilitates the link to the enrolment screen will contain the following information:

* Enrolment code which will be visible in the URL as shown below:



The enrolment code will be a one-time generated random code unique to the customer. This random code will be generated using a standard MS SQL function which generates a unique GUID (Globally Unique Identifier) – this itself utilises a standard Window operating system level routine to generate this based on unique settings of the server (including IP address, network MAC address & clock date/time). This method aligns with accepted good practice for generation of unique identifiers. Each code will be stored with the customer id in a table on the UK Warranty server.

New Shop Direct customers will be sent an enrolment email **(see section 9.6 for enrolment email details)** within 24 hours of receipt of the file by UK Warranty. Initial enrolment emails will be phased.

### Initial Enrolment Page

The link will open a .NET new password page on the customer portal server. The user will be requested for their email address and postcode. (**See Customer Portal Screen Shots slide 3 Enrolment Page for details.)**

### Enrolment Email and Postcode Validation

The postcode and email will be uppercased and space trimmed and compared to the customer record. If these do not match the user will be given an email address and postcode error and not moved forward to enter a new password.

If there is not a match a message will appear that will read ‘The email and postcode combination do not match’. This will then allow the entry to be retried. **(See Customer Portal Screen Shots slide 4 Enrolment Page – Email and Postcode do not match**

**for details.)**

If the email or postcode is entered incorrectly more than five times the enrolment code will be invalidated. The user will then be presented with the ‘Enrolment Failed’ page where the user will enter their email address **(Reference the screen shots here)**.

A new email can then be generated to the email address for the customer to try again.

Once the postcode has been verified the user will be requested for a password and to confirm it. **(Reference the screen shots here)**.

Passwords will be validated as containing both alpha and numeric characters and be at least eight characters in length.

Once the password is set the user will be logged in and presented with the home page. **(See section 7.6 for Home Page details)**

All passwords will be stored in a salted hash format using bCrypt library.

### Additional SG service plans

Any further policies this service guarantee holder sets up will not generate an enrolment mail.  An email will however be generated to advise this new service guarantee has been added to their existing portal account. **(See section 9.6 for New Service Guarantee email details)**

### Reusing the Enrolment Link

After enrolment the user can use the link from the enrolment email to login to their portal account. Clicking on the enrolment link if the password has already been set the user will be presented with the standard customer login page. If a user has been sent more than one enrolment email only the link from the last enrolment email will work. **(See Customer Portal screen Slide 3 - Standard Customer Login Page)**

In addition the standard URL link will allow the customer to login from SD brand websites i.e. ‘My Account’, ‘FAQs’ and ‘Money Zone’.

### New Email Address from Streamline

#### Customer changes e-mail address after enrolment email received but has never enrolled

There may be occasions where a customer receives an enrolment email but doesn’t click on the enrolment link for a long period of time e.g. 6 months from receiving the enrolment email.

It is possible that during these 6 months the customer may change their email address in ‘My Account’. Changes made in ‘My Account’ do not automatically update streamline. This will create a potential issue for customers whereby they believe the email address for the customer portal has been changed. Copy and content in conjunction with communications to relevant areas will attempt to ensure that customers informed appropriately.

If a customer changes their email address in ‘My Account’ then ONLY upon either of the two events listed below will the streamline data feed provide a new email address to UK Warranty thus ensuring the customer portal account email address has been updated

* Upon renewal of SG post email being changed in ‘My Account’
* Purchase of a service guarantee warrantable retail item from either Very or Littlewoods

During the intervening period between customers changing their ‘My Account’ email address and either of the two events above occurring, customers may try and use the old enrolment email and link.

In this scenario the customer will be allowed to click the link and will be presented with the ‘Enrolment Page’. However as the email address has been changed the customer will receive an ‘Enrolment Failed’ message and will be prompted to enter an email address. It is the email address entered at this point where the new enrolment email will be issued to.

#### Customer changes e-mail address after enrolment email received and has enrolled

Should a customer enrol for the customer portal after receiving the enrolment email and subsequently change their email address in ‘My Account’ they will still be able to use the email address the enrolment email was issued to until either of the events bulleted in 5.2.6.1.

If either if the events bulleted in 5.2.6.1 occurs then the ‘Enrolment Failed’ journey will be followed and when the customer is prompted to enter an email address they should enter their new email address.

# Customer Login Process



After clicking any of the available links to the customer portal the user will be presented with the standard customer login screen **(reference screen shot here)** where the customer will enter their email address and password.

## Successful Login

### One email address to One SD account Number

The user will enter their email address and password combination and click the ‘Sign In’ button.

When the username and password combination are correct the user will be presented with the Home Page of the customer portal. See section 7.6 for full details on the Home Page.

### One email address to more than One SD account Number

An additional validation step will appear **ONLY** when an SG holder attempts to login to the customer portal when more than one account number is associated to the email address.

If more than one Shop Direct account number is associated with an email address an ‘Account Validation’ screen will appear asking the customer to enter their shop direct account number **(reference screen shot here).**

Once the Shop Direct account number has been entered the customer will click on **‘Next’**.

Once this button has been clicked the customer will be presented with the Home Page of the correct account showing the Service Guarantee warranties associated to that email address, account number and brand.

If the customer enters an incorrect account number (defined as an account number that does not match the records in UK Warranty systems) they will be given a maximum of 5 attempts to enter it correctly.

When the incorrect account number is entered and the customer clicks ‘Next’ an on screen message will appear that will read ‘An unrecognised account number has been entered. Please try again.’ This message will appear in red text underneath the words ‘Account Validation’

After the 5th incorrect attempt the customer will see a new page on screen that will advise the customer to call the contact centre using the claims number to proceed with their journey.

The offline process will then continue with UK Warranty claims handlers completing ID&V checks.

## Unsuccessful Login

The user will have three scenarios that lead to an unsuccessful login

* Forgotten Password link
* Exceeding the maximum of 5 login attempts

### Forgotten Password Link

A ‘Forgotten Password’ link **(reference screen shot here)** is available to the customer that takes the customer to the ‘Forgotten Password’ page. **(reference screen shot here).**

The customer will enter an email address which will generate a ‘Forgotten Password’ email to reset the password. The link should be above the ‘Sign In’ button. **(See section 9.6 for Forgotten Password email details)**

### Exceeding the maximum of 5 login attempts

Users will get a maximum of 5 login attempts to enter the correct email address and password combination. If the combination entered is incorrect they will receive a message on screen “Email address not recognised”or “Password not recognised” depending on which data item is incorrect. **(Reference screen shot here).**

The customer email is always sourced from the customer’s streamline service guarantee information. This will be updated when the service guarantee information is imported. A new Streamline email address will change the login email address for the customer.

An exception to this rule would be where a customer updates their email address with UK Warranty directly as per the process detailed in **6.5 Not Enrolled Link.**

Where the email address has been updated directly with UK Warranty the Streamline data feed should not overwrite thisin UK Warranty systems.

If a customer attempts to password re-set on an email not set up in the system their logon attempt will be unsuccessful. They will be presented with an error message that says “Email address not recognised”. Customers will have 5 attempts to enter the associated email address. After the 5th attempt customers will be directed offline as per 6.4 Unrecognised Email Address

There will be scenarios where by the customer may update their email address in ‘My Account’ which will not automatically update streamline. This will create a potential issue for customers whereby they believe the email address for the customer portal has been changed. Copy and content in conjunction with communications to relevant areas will attempt to ensure that customers informed appropriately.

If a customer changes their email address in ‘My account’ ONLY upon either of the two events listed below will the streamline data feed provide a new email address to UK Warranty thus ensuring the customer portal account email address has been updated

* Upon renewal of SG post email being changed in ‘My Account’
* Purchase of a service guarantee warrantable retail item from either Very or Littlewoods

During the intervening period between a customer changing their my account email address and either of the two events above occurring, customers may forget and try and access the customer portal using the ‘My Account’ email address. This scenario follows the same 5 login attempt rule.

The Streamline data will be made unique using the Streamline customer id. This the SD account number.

## Forgotten Password / Incorrect Password Process

If a user exceeds their maximum login attempts or clicks the forgotten password link they will be presented with the ‘Forgotten Password’ page where the user will enter their email address **(Reference the screen shots here)**.

A ‘Forgotten Password’ email with a link to reset the password will then be generated to the email address for the customer. When the customer clicks on the link they will be presented with a ‘New Password’ page. **(Reference the screen shots here)**.

The customer will enter a new password in the ‘New Password:’ field and click ‘next’.

Passwords will be validated as containing both alpha and numeric characters and be at least eight characters in length.

Once the password is set the user will be logged in and presented with the home page. **(See section 7.6 for Home Page details)**

**A ‘Password Changed Confirmation’ email will be issued to the customer. (See section 9.6 for ‘Password Changed Confirmation’ email details)**

If the password is not validated the customer will receive a message on screen ‘Invalid Password’ and will be given the opportunity to enter a new password. The user has unlimited attempts to choose a password. **(Reference the screen shots here – This needs a screen shot and confirming with UKW.)**.

## Unrecognised Email Address

There may be scenarios where by the customer is entering an email address at login that does not match records held by UK Warranty.

Where a customer exceeds the 5 login attempts due to an unrecognised email address being entered the customer will be presented with an on screen message to direct the customer offline to discuss and update their login credentials with UK Warranty directly.

## Not Enrolled Link

A link will exist on the Login page that will allow users to select a new enrolment email to be issued.

Predominantly those who will benefit from this functionality will be:

* Back Book customers having access to the customer portal
* Customers who misplace their enrolment links
* Invalid email addresses (defined as an email address that doesn’t correspond with what is already captured for the customer)

When the customer clicks on the link they will be presented with the option to enter an email address for the enrolment email to be issued to. The email address the customer entered will be validated against what is already captured for the customer.

* If the email address entered **DOES** match what is already captured an enrolment email will be issued to the customer using this email address. The customer will receive an on screen notification that will explain the next steps and what the customer should do in the event the enrolment email is not received. (Refer to screen shot here)
* If the email address entered **DOES NOT** match what is already captured the customer will receive an on screen notification to call the contact centre to complete the enrolment by updating the email address. (Refer to screen shot here)

When an email address is updated by the customer by calling the contact centre subsequent Streamline policy files from Shop Direct should not overwrite these.

# Portal Functionality

## Portal Flow



## Page Footer

Every page will include standard website footer. The footer content will be provided by Shop Direct. **(Reference screen shot here)**

## Contact Us / Legal Page

A contact us page will be available to the customer containing content provided by Shop Direct. **(Reference screen shot here)**

## Home Button

A ‘Home’ button will be visible on each screen available in the customer portal. The ‘Home’ button will take the user back to the Home page. **(insert Icon Here)**

## Back Button

The ‘Back’ button will only be available on pages in the customer portal where it is logical for users to return to the previous screen. E.g. returning to the ‘Home’ page from the ‘Product’ page. **(insert Icon Here)**

## Home Page

The appliances and SG’s will be ordered by date in descending order showing the most recently purchased SG first. Expired SG’s will be displayed last. The icon and text on expired SG’s will be greyed out. **(Reference screen shot here)**

### Expired SG Products

Customers will still be able to click on expired SG products. They will be able to do this by clicking on the icon or the ‘Access to Services’ button.

Customers will be able to access the product page after clicking on the icon or the ‘Access to Services Button’.

Customers will not be able to report a fault on expired SG products.

For day 1 historical service plans that have expired with in the previous 2 years from the date of implementation will be displayed in the portal.

### Cancelled SG Products

Cancelled warranties will not be displayed in the portal. If a warranty is cancelled after being presented in the portal it should be removed once cancellation status is received on the Shop Direct Policy File

### Customer Information Drop Down

This screen contains a dropdown to display the following:

* Customer address
* Customer telephone number
* Customer email address

#### ***Mobile Input***

If a mobile number is not recorded from the service guarantee file the customer will be requested for a new mobile number. The customer will see an extra drop down appearing on the home page asking for mobile number. After the mobile is entered drop down disappears.

### Job Notes Prompt

The notes button will only show on a product that has an open job. The button will list how many unread notes are available. The button will open the relevant job page and position the page to the notes section.

### Retail Product Icon

|  |  |
| --- | --- |
|  | The details included here are:   * + Product category e.g. Electric Cooker   + Product Brand e.g. Vestel   + Model Number e.g. WMB81445L   + Serial Number e.g. 34465657686   + Warranty Status. This could be either ‘Appliance Under Cover’ or ‘Expired’. This status will be updated in real time to reflect the current status of the warranty. |

This is the product icon and accompanying details as per the screen shot above.

When the user clicks on the icon they are directed to the Product Page **(See section 7.7 for ‘Product Page details)**

### ‘View Job’ Button

This button is found below the retail product information and will only appear when there is a job active on that particular warranty. When the user clicks on this they are directed to the Job Page **(See section 8.4 for ‘Job Page’ details) (Reference screen shot here)**

### ‘Access Service’ Button

This button is found below the retail product information and will appear when there is no job active on that particular warranty. When the user clicks on this they are directed to the Product Page **(See section 7.7 for ‘Product Page’ details) (Reference screen shot here)**

### New Product Support Content Alerts

Product support content is defined as hints and tips, set up support and annual health checks. **(See section 7.7.2.1 for Product Support Content details)**

If any product support content is newer since the last customer login timestamp an alert link will be displayed at the top of the page under the customer information section. This link will take the customer to the relevant product page to view the new product support content.

When each link has been ‘clicked’ on by the user the alert should disappear. The alert should not appear again unless there is new product support content available to the user.

The product support content links will be relatable to the appliance the content is available for. The link should include the appliance type the alert is related to e.g. Beko Washing Machine, Samsung TV etc.

The product support content link will be presented whilst including the title of the product support type and the appliance it relates to e.g.

‘New hints and tips available for BEKO Washing Machine’

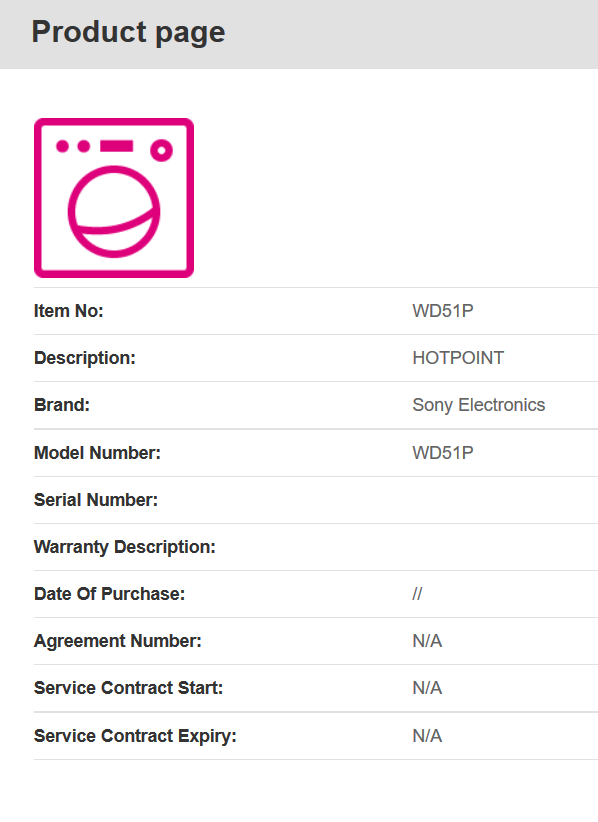
Where there is more than two product support alerts there will be a scroll bar that customer can use to see further alerts.

## Product Page

The product page displays retail product information, warranty details, access to report a fault and services available to Service Guarantee holders.

### Retail Product Information

This section includes all pertinent information regarding the warranty and the retail product. The information provided on this screen includes the following:



### Product Support Information

This section will include the following services:

* Hints and Tips
* Set up services
* Annual Health Check
* Report a Fault **(please see section 8 for full details of the report a fault process)**

#### *Hints and tips, Set up services, annual health check*

The service information will be relevant to the retail product under guarantee.

On the product page will be a list of ‘clickable’ links available to the user.

A link will be available for any of the following services where content is available:

* Hints and Tips
* Set Up Services
* Annual Health Check

Should there be no content available for these services for the appliance under warranty then the links will not be shown to the customer.

When the user clicks on the available service a new page will appear that will present a list of all of the media available to the user.

Each line will form a link to open the media in the browser *(e.g. Hint and Tips PDF)* or link a separate browser page with an external link *(e.g. Manufacturer’s product page).*

**(Please see section 0 which shows all services available by product at day 1.)**

#### *Report a fault*

**Please see section** 8 **for full details on ‘Report a Fault’**

### Terms and Conditions

Each Service Guarantee product a customer owns will have corresponding terms and conditions for both new business and back SG’s. Customers will access these from the associated product page.

Terms & Conditions will be displayed as a PDF document and will be accessed using a link with on the product page. **(Reference screen shot here)**

# Report a Fault Process

The service to ‘Report a Fault’ will be available to all users. However the journey they follow to report their fault will firstly be dictated by when they raise the fault and whether they are in their ‘extended’ warranty period or their ‘in warranty’ period.

The difference will be either the user is presented with a button or manufacturer details. **(Please see section 8 for further details on Report A Fault’)**

The process below shows the various steps followed when reporting a fault.



## In Warranty or Extended Warranty

Firstly the portal will identify whether the warranty is:

* In Warranty = Manufacturer warranty period therefore the responsibility of the repair lays with the manufacturer
* Extended Warranty = Covered by the SD Service Guarantee and therefore the responsibility of the repair lays with UK Warranty

The customer portal will determine this by assessing which of the two date periods the fault is being reported in:



## Extended Warranty period

If a fault is reported during the ‘Extended Warranty period’ a ‘Report a Fault’ button will be presented on the Product Page.

There are two potential journeys available to the customer and these journeys are dictated by whether the retail product value meets the low cost rule or not. **(Please see section 9.2 for Low Cost Rule details)**

* If the retail product value is above the low cost limit the customer will proceed down the Repair Journey **(please see section 8.2.1 for the Repair Journey details)**
* If the retail product value is below the low cost limit the customer will proceed down the Replacement Journey **(please see section 8.2.2 for the Replacement Journey details)**

### Repair Journey

#### **Soft Fix**

After clicking ‘Report a Fault’ the customer will be presented with a series of ‘Soft Fix’ statements related to the retail product covered by the warranty.

The customer can choose which ‘Soft Fix’ is closest in description to their fault and will be able to click on either of the two options below if the soft fix information solves the fault or not:

* Yes
* No

If the customer selects ‘Yes’ a ‘Success’ message page. This will be the end of the ‘report a fault’ journey. The customer will then be able to click on ‘Home’ or ‘Back’ button to navigate away from this screen.

If the customer selects ‘No’ the customer is directed to the Accidental Damage question.

If none of the descriptions match the customers fault there will be a link available at the bottom of the descriptions reading ‘None of these match my fault’. When the customer clicks on this link they will proceed to the Accidental Damage questions.

The customer portal is a service available to SD customer who purchase an SG product post go live. However the ‘Report a Fault’ capability will be available to back book customers. There are a number of SG holders in the back book population who’s appliance will no longer be covered by a SG after their renewal date.

For those customers who have a renewal date after the go live date they will not be presented with any soft fix questions should they attempt to report a fault at any stage between go live and their renewal date.

If they wish to make a service request they will click on the ‘Report a Fault’ button and will be immediately presented with the ‘Accidental Damage’ questions. The accidental damage rules will apply as documented in 8.2.1.2.

Please see section 9.9 Service Available on Launch for a list of appliances that will not require soft fix questions from go live.

#### Accidental Damage

The next stage will present a number of options to the customer, of which they will be asked to pick the option that best describe the product failure.

Please select from the below the reason that best explains your product failure;

* My product was working but stopped working during operation
* I went to use my product and it wouldn’t operate, it was fine the last time I used it
* I dropped or knocked my product and now it has stopped working **\***
* Some water got onto my product and now its stopped working **\***
* My product is leaking and I don’t want to switch it on incase its unsafe
* My product is scratched, dented or chipped but it still works **\***
* My product won’t switch on, I’ve checked the fuse in the plug
* The door on my product is loose or doesn’t close correctly
* A shelf, drawer, filter, charger or other accessory is damaged or not working

**\*** If the customer selects any of the asterix options the fault will be deemed as accidental damage. This will be stored in service.repfault.

Clicking ‘Next’ button:

* If the option selected is AD a message will appear to prompt the customer to call UK Warranty to continue ‘reporting their fault’ offline. Development still required to prevent customers from starting the report a fault journey again. Report a fault button should not appear and customers shouldn’t be given a back button option after selecting an AD question.
* If the customer selects a non AD option they will proceed to the next step of the ‘Repair a Fault’ process. Here the customer will be able to select an engineer appointment or arrange a back to base collection.

If a customer selects a fault reason that is flagged as potentially accidental damage the customer will be prevented from reporting any further faults against that appliance until either one of the following events occur claims handler has:

* Claims handler unlocks the portal account
* Claim is closed or declined

Should the customer land on the Product page again there will be no ‘Report a fault’ button available. All other links and functionality that precedes the report a fault process will be available to the customer e.g. appliance icon and access services button should operate as usual.

If a customer flags an AD question and contacts call centre the claims handler should have the ability to unlock customer connect if the fault was determined not to be accidental damage. This should allow the customer to use the portal for reporting a fault in the future.

#### Engineer Appointment or Back to Base Collection

The customer portal will assess if the retail product is categorised for an Engineer Appointment or a Back to Base repair. (**Please see appendix 9.3 for this detail.)**

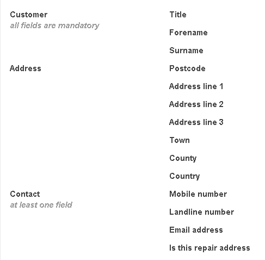
If the product is within the extended warranty period, and does not meet the Low Cost rule and the product is not back to base this button will direct the customer to the ‘Book standard repair’ screen **(Please see section 8.2.1.4 for the Book an Engineer Appointment details)**

If the product is within the extended warranty period, does not meet the Low Cost limit and the product is back to base repair the customer will be directed to ‘Book a Back to Base Collection’ page. **(Please see section 8.2.1.5 for the Book a Back to Base Collection details)**

#### Book an Engineer Appointment

Customers will be asked to review address and contact details and given the option to update if required. If no updates are required customers can click on ‘Next’ button and they will be directed to the ‘Book an Appointment’ page. **(Refer to screen shot here)**

The following information will be shown on this screen:



The information will be pre–populated using the SD SG file data.

During the book a repair process a question is presented to the customer which is “Do any of these details need amending?”This question is not defaulted and will stand out from the current details.

If the customer selects **‘No’** and clicks **‘Next’** they will proceed to the Book an Appointment Screen.

If the customer has no telephone contact number saved then when they click on ‘No’ to the question ‘Do any of these details need amending?’ they will receive an on screen pop up message that will read ‘Please click yes to amend details and add a telephone number in order to continue’.

If the customer does not provide a response to this question and they click **’Next’** an error message will appear to prompt the customer to select an option. The message ‘Please select an option if any of these details need amending?’ will appear in red text below the “Do any of these details need amending?” question **(Refer to screen shot here)**

If the customer selects “Yes”, they are presented with a page where they can input new address and / or contact details. **(Refer to screen shot here).**

Customers can search for an address using the postcode lookup button ‘Find Address’. Customers must first enter a postcode before clicking this button for it to search for a new address. **(Refer to screen shot here)**

The service guarantee holder primary details, held in the Customer Information Drop Down **(see section 7.6.3 for Customer Information Drop Down details)**, will not be changed. A message will be displayed to the customer indicating that the details changed on this page relate only to this service request.

        IF a customer clicks ‘Yes’ to the question “Do any of these details need amending?” the next page should appear with all address and contact details populated but editable

        IF a customer wishes to search for another address then after they enter a new postcode and click ‘Postcode lookup’ button the other address details should disappear and then they will be presented with the address selection menu

        IF a customer enters a new postcode but doesn’t click ‘Postcode lookup’ button AND they click ‘Update’ the customer should receive a message under the postcode field to prompt them to ensure the address is correct. **The functionality stops us proceeding but doesn’t present an error message**

An engineer will be deployed to the updated address for this service request only.

Once the fields have been updated the customer will click on the ‘Update’ button for these to be saved.

The ‘Preferred Contact Method’ will be removed as descoped. The mobile number and email address will be mandatory.

The mobile number field will contain two validation checks:

* Ensure the number begins ‘07’
* Checks if the number is also 11 numbers long

Once the details have been updated the customer will be presented with the ‘Book an Appointment’ screen.

The customer will be prompted to enter a fault description which is a mandatory field. A label will be provided to inform the customer this is mandatory. This description can be up to 64k characters in length.

Customers will be able to select a date using either the ‘Book This Date’ or ‘Calendar’ buttons but will not be able to confirm this date until a fault description has been captured.

If a customer selects a date before providing the fault description they will be presented with a message on screen reminding them to enter a fault description before selecting a date. The message will appear as red text underneath the fault description field. This message will also appear if the customer clicks in to the field and out again with out entering any information.

If the customer used the ‘Calendar’ option to select a date. The 5 option presented should remain on screen for the customer.

If the customer did not use the ‘Calendar’ option the initial 5 dates should remain on screen for the customer to select.

Customers will be presented with an option to select from 5 available dates, which reflect the real-time availability of diaries. If these dates are not suitable to the customer they have an option to select an alternative date within the next 28 days from today using a calendar. The dates available to the customer will only be future dates.

##### Five available dates

If the customer selects a date from the 5 offered any date in the preferred repair visit box should be removed. This will avoid customer confusion as to which date they have chosen.

If the customer is happy with any of the 5 offered dates they will click on the ‘Book this Date’ button to confirm the engineer visit date.

##### Calendar selected dates

If the customer selects a date from the calendar option they will click ‘Check Availability’ to see if an engineer is available.

**Calendar option will appear and customer can select any of the available 28 days. Unavailable dates will appear as ‘greyed out’ If 28 day’s spans across 2 months the customer will be able to scroll to the next month. No previous dates to the date the customer is using the portal will be available.**

The portal will present the next 5 available dates for an engineer appointment including (if available) the date the customer selects. If the date the customer selected is not available an explanation should appear to the customer.

If an engineer is available the customer can select this date by clicking ‘Book this Date button’

Once the ‘Book this Date’ button has been clicked the customer will be presented with a ‘Booking Confirmation’ page**. (Refer to screen shot here)**

##### No Availability

If the availability check is performed and no availability is returned the customer will be directed to a page requesting the customer contacts the service desk to complete the appointment booking.

#### This page will save the job into the service system and provide the customer with their job number. Book a Back to Base Collection

The customer will follow the same steps as defined in sections, 6.2.1.4 up to and including 6.2.1.4.2. With the exception that the screens will be labelled ‘Book a Courier. **(refer to screen shots here)**

It should be noted that where a courier is deployed all communications with the customer from that point in respect of the functions the courier is undertaking will be made by the courier and not reflected in the portal.

When a customer is selecting a date for a courier collection the first ‘available’ dates presented to the customer will be 48 hours after the date the service request is being made.

The reason for this is that courier appointment will be made offline using a back office operational process where a claim handler will be arranging the collection (and return delivery) directly with the courier using a courier’s website / system. There is no interface between the customer portal and any of the couriers utilised by UK Warranty.

#### Journey References

After the customer has clicked ‘Report a Fault’ the journey the customer is directed through will be clear on the relevant page headings.

The customer portal will know which journey is applicable to the customer using a combination of rules including but not limited to:

* Response to the AD question
* Service and warranty start dates
* Appliance the fault is being reported against

Each page presented to the customer after clicking the ‘Report a Fault’ button will have the same heading for both engineer and courier journeys up to the page for selecting a date for the visit or collection.

The page presented to the customer where they will select the date of the engineer visit or courier collection will reference the appropriate journey e.g.

* Engineer visit journey = Book Standard Repair
* Back to Base Collection = Book a Courier

The relevant journey will be referenced on all subsequent pages presented to the customer up to and including the appointment / visit confirmation page.

### Replacement Journey

The portal will determine if the retail product should be replaced by assessing if the low cost rules have been met **(see section 9.2).**

If the value retail product is less than the low cost limit the customer will still complete the same steps for soft fix **(see section 8.2.1.1),** accidental damage **(see section 8.2.1.2)** fraud indicators **(see section 8.2.6 for Fraud Indicator details).**

For each of these steps the same offline triggers will work as per the repair journey.

The difference with the replacement journey comes in when the customer selects ‘Next’ from the accidental damage screen.

They will be directed to a ‘Fault description’ page **(refer to screen shot here).** The customer will be prompted to enter a fault description which is a mandatory field. A label will be provided to inform the customer this is mandatory. A ‘Submit’ button will then allow the customer to save the new job.

The customer will then be directed offline with a new page containing the replacement team’s telephone number.

The customer will then complete the process offline with UK Warranty.

### Replacement Job Status Change

When a replacement journey is triggered (whether that be on-line or offline) the job status in the portal will be updated to 'Awaiting Replacement'.

The offline trigger will be when a decision has been made to BER the appliance as per the BER process. The online trigger being that which is document in 8.2.2

When the item has been replaced the job status will default to ‘BLANK’ and the SG should then be expired as per the product rules.

### Replacement Journey Job Page

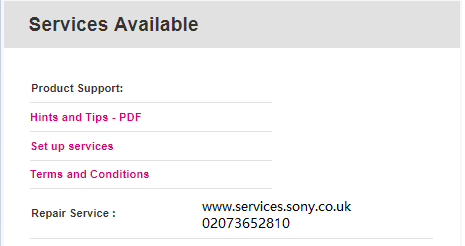
For the duration of a replacement journey the jobs page will remain open until item is replaced, however, 'Cancel Job' and 'Rearrange Appointment' buttons will not be available to the customer.

The ability for the customer and the contact centre will still be able to send and receive messages using the jobs notes functionality.

This will be pertinent to UKW who will try and outbound the customer when a BER decision has been made. Should they not be able to contact the customer directly using the contact number details they will be able to send a note to inform the customer they have tried to contact them.

### In Warranty

If a fault is reported during the ‘In Warranty period’ the customer will be presented with the contact details of the manufacturer as shown below.



The Customer will be required to continue with this journey off line directly with the manufacturer.

The ‘Report a Fault’ Button will not be visible as the customer will not be able to proceed with this journey.

### Booking Confirmation

Irrespective of the journey when a customer selects a date for either ‘Engineer Appointment’ or ‘Back to Base Collection’ a new page will be displayed to allow the customer to confirm the date selected. This will provide a ‘Yes’ and ‘No’ option.

If ‘Yes’ is selected the ‘Booking Report’ will be displayed and the booking confirmed **(please see section 8.2.5 for Booking Report Details).**

If ‘No’ is selected the customer is returned to the ‘Book an Appointment’ page.

### Booking Report

The customer will then be presented with a ‘Booking Report’ page.

This will detail the following information:

* Customer repair number
* Product category
* Appliance Model Number
* Next Steps

The booking report next steps will be tailored according to which one of the 3 journeys below the customer has followed:

* In warranty service request where UK Warranty have link to the manufacturer **(refer to screen shot here)**
* Extended warranty service request resulting in an engineer appointment **(refer to screen shot here)**
* Extended warranty service request resulting in a back to base collection **(refer to screen shot here)**

### Fraud Indicators

The inputted date, customer historic data, appliance and geo-graphic data will be used to calculate a fraud score. This score will be used to dictate the action on the service request.

Several service request statistics will be identified and scored. These scores will then be amalgamated into a final fraud score for the service request

Each indicator will be assigned a maximum percentage of the final score. These will be weighted by the degree of fraud likelihood.

It should be understood this is based on the information collected since Pacifica based all repairs on the imported policy book.

The fraud indicators currently identified are listed here:

* Within 60 days from end of warranty. Score derived by number of days from end of warranty. Score number of days scaled to 7 if within 60 and 10 if within 30
* Customer has made service request previously. Score of 2

Across all of the three products in scope

* Customer has required a service visit more than 50% of product purchased where the customer has more than three electrical items products. 20
* Postcode area service requests 20% above average postcode area service requests. Score 10
* Serial numbers for service requests at difference addresses in the past. Score 10

Repair address to be used

## Fraud Score

These indicator scores are then totalled into a single score that is then measured to trigger one of the following responses.

* Response A : Over 15 will allow the online booking to be made but mark the service request for inspection by the service request handling team.
* Response B : Over 20 will direct the user to a fraud screening service centre telephone number. Users form will be saved and made available to the service centre user.
* Response C : Over 35 will escalate to the fraud manager and direct user to escalated fraud screening number. This is different to the Response B telephone number.

The system will store all previous scores for each service guarantee. If the customer is blocked from online booking on fraud scores they will then continue to be blocked from online booking on that service guarantee.

## Job Page

The Job page will display the following information:

* Job Status (see Section 8.4.5)
* Repairer details – Two types of engineer may be used. Either a UK Warranty employed repairer or a sub-contractor. Where the repairer is sub-contracted UK Warranty contact details will be displayed. UK Warranty employed repairer contact detailed will be displayed.
* Repair detail – shows the fault description input by the user and soft fix options chosen by the customer
* Courier details – picture replaced with logo of courier **UKW contact details**
* Retail and Warranty Product information
* Services content links
* Job Notes
* Cancel job button
* Reschedule appointment button

The job page provides the customer with online information about the real-time state of the repair.

This page contains the information pertaining to the appliance and the job details. The label ‘Engineer’ will be replaced with ‘Courier’ to describe the operative where appropriate.

Details of the attending engineer or courier will be shown on the job page as below:

When awaiting confirmation of an engineer the engineer name will be populated with ‘Awaiting Allocation’

|  |  |
| --- | --- |
| Engineer | Courier |
|  | Courier screen grab to be inserted here |

The functions available on this page:

### Cancel Job

After selecting the cancel job button, the customer has a cancellation confirmation on screen and the reason for the cancellation will be captured through a free text box, which is a mandatory field 64k character length. This will be labelled ‘Cancellation Reason’. The customer must select ‘Yes’ to the confirmation question to proceed with the cancellation. If the customer selects ‘No’ the cancellation box is closed.

### Reschedule Appointment Job

After selecting the reschedule repair button, the customer will be transferred to the ‘Book Appointment / Book a Courier’ page. The fault description will not be displayed. The customer will select a new date as per the 6.2.4.1 and 6.2.4.2 sections above. This functionality will only be available up to 24 hours before the appointment. No reschedule repair button will be visible during the 24 hours prior to the original appointment.

### Cancel or Reschedule Job Confirmation

The customer will receive an on-screen confirmation that their job has been cancelled or rescheduled. **– When customer clicks cancel job the applinca and another disappears**

### Job Notes

* All notes will appear in the notes list as unread until the user clicks on the note. Unread notes are notes from the Pacifica service desk specifically to the customer.
* The ‘You have X Notes’ button on the ‘Home’ page will count the unread notes
* All notes will be marked as ‘read’ when the user opens the job form containing the notes.
* Add a new note – new notes added by the customer will appear on a new note line in the portal
* All notes will contain the user and time stamp. The notes will be displayed in reverse order of time and date.
* When a note has been written by the customer they can hit the button titled ’Send’ to submit this to the contact centre

### Job status

* Job status will be displayed to customer on both the ‘Job’ and ‘Home’ page. **(Please see section 9.7 for full Job Status details).**
* When a service request has been completed or declined the job page will no longer be visible in the portal.
* For courier deliveries (repaired back to base items) when the date the delivery has been booked for is met in real time then status changes to job complete.

### Maximum number of Service Requests

**As per the SG product rules if a customer makes more than two service requests against the same appliance during the lifetime of the warranty at the third attempt to make a service request the customer will be driven towards the replacement process.**

**Exception will exist for this rule, those exceptions are:**

* **If the customer initiates a service request but then cancels it prior to an engineer repair visit or a courier collection of an appliance taking place**
* **If a second service request is a ‘recall’ i.e. the first and second service requests should be treated as 1 total service request as the fault was not rectified previously**

### Repair Details

This section will contain details of the fault description for easy reference on the Job Page.

# Appendix

## Offline BER Rules

**Stage 1**

1. Where the cost of repair is less than 75% of the original appliance retail price we **repair**
2. Where the repair price is greater than the original purchase price we **replace**
3. Where the repair price is greater than 75% of the original purchase price, we **refer** for replacement by considering replacement cost
4. If the agreement has 60 days or less to run then should be **refer to manager for decision**

**Stage 2 (when referred for replacement)**

1. If replacement cost is greater than repair cost, we **repair**
2. If replacement cost is less than 90% of repair cost, **we replace**
3. If neither 1) nor 2) is true **we refer to reports team**

If the repair is logged via an offline channel then UKW will also use Streamline to view any previous claims and this information should be used when making a repair/replacement decision.

By way of confirmation the High Value Auth limits. NB These include VAT.

£180 for mobile (smart mobiles)

£225 large TVs

£150  for everything else.

## Low Cost Rule

This rule will determine whether a retail product will go for repair or offline replacement.

If the “Market Value” of the item is less than £150.00.    The Market Value in Streamline means the original purchase price less 20% if breakdown occurs within 12 and 24 months from the purchase date and less a further 1% per month thereafter (12% per annum).

Therefore the portal will calculate the item Market Value and if this value is less an £150.00 the customer should be referred to the offline process for replacement.

## Back to Base\ Engineer Repair

This is the list of product types and how they are treated.

|  |  |  |
| --- | --- | --- |
|  | | Field/B2B |
| Washing Machine |  | Engineer |
| Tumble Dryers |  | Engineer |
| Washer Dryers |  | Engineer |
| Electric Cooker |  | Engineer |
| Gas Cooker |  | Engineer |
| Refrigeration |  | Engineer |
| Dishwashers |  | Engineer |
| Television | <26" | Back 2 Base |
| 27" to 36" | Back 2 Base |
| 37" to 42" | Engineer |
| 43" & over | Engineer |
| Blu-ray/DVD |  | Back 2 Base |
| Audio |  | Back 2 Base |
| Camera |  | Back 2 Base |
| Camcorder |  | Back 2 Base |
| Vacuum Cleaners |  | Back 2 Base |
| Coffee Machines |  | Back 2 Base |
| Microwaves |  | Back 2 Base |
| Food Processors/Mixers/Blenders |  | Back 2 Base |
| Iron/Steam Generator |  | Back 2 Base |
| Desktop Computers |  | Back 2 Base |
| Sat Nav |  | Back 2 Base |
| Laptops |  | Back 2 Base |
| Wearable Technology |  | Back 2 Base |
| Tablet & E-Readers |  | Back 2 Base |
| Printers |  | Back 2 Base |
| Mobile Phones | £0.00 - £100.00 | Back 2 Base |
| (all manufacturers excl Apple) | £100.01 - £300.00 | Back 2 Base |
|  | £300.01 > | Back 2 Base |
| Games consoles |  | Back 2 Base |
| Apple i-phone |  | Back 2 Base |
| Apple i-watch |  | Back 2 Base |
| Apple IMAC |  | Back 2 Base |
| Apple i-pad |  | Back 2 Base |
| Apple i-pod touch |  | Back 2 Base |
| Apple Macbook |  | Back 2 Base |

## Web Services

There are two web services called from the backend code on Customer Connect.

The first one is used in the postcode lookup. This uses the PAF file provide addresses.

The second web service is called ‘OnlineBooking’. This call provides the availability check, job booking and fraud checks. This web service is hosted by Pacifica on the call booking system.

## Management Information

The list below identifies the various MI reports and there access levels that will be available in ‘Client Connect’

**CAVEAT : Details how to access client connect and view use this MI has yet to be covered with UK Warranty. MI is expected in the relase scheduled for 11/9. Prior to this release it will need to be understood ‘HOW’ SD will access these reports.**

|  |  |
| --- | --- |
| Frequency | Definition |
| Weekly | Reports are available to SD each Monday by 4pm. The data displayed will include the previous Monday through to Sunday |
| Monthly | Reports to be produced in line with Shop Direct period end dates. Period dates will be confirmed by SD in advance as they will change each year. All monthly reports should be made available to SD before the end of first week after period end. |
| Quarterly | Reports to be produced in line with Shop Direct period end dates. Period dates will be confirmed by SD in advance as they will change each year. All quarterly reports should be made available to SD before the end of first week after quarter end. |
| Annual | Reports to be produced in line with Shop Direct Financial Year. FY will be confirmed by SD in advance as they will change each year. |
| Ad-Hoc | Reports will be requested in frequently and may be as a one off. These requests will be raised by SD using the point of contact at UK Warranty as defined in the Governance Framework. |

| **MI Name** | **Description** | **Target Audience** | **Frequency** | **Internal / External** | **Owned By** | **Produced By** | **UKW**  **Access Type** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Master Performance Report - Portal | Report providing Web Analytics of portal performance | FS Product & Marketing Team & Pricing | Monthly | Internal | UK Warranty | UK Warranty | Client Connect |
| Master Performance Report - Portal | Breakdown of claim registered via portal which have not been completed | FS Product & Marketing Team & Pricing | Weekly | Internal | UK Warranty | UK Warranty | Client Connect |
| Master Performance Report - Portal | Report to show volumes of customer who have been unable to access the Portal | FS Product & Marketing Team & Pricing | Monthly | Internal | UK Warranty | UK Warranty | Client Connect |
| Master Performance Report - Portal | Report to show portal response times | FS Product & Marketing Team & Pricing | Quarterly | Internal | UK Warranty | UK Warranty | Client Connect |
| Master Performance Report - Call Centre | Breakdown of key KPI's to show Call Centre performance | FS Product & Marketing Team & Pricing | Weekly | Internal | UK Warranty | UK Warranty | Bespoke Production |
| Master Performance Report - Call Centre | Breakdown of FTE providing service to SD customers | FS Product & Marketing Team & Pricing | Quarterly | Internal | UK Warranty | UK Warranty | Bespoke Production |
| Master Performance Report -Call Centre | Breakdown of FTE providing service to SD customers | FS Product & Marketing Team & Pricing | Weekly | Internal | UK Warranty | UK Warranty | Bespoke Production |
| Master Performance Report - Claim/Repairs | Breakdown of all jobs logged in relation to SG, RG and MPI | FS Product & Marketing Team & Pricing | Weekly & Period | Internal | UK Warranty | UK Warranty | Client Connect |
| Master Performance Report - Claims/Repair | Breakdown of all jobs logged in relation to SG, RG and MPI | FS Product & Marketing Team & Pricing | Weekly | Internal | UK Warranty | UK Warranty | Bespoke Production |
| Master Performance Report - Claims/Repair | Report to track the progress of a claim from registration to completion | FS Product & Marketing Team & Pricing | Monthly | Internal | UK Warranty | UK Warranty | Client Connect |
| Master Performance Report - Claims/Repair | Breakdown of time taken to fix a product when an engineer has attended | FS Product & Marketing Team & Pricing | Weekly | Internal | UK Warranty | UK Warranty | Client Connect |
| Master Performance Report - Claims/Repair | Breakdown of engineer coverage vs SD policies in force | FS Product & Marketing Team & Pricing | Quarterly | Internal | UK Warranty | UK Warranty | Client Connect |
| Master Performance Report - Claims/Repair | Report to show volume of manual work received and the average time taken to action | FS Product & Marketing Team & Pricing | Monthly | Internal | UK Warranty | UK Warranty | Bespoke Production |
| Master Performance Report - Claims/Repair | Breakdown report to show the reasons for replacement offers | FS Product & Marketing Team & Pricing | Weekly | Internal | UK Warranty | UK Warranty | Bespoke Production |
| Master Performance Report - Claims/Repair | Breakdown of customer contacts as a result of the Annual Health Check communication | FS Product & Marketing Team & Pricing | Monthly | Internal | UK Warranty | UK Warranty | Bespoke Production |
| Master Performance Report - Claims/Repair | Report to provide information on when Service Promises have failed to be met | FS Product & Marketing Team & Pricing | Monthly | Internal | UK Warranty | UK Warranty | Bespoke Production |
| Master Performance Report - Ad hoc | Report to show UK Warranty performance benchmarked against other service providers | FS Product & Marketing Team & Pricing | Quarterly | Internal | UK Warranty | UK Warranty | Bespoke Production |
| Master Performance Report - Claims/Repair | Breakdown of performance against agreed SLA's | FS Product & Marketing Team & Pricing | Weekly | Internal | UK Warranty | UK Warranty | Bespoke Production |
| Master Performance Report - Claims/Repair | Breakdown to show when agreed SLA's have not been achieved | FS Product & Marketing Team & Pricing | Monthly | Internal | UK Warranty | UK Warranty | Bespoke Production |
| Master Performance Report - Claims/Repair | Report to show the volume of RPP sales opportunities vs the RPP take up | FS Product & Marketing Team & Pricing | Monthly | Internal | UK Warranty | UK Warranty | Bespoke Production |
| Master Performance Report - Customer Satisfaction | Breakdown of results from Customer Satisfaction survey - after engineer appointment | FS Product & Marketing Team & Pricing | Monthly | Internal | UK Warranty | UK Warranty | Bespoke Production |
| Master Performance Report - Customer Satisfaction | Breakdown of results from Customer Satisfaction survey - Inbound | FS Product & Marketing Team & Pricing | Monthly | Internal | UK Warranty | UK Warranty | Bespoke Production |
| Claim complaints received | Breakdown of complaints received by UK Warranty that relate to claims for RG and MPI products | Shop Direct Customer Excellence (Jackie Sunner and Rebecca Rattigan) | Monthly | Internal - Customer Excellence | UK Warranty | UK Warranty | Bespoke Production |
| RCA of complaints | Breakdown of RCA on complaints received by UK Warranty that relate to claims and sales for SG, RG and MPI products | Shop Direct Customer Excellence (Jackie Sunner and Rebecca Rattigan) | Monthly | Internal - Customer Excellence | UK Warranty | UK Warranty | Bespoke Production |
| FOS referrals complaints | Details of FOS referrals complaints for SG, RG and MPI products | Shop Direct Customer Excellence (Jackie Sunner and Rebecca Rattigan) | Monthly | Internal – Customer Excellence | UK Warranty | UK Warranty | Bespoke Production |
| RCA of complaints | Breakdown of RCA on complaints received by UK Warranty that relate to claims and sales for SG, RG and MPI products | Shop Direct Customer Excellence (Jackie Sunner and Rebecca Rattigan) | Quarterly | Internal - Customer Excellence | UK Warranty | UK Warranty | Bespoke Production |
| RCA of claims | 0 | 0 | Quarterly | 0 | UK Warranty | UK Warranty | Bespoke Production |
| QA Reporting | The QA report will inform us of agent performance and give us an insight into the quality of the experience our customers are receiving. It will also help us to collaboratively improve the level of service UK Warranty provide to our customer base by allowing us to pinpoint specific failure categories / reasons and work to address / enhance these. | Shop Direct 1st Line Governance - Brian Forrester Shop Direct Claims Officer - Debbie Samuel | Monthly | Internal | UK Warranty | UK Warranty | Bespoke Production |
| Redirected Complaints | Breakdown of complaints received by UK Warranty that relate to Shop Direct sales, marketing, claim activity for SG, RG and MPI products | Shop Direct Customer Excellence (Jackie Sunner and Rebecca Rattigan) | Monthly | Internal – Customer Excellence | UK Warranty | UK Warranty | Bespoke Production |
| Master Performance Report - Claims/Repair | Report to provide a breakdown of Soft Service performance | FS Product & Marketing Team & Pricing | Monthly | Internal | UK Warranty | UK Warranty | Bespoke Production |
| Master Performance Report - Portal | Breakdown of message centre metrics including volumes of customer who open and respond to messages | FS Product & Marketing Team & Pricing | Ad Hoc | Internal | UK Warranty | UK Warranty | Bespoke Production |
| Master Performance Report - Claim/Repairs | Report to show of alternative settlements offered by UK Warranty for SG, RG & MPI products | FS Product & Marketing Team & Pricing | Monthly | Internal | UK Warranty | UK Warranty | Bespoke Production |
| Master Performance Report - Portal | Report to breakdown performance of communication sent from UK Warranty to SD customer via e-mail. | FS Product & Marketing Team & Pricing | Monthly | Internal | UK Warranty | UK Warranty | Bespoke Production |
| Master Performance Report - Claim/Repairs | Breakdown of any Fraud identified in a specific period for all RPP products managed by UK Warranty | FS Product & Marketing Team & Pricing | Monthly | Internal | UK Warranty | UK Warranty | Client Connect |
| Master Performance Report - Ad hoc | Breakdown of any issues identified and track issue resolution progress | FS Product & Marketing Team & Pricing | Monthly | Internal | UK Warranty | UK Warranty | Bespoke Production |

## Communication Content

Emails need to be linked to the test system

The content of including tone of voice and brand values for each of the communications are to be agreed. However, it is expected that each communication will include a next steps section where applicable.



|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  | **SG** | | | | **RG** | | | **MPI** | | |  |
| **comms no.** | **Comms Title** | **Category** | **Trigger Point / Notes** | **Job Notes (Portal)** | **Priority 1** | **Priority 2** | **Priority 3** | **Priority 1** | **Priority 2** | **Priority 3** | **Priority 1** | **Priority 2** | **Priority 3** | **Portal status** |
| 1 | Enrolment Email | Data Feed | Link to enrolment screen | No | Email | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a |  |
| 2 | Forgotten password | Login Page | Linked to reset process | No | Email | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a |  |
| 3 | Confirmation changed password | Reset process | Your password has been changed | No | Email | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a |  |
| 4 | Annual Health Check | Product Page | Annual Health Check | No | Product Support | Email | letter | n/a | n/a | n/a | n/a | n/a | n/a |  |
| 5 | Hints and tips/ set up support | Product Page | New hints and tips/ set up support | No | Product Support | Email | Letter | n/a | n/a | n/a | n/a | n/a | n/a |  |
| 6 | New SG | Data Feed | Inform user that a new SG has been added to the portal | No | Email | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a |  |
| 7 | Initial Confirmation of engineer appointment | My Claims | Confirm engineer has been booked (NOT a guaranteed date - Sub Contractors / In Warranty Manufacturer Links) | Yes | Email | SMS | n/a | n/a | n/a | n/a | n/a | n/a | n/a | Engineer booked |
| 8 | Initial Confirmation of engineer appointment | My Claims | Confirm engineer has been booked (Guaranteed date - Employed Engineers) | Yes | Email | SMS | n/a | n/a | n/a | n/a | n/a | n/a | n/a | Engineer booked |
| 9 | Confirmation of Courier collection | My Claims | Confirm courier collection has been booked. RG for Dr Dree headphones and tablets only | Yes | Email | SMS | n/a | Email | SMS | n/a | Email | SMS | n/a | Courier booked for collection |
| 10 | Reminder Booking | Booking Process | Our engineer will be calling on you tomorrow | Yes | Email | SMS | n/a | n/a | n/a | n/a | n/a | n/a | n/a | Engineer booked |
| 11 | Customer appointment cancelled | My Claims | Confirm appointment cancelled | Yes | Email | n/a | n/a | n/a | n/a | n/a | n/a | n/a | n/a |  |
| 12 | Failed appointment | My Claims | Informing customer of a failed appointment and offer alternative | Yes | Telephone | Email | SMS | n/a | n/a | n/a | n/a | n/a | n/a |  |
| 13 | Delayed appointment | My Claims | Informing customer of a delayed appointment and offer alternative | No | Telephone | SMS | n/a | n/a | n/a | n/a | n/a | n/a | n/a |  |
| 14 | Courier collection status updates | My Claims | Arrive at depot | Yes | Email | SMS | n/a | Email | SMS | n/a | Email | SMS | n/a | Item arrived at depot for repair/ Awaiting parts |
| Arrived at Back to Base location for repair. RG for Dr Dree headphones and tablets only |
| 15 | Courier collection repair status updates | My Claims | With Back to base engineer with ETA for repair. RG for Dr Dree headphones and tablets only | Yes | Email | SMS | n/a | Email | SMS | n/a | Email | SMS | n/a | Item arrived at depot for repair |
| 16 | Courier collection repair status updates | My Claims | Repair complete. RG for Dr Dree headphones and tablets only | Yes | Email | SMS | n/a | Email | SMS | n/a | Email | SMS | n/a | Item arrived at depot for repair |
| 17 | Courier collection repair status updates | My Claims | Dispatched back with ETA. RG for Dr Dree headphones and tablets only | Yes | Email | SMS | n/a | Email | SMS | n/a | Email | SMS | n/a | Courier booked for delivery |
| 18 | Job complete | My Claims | Confirmation of job complete. RG for Dr Dree headphones and tablets only | Yes | Email | n/a | n/a | Email | n/a | n/a | Email | n/a | n/a | Job complete |
| 19 | BER notification | My Claims | Advising the customer to contact us to arrange BER | Yes | Telephone | SMS | Email | n/a | n/a | n/a | Telephone | SMS | Email | Item to be replaced |
| 20 | Repudiated claim | My Claims | Confirm repudiation and Inform the customer on who to contact | Yes | Letter | n/a | n/a | Letter | n/a | n/a | Letter | n/a | n/a |  |
| 21 | Survey | Communication | End of repair | Yes | Email | n/a | n/a | Email | n/a | n/a | Email | n/a | n/a |  |
| N/A | Complaint Acknowledgement | Complaints | Confirm we have received complaint and what happens next steps | Yes | Letter | n/a | n/a | Letter | n/a | n/a | Letter | n/a | n/a |  |
| N/A | Complaint Update 4 week | Complaints | Keeping the customer informed as per Shop Direct processes | Yes | Letter | n/a | n/a | Letter | n/a | n/a | Letter | n/a | n/a |  |
| N/A | Complaint Update 8 week | Complaints | Keeping the customer informed as per Shop Direct processes | Yes | Letter | n/a | n/a | Letter | n/a | n/a | Letter | n/a | n/a |  |
| N/A | Complaint Update 12 week | Complaints | Keeping the customer informed as per Shop Direct processes | Yes | Letter | n/a | n/a | Letter | n/a | n/a | Letter | n/a | n/a |  |
| N/A | Complaint Final Response | Complaints | Final Response | Yes | Letter | n/a | n/a | Letter | n/a | n/a | Letter | n/a | n/a |  |
| N/A | Complaint resolution | Complaints | Send customer a notification of resolution and deliver it by phone, email and portal. But also can be notified by text that resolution is inbox | Yes | Letter | n/a | n/a | Letter | n/a | n/a | Letter | n/a | n/a |  |

### Customer Surveys

After a request for service has been successfully completed, the customer will receive an email requesting them to complete a satisfaction survey.

An html email will be created and this will be sent to the customer. It contains a link for the customer to click that takes them to the online survey. When the customer reaches the survey page they choose a response to a range of questions by clicking the circle button next to each question.

A survey can be created containing up to ten questions with up to ten responses for each. The questions are free type so we can create any question. The possible responses are free type so we can create any response..

We can set trigger actions dependent on what response the customer chooses. The triggers can generate a further email, an sms, an internal communication (for example, an email to customer services directing them to call the customer) or a further survey. We can report on the survey results.

## Customer Status Conversion

Using the statuses provided in the bullet point list below. UK Warranty to map these in the Customer Description column to the appropriate Call Centre Status. This will mean overwriting the current Customer Descriptions below.

* Engineer booked
* Courier booked for collection
* Job complete- (only live for 7 days and then reverts to no status)
* Awaiting parts
* Item to be replaced
* Item arrived at depot for repair
* Courier booked for delivery



|  |  |  |
| --- | --- | --- |
| **Status ID** | **Call Centre Status** | **Customer Description** |
| 3 | "Waiting for Engineer" | Engineer booked |
| 4 | "AW system to send" | Engineer booked |
| 5 | "Engineer Allocated" | Engineer booked |
| 6 | "Parts on Order" | Awaiting parts |
| 7 | "Parts sent" | Awaiting parts |
| 8 | "Complete" | Job complete |
| 9 | "Awaiting Parts Order" | Awaiting parts |
| 10 | "Rejected" | Engineer booked |
| 12 | "Waiting for Approval" | Engineer booked |
| 14 | "Awaiting Info" | Engineer booked |
| 15 | "DVS Job on Hold" | Engineer booked |
| 16 | "Parts Received" | Engineer booked |
| 17 | "Customer Promise" | Engineer booked |
| 18 | "Appliance in Workshop" | Item arrived at depot for repair |
| 29 | "Not Complete by Engineer" | Engineer booked |
| 32 | "Modification Created" | Engineer booked |
| 33 | "Waiting for Exchange" | Item to be replaced |
| 39 | "Escalated to Technical" | Engineer booked |
| 41 | "Escalated to Network Manager" | Engineer booked |
| 42 | "Delivered into DC" | Engineer booked |
| 43 | "Booked onto Van" | Engineer booked |
| 46 | "Refund Request" | Engineer booked |
| 47 | "OUTSTANDING CALL" | Engineer booked |

## Non-Functional Requirements

**THESE SHOULD COVER BOTH CUSTOMER AND CLIENT PORTAL**

|  |  |
| --- | --- |
| **CPNFR - 1.1** | The online solution must be available 24 hrs per day/7 days per week/365 days per year. |
| **CPNFR - 1.10** | The system should provide transaction log data for the previous 30 days on a rolling basis |
| **CPNFR - 1.12** | Planned system downtime (Maintenance) should not exceed 3 hours |
| **CPNFR - 1.13** | The system will be re-started (failover) after 30 mins following a failure |
| **CPNFR - 1.14** | If possible, the system maintenance should be managed by way of hot standby and failover to a secondary system |
| **CPNFR - 1.15** | Data and System back up to occur whilst system is operational |
| **CPNFR - 1.16** | The system shall have a back up system available to support primary system shut down |
| **CPNFR - 1.17** | The system should maintain 20% available data storage capacity |
| **CPNFR - 1.18** | The system should be compatible with all supported browsers (defined within the Shop Direct company policy) |
| **CPNFR - 1.19** | The system should allow for PCI Compliance |
| **CPNFR - 1.2** | The maximum duration of planned outages must not exceed 8 hours per year, with a maximum of 2 planned outages per year. |
| **CPNFR - 1.20** | The system should allow for DPA Compliance |
| **CPNFR - 1.21** | The system should be dynamically flexible to allow 100,000 concurrent users |
| **CPNFR - 1.22** | The system should support concurrency requirement in invocation of Disaster Recovery situation for both peak and non peak periods |
| **CPNFR - 1.23** | Ensure, where appropriate, all customer data is maintained and transitioned to the new or changed service. |
| **CPNFR - 1.24** | For Ecomm changes, the target load speeds for the following should be agreed with Ecommerce Site Management Team (in line with leading industry standards and meet the requirements of the business); - Access to the customer portal |
| **CPNFR - 1.25** | The process for system restoration and recovery must ensure data integrity and security |
| **CPNFR - 1.26** | Cross site inclusive of Third Parties and Partners resilience must be demonstrated in multiple or combinatorial scenarios |
| **CPNFR - 1.27** | In the event of declaration of a disaster the new service will have an immediate Recovery Time Objectives (RTO) |
| **CPNFR - 1.28** | In the event of declaration of a disaster the new service will have an immediate Recovery Point Objectives (RPO) |
| **CPNFR - 1.3** | Availability percentage excluding planned outages should meet/exceed 99.99%. |
| **CPNFR - 1.4** | The maximum duration of unplanned outages should be less than 1 hour per year. |
| **CPNFR - 1.5** | Time to respond during normal operations – from time of failure to initial incident escalation - should be less than 15 minutes. |
| **CPNFR - 1.6** | The solution must be immediately restored after failure, during normal operations - from time of escalation to time of return to service. |
| **CPNFR - 1.7** | Recovery time objective during normal operations must be immediate. |
| **CPNFR - 1.8** | We require immediate response during a disaster scenario – from time of failure to initial incident escalation. |
| **CPNFR - 1.9** | We require immediate restoration during a disaster scenario - from time of escalation to time of return to service. |

## 

## Services Available on Launch

| **Product** | **Sub Category** | **Mechanical / Electrical** | **Soft Fix** | **Set Up** | **Health Check** | **Resolution** | **Services Available on Launch** |
| --- | --- | --- | --- | --- | --- | --- | --- |
|
|  |
| Camcorder | Camcorder | yes | yes | yes | yes | Remain on SG | Yes |
| Carpet Cleaner | Carpet washers and steam cleaners low value | yes | yes | yes | yes | Remain on SG | Yes |
| Carpet Cleaner | Carpet washers and steam cleaners high value | yes | yes | yes | yes | Remain on SG | Yes |
| Cooking Appliance | Built in and Electric low value | yes | yes | yes | yes | Remain on SG | Yes |
| Cooking Appliance | Built in and Electric high value | yes | yes | yes | yes | Remain on SG | Yes |
| Cooking Appliance | Dual Fuel cookers | yes | yes | yes | yes | Remain on SG | Yes |
| Cooking Appliance | Gas Cookers | yes | yes | yes | yes | Remain on SG | Yes |
| Cooking Appliance | Range Cookers | yes | yes | yes | yes | Remain on SG | Yes |
| Desktop | Desktop | yes | yes | yes | yes | Remain on SG | Yes |
| Digital Camera | Bridge Camera / compact / digital | yes | yes | yes | yes | Potential SG - UKW to Review | Yes |
| Digital Camera | Action Cameras (and Accessories) | yes | yes | yes | yes | Remain on SG | Yes |
| Dishwasher | Dishwasher | yes | yes | yes | yes | Remain on SG | Yes |
| DVD HTK | Home Cinema (Sound Bars) | yes | yes | yes | yes | Potential SG - UKW to Review | Yes |
| Fire | Home Automation (Thermostats) | yes | no | no | no | Potential SG - UKW to Review | Yes |
| Fire | Airconditioning and dehumidifiers | yes | yes | yes | yes | Remain on SG | Yes |
| Games Console | Playstations, X-Box, Nintendo | yes | yes | yes | yes | Remain on SG | Yes |
| Games Console | Playstation VR Head sets | yes | yes | yes | yes | Remain on SG | Yes |
| Kitchen Electrics | Bean to cup | yes | yes | yes | yes | Remain on SG | Yes |
| Kitchen Electrics | Built in Cookers | yes | yes | yes | yes | Remain on SG | Yes |
| Laptop | Laptop | yes | yes | yes | yes | Remain on SG | Yes |
| Microwave | Microwave | yes | yes | yes | yes | Remain on SG | Yes |
| Portable Games Console | Nintendo | yes | yes | yes | yes | Remain on SG | Yes |
| Printer | Printers | yes | yes | yes | yes | Remain on SG | Yes |
| Projector | Projector | yes | yes | yes | yes | Remain on SG | Yes |
| Refrigeration | American Style (fridge freezers) | yes | yes | yes | yes | Remain on SG | Yes |
| Refrigeration | Freezers | yes | yes | yes | yes | Remain on SG | Yes |
| Refrigeration | Fridge Freezers | yes | yes | yes | yes | Remain on SG | Yes |
| Refrigeration | Fridges | yes | yes | yes | yes | Remain on SG | Yes |
| Refrigeration | Built in Refrigeration | yes | yes | yes | yes | Remain on SG | Yes |
| Smart Watch | Apple Watch | yes | yes | yes | yes | Remain on SG | Yes |
| Tablet | Tablet | yes | yes | yes | yes | Remain on SG | Yes |
| Television | Television | yes | yes | yes | yes | Remain on SG | Yes |
| Tumble Dryer | Tumble Dryer | yes | yes | yes | yes | Remain on SG | Yes |
| Vacuum Cleaner | Vacuum Cleaner Low Value | yes | yes | yes | yes | Remain on SG | Yes |
| Vacuum Cleaner | Vacuum Cleaner High Value | yes | yes | yes | yes | Remain on SG | Yes |
| Vacuum Cleaner | Vacuum Cleaner Robotic | yes | yes | yes | yes | Remain on SG | Yes |
| Washer Dryer | Washer Dryer | yes | yes | yes | yes | Remain on SG | Yes |
| Washing Machine | Washing Machine | yes | yes | yes | yes | Remain on SG | Yes |

| **Product** | **Sub Category** | **Mechanical / Electrical** | **Soft Fix** | **Set Up** | **Health Check** | **Resolution** | **Services Available on Launch** |
| --- | --- | --- | --- | --- | --- | --- | --- |
|
|  |
| Audio | Audio Accessories (headphones) High Value | yes | no | no | no | Move to RG | No |
| Audio | Audio Accessories (headphones) Low Value | yes | no | no | no | Move to RG | No |
| Audio | Audio Accessories high value (headphones) | yes | no | no | no | Move to RG | No |
| Audio | Audio Accessories low value (headphones) | yes | no | no | no | Move to RG | No |
| Audio | Baby Monitors (high value) | yes | no | no | no | Remove SG | No |
| Audio | Baby Monitors (low value) | yes | no | no | no | Move to RG | No |
| Audio | Bench Drill | yes | no | no | no | Remove SG | No |
| Audio | Camera Accessories (lenses) | yes | ? | ? | ? | Remove SG | No |
| Audio | Camera Accessories (smart phone printer) | yes | yes | yes | yes | Remove SG | No |
| Audio | CCTV Cameras | yes | no | no | no | Remove SG | No |
| Audio | Mobile Accessories | yes | no | no | no | Move to RG | No |
| Audio | Musical Instrument | yes | no | no | no | Remove SG | No |
| Audio | non robotic mower | yes | yes | no | yes | Remove SG | No |
| Audio | Nursery Accessories (breats pump) | yes | no | no | no | Remove SG | No |
| Data Storage | Other Smart Home (CCTV) | yes | yes | yes | yes | Remove SG | No |
| Desktop | Other wearable tech | yes | yes | yes | yes | Move to RG | No |
| Digital Camera | PC Components | yes | no | no | no | Remove SG | No |
| Digital Camera | PC Monitors | yes | no | no | no | Move to RG / remove SG from high value | No |
| Digital Camera | Power Tools (sanders, hammers, jig saws) | yes | no | no | no | Move to RG / remove SG from high value | No |
| Digital Camera | Pressure Washers | yes | no | no | no | Move to RG / remove SG from high value | No |
| Digital Set Top Box | Toasters | yes | no | no | no | Move to RG | No |
| DVD | Chainsaw | yes | no | no | no | Move to RG | No |
| DVD HTK | Coffee Machines | yes | no | no | no | Move to RG / remove SG from high value | No |
| DVD HTK | Dashcams | yes | no | no | no | Move to RG | No |
| Electric Shower | Trimmers | yes | no | no | no | Move to RG / remove SG from high value | No |
| Fire | Radio high value | yes | no | no | no | Remove SG | No |
| Fire | Radio low value | yes | no | no | no | Move to RG | No |
| Fire | Sat Navs | yes | ? | ? | ? | Move to RG / remove SG from high value | No |
| Games Console | Sewing Machines | yes | yes | ? | ? | Move to RG / remove SG from high value | No |
| Headphones | Data Storage | yes | no | no | no | Remove SG | No |
| Headphones | Dental | yes | no | no | no | Move to RG / remove SG from high value | No |
| In Car | Digital Set Top Box | yes | no | no | no | Remove SG | No |
| In Car | DIY Equipment (alarm starter kits) | yes | no | no | no | Remove SG | No |
| Kitchen Electrics | DVD | yes | no | no | no | Move to RG | No |
| Kitchen Electrics | DVD Player | yes | no | no | no | Move to RG | No |
| Kitchen Electrics | Electric Fires | yes | no | no | no | Remove SG | No |
| Kitchen Electrics | health and fitness trackers | yes | yes | yes | yes | Move to RG | No |
| Kitchen Electrics | Health and fitness trackers (ear phones) | yes | no | no | no | Remove SG | No |
| Kitchen Electrics | Health Grills | yes | no | no | no | Move to RG / remove SG from high value | No |
| Kitchen Electrics | Heaters | yes | no | no | no | Remove SG | No |
| Kitchen Electrics | HIFI high value (portable and separates) | yes | no | no | no | Move to RG | No |
| Mower | Shredders | yes | no | no | no | Move to RG / remove SG from high value | No |
| Musical Instrument | Singing machine | yes | no | no | no | Remove SG | No |
| PC Monitor | Electric Shower | yes | no | no | no | Remove SG | No |
| PC Monitor | HIFI low value (portable and separates) | yes | no | no | no | Move to RG | No |
| PC Monitor | smart gadgets | yes | yes | yes | yes | Move to RG | No |
| Personal Care | Home Automation (Home security camera) | yes | yes | yes | yes | Move to RG | No |
| Personal Care | Home Cinema High value | yes | yes | yes | yes | Remove SG | No |
| Personal Care | Home Cinema low value | yes | no | no | no | Move to RG | No |
| Personal Care | In car Stereo | yes | no | no | no | Move to RG | No |
| Personal Care | In car stereo | yes | no | no | no | Move to RG | No |
| Personal Care | Smart Gadgets (web cam) | yes | yes | yes | yes | Remove SG | No |
| Photgraphic Lenses | Smart Home - echo | yes | no | no | no | Move to RG | No |
| Photgraphic Lenses | smart watches | yes | yes | yes | yes | Move to RG | No |
| Power Tools | Fans | yes | no | no | no | Remove SG | No |
| Power Tools | iPod Touch | yes | yes | yes | yes | Move to RG | No |
| Power Tools | Ironing | yes | no | no | no | Move to RG / remove SG from high value | No |
| Power Tools | Kettle | yes | no | no | no | Move to RG | No |
| Power Tools | Kitchen Top (ice cream maker, bread maker) | yes | no | no | no | Move to RG | No |
| Power Tools | sports equipment | yes | yes | yes | yes | Move to RG | No |
| Power Tools | Steam Cleaners | yes | no | no | no | Move to RG / remove SG from high value | No |
| Power Tools | Steam Press | yes | no | no | no | Move to RG / remove SG from high value | No |
| Power Tools | Telephone Answer Machine | yes | no | no | no | Move to RG | No |
| Sat Nav System | Ladies and mens watches | yes | yes | yes | yes | Move to RG | No |
| Sewing Machines | Ladies grooming | yes | no | no | no | Move to RG / remove SG from high value | No |
| Smart Watch | Film Cameras (Polaroids) | yes | yes | yes | yes | Remove SG | No |
| Smart Watch | Flashes | yes | ? | ? | ? | Remove SG | No |
| Smart Watch | Food Prep One (food processors) | yes | yes | yes | yes | Move to RG / remove SG from high value | No |
| Smart Watch | Fryers | yes | no | no | no | Move to RG / remove SG from high value | No |
| Smart Watch | Gaming Accessories (Joy stick) | yes | no | no | no | Remove SG | No |
| Smart Watch | Haircare (straighteners) | yes | no | no | no | Move to RG / remove SG from high value | No |
| Smart Watch | HD DVD | yes | no | no | no | Move to RG | No |
| Steam Cleaners | Leaf Blower | yes | no | no | no | Remove SG | No |
| Steam Press | Mens grooming | yes | no | no | no | Move to RG / remove SG from high value | No |
| Telephone Answer Machine | Health and Beauty Care (Slendertone, Micro dermobrasion) | yes | no | no | no | Move to RG / remove SG from high value | No |

Part

3

Database Structure

Database file structure and field descriptions

The following sections describe each file that make up the information database. The sections are split into categories:

1. **Record Structure.** The record structure contains the fields of data held and is described below:

|  |  |  |
| --- | --- | --- |
| **System Name** | This is the name given to a field by the system. This is a short code that is referenced by the program.  The name will be in *italics* if the field is a foreign key and in ***italic bold*** if it is the unique record key. | |
| **Type** | This is the type of data the field may hold: | |
|  | A | Alphanumeric. This field can hold alpha-numeric data. |
|  | N | Numeric. This may only hold numeric data. |
|  | L | Logical. This may only hold ‘True’ or ‘False’. |
|  | M | Memo. This holds free format alpha-numeric data and has no fixed length. |
|  | B  C | Binary. This holds a binary block of data and has no fixed length *e.g. an image*.  Currency |
| **Width** | This holds the width of the field. | |
| **Description** | This gives a full description of the field. The common name of the fields is highlighted in bold. | |

# Customer Table

## System Record Structure (CUSTOMER)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Customer Table** | | | | |
| **System Name** | | **Type** | **Width** | **Description** |
| ***CUSTOMERID*** | | N |  | **Customer Identifier**. This is a unique system generated customer identifier derived from the SYSTEM table field NxCustomerID. |
| TITLE | | A | 5 | **Title.** |
| FIRSTNAME | | A | 20 | **First Name**. |
| SURNAME | | A | 25 | **Surname**. |
| ADDR1 | | A | 22 | **Address Line 1**. |
| ADDR2 | | A | 22 | **Address Line 2**. |
| ADDR3 | | A | 20 | **Address Line 3**. |
| TOWN | | A | 20 | **Town**. |
| COUNTY | | A | 17 | **Country**. |
| POSTCODE | | A | 8 | **Postcode**. |
| TEL1 | | A | 20 | **Telephone Number 1**. |
| TEL2 | | A | 20 | **Telephone Number 2**. |
| SMS | | A | 20 | **SMS number** |
| EMAIL | | A | 30 | **Email Address.** |
| DIRECTIONS | | M |  | **Customer Directions**. These are directions to the customer’s residence. |
| NOTES | | M |  | **Customer Notes**. These are adhoc notes concerning the customer. |
| MARKETING | | A | 20 | **Marketing Source** |
| EMAIL | | A | 40 | **Email Address** |
| ONSTOPFG | | L |  | **Customer On Stop Flag** |
| ONSTOPNOTE | | M |  | **Customer On Stop Description** |
| ONSTOPUSERID | | A | 10 | **User ID that set On Stop** |
| ONSTOPDATE | | D |  | **Date On Stop Set** |
| CLIENTCUSTREF | | A | 20 | **Client Reference Code for the Customer.** |
| RETAILCLIENTID | | I |  | **Retailer ID.** This links into the RetailClient table to retrieve the retailer name. |
| X | | N |  | **Customer X mapping co-ordinate** |
| Y | | N |  | **Customer Y mapping co-ordinate** |
| **Unique Key:** | CUSTOMERID | | | |

# Service Table

The service table holds a record for each service call that is made. Each call is linked to a customer to get the address and customer information.

The imported service table will be split between the Service table and the Customer table.

## System Record Structure (SERVICE)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Service Table** | | | | |
| **System Name** | | **Type** | **Width** | **Description** |
| ***SERVICEID*** | | N |  | **Service Call Identifier**. This is a unique system generated service call identifier derived from the SYSTEM table field NxServiceID. |
| *CUSTOMERID* | | N |  | **Customer Identifier**. This links to the CUSTOMER table CUSTOMERID fields. |
| *CLIENTID* | | N |  | **Client Identifier**. This links to the CLIENT table CLIENTID fields. |
| *CUSTAPLID* | | N |  | **Customer Appliance Identifier**. This links to the CUSTAPL table to obtain the appliance information. |
| *INSPECTID* | | N |  | **Inspection ID**. This is the key into an attached call inspection in table InpsectData. |
| *RETURNID* | | N |  | **Goods Returned Number**. This is the goods returned number from the goods returned table. *(Only populated for a goods returned service call)*. |
| REF | | A | 10 | **Easy Log Reference Number**. This is the reference number generated from the Easy Log system. This will only be populated by Imported records for reference purposes. |
| TODAYDATETIME | | D |  | **Date and Time Call Entry Started**. Date and time the call was created. |
| CALLDATETIME | | D |  | **Date and Time Call Entry Finished.** This is the date and time the call was fully entered. This is used to time how long the call took. |
| *LABOURID* | | D |  | **Labour ID**. This is the key into the labour rates table. |
| DONEDATE | | D |  | **Call Date**. This is the date when the service call was actually made. |
| PROCDATE | | D |  | **Date Spares Dispatched**. This is the date the spare parts were dispatched. |
| REPFAULT | | M |  | **Fault Report Note.** This is a short note on the fault to be repaired. |
| *FAULTCD1* | | A | 2 | **Fault Code 1**. This is linked into the POP\_FAUL table. |
| *FAULTCD2* | | A | 2 | **Fault Code 2**. |
| *FAULTCD3* | | A | 2 | **Fault Code 3**. |
| *FAULTCD4* | | A | 2 | **Fault Code 4**. |
| *FAULTCD5* | | A | 2 | **Fault Code 5**. |
| *FAULTCD6* | | A | 2 | **Fault Code 6**. |
| *APLPART1* | | A | 3 | **Appliance Part Code 1**. This is linked into the Appliance Parts table. |
| *APLPART2* | | A | 3 | **Appliance Part Code 2**. |
| *APLPART3* | | A | 3 | **Appliance Part Code 3**. |
| *APLPART4* | | A | 3 | **Appliance Part Code 4**. |
| *APLPART5* | | A | 3 | **Appliance Part Code 5**. |
| *APLPART6* | | A | 3 | **Appliance Part Code 6**. |
| WARRANTYFG | | L |  | **Warranty Flag**. This is set to True to indicate that the customer has warranty at the time the call was booked. Renamed from ‘WRNTY’. |
| *VISITCD* | | A | 3 | **Visit Reason Code**. This is linked into the return reason table POP\_CC. Renamed from ‘OUTWRNTY’. |
| *USERID* | | A | 6 | **User Identifier**. This is the user ID of the staff member entering the call. This is linked into the USER table. Renamed from RECALL. |
| NOTES | | M |  | **Service Call Notes.** These are notes pertaining to the service call. |
| CALLSHEETNO | | A | 10 | **Engineers Call Sheet Number**. This is entered from the engineers returned call sheet. |
| CALLNET | | $ |  | **Engineer Call Sheet Net Cost.** |
| CALLESTIMATE | | $ |  |  |
| CALLCONTRACT | | $ |  | **Engineer Call Sheet Contract Fee Taken** |
| CALLACCESS | | $ |  | **Engineer Call No Access Fee Taken** |
| CALLPARTSCOST | | $ |  | **Engineer Call Sheet Parts Cost.** |
| CALLDISCOUNT | | $ |  | **Engineer Call Sheet Discount.** |
| CALLLABOUR | | $ |  | **Engineer Call Sheet Labour Cost.** |
| CALLVAT | | $ |  | **Engineer Call Sheet VAT.** |
| CALLCASH | | $ |  | **Engineer Call Sheet Cash Collected.** |
| CALLCARD | | $ |  | **Engineer Call Sheet Credit Card Collected.** |
| CALLDEALER | | $ |  | **Engineer Call Sheet Dealer Cost.** |
| CALLBANKSLIP | | A | 10 | **Bank Slip Number 1.** |
| CALLBANKSLIP2 | | A | 10 | **Bank Slip Number 2.** |
| CALLBANKDATE | | D |  | **Date Money Banked.** |
| CALLCHEQUE | | $ |  | **Engineer Call Sheet Cheque Collected.** |
| *PREVSERVICEID* | | N |  | **Previous Parent Service ID** |
| CALLTYPE | | A | 20 | **Call Sheet Call Type** |
| *STATUSID* | | N |  | **Service Call Status.** This is linked to the STATUS table |
| *SUBSTATUS* | | N |  | **Service Call Sub Status.** This is linked to the SUBSTATUS table. The substatus is a child record of status. |
| *LABOURMINUTES* | | N |  | **This is the Engineer Recorded Time in minutes that the job took to complete.** |
| **Unique Key:** | SERVICEID | | | |

# Service Visit Reason Table

## System Record Structure (POP\_CC)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Service Visit Reason Table** | | | | |
| **System Name** | | **Type** | **Width** | **Description** |
| ***VISITCD*** | | A | 3 | **Visit Code**. This is a unique user entered code giving reason for visit. |
| ACTIVE | | L |  | **Reason Active Flag**. If this is set to True the reason is available for selection. |
| DESC | | A | 45 | **Reason Description**. |
| **Unique Key:** | VISITCD | | | |

# Parts Table

This table holds all the parts ordered for the service calls. One call can order many parts. The parts are referenced in this table until the parts are delivered.

## System Record Structure (PARTS)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Parts Table**  ***(New Table)*** | | | | |
| **System Name** | | **Type** | **Width** | **Description** |
| ***PARTSID*** | | N |  | **Parts Identifier**. This is provided from the Enterprise Exchequer Stock control system. |
| ***SERVICEID*** | | N |  | **Service Call Identifier**. This is the identifier of the service call that has ordered this part. |
| STOCKCODE | | A | 16 | **Exchequer Stock System Stock Code** |
| DESCRIPTION | | A | 80 | **Parts Description.** This is the description taken from Enterprise Exchequer. |
| QUANT | | N |  | **Quantity Ordered** |
| RETAILVALUE | | $ |  | **Retail Value.** This is the retail value or the parts taken from Enterprise Exchequer. |
| COSTVALUE | | $ |  | **Cost Value.** This is the cost value or the parts taken from Enterprise Exchequer. |
| VATVALUE | | $ |  | **VAT Value.** This is the VAT value or the parts taken from Enterprise Exchequer. |
| STATUS | | A | 1 | **Parts Status.** This can be one of the following:  0 – Parts Ordered  1 – Parts Dispatched |
| DATEORDERED | | D |  | **Date Order Placed.** This is the date parts were ordered via Enterprise Exchequer. |
| DATEDISPATCH | | D |  | **Date Parts Dispatched.** This is the date the parts were dispatched via Enterprise Exchequer. |
| TRANSCODE | | A | 9 | **Exchequer Transaction Code.** This is entered once the parts are ordered and if the ‘SORXXXXX’ number of the parts order. |
| LINENO | | S |  | **Exchequer Transaction Line No.** This is entered once the parts are ordered and is the line number of on the transaction. |
| **Unique Key:** | PARTSID, SERVICEID | | | |

# Engineers Table

This holds a record for each engineer. Service Agents are also stored here with a special flag (ISAGENT) to indicate an agent. This provides a consistent interface allowing agents to be selected as though they were normal engineers.

## System Record Structure (ENGNRS)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Engineers Table** | | | | |
| **System Name** | | **Type** | **Width** | **Description** |
| ***ENGINEERID*** | | N |  | **Engineer Identifier**. This is a unique system generated engineer identifier derived from ‘NxEngineerID’ in the SYSTEM table. Renamed from ‘ID’. |
| NAME | | A | 25 | **Engineer’s Name**. |
| ADDRESS | | M |  | **Engineers Address** |
| TELNO | | A | 20 | **Engineers Telephone Number** |
| SMS NO | | A | 20 | **SMS Number**. This is the SMS number used for appointments. |
| EMAIL | |  |  |  |
| ACTIVEFG | | L |  | **Active Flag**. This is True when the engineer is currently available. |
| PC\_LONG | | A | 150 | **Engineer Postcodes.** |
| PC\_BUDDY | | A | 150 | **Buddy Engineer Postcodes**. |
| SKILL1 | | A | 1 | **Engineer Skill 1.** |
| SKILL2 | | A | 1 | **Engineer Skill 2.** |
| SKILL3 | | A | 1 | **Engineer Skill 3.** |
| NOTES | | M |  | **Engineer Notes** |
| MONDAYFG | | L |  | **Monday Work Day Flag.** |
| TUESDAYFG | | L |  | **Tuesday Work Day Flag.** |
| WEDNESDAYFG | | L |  | **Wednesday Work Day Flag.** |
| THURSDAYFG | | L |  | **Thursday Work Day Flag.** |
| FRIDAYFG | | L |  | **Friday Work Day Flag.** |
| SATURDAYFG | | L |  | **Saturday Work Day Flag.** |
| SUNDAYFG | | L |  | **Sunday Work Day Flag.** |
| ENTCUSTACC | |  |  | **Engineers Enterprise Customer Account Number** |
| ENTSTOCKLOC | |  |  | **Engineers Enterprise Stock Location** |
| LASTCSDATE | |  |  | **Last Date** |
| SENDBY | | S |  | **Send Appointments By.**  0 – By Post  1 – By SMS  2 – By Email |
| DEFAULTLIM | | S |  | **Default Number of Calls Per Day.** |
| PRINT\_STYL | | N |  |  |
| **Unique Key:** | ENGINEERID | | | |

# Customer Appliance Table

Each customer’s appliance has a record generated in this table. This table holds all the information concerning each appliance.

## System Record Structure (CUSTAPL)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Appliance Table** | | | | |
| **System Name** | | **Type** | **Width** | **Description** |
| ***CUSTAPLID*** | | N |  | **Customer Appliance Identifier**. This is a unique system generated customer appliance identifier derived from ‘NxCustAplID’ in the SYSTEM table. |
| *CUSTOMERID* | | N |  | **Customer Identifier**. This links to the CUSTOMER table CUSTOMERID fields. |
| *APPLIANCECD* | | A | 5 | **Appliance Code Identifier.** This is the appliance type from the POP\_APL files. Also linked into the MODEL table |
| *MODEL* | | A | 12 | **Model Code.** This is the manufacturer’s unique model code linked into the MODEL table. |
| SNO | | A | 10 | **Serial Number.** This is the appliance Serial Number. |
| SUPPLYDAT | | D |  | **Date of Purchase**. This is the date of purchase. |
| SUPPLIER | | A | 21 | **Supplier Name**. This is the text name of the supplier. |
| SUPCONT | | A | 26 | **Supplier Contact Name**. |
| POLICYID | | N |  | **Contract Service Guarantee ID.** This links to the policy table. |
| POLICYNUMBER | | A | 25 | **Contract Service Guarantee Number.** |
| CONTRACTDT | | D |  | **Contract Date.** This is the date the last annual contract was taken out. |
| CONTRACTSTART | | D |  | **Contract Start Date.** |
| CONTRACTEXPIRES | | D |  | **Contract Expiry Date.** |
| CONTRACTCANCELDATE | | D |  | **Contract Cancelled Date.** |
| CONTRACTPRICE | | C |  | **Contract Price.** |
| REGNO | | A | 20 | **Registration Card Number.** This is the number on the registration card. |
| CONTRACTSTAT | | A | 1 | **Contract Status.** This shows the current status of the contract for this appliance and can be one of the following:  1 – Under Guarantee *(Under 1 year)*  2 – Cash Call *(Over 1 Year)*  3 – Dealer Account  4 – Under Contract |
| APPLIANCEPRICE | | C |  | **Appliance Purchase Price** |
| CLIENTCUSTAPLREF | | A | 10 | **Client Reference for Appliance** |
| DESC | | A | 25 | **Customer Appliance Description**. This is additional information about the customer’s appliance. |
| NOTES | | M |  | **Customer Appliance Notes.** |
| SERVICEID | | N |  | **Service ID of Last Gas Inspection** |
| SKILL | | S |  | **Skill Required to Service.** This is matched with Skill1-3 in Engineers table. |
| LASTGASDATE | | D |  | **Last Gas Inspection Date** |
| SERVICESTART | | D |  | **Service Start Date.** |
| SERVICEEXPIRES | | D |  | **Service Expiry Date.** |
| **Unique Key:** | CUSTAPLID | | | |

# Appliance Table

List of generic appliances *e.g Gas Oven*.

## System Record Structure (POP\_APL)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Appliance Table** | | | | |
| **System Name** | | **Type** | **Width** | **Description** |
| ***APPLIANCECD*** | | A | 5 | **Appliance Code**. This is a user assigned unique identifier code for the appliance. Renamed from ‘CODE’. |
| ACTIVE | | L |  | **Appliance Active Flag**. If this is False the appliance is no longer in use. This is merely used for informational purposes. |
| DESC | | A | 30 | **Appliance Description**. |
| **Unique Key:** | APPLIANCECD | | | |

# Manufacturer Table

This stores the names or the manufacturers for lookup purposes.

## System Record Structure (MANUFACT)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Manufacturer Table** | | | | |
| **System Name** | | **Type** | **Width** | **Description** |
| ***MFR*** | | A | 3 | **Manufacturer Code.** This is linked into the MANUFACT table |
| NAME | | A | 25 | **Manufacturer Name**. |
| **Unique Key:** | MFR | | | |

# Appliance Model Table

This is a list of appliance models. Each model is linked to the manufacturer and the generic appliance.

## System Record Structure (MODEL)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Appliance Model Table** | | | | |
| **System Name** | | **Type** | **Width** | **Description** |
| ***APPLIANCECD*** | | A | 5 | **Appliance Code**. This is a link into the appliance table |
| ***MFR*** | | A | 3 | **Manufacturer Code**. This is linked into the MANUFACT table |
| ***MODEL*** | | A | 12 | **Model Code.** This is the manufacturer’s unique model code. |
| DESCRIPTION | | M |  | **Model Description**. This is a description of the specific model. This can be used to enter common faults and instructions. |
| GASFG | | L |  | **Gas Appliance** |
| NOTES | | M |  | **Note on Model** |
| ENTCATEGORY | | A | 16 | **Enterprise Model Category** |
| LASTUPDATE | | D |  | **Last Updated from Enterprise.** |
| **Unique Key:** | APPLIANCECD, MFR, MODEL | | | |

# Faults Table

This holds a record for each fault code that is assigned in the service table. The faults are not linked to a specific appliance. The fault code forms the last two digits of the overall fault code.

## System Record Structure (POP\_FAUL)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Appliance Faults Table** | | | | |
| **System Name** | | **Type** | **Width** | **Description** |
| ***FAULTCD*** | | A | 2 | **Fault Code**. This is a user entered unique fault code for the appliance. |
| DESC | | A | 50 | **Fault Description**. This is a text description of the fault. |
| **Unique Key:** | FAULTCD | | | |

# Appliance Parts Table

This holds a record for each part of an appliance. These parts are assigned together with a fault code in order to extend the reporting capabilities. This will allow the tracking of which parts are failing most often. The part code forms the first three digits of the fault code.

## System Record Structure (APLPARTS)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Appliance Parts Table**  ***(New Table)*** | | | | |
| **System Name** | | **Type** | **Width** | **Description** |
| ***APPLIANCECD*** | | A | 5 | **Appliance Code**. This is a link into the appliance table. |
| ***APLPARTCD*** | | A | 3 | **Part Code**. This is a three digit part number. |
| DESC | | A | 50 | **Part Description**. This is a text description of the fault. |
| **Unique Key:** | APPLIANCEID, PARTCD | | | |

# Diary Table

This holds a record for each engineer’s diary. Each record stores a summary of appointments for an engineers week by engineer identifier, year, week and time period.

## System Record Structure (DIARY)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Diary Table** | | | | |
| **System Name** | | **Type** | **Width** | **Description** |
| ***USERID*** | | A | 10 | **Engineer Identifier**. This is the link into the ENGINEER table (EngineerID). |
| ***YEAR*** | | N |  | **Year for Diary**. This is the year on which the Monday starts. |
| ***WEEKNO*** | | N |  | **Week Number**. This is the week number of the diary entry. |
| TIMEPERIOD | | N |  | **Time Period**. This is the time period in the day and can be one of the following.  1 Morning  2 Afternoon  3 Evening |
| MONDAY | | M |  | **Monday Appointment Text**. |
| TUESDAY | | M |  | **Tuesday Appointment Text**. |
| WEDNESDAY | | M |  | **Wednesday Appointment Text**. |
| THURSDAY | | M |  | **Thursday Appointment Text**. |
| FRIDAY | | M |  | **Friday Appointment Text**. |
| SATURDAY | | M |  | **Saturday Appointment Text**. |
| SUNDAY | | M |  | **Sunday Appointment Text**. |
| MONDAYDAY | | A | 1 | **Monday Day Type**.  W – Working,  N - Non-Working  H – Holiday  S - Sick |
| TUESDAYDAY | | A | 1 | **Tuesday Day Type**. |
| WEDNESDAYDAY | | A | 1 | **Wednesday Day Type**. |
| THURSDAYDAY | | A | 1 | **Thursday Day Type**. |
| FRIDAYDAY | | A | 1 | **Friday Day Type**. |
| SATURDAYDAY | | A | 1 | **Saturday Day Type**. |
| SUNDAYDAY | | A | 1 | **Sunday Day Type**. |
| MONDAYLIM | | S |  | **Monday Call Limit**. |
| TUESDAYLIM | | S |  | **Tuesday Call Limit**. |
| WEDNESDAYLIM | | S |  | **Wednesday Call Limit**. |
| THURSDAYLIM | | S |  | **Thursday Call Limit**. |
| FRIDAYDAYLIM | | S |  | **Friday Call Limit**. |
| SATURDAYLIM | | S |  | **Saturday Call Limit**. |
| SUNDAYDAYLIM | | S |  | **Sunday Call Limit**. |
| **Unique Key:** | USERID, YEAR, WEEKNO | | | |

# Diary Entry Table

This holds a record for each engineer’s appointment. Each record links all other records to the appointment

## System Record Structure (DIARYENT)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Diary Entry Table** | | | | |
| **System Name** | | **Type** | **Width** | **Description** |
| ***DIARYID*** | | N |  | **Diary Identifier**. This is a system generated number from the SYSTEM table ‘NxDiaryID’. |
| *USERID* | | N |  | **Engineer Identifier**. This is linked into the ENGNRS table and represents the engineer to fill the appointment. |
| *CUSTOMERID* | | N |  | **Customer Identifier**. This is the customer identifier that booked the appointment. This is a link into the CUSTOMER table. |
| *SERVICEID* | | N |  | **Service Call Identifier**. This is the service identifier that booked the appointment. This is a link into the SERVICE table. |
| *USERID* | | A | 10 | **User Identifier**. This is linked into the USER table and represents the user that made the diary entry. |
| ENTERDATE | | D |  | **Date Appointment Made**. |
| EVENTDATE | | D |  | **Date of Appointment**. |
| TIME | | A | 8 | **Time of Appointment**. |
| TIMEPERIOD | | N |  | **Time Period of Appointment**. |
| TITLE | | A | 60 | **Appointment Title**. |
| TYPE | | A | 10 | **Type of Appointment**. |
| DESC | | M |  | **Description**. This is a full text description of the appointment. |
| ISPOSTED | | L |  | **Posted Flag**. This is set to true once the appointment has been posted to the engineer. |
| *TAGINTEGER1* | | N |  | **Service ID.** This links to the service table serviceid for the service call appointment. |
| *TAGINTEGER2* | | N |  | **Customer ID.** This links to the customer table customerid for the customers appointment. |
| *TAGINTEGER3* | | N |  | **Return ID.** This links to the returns table returnid for the goods return appointment. |
| **Unique Key:** | DIARYID | | | |

# Web User Table – Client Connect Only

## User Record Structure (USERWEB)

|  |  |  |  |
| --- | --- | --- | --- |
| **User Web Table** | | | |
| ***USERID*** | A | 10 | **User ID.** This is the user ID that is recognised by the system. This ID is typed at login and must be unique. |
| PASSWORD | A | 100 | **User Password.** This is the password required at login. The password will be stored as a salted hash encryption and will be unreadable. |
| FULLNAME | A | 40 | **Full name of user.** |
| TITLE | A | 40 | **User Job Title.** |
| LEVEL | N | 1 | **Security Level.** This is stores the user’s security level:  0 – Supervisor *(Only a single user allowed this level)*  1 – Executive  2 – Operator  9 – Access Denied |
| ***CLIENTID*** | N |  | **Client ID.** This is the client ID the user will log in on. |
| LASTACDT | D |  | **Last Access Date & Time.** This is automatically updated then the user logs is and show the date the user last accessed the system. |
| **Unique Key:** | USERID | | |

# Web Customer Password Table

## Customer Password Record Structure

|  |  |  |  |
| --- | --- | --- | --- |
| **Customer Web Password Table** | | | |
| ***CUSTOMERID*** | N |  | **Customer ID.** Link into the customer table. |
| PASSWORD | A | 100 | **Customer Password.** This is the password required at login. The password will be stored as a salted hash encryption and will be unreadable. |
| DATETIMESET | D |  | **Date and Time Password Set** |

# Enrolment Code Table

## Customer Password Record Structure (CustomerEnrolement)

|  |  |  |  |
| --- | --- | --- | --- |
| **Customer Web Password Table** | | | |
| ***ENROLEID*** | N |  | **Enrolement ID.** This is an auto incremented number. |
| ***CUSTOMERID*** | N |  | **Customer ID.** Link into the customer table. |
| EnroleCode | U |  | **Enrolement Code. This a GUID unique identifier.** |
| ValidFlag | L |  | **Valid Flag.** This True if valid and False if used\failed. Default True. |
| ATTEMPTS | N |  | **Number of Attempts.** This is the number of attempts the postcode has been tried. The reset expires after five failed attempts. |
| DATETIMESET | D |  | **Date and Time Password Set.** If code successfully set the password this date\time is set. |
| DateCreated | D |  | **Date and Time Created.** |

# Customer Activity Log Table

This table will be pulled down to UKW Complete Service and accessible by the UKW fraud team. This will be maintained for 30 days.

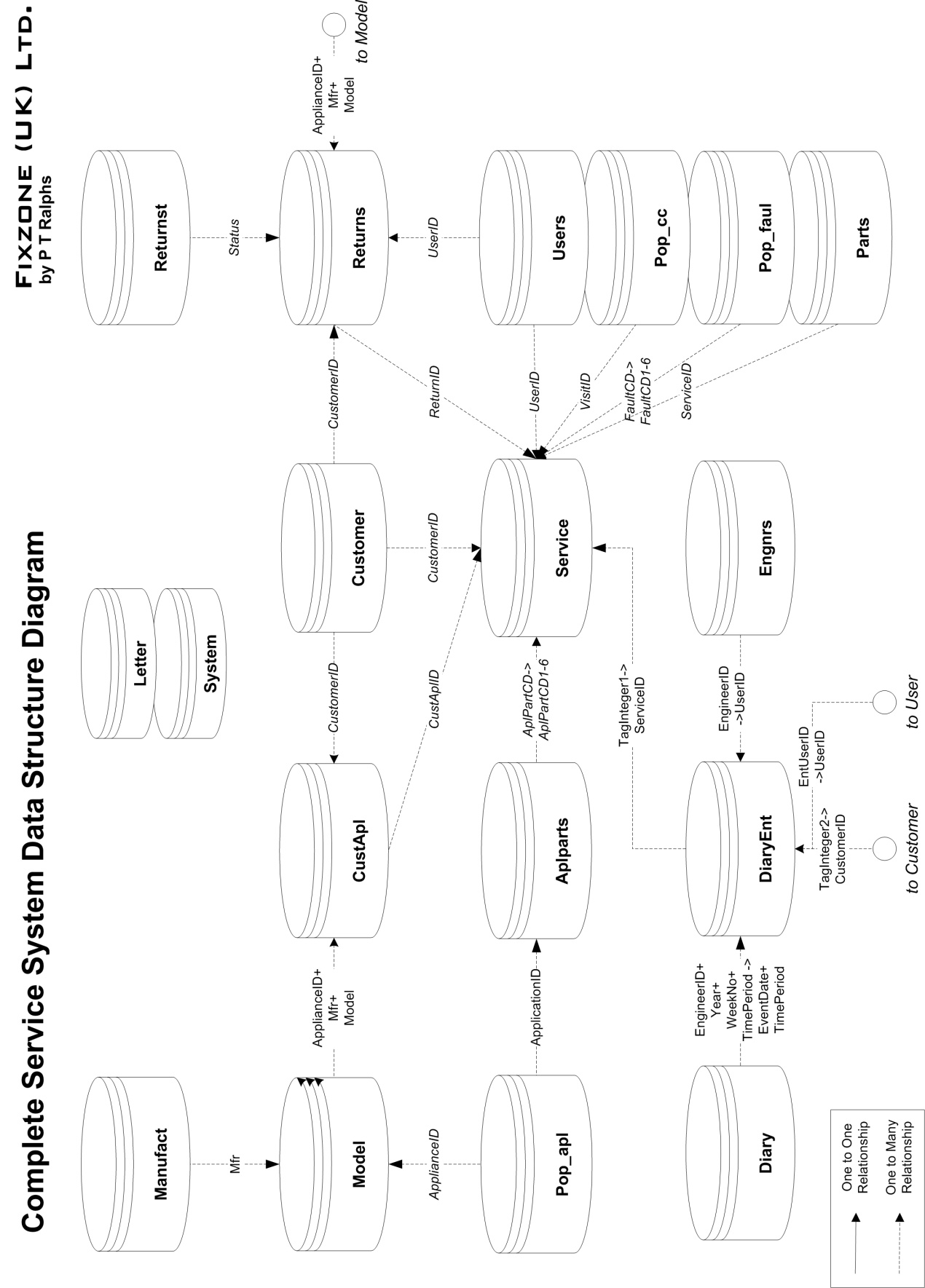
## Activity Log Structure

|  |  |  |  |
| --- | --- | --- | --- |
| **Customer Activity Log Table** | | | |
| **System Name** | **Type** | **Width** | **Description** |
| ***ID*** | ***N*** |  | **Unique Identifier.**Auto incremented. |
| CustomerID | N |  | Customer Id |
| CustAplId | N |  | Customer Appliance Id |
| ServiceID | N |  | Service Id |
| ActivityURL | A | 200 | Visited page URL |
| DateTimeCreated | D |  | Date and Time of action |
| FieldName | A | 60 | Field name updated. |
| PreviousData | M |  | Previous field data |
| UpdatedData | M |  | Update field data |
| CommittedFlag | B |  | Committed to database flag. This is True is saved to database and False if not. |

# Recommended Communication Template Fields

Any of the fields in the job object can be used in the communication templates. The following is the recommended list.

|  |  |  |  |
| --- | --- | --- | --- |
|  | | | |
| **System Name** | **Type** | **Width** | **Description** |
| TITLE | A | 5 | **Title.** |
| FIRSTNAME | A | 20 | **First Name**. |
| SURNAME | A | 25 | **Surname**. |
| ADDR1 | A | 22 | **Address Line 1**. |
| ADDR2 | A | 22 | **Address Line 2**. |
| ADDR3 | A | 20 | **Address Line 3**. |
| TOWN | A | 20 | **Town**. |
| COUNTY | A | 17 | **Country**. |
| POSTCODE | A | 8 | **Postcode**. |
| TEL1 | A | 20 | **Telephone Number 1**. |
| TEL2 | A | 20 | **Telephone Number 2**. |
| EMAIL | A | 30 | **Email Address.** |
| CLIENTCUSTREF | A | 20 | **Client Reference Code for the Customer.** |
| ***SERVICEID*** | N |  | **Service Call Identifier**. This is a unique system generated service call identifier derived from the SYSTEM table field NxServiceID. |
| TODAYDATETIME | D |  | **Date and Time Call Entry Started**. Date and time the call was created. |
| DONEDATE | D |  | **Call Date**. This is the date when the service call was actually made. |
| ***ENGINEERID*** | N |  | **Engineer Identifier**. This is a unique system generated engineer identifier derived from ‘NxEngineerID’ in the SYSTEM table. Renamed from ‘ID’. |
| NAME | A | 25 | **Engineer’s Name**. |
| TELNO | A | 20 | **Engineers Telephone Number** |
| *MODEL* | A | 12 | **Model Code.** This is the manufacturer’s unique model code linked into the MODEL table. |
| SNO | A | 10 | **Serial Number.** This is the appliance Serial Number. |
| SUPPLYDAT | D |  | **Date of Purchase**. This is the date of purchase. |
| POLICYNUMBER | A | 25 | **Contract Service Guarantee Number.** |
| CONTRACTDT | D |  | **Contract Date.** This is the date the last annual contract was taken out. |
| CONTRACTSTART | D |  | **Contract Start Date.** |
| CONTRACTEXPIRES | D |  | **Contract Expiry Date.** |
| CONTRACTCANCELDATE | D |  | **Contract Cancelled Date.** |
| REGNO | A | 20 | **Registration Card Number.** This is the number on the registration card. |
| DESCRIPTION | M |  | **Model Description**. This is a description of the specific model. This can be used to enter common faults and instructions. |
| NAME | A | 25 | **Manufacturer Name**. |
| DESC | A | 30 | **Appliance Description**. |
| EVENTDATE | D |  | **Date of Last Appointment**. |



# Shop Direct Policy Data Conversion

**Imported Streamline Fields** **Pacifca system table.field**



The portal will accept service requests on any service guarantee uploaded. Only ‘SG’ service guarantee data will be loaded into the customer portal. Any new service guarantees will be included in the customer’s portal.

The service guarantee processing will be configured to import based on a file trigger. The new service guarantee file will be polled every 15 minutes.