**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.  
  Significant development
* Mark relevant fields with \* where they are a Mandatory Field and add \* Mandatory Field to bottom of page.  
  Simple change
* 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)  
  Significant development

1. **Book Appointment**

* Remove Appointment Reason Simple change
* Remove the Additional Slot Simple change
* Select preferred date – No date should be pre-populated and availability search should only be called once date entered by the Client. Some development
* 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.*Simple change

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* Some development

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

Significant development

* Two reports (exportable as csv) containing all relevant fields;
* All open jobs
* Closed jobs between two selectable dates

Significant development

1. **Add Appliance Page**
   * Remove PNC and Retailer fields Simple change
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.  
     Significant development
3. **Add Model**
   * When adding a model will need to use the Appliance Type skill set.   
     Some development
   * Need to check if we can add Appliance Category by Client in Complete Service.  
     Some development
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.  
     Significant development
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.  
     Significant development