**CC Generic Version – Notes from Fixzone Meeting with Jon Negri 16/10/19**

1. **Customer Address Confirmation screen**

* Remove restriction on amending the Customer Address and Contact Information. Mark relevant fields with \* where they are a Mandatory Field and add \* Mandatory Field to bottom of page.
* If any customer details are changed this should be captured and a Customer Note created with User Details and the change made. i.e. Telephone number changed from XXXX to YYYY (tbc)

1. **Book Appointment**

* Remove Appointment Reason
* Remove the Additional Slot
* Select preferred date – No date should be pre-populated and availability search should only be called once date entered by the Client.
* If requested date is not available change message displayed to:

*Sorry that date is not available, please select from one of the available dates below.*

1. **Job Notes**
   * Amend the format of the notes to:

*Client Preferred Date: DD-MM-YY, 1st Date Available: DD-MM-YY, Client Selected Date: DD-MM-YY*

1. **Unread Client Notes**
   * Check script is running
   * Only required for In-progress jobs (as per LG)
2. **Home Page**
   * Remove WA Query Answered
   * Remove WA Query Raised
   * Remove Product Search
3. **New Customer**
   * Indicate Mandatory Fields with \* and add \* Mandatory Field to bottom of page
   * Amend order of Title options – preferred order is Mr, Mrs, Miss, Ms etc.
4. **Performance Reports**

* Dashboard showing the following two tables;
* Table showing open jobs by Status
* Table showing open jobs by age, i.e. 0-7 days, 8-14 days, 15-21 days, 22-28 days and >= 29 days
* Two reports (exportable as csv) containing all relevant fields;
* All open jobs
* Closed jobs between two selectable dates

1. **Add Appliance Page**
   * Remove PNC and Retailer fields
2. **Master Account**
   * One Master Account and Password will be created by Fixzone for each Client and this will be given to the Account Manager who will be responsible creating additional users for the Client.
3. **Add Model**
   * When adding a model will need to use the Appliance Type skill set.
   * Need to check if we can add Appliance Category by Client in Complete Service.
4. **Customer Import**
   * Need to see if it is possible to do a 1 off import of the Client’s customer information via an agreed spreadsheet. (to be discussed with PR/BM)
   * JN to provide a suggested template for review.
5. **Email to Contact Centre**
   * Requirement to have ability to email the Contact Centre as Service Notes are not currently flagged up to anyone in Complete Service.