BOHECO I
CRMS

Consumer
Relations
Management
System

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User's Manual

Consumer Relations Management System (CRMS) @ 2023

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I. Membership

1. **Creating a New Membership Application**

    To create a new membership, go to **Membership -> Register New MCO** and fill in the fields. Alternatively, you can click on the **Green Plus Icon** on the upper left side of the application. Hit **Save** once done typing the details.

2. **Viewing a Membership Application Data**

    To view an existing member consumer data, go to **Membership -> Member Consumers -> View** (eye icon on the list). You can also search an MCO from the search bar. The list provides you with a brief information about the consumer for easier access.

3. Updating a Membership Application Data

To update an existing membership data, go to **Membership -> Member Consumers -> Edit** (pencil icon on the list).

4. Membership Reports

Membership reports can be found under **Membership -> Reports.** As of the moment, there are two reportorial templates available: **Monthly,** and **Quarterly.** You can also download all the reports in Excel format.

II.   Service Connections (Housewiring)

1. **Creating a New Service Connection Application**

   a. To create a new service connection application, go to **Service Connections -> New Application**. Select from the **Member-Consumers** list and click **Go**. You can also search a name from the list thru the search bar.Alternatively, you can also click on the **Yello Plus Icon** on the right-upper side of the application.

   b. Supply all the fields indicated by an **asterisk** (*****) to be able to save and validate the application. The system will refuse to save if you will not supply these fields. Once done on the first form, click **Next** to go to the **assessment of checklists**.

c. Next, assess all the requirements the consumer has submitted, and check it from the checklist provided. **NOTE** that checklists with red asterisks beside it (*) are the **minimum requirements for inspection**. BOHECO I however requires the full requirements once the application is about to be energized. Once done, click the **Save and Proceed** button to proceed to the **assigning of verifier/inspector**. **ALSO NOTE** that if the submitted requirements doesn't meet the minimum requirements for inspection, the program will not proceed to the assigning of verifier/inspector as a preliminary security of the application flow. The checklist can always be updated from the update module.

d. Next is the **assigning of verifier/inspector** and filling up of the as-planned data, which are based from the electrical plan embedded from the requirements submitted by the consumer. Simply select the name of the inspector from the dropdown menu, and fill in all other data. **NOTE** that all the data **except** the **verifier** are **optional**.

Also, the current number of active inspections per verifier is shown on the right side of the form in order for the clerk to have a numeric analysis on the amount of inspections each verifier, should the clerk desires to assign an application to another verifier/inspector.

Click **Next** to proceed to the **assessment of fees**.

e. Next is the **service connection charge assessment**.

To assign the accredited electrician, switch on the **toggle button** to turn **green.** This will enable the selection of electrician through the dropdown button below. Select the electrician from the list and the details will automatically fill in on all the fields at the right.

The **service connection fee** and **bill deposits** are now automatically computed based on the technical details of the application (consumer type, load, phase, etc.)

For the **electrician's labor charges**, simply fill in the number of circuit breakers, convenience outlets, lighting outlets, and service entrance fields and the system will automatically compute the charges, which can be seen on the Payment Summary.

Once done, click **Submit,** and that ends the application process.

2. **Viewing a Service Connection Application**

To view a service connection application, go to **Service Connections -> All Applications**. You can also search an application through the search bar. Click on the **Turn On ID** or on the **View** (eye icon) button on the right side of the list to view.

The view module gives you several categorizations of the data of the consumer's application, which can be accessed by the **tabs** on the right part of the app.

3. **Updating a Service Connection Application Data**

To update a service connection application data, go to the **View Module** (see item #2). Once you're in the view module, scroll below and you can see toolbar buttons. Click on the **edit icon** (pencil icon) to update.

Once done editing the details, click **Save.**

4. **Updating Service Connection Checklist**

    To update the service connection checklists, go to the **View Module** (see item #2), then go to the **Requirements and Crew tab.**

Click on the **edit button (pencil icon)** to update the checklist data.

5. **Updating Service Connection Fees/Payables**

    To update the service connection checklists, go to the **View Module** (see item #2), then go to the **Payment Invoice tab.**
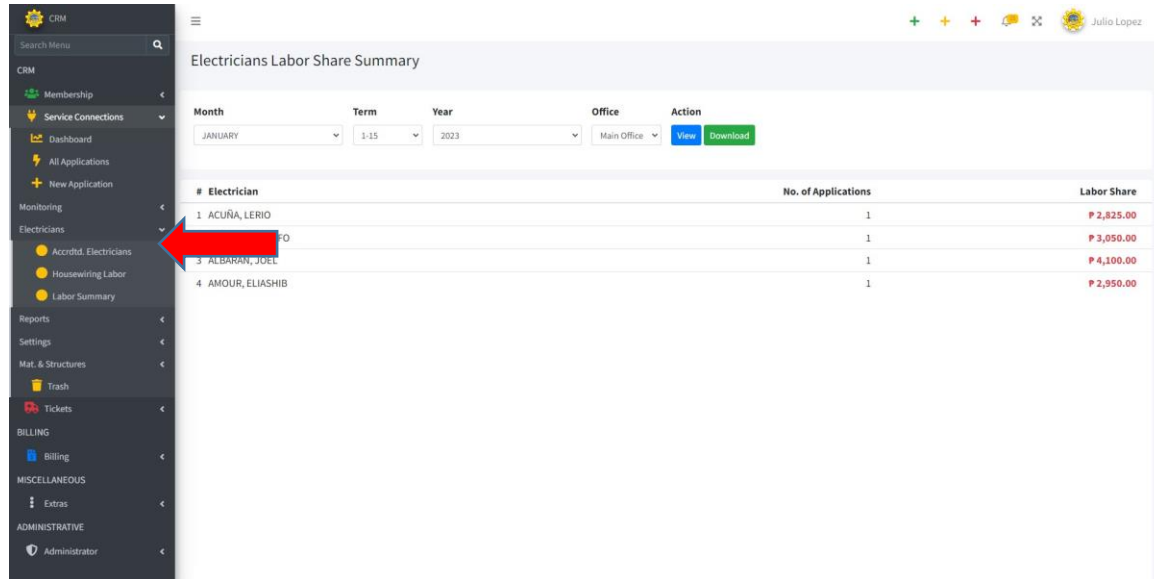
Click on the **update button (pencil icon)** to update the payables.

6. Preparing Electricians Labor
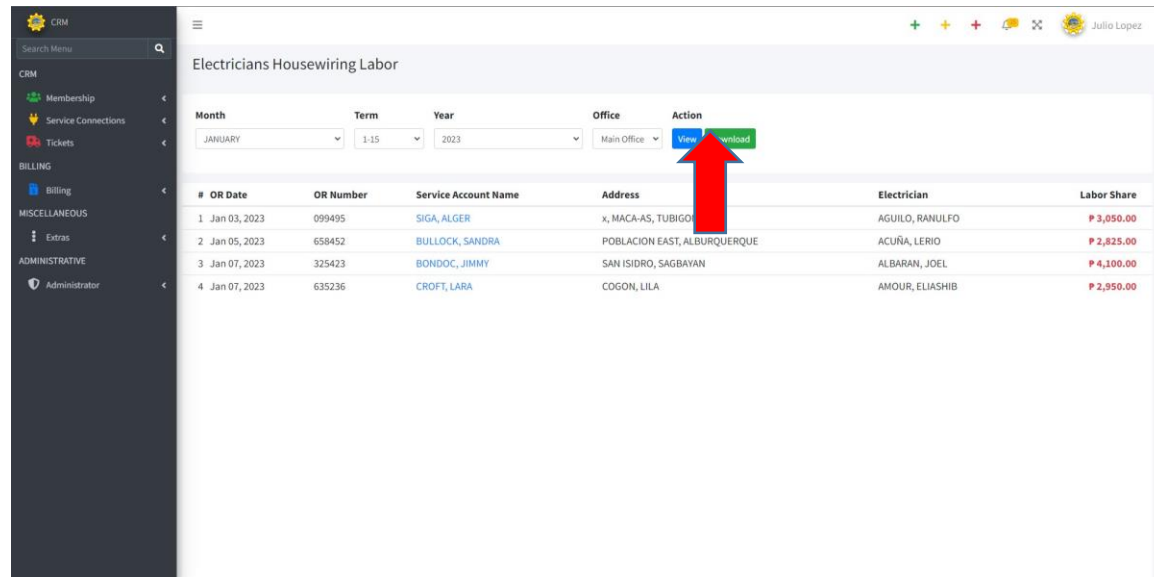
To prepare the **Housewiring Labor Summary** and **Labor Share**, go to **Service Connections -> Electricians.** You can view the data or download it in Excel format.

7. Reports

Reports can be found under **Service Connections -> Reports**. There are various types of reports available as of the moment. NOTE that these reports are subject to changes should the need for one arises.
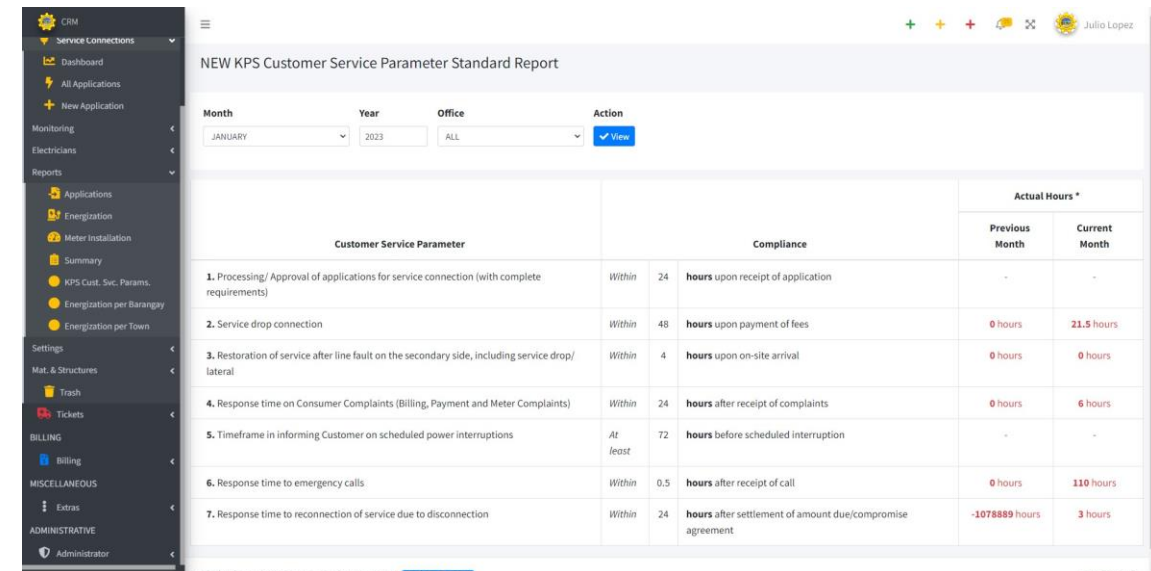
8. Crew Assigning (Engineering Department)

To assign the crew to a specific energization (application), go to **Service Connections -> Monitoring -> Crew Assigning.**

Select the **Station Crew** on the **right side of the list**, and click the **check icon to save**. You can also filter the list of unassigned service connections by office.

9. Meter Assigning (SEEAD – Metering Division)

To assign meters to new service connection applications, go to **Service Connections -> Dashboard -> Process Flow Monitor -> Unassigned Meters.** Expand the menu by clicking the **view button** (eye icon).

The list shows all the applications with no meter assigned yet. Click on the **go button** (arrow-right button) on the right side of the list.

Supply all the necessary information pertaining meters on the fields provided, and click **Submit** once done.

10. Energization (Manual, in Web App)

We assume that not all of the linemen will bring tablets during the first implementation, hence there is still a module for manual updating of energizations. Simply go to **Service Connections -> Dashboard -> Process Flow Monitor -> Applications For Energization.** Expand the menu by clicking the **view button** (eye icon).
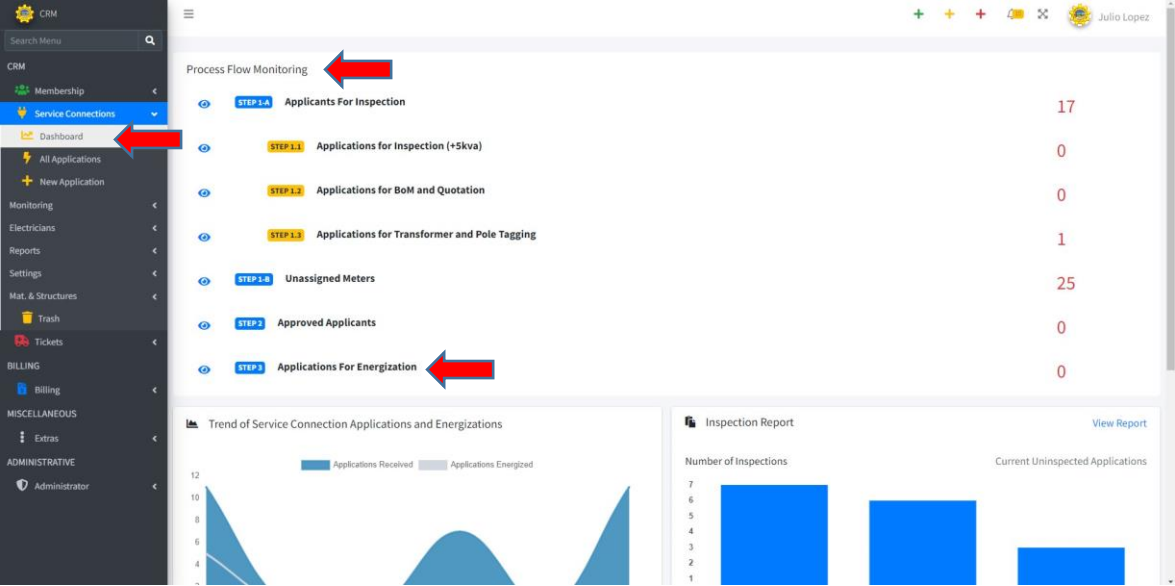
The list shows all applications that are all set to be energized.

In here, you can **print the Turn On Order**, **change the crew assigned**, or **update the post-energization status** (executed or not executed) of the application.

Save the changes once you're done altering the pre and post-energization modules.

III. Tickets (Complaints/Requests)

1. **Creating New Tickets**

   To create a new ticket, go to **Tickets -> Create Ticket**. There are three kinds of tickets to choose from: **Ordinary tickets**, **Relocation (Transfers)**, and **Change Meters**. Each vary depending on the access of each user.
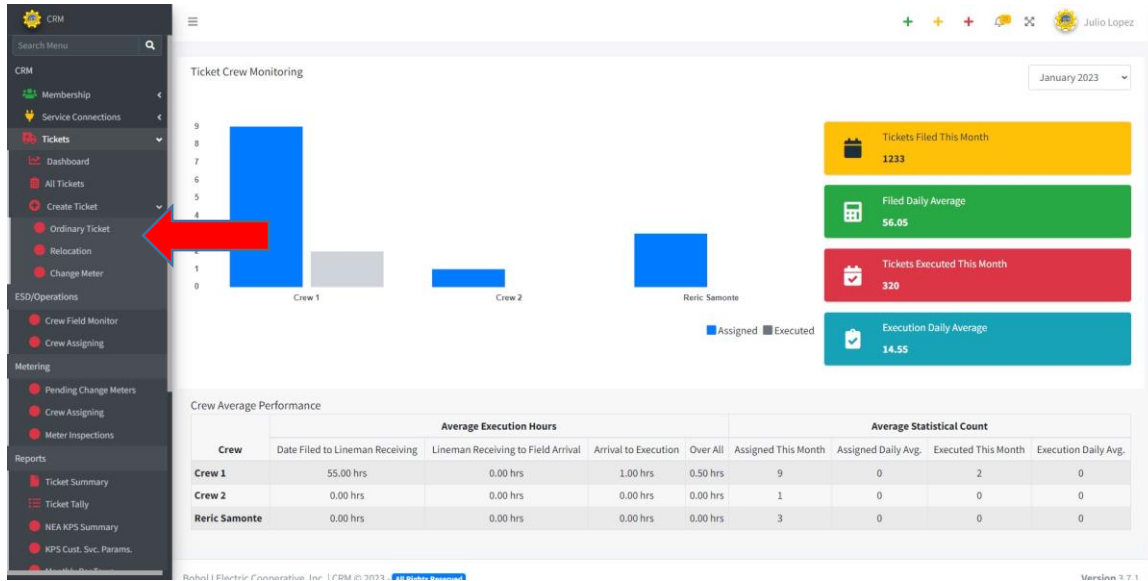
Alternatively, you can create tickets using the shortcut on the right-upper side of the application, indicated by the **Red Plus Icon**.
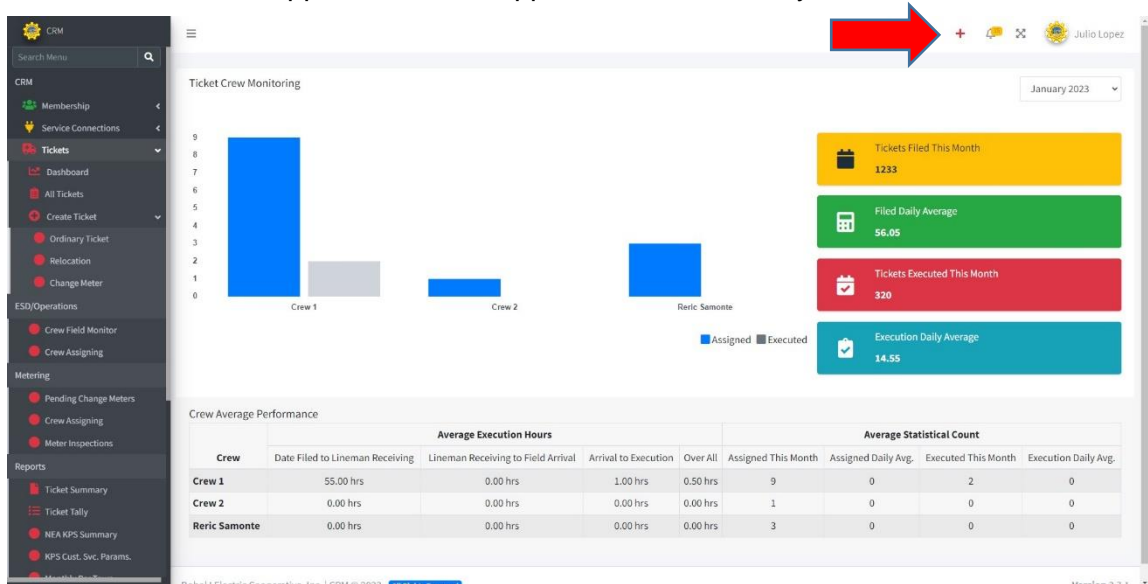
Fill in all the necessary fields, especially the **ticket type** to create a new ticket. You can **skip** selecting the **crew assigned field** as it will be re-assigned by the engineering department later on.

For the relocation tickets, **don't forget** to specify the **inspector/verifier** in order for the ticket to be inspected first before being forwarded to the linemen.

For the **change meters,** only the metering division can now create these kinds of tickets. You can also skip adding the meter details and update it later after the actual changing of meter.

2. Viewing of Tickets

To view a ticket, go to **Tickets -> All Tickets.** Click the **Ticket ID** to view.

Tickets are segregated by the tabs, indicating the nature of their data which includes, the ticket details itself, metering details, logs, and history.

The **status** are also indicated on the left-upper corner of the ticket. On the right side are the **time log summary**. You can update the time log by clicking on the **edit** (pencil icon) right beside it.

3. **Updating of Tickets**

To update a ticket, go to the **View Module** of the ticket (**see #2**), and click on the **update button** (pencil icon) on the ticket card.

Alternatively, you can go the **All Tickets module** and click on the **update button** (pencil icon) on the right side of the list.

NOTE that only un-executed tickets are editable/updatable.

4. **Crew Assigning (Engineering Department)**

To access the crew assigning, go to **Tickets -> ESD/Operations -> Crew Assigning**.

Select the crew to be assigned to a particular ticket on the **right side** of the list, and **click the check button** to save. You can also filter the tickets by office.

5. Monitoring

The system have a handful of monitoring tools for tickets like Crew Field Monitor, Pending Change Meters, Meter Inspections, and etc.

6. Reports

As of the making of this manual, there are already a handful of reports available to be generated real-time or can be downloaded in Excel format.

IV. General Controls

1. Register Your Account

In the login page, click on the Register a new membership link and fill in the required fields.

2. Logging out

To logout, click on the **profile button** at the right-upper side of the app. On the popup menu that will appear, click **sign out**.

3. Full Screen

4. **Notifications**

5. **Dashboards**

   Dashboards can be found under all major modules (Membership, Service Connections, and Tickets).