

Clic Ceredigion

CRM Enquiry Updates and Reassignment



Opening the CRM

The Clic Ceredigion interface is a web based application that can be accessed via the following link; http://eforms5test/ufs/CLIC_HUB.eb

This will open the interface on the main Home page but there are options in tabs to change the view

Change the view with these tabs

At the top of each column in the list, there are double arrows which allow you to sort the data allowing you to view the information in a way that suits you

Applying any of the filters in this area will limit the information shown in the main enquiries screen. This works for both the My Enquiries view and also the Team Enquiry view



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Opening the CRM continued

To change the view, you can click on the Search or New Enquiry tabs.

It is probably more likely that you would use the Search Tab more often to find details of Customers or search for Enquiries

The screenshot shows the CLIC Hub web application. At the top, there are tabs for 'Customer' and 'Enquiry'. The 'Customer' tab is currently active, displaying fields for Customer ID, Email Address, Forename, Surname, Telephone, NI No., Postcode, Type (with 'Residential' selected), and Show Disabled Accounts. There are also 'Search Customers' and 'Reset' buttons. The 'Enquiry' tab is visible on the right. The main content area has sections for 'Enquiry ID' (with a note about direct links), 'Subject', 'Category', 'Source', 'Type', 'Assigned To (Person)' (with a note about selecting a team first), and 'Search for enquiries created between these dates' with Start Date and End Date fields. A 'Search Enquiries' button is at the bottom of this section. The bottom of the page includes system information (System Name: hub.ceredigion.gov.uk (v.1.56), 08:55:56, 15 November 2017) and a footer with a note about Andy O'Donnell (Customer Services Business Analyst).

Opening the CRM continued

The New Enquiry Tab can be used if you have to start entering enquiry details before a customer has given their own contact details. This will allow you to select the category/subcategory and enter important details immediately.

The screenshot shows the CLIC Hub software interface for creating a new enquiry. The top navigation bar includes links for Home, Search, and New Enquiry. The main area is titled 'Enquiry' and contains fields for Source (Telephone), Priority (Medium), Type (Service Request), Category (Please select), Sub Category (dropdown menu showing options like Waste Management - Real Nappies Request, Waste Management - Replacement food caddy process (residential), Waste Management - Report of Missed Collection, etc.), and Subject (Details). To the right, there's a 'Customer' section with fields for Type (Residential), Name, Post Code, NI No., and Telephone, along with 'Additional information' and 'Forms / Documents' tabs. A large text area at the bottom is labeled 'Powered by Triforce'. The status bar at the bottom shows the system name, date, and time.

Source: Telephone
Priority: Medium
Type: Service Request
Category: Please select
Sub Category: Waste Management - Real Nappies Request, Waste Management - Replacement food caddy process (residential), Waste Management - Report of Missed Collection, Waste Management - Street Cleaning Enquiry, Waste Management - Trade Waste and Trade Waste Bag/Tag Process, Waste Management - Trial Glass collection and Free Recycling Bag Schemes, Workways+, Workways+ Enquiry
Subject: Details

Customer
Type: Residential
Name: _____
Post Code: _____
NI No.: _____
Telephone: _____

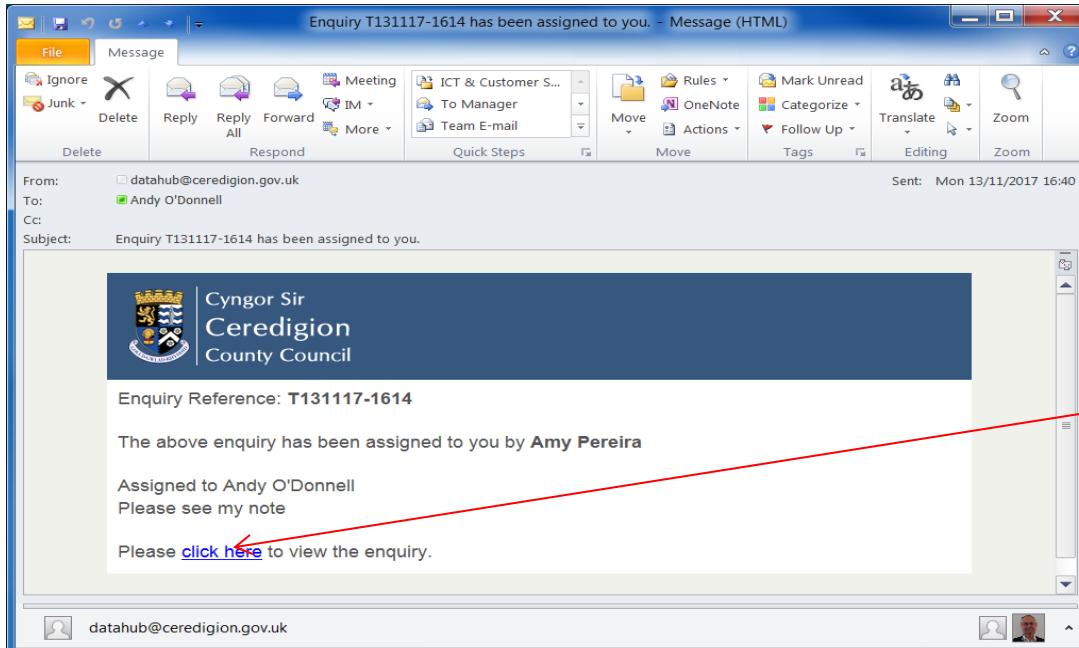
Additional information | Forms / Documents

Powered by Triforce

System Name: hub (v.1.56) 09:03:26 15 November 2017 Andy O'Donnell - Customer Services Business Analyst

Receiving Assigned Enquiries

- E-mail received with information and link to enquiry



Click on the hyperlink in the email to go direct to the enquiry in the CRM

Opening Assigned Enquiries

- Open enquiry from your assigned enquiry list

CLIC Hub TEST SYSTEM

Enquiries

My Enquiries

Displaying 1...7 of 19 records

ID	Priority	Customer	Status	Subject	Category	Date created	SLA	Due Date	Last Action	Action Date
1614	Medium	Tiberius Smythe	New	Bins & Recycling	Waste Management	13/11/2017 16:05:08		Note	13/11/2017 16:08	
1610	Medium	Castle Hotel	New	Trade & Non-Domestic Waste	Waste Management	10/11/2017 11:26:48		Note	10/11/2017 11:29	
1567	Medium	Elizabeth O'Donnell	New	Real Nappy Project	Waste Management	06/11/2017 15:31:57		Note	09/11/2017 16:53	
1566	Medium	Amanda Smith	New	Real Nappy Project	Waste Management	06/11/2017 15:22:15				
1563	Medium	Andy O'Donnell	New	Real Nappy Project	Waste Management	03/11/2017 15:51:28				
1562	Medium	Andy O'Donnell	New	Bulky Household Waste	Waste Management	03/11/2017 15:47:34				
1557	Medium	Andy O'Donnell	Waiting Customer Response	Bulky Household Waste	Waste Management	31/10/2017 10:13:25		Status Changed	31/10/2017 15:10	

ICT & Customer Services Enquiries

Filter

Goto

Search CUS

Click on Enquiry ID to open enquiry details from your "My Enquiries" list

System Name: eformsTest (v.1.61) 16:56:08 13 November 2017 Andy O'Donnell - Customer Services Business Analyst

Opening Assigned Enquiries

- Open enquiry from your Teams assigned enquiry list

Displaying 1...7 of 19 records

ID	Priority	Customer	Status	Subject	Category	Date created	SLA	Du
1614	Medium	Tiberius Smythe	New	Bins & Recycling	Waste Management	13/11/2017 16:05:08		
1610	Medium	Castle Hotel	New	Trade & Non-Domestic Waste	Waste Management	10/11/2017 11:26:48		
1567	Medium	Elizabeth O'Donnell	New	Real Nappy Project	Waste Management	06/11/2017 15:31:57		
1566	Medium	Amanda Smith	New	Real Nappy Project				
1563	Medium	Andy O'Donnell	New	Real Nappy Project				
1562	Medium	Andy O'Donnell	New	Bulky Household Waste				
1557	Medium	Andy O'Donnell	Waiting Customer Response	Bulky Household Waste				

ICT & Customer Services Enquiries

System Name: eforms5test (v.1.61) 09:24:58 14 November 2017

Displaying 1...7 of 96 records

ID	Priority	Customer	Status	Subject	Category	Date created	SLA	Ass To
1614	Medium	Tiberius Smythe	New	Bins & Recycling	Waste Management	13/11/2017 16:05:08		Ani O'T
1610	Medium	Castle Hotel	New	Trade & Non-Domestic Waste	Waste Management	10/11/2017 11:26:48		Ani O'T
1606	Medium	Greg Jones	New	Bulky Household Waste	Waste Management	09/11/2017 16:47:28		Gre Jon
1602	Medium	Peter Evans	New	Report a problem (Streetlight)	Highways	09/11/2017 15:31:19		Gre Jon
1593	Medium	Greg Jones	New	Bulky Household Waste	Waste Management	09/11/2017 13:55:23		Gre Jon
1592	Medium	Greg Jones	Waiting Customer Response	Bulky Household Waste	Waste Management	09/11/2017 12:46:17		Gre Jon
1589	Medium	Greg Jones	Waiting Customer Response	Bulky Household Waste	Waste Management	09/11/2017 11:32:49		Gre Jon

System Name: eforms5test (v.1.61)

Opening Assigned Enquiries

- Open enquiry from your Teams assigned enquiry list

The screenshot shows the CLIC Hub interface for managing enquiries. The main area displays a grid of 96 records, with the 7th record highlighted by a red arrow. This record has the following details:

ID	Priority	Customer	Status	Subject	Category	Date created	SLA	Assigned To	Due Date	Last Action	Action Date
1614	Medium	Tiberius Smythe	New	Bins & Recycling	Waste Management	13/11/2017 16:05:08		Andy O'Donnell		Note	13/11/2017 16:08
1610	Medium	Castle Hotel	New	Trade & Non-Domestic Waste	Waste Management	10/11/2017 11:26:48		Andy O'Donnell		Note	10/11/2017 11:29
1606	Medium	Greg Jones	New	Bulky Household Waste	Waste Management	09/11/2017 16:47:28		Gregory Jones			
1602	Medium	Peter Evans	New	Report a problem (strong)	Highways	09/11/2017 15:31:19		Gregory Jones			
1593	Medium	Greg Jones	New	Bulky Household Waste	Waste Management	09/11/2017 13:55:23		Gregory Jones		Note	09/11/2017 15:31
1592	Medium	Greg Jones	Waiting Customer Response	Bulky Household Waste	Waste Management	09/11/2017 12:46:17		Gregory Jones		Status Changed	09/11/2017 16:36
1589	Medium	Greg Jones	Waiting Customer Response	Bulky Household Waste	Waste Management	09/11/2017 11:32:49		Gregory Jones		Status Changed	09/11/2017 11:37

A red box highlights the row for Enquiry ID 1606, with the following text overlaid:

Click on Enquiry ID to open enquiry details from your Enquiries list

Enquiry View

The screenshot shows the CLIC Hub Enquiry View interface. Several sections are highlighted with red boxes and arrows:

- Enquiry Reference ID:** T131117-1614 - Bins & Recycling (highlighted in a red box with an arrow pointing to it from the left).
- Category & Subcategory information:** Waste Management, Report of Missed Collection, ICT & Customer Services, Andy O'Donnell (highlighted in a red box with an arrow pointing to it from the top center).
- Customer Address details:** Tiberius Smythe, MAESLLWYD, LAMPETER, CEREDIGION, SA48 7ND (highlighted in a red box with an arrow pointing to it from the right).
- Enquiry Detail:** A table showing history items with columns for Date, Type, and Agent (highlighted in a red box with an arrow pointing to it from the bottom left).
- Comments/Actions and comment/action text:** A text area containing "Checked customer collection schedule and it seems that their collection date was Friday 10th Nov as expected." (highlighted in a red box with an arrow pointing to it from the bottom center).

Other visible elements include the header "CLIC Hub", the "TEST SYSTEM" indicator, and the footer with system name and version information.



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Enquiry View continued

http://eforms5test/ufs/CLIC_ENQUIRY.eb?ebd=0&ebz=1

cribyn garage - Google Search ceredigion.gov.uk CLIC Hub CLIC Admin

File Edit View Favorites Tools Help

https://www.ceredigion.gov... Welsh Government Home Business Analysis - Content... http://hub.ceredigion.gov... Google Web Slice Gallery Clic Ceredigion - The Digi...

Cymraeg

CLIC Hub

TEST SYSTEM

T131117-1614 - Pinc & Recycling

Status: **New**

Priority: **Medium**

Source: **Telephone**

Type: **Service Request**

Management of Missed Collection

Customer Services

Personnel

Photographs or documents may be attached to enquiries, this is easily spotted by noticing the red Paperclip symbol in the enquiry.

Minimum Information Required

- When is your collection due?
- Customer Contact Number (if required) - As customer details
- Is the customer a business customer - Residential Customer
- Date of Incident (if not today) - 10/11/2017
- Has neighbours waste been collected - Yes
- Precise location of collection point - At bottom of driveway on roadside
- Has an advisory sticker been placed on the waste - No

Actions Attachments Links Record Details

Displaying 1...1 of 1 records

File Name	Created By	Date Created	Delete	Open	Preview
1614_Black_bags_waiting_collection.jpg	andyo	14/11/2017 09:54			

Type: **Photograph**

Description: **Black Bags Waiting for Collection**

Tiberius Smythe

Address: **MAESLLWYD**

Town: **LAMPETER**

County: **CEREDIGION**

Postcode: **SA48 7ND**

Some document types (pictures and .pdf files) can be previewed within the CRM, by clicking on the "Preview" option



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Referencing Back End Systems

The screenshot shows a web-based application for managing customer requests. At the top, there's a navigation bar with links to various government websites. The main header says "CLIC Hub" and "TEST SYSTEM". On the left, there's a sidebar with the Cyngor Sir Ceredigion County Council logo and some basic information about the record (Status: New, Priority: Medium, Source: Telephone, Type: Service Request). The main content area displays detailed information about a waste management issue. To the right, there's a sidebar for a customer named "Tiberius Smythe" with address details. At the bottom, there's a "Record Details" tab highlighted with a red arrow, and a reference number "ABC-1234" is shown in a text input field. A red callout box contains the following text:

Alternate Back End Systems can be referenced in the Record Details tab (to allow cross referral between systems)



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Viewing Customer Details

- From the Enquiry Screen it is easy to view the full customer details.

The screenshot shows a computer screen with a web browser window titled 'CLIC Hub' open. The URL is http://eforms5test/ufs/CLIC_ENQUIRY.eb7ebd=0&ebz=1. The page displays an enquiry for 'T131117-1614 - Bins & Recycling'. On the left, there's a sidebar with 'Actions', 'Record', 'Edit', and a highlighted 'View Customer' tab. A red arrow points from this tab to a callout box containing the text: 'Hover the mouse over the View Customer tab and click'. To the right of the sidebar, there's a summary section for 'Tiberius Smythe' with fields for Address, Town, County, and Postcode. Below this, a table lists collection records. At the bottom, there are standard system status bars for Date Created, Created By, Date Last Modified, Modified By, and Date Completed.

Date	Type	Agent	Action
13/11/2017 16:40	Assigned	Amy Pereira	Select
13/11/2017 16:40	Note	Amy Pereira	Select
13/11/2017 16:09	Assigned	Andy O'Donnell	Select
13/11/2017 16:08	Note	Andy O'Donnell	Select

Customer Details

The screenshot shows the CLIC Hub customer details interface. A red box highlights the "Customer detail including contact information" section, which contains fields for Title, Other Title, Firstname, Middle Name(s), Surname, Date of Birth, Deceased, and NI No. Below this, a red arrow points from the "Town", "County", "Postcode", "Telephone", "Mobile", and "Email" fields to a detailed address block: 29, CRIbyn, LAMPETER, CEREDIGION, SA48 7ND, 01570246819, 07000123456, and andy.o'donnell@ceredigion.gov.uk.

A red box highlights the "Previous Enquiry log" section, which displays two records:

ID	Subject	Category	Source	Date created	Created By	Status	SLA Status	Last Action	Action Date
1614	Bins & Recycling	Waste Management	Telephone	13/11/2017 16:05:08	andyo	New		Note	13/11/2017 16:08
1569	Land Drainage	Highways	Telephone	07/11/2017 11:34:13	andyo			Assigned	07/11/2017 11:35

A red box highlights the "Clicking on the Enquiry ID will take you to the selected enquiry detail screen" section, with an arrow pointing to the ID 1614 in the previous table.



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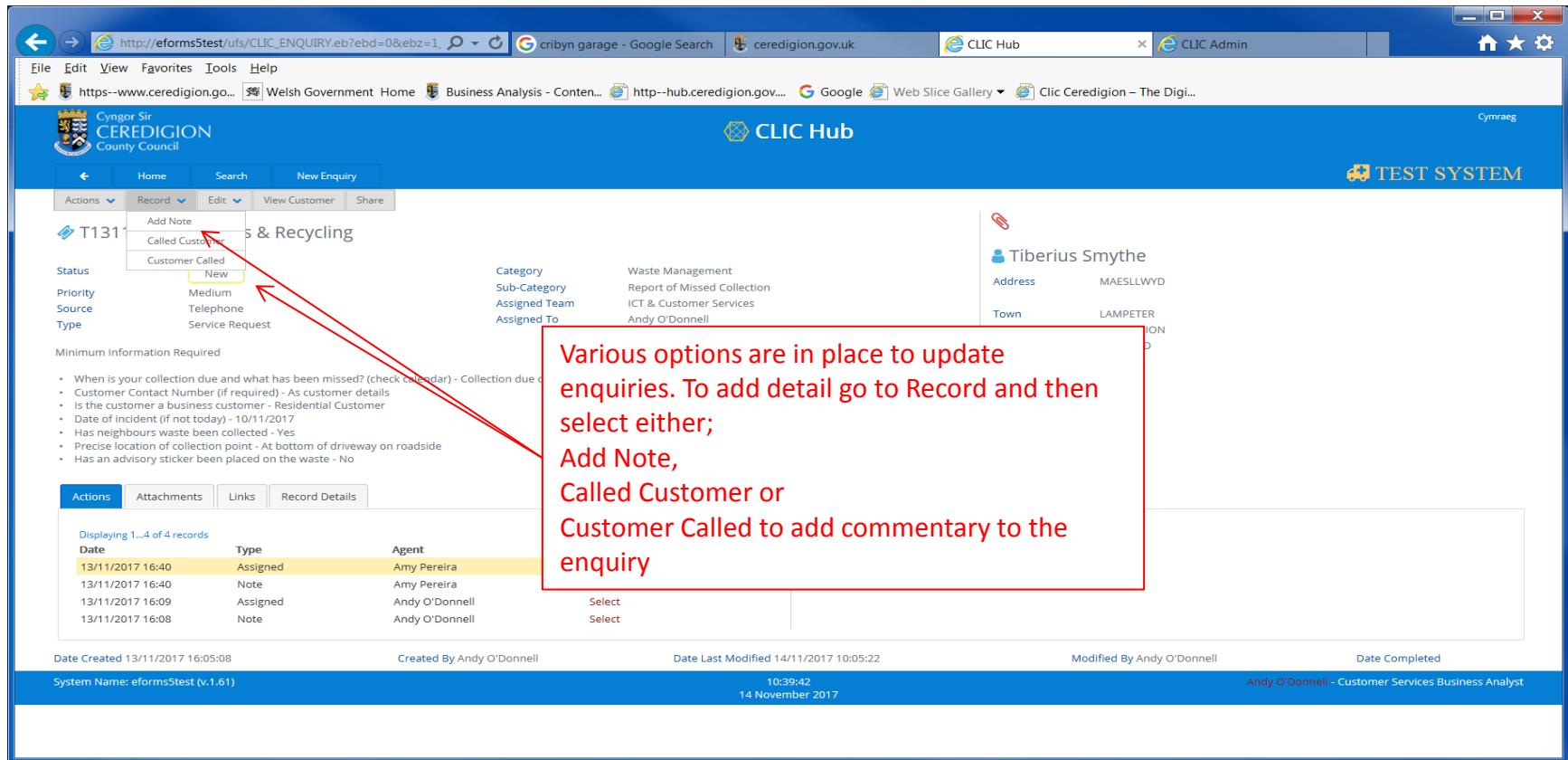
Customer Details continued

The screenshot shows a web browser window for the CLIC Hub system. The URL is http://eforms5test/ufs/CLIC_CUSTOMER.ebd?ebd=0&ebz=0. The page displays customer details for ID 52093, including personal information like Title (Dr), Firstname (Tiberius), and Surname (Smythe), and contact details such as UPRN (49062829), Address (MAESLLWYD, CRIBYN, LAMPETER, CEREDIGION, SA48 7ND), and Email (andy.o'donnell@ceredigion.gov.uk). A red box highlights the "Addresses" tab in the navigation bar, with a red arrow pointing to it from the left. A red callout box contains the text: "Clicking on the \"Addresses\" bar will open previous recorded addresses of the customer". Below the navigation bar, there is a table showing the customer's address record:

Address ID	Type	UPRN	Fulladdress	Postcode	Date Created	Created By	Enabled	Make Default
52089	Residential	49062829	MAESLLWYD, CRIBYN, LAMPETER, CEREDIGION, SA48 7ND	SA48 7ND	07/11/2017 11:31	andyo	<input checked="" type="checkbox"/>	

At the bottom of the page, there is footer information: "Date Created: 07/11/2017 11:31", "Created By: andyo", "Date Modified: 10:36:58 14 November 2017", "Modified By: Andy O'Donnell - Customer Services Business Analyst", and "System Name: eforms5test (v.1.6.1)".

Updating Enquiries



Various options are in place to update enquiries. To add detail go to Record and then select either;
Add Note,
Called Customer or
Customer Called to add commentary to the enquiry



Adding a Note

The screenshot shows the Ceredigion County Council Enquiry System interface. At the top, there's a navigation bar with links like 'File', 'Edit', 'View', 'Favorites', 'Tools', and 'Help'. Below the navigation is a header with the council's logo and name. The main content area displays an enquiry record for reference number T131. The record includes fields for 'Status' (Medium), 'Priority' (Medium), 'Source' (Telephone), and 'Type' (Service Request). A section titled 'Minimum Information Required' lists several items, with the last one being 'Has an advisory sticker been placed on the bin?'. Below this is a table showing a history of interactions:

Date	Type	Assigned To	Status
13/11/2017 16:40	Assigned	Amy Pereira	Sel
13/11/2017 16:40	Note	Amy Pereira	Sel
13/11/2017 16:09	Assigned	Andy O'Donnell	Sel
13/11/2017 16:08	Note	Andy O'Donnell	Sel

At the bottom, there are buttons for 'Actions', 'Attachments', 'Links', and 'Re'. A red arrow points from the 'Record' button in the top navigation to a callout box containing the text: 'Clicking on Record/Add Note allows you to add commentary to the Enquiry'.

The screenshot shows the 'Add Note' dialog box from the Clic Hub. The dialog has a title 'Add Note' and a text area containing the placeholder text 'This is a note'. There are 'Cancel' and 'Save' buttons at the bottom. The background shows the Clic Hub interface with the same enquiry record (T131) visible. A red arrow points from the text area in the dialog back to the 'Record' button in the left-hand screenshot.

Editing the Enquiry

The screenshot shows a web-based application interface for managing enquiries. At the top, there's a navigation bar with links like 'File', 'Edit', 'View', 'Favorites', 'Tools', and 'Help'. Below the navigation is a header with the Ceredigion County Council logo and the text 'CLIC Hub'.

The main content area displays an enquiry record for reference number T131117-1614. The record includes fields for Status (Medium), Priority (Medium), Source (Telephone), Type (Service Request), Category (Recycling), Sub-Category (Waste Management), Assigned Team (ICT & Customer Services), and Assigned To (Andy O'Donnell). A note indicates a missed collection.

On the right side, there's a sidebar for 'Tiberius Smythe' with contact details: Address (MAESLLWYD), Town (LAMPETER), County (CEREDIGION), and Postcode (SA48 7ND).

A red callout box highlights the 'Edit' dropdown menu at the top left of the enquiry form, which is currently set to 'Recycling'. The callout text reads:

Options are also in place to edit;
The content of an enquiry,
It's status,
It's priority
or even the Category type

At the bottom of the page, there's a footer with the Ceredigion County Council logo and the text 'Clic Ceredigion - The Digital Business Hub'.

Editing the Enquiry continued

http://eforms5test/ufs/CLIC_ENQUIRY.eb?ebd=0&ebz=1

File Edit View Favorites Tools Help

Welsh Government Home Business Analysis - Content http://hub.ceredigion.gov... Google Web Slice Gallery Clic Ceredigion – The Digi...

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T131117-1614 - Bins & Recycling

Status New
Priority Medium
Source Telephone
Type Service Request

Category Waste Management
Sub-Category Report of Missed Collection
Assigned Team ICT & Customer Services
Assigned To Andy O'Donnell

Minimum Information Required

- When is your collection due and what has been missed? (check calendar) - Collection due on Friday
- Customer Contact Number (if required) - As customer details
- Is the customer a business customer - Residential Customer
- Date of incident (if not today) - 10/11/2017
- Has neighbours waste been collected - Yes
- Precise location of collection point - At bottom of driveway on roadside
- Has an advisory sticker been placed on the waste - No

Actions Attachments Links Record Details

Displaying 1...5 of 5 records

Date	Type	Agent	Action
14/11/2017 10:50	Note	Andy O'Donnell	Select
13/11/2017 16:40	Assigned	Amy Pereira	Select
13/11/2017 16:40	Note	Amy Pereira	Select
13/11/2017 16:09	Assigned	Andy O'Donnell	Select
13/11/2017 16:08	Note	Andy O'Donnell	Select

This is a note

Each note will automatically identify who entered it, and is date stamped

Date Created 13/11/2017 16:05:08
Created By Andy O'Donnell
Date Last Modified 14/11/2017 10:05:22
Modified By Andy O'Donnell
System Name: eforms5test (v.1.61)
10:50:10
14 November 2017
Date Completed
Andy O'Donnell - Customer Services Business Analyst



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Changing the Status of an Enquiry

The screenshot shows a web browser window for the CLIC Hub application. The URL is http://eforms5test/ufs/CLIC_ENQUIRY.eb?ebd=0&ebz=1. The page displays an enquiry record for reference number T131117-1614. A red arrow points from the text "Clicking in Edit and Status allows you to update the enquiry status" to the "Status" dropdown menu, which is currently set to "recycling". The "Actions" tab is selected at the top left. On the right side, there is a sidebar for "Tiberius Smythe" with contact information: Address MAESLLWYD, Town LAMPETER, County CEREDIGION, Postcode SA48 7ND. A red box highlights the status dropdown menu.

Clicking in Edit and Status allows you to update the enquiry status

Date	Type	Agent
14/11/2017 10:50	Note	Andy O'Donnell
13/11/2017 16:40	Assigned	Amy Pereira
13/11/2017 16:40	Note	Amy Pereira
13/11/2017 16:09	Assigned	Andy O'Donnell
13/11/2017 16:08	Note	Andy O'Donnell

Actions Attachments Links Record Details

Displaying 1...5 of 5 records

Date Created 13/11/2017 16:05:08 Created By Andy O'Donnell Date Last Modified 14/11/2017 10:05:22 Modified By Andy O'Donnell Date Completed

System Name: eforms5test (v.1.61) 10:52:28 14 November 2017 Andy O'Donnell - Customer Services Business Analyst



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Changing the Status of an Enquiry continued

The screenshot shows a web browser window for the CLIC Hub. The title bar includes the URL http://eforms5test/ufs/CLIC_ENQUIRY.eb?ebd=0&ebz=1. The main content area is titled "Change Status". On the left, there are tabs for "Status" and "Notes". A dropdown menu is open under "Status" with the following options: "Please select", "Hold", "Waiting Third Party", and "Waiting Customer Response". The "Waiting Customer Response" option is highlighted with a blue background. Below the dropdown are "Cancel" and "Save" buttons. A red arrow points from a callout box to the "Status" button in the dropdown menu. The callout box contains the text: "Select the status required and add a comment to add clarity for the change". The bottom of the screen shows system information: "System Name: eforms5test (v.1.61)", "Time: 10:53:50", "Date: 14 November 2017", and "User: Andy O'Donnell - Customer Services Business Analyst".



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Changing the Status of an Enquiry continued

The screenshot shows a web browser window for the CLIC Hub system. The main content area displays an enquiry record for reference number T131117-1614, titled 'Bins & Recycling'. The record includes fields for Status (Waiting Customer Response), Priority (Medium), Source (Telephone), Type (Service Request), Category (Waste Management), Sub-Category (Report of Missed Collection), Assigned Team (ICT & Customer Services), and Assigned To (Andy O'Donnell). A red arrow points from a comment box to the 'Waiting Customer Response' status field.

The New Status is shown and a comment added to explain the change

A red box highlights the status change in the history log:

Date	Type	Agent	Notes
14/11/2017 10:57	Status Changed	Andy O'Donnell	Select
14/11/2017 10:50	Note	Andy O'Donnell	Select
13/11/2017 16:40	Assigned	Amy Pereira	Select
13/11/2017 16:40	Note	Amy Pereira	Select
13/11/2017 16:09	Assigned	Andy O'Donnell	Select
13/11/2017 16:08	Note	Andy O'Donnell	Select

A red arrow points from the same comment box to the 'Status changed from New to Waiting Customer Response - Waiting for the Customer to call back with further information' note in the history log.

At the bottom right of the screen, there is a sidebar for 'Tiberius Smythe' with contact details: Address (MAESLLWYD), Town (LAMPETER), County (CEREDIGION), and Postcode (SA48 7ND).



Re-Assigning an Enquiry

The screenshot shows a web browser window for the CLIC Hub application. The URL is http://eforms5test/ufs/CLIC_ENQUIRY.eb?ebd=0&ebz=1. The page title is "CLIC Hub". The main content area displays an enquiry for "Tiberius Smythe" with details like address, town, county, and postcode. A red callout box highlights the "Actions/Assign" section, which includes options like "Send Email", "Correspondence Received", "Link Enquiry", "Close Enquiry", and "Complete". A red arrow points from the text "You can easily reassign an enquiry by selecting Actions/Assign" to the "Actions" button. A red box highlights the "Waiting Customer Response" status in the enquiry list. The bottom of the screen shows a timeline of activity logs and system metadata.

You can easily reassign an enquiry by selecting Actions/Assign

Date	Type	Agent	Action
14/11/2017 10:57	Status Changed	Andy O'Donnell	Select
14/11/2017 10:50	Note	Andy O'Donnell	Select
13/11/2017 16:40	Assigned	Amy Pereira	Select
13/11/2017 16:40	Note	Amy Pereira	Select
13/11/2017 16:09	Assigned	Andy O'Donnell	Select
13/11/2017 16:08	Note	Andy O'Donnell	Select

Status changed from New to Waiting Customer Response - Waiting for the Customer to call back with further information

Date Created 13/11/2017 16:05:08 Created By Andy O'Donnell Date Last Modified 14/11/2017 10:05:22 Modified By Andy O'Donnell Date Completed
System Name: eforms5test (v.1.61) 10:59:46 14 November 2017 Andy O'Donnell - Customer Services Business Analyst



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Re-Assigning an Enquiry continued

The screenshot shows a web browser window with the URL http://eforms5test/ufs/CLIC_ENQUIRY.eb?ebd=0&ebz=1. The title bar includes tabs for 'Google Search', 'ceredigion.gov.uk', 'CLIC Hub', and 'CLIC Admin'. The main content area is titled 'Assign Enquiry' and shows the following form fields:

- Assign To:** Team Leader (selected), ICT & Customer Services
- Notes:** A large text input field.
- Buttons:** Cancel, Assign

A red box highlights the 'Assign' button and the notes input field, with the text: "A new screen appears allowing you to select a new assignee."

At the bottom of the page, there is footer information: System Name: eforms5test (v.1.61), Date: 14 November 2017, Time: 11:01:20, and User: Andy O'Donnell - Customer Services Business Analyst.



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Re-Assigning an Enquiry continued

The screenshot shows two consecutive steps in the 'Assign Enquiry' interface:

- Step 1:** A dropdown menu titled 'Please select' is open under the 'Team' section. It lists several options: Application Support, Business Support, Corporate Customer Services (which is highlighted with a blue selection bar), ICT & Customer Services, and ICT Application Support. A red arrow points from the text 'First select the team that they are in.' to the 'Corporate Customer Services' option.
- Step 2:** The dropdown has been closed, and the 'Corporate Customer Services' team is selected. The 'Person' dropdown now shows 'Joy Lake'. The 'Notes' text area contains the message 'Reassigned back to Customer Services for closing'. A red arrow points from the text 'Finally click on "Assign" to complete the change' to the 'Assign' button at the bottom of the form.

First select the team that they are in.

Then, if required, you may select an individual within the team (if not then the assignment will go to the default team mailbox), then add a comment explaining the action.

Finally click on "Assign" to complete the change



Re-Assigning an Enquiry continued

The screenshot shows a web browser window for the CLIC Hub system. The title bar includes the URL http://eforms5test/ufs/CLIC_ENQUIRY.eb?ebd=0&ebz=1. The page header features the Ceredigion County Council logo and the text "CLIC Hub". A red callout box with the text "The enquiry will be updated with the action" points to the "Assigned To" field in the enquiry details section. A red arrow also points from this callout to the "Assigned" status in the history table.

Enquiry Details:

Status	Waiting Customer Response
Priority	Medium
Source	Telephone
Type	Service Request

Category:

Sub-Category	Waste Management
Assigned Team	Report of Missed Collection
Assigned To	Corporate Customer Services

Customer Information:

Tiberius Smythe	
Address	MAESLLWYD
Town	LAMPETER
County	CEREDIGION
Postcode	SA48 7ND

History:

Date	Type	Agent	Action
14/11/2017 11:08	Assigned	Andy O'Donnell	Select
14/11/2017 10:57	Status Changed	Andy O'Donnell	Select
14/11/2017 10:50	Note	Andy O'Donnell	Select
13/11/2017 16:40	Assigned	Amy Pereira	Select
13/11/2017 16:40	Note	Amy Pereira	Select
13/11/2017 16:09	Assigned	Andy O'Donnell	Select
13/11/2017 16:08	Note	Andy O'Donnell	Select

Annotations:

- A red callout box with the text "The enquiry will be updated with the action" points to the "Assigned To" field.
- A red arrow points from this callout to the "Assigned" status in the history table.

Log:

Date Created	13/11/2017 16:05:08
Created By	Andy O'Donnell
Date Last Modified	14/11/2017 10:05:22
Modified By	Andy O'Donnell
Date Completed	

System Information:

System Name	eforms5test (v.1.61)
Created At	11:08:29
Modified At	14 November 2017

Notes:

Assigned to Joy Lake
Reassigned back to Customer Services for closing



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Closing an Enquiry

The screenshot shows a web browser window for the CLIC Hub system. The title bar includes the URL http://eforms5test/ufs/CLIC_ENQUIRY.eb?ebd=0&ebz=1. The main content area displays an enquiry titled "Bins & Recycling". On the left, there's a toolbar with actions like "Assign", "Send Email", "Correspondence Received", "Link Enquiry", "Close Enquiry", and "Complete". A red arrow points from the text "By clicking on Actions/Close Enquiry, you have the option to close an Enquiry" to the "Close Enquiry" button. To the right of the enquiry details, there's a sidebar for "Tiberius Smythe" with contact information: Address MAESLLWYD, Town LAMPETER, County CEREDIGION, Postcode SA48 7ND. At the bottom, a table shows a history of changes with columns for Date, Type, and Agent.

By clicking on Actions/Close Enquiry, you have the option to close an Enquiry

Date	Type	Agent	Notes
14/11/2017 11:08	Assigned	Andy O'Donnell	Select
14/11/2017 10:57	Status Changed	Andy O'Donnell	Select
14/11/2017 10:50	Note	Andy O'Donnell	Select
13/11/2017 16:40	Assigned	Amy Pereira	Select
13/11/2017 16:40	Note	Amy Pereira	Select
13/11/2017 16:09	Assigned	Andy O'Donnell	Select
13/11/2017 16:08	Note	Andy O'Donnell	Select



Closing an Enquiry continued

Please select

Notes

Please select

Cancel Close

Successfully Resolved

11:12:02
14 November 2017

Andy O'Donnell - Customer Services Business Analyst

A series of options allows you to select the success of the action before closing the Enquiry. Again a note is added to add clarity



Closing an Enquiry continued

The enquiry is updated with the new status and an explanatory note added

T131117-1614 - Bins & Recycling

Status: Closed (Medium Priority, Telephone Source, Service Request Type)

Category: Sub-Category: Assigned Team: Assigned To:

Minimum Information Required:

- When is your collection due and what has been missed? (check calendar) - Collection due on Friday (10/11/2017)
- Customer Contact Number (if required) - As customer details
- Is the customer a business customer - Residential Customer
- Date of incident (if not today) - 10/11/2017
- Has neighbours waste been collected - Yes
- Precise location of collection point - At bottom of driveway on roadside
- Has an advisory sticker been placed on the waste - No

Actions: Attachments: Links: Record Details

Displaying 1...8 of 8 records			
Date	Type	Agent	Action
14/11/2017 11:14	Enquiry Closed	Andy O'Donnell	Select
14/11/2017 11:08	Assigned	Andy O'Donnell	Select
14/11/2017 10:57	Status Changed	Andy O'Donnell	Select
14/11/2017 10:50	Note	Andy O'Donnell	Select
13/11/2017 16:40	Assigned	Amy Pereira	Select
13/11/2017 16:40	Note	Amy Pereira	Select
13/11/2017 16:09	Assigned	Andy O'Donnell	Select
13/11/2017 16:08	Note	Andy O'Donnell	Select

Resolution Status: Successfully Resolved
Customer agrees to re-present waste in time for next collection

Date Created: 13/11/2017 16:05:08 Created By: Andy O'Donnell Date Last Modified: 14/11/2017 10:05:22 Modified By: Andy O'Donnell Date Completed: 11:14:14
System Name: eforms5test (v.1.61) Andy O'Donnell - Customer Services Business Analyst

Searching for Enquiries or Customers

The screenshot shows the CLIC Hub search interface. On the left, there is a 'Customer' search form with fields for Customer ID, Email Address, Type (Residential), Forename, Surname, NI No., Telephone, Postcode, and a checkbox for Show Disabled Accounts. A red arrow points from the 'Surname' field towards the 'Enquiry' search form. On the right, there is an 'Enquiry' search form with fields for Enquiry ID, Subject, Category, Source, Type, Assigned To (Team), Assigned To (Person), Start Date, End Date, and a 'Search Enquiries' button. Another red arrow points from the 'Assigned To (Person)' section towards the 'Enquiry' search form. At the bottom of the screen, a red box contains the text: 'The main Search tab in the CRM allows you to search for either Customers or Enquiries in the system'. The status bar at the bottom shows 'System Name: eforms5test (v.1.61)', 'Time: 10:00:00', and 'User: Andy O'Donnell - Customer Services Business Analyst'.

The main Search tab in the CRM allows you to search for either Customers or Enquiries in the system



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Searching for Enquiries or Customers continued

The screenshot shows a web browser window with the CLIC Hub interface. On the left, the 'Customer' search form is displayed, featuring fields for Customer ID, Email Address, Type (set to Residential), Forename (Smythe), Surname, NI No., Telephone, Postcode (SA487ND), and a checkbox for Show Disabled Accounts? (unchecked). Red arrows point from the 'Surname' field and the 'Postcode' field towards a central callout box. On the right, the 'Enquiry' search form is shown with fields for Enquiry ID, Subject, Category, Source, Type, Assigned To (Team) and (Person), and a date range selector. A red callout box contains the text: "Multiple Search criteria can be applied to the search to limit the results as much as possible". The browser's address bar at the bottom shows the URL: http://eforms5test/ufs/CLIC_SEARCH.ebz=0&ebz=1_1510651210468.



Searching for Enquiries or Customers continued

The screenshot shows a web browser window with the URL http://eforms5test/ufs/CLIC_SEARCH.ebd?ebd=0&ebz=1. The page title is "CLIC Hub". The header includes the Cyngor Sir Ceredigion logo, a search bar, and links for Home, Search, New Enquiry, and New Customer. A red arrow points from a callout box to the "Name" field in the search results table.

ID	Type	Name	Address	Date Created	Created By	Date Modified	Modified By
52093	Residential	Dr Tiberius Montague Smythe	MAESLLWYD, CRIBYN, LAMPETER, CEREDIGION, SA48 7ND	07/11/2017 11:31	andyo		Andy O'Donnell - Customer Services Business Analyst

System Name: eforms5test (v.1.61) 11:30:09
14 November 2017

Matched results will appear, allowing you to select the detail

Creating a new Enquiry for a Customer

The screenshot shows the CLIC Hub software interface. At the top, there is a navigation bar with links to various websites. Below the navigation bar, the Ceredigion County Council logo is displayed. The main content area shows a customer detail screen for a customer with ID 52093. A red arrow points from the text in the callout box to the 'New Enquiry' button in the top right corner of the customer detail screen.

ID: 52093

Title	Dr	UPRN	49062829
Other Title		Address	MAESEWLWYD
Firstname	Tiberius	Town	CRIBYN
Middle Name(s)	Montague	County	CAMPETER
Surname	Smythe	Postcode	CEREDIGION
Date of Birth	25/01/1965	Telephone	SA48 7ND
Deceased	<input type="checkbox"/>	Mobile	01570246819
NI No.		Email	07000123456 andy.o'donnell@ceredigion.gov.uk

With the Customer detail screen open, select the New Enquiry Button to search for an Enquiry Category

Enquiries

ID	Subject	Category	Source	Date created	Created By	Status	SLA Status	Last Action	Action Date
1614	Bins & Recycling	Waste Management	Telephone	13/11/2017 16:05:08	andyo	Closed		Note	13/11/2017 16:08
1569	Land Drainage	Highways	Telephone	07/11/2017 11:34:13	andyo			Assigned	07/11/2017 11:35

Addresses

Date Created: 07/11/2017 11:31 Created By: andyo Date Modified: Modified By:

System Name: eforms5test (v.1.61) 11:32:07
14 November 2017 Andy O'Donnell - Customer Services Business Analyst

Creating a new Enquiry for a Customer continued

A series of options allows you to select the Type of request, the priority of the request and the Category (typing in the Category field may help you narrow down your search)

The screenshot shows the CLIC Hub software interface. On the left, the 'Enquiry' tab is active, displaying fields for Source (Telephone), Priority (Medium selected), Type (Service Request), Category (Please select), and Sub Category (gard). A dropdown menu shows 'Waste Management - Garden Waste Collection' selected. On the right, the 'Customer' tab is active, showing details for Dr Tiberius Montague Smythe, address MAESLLWYD, CRIBYN, LAMPETER, CEREDIGION, SA48 7ND, email and phone number. A red callout box highlights the search and selection options for request type, priority, and category. The bottom status bar shows system name, date, and time.



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Creating a new Enquiry for a Customer continued

The screenshot shows the CLIC Hub software interface for creating a new enquiry. On the left, there's a sidebar with 'Enquiry' buttons for Source (Telephone), Priority (Medium), Type (Service Request), Category (Waste Management - Garden Waste Collection), and Sub Category (Garden Waste Collection). Below this is a 'Garden Waste' editor with a rich text toolbar. In the center, there's a 'Customer' detail box with fields for Name (Dr Tiberius Montague Smythe), Address (MAESLLWYD, CRIBYN, LAMPETER, CEREDIGION, SA48 7ND), Email (andy.o'donnell@ceredigion.gov.uk), Tel (01570246819), Mobile (empty), and Primary Language (English). To the right of the customer details is an 'Additional Information' panel containing a 'More information link' for garden waste collection guidelines. A red callout box on the left points to the 'Information Required' section in the main detail box, which lists items like 'Customer Contact Number' and 'Collection Address'. Another red callout box on the right points to the 'Additional Information' panel, highlighting the 'Key information about the category can be found on the Right hand side'.

Prompts for additional detail can be seen in the main detail box on the left hand side

Key information about the category can be found on the Right hand side

Creating a new Enquiry for a Customer continued

The screenshot shows a computer screen displaying the CLIC Hub software. The top navigation bar includes links to Ceredigion.gov.uk, CLIC Hub, and CLIC Admin. The main interface shows a customer record for 'Tiberius Smythe' and an open enquiry for 'Garden Waste' with ID T141117-1615.

Customer Record:

Address	MAESLLWYD
Town	LAMPETER
County	CEREDIGION
Postcode	SA48 7ND

Enquiry Details:

Status	New
Priority	Medium
Source	Telephone
Type	Service Request

Category:

Category	Sub-Category
Waste Management	Garden Waste Collection
	ICT & Customer Services

Assigned To:

Assigned Team	Assigned To
	Andy O'Donnell

Information Required:

- Customer Contact Number - 01570246819
- Collection Address (if different to customer address) - as customer address
- Number of bags to be collected - 2
- Date for collection - 24/11/2017

Actions:

- Actions
- Attachments
- Links
- Record Details

Logistics:

Date	Type	Agent
No records to display		

Timestamps:

- Date Created: 14/11/2017 11:41:06
- Created By: Andy O'Donnell
- Modified By: (empty)
- Date Completed: (empty)

System Information:

- System Name: eforms5test (v.1.61)
- Created On: 14 November 2017 11:41:13

Annotation:

The new enquiry will remain with you until you reassign it, allowing you to check and update any details as necessary.

A red arrow points from this annotation to the 'Assigned To' field in the enquiry details table.