

# Create New Account Wizard - Services & Charging

| Complex {enter street name}  | A          |
|--|------------|
| Service Address {enter service address details}                      | В          |
| Start Date DD / MM / YYYY  |            |
| Service to Use   | <b>B</b> : |
| Service Model Full Service (Customer Care) ▼ ☐ Reference Account     | C          |
| Account Type   | D          |
| Charge Profile electricity service Commercial Flat (CTP_COM_FLA_0) ▼ | • 1        |
| water service City West Water Resi (CWW_RES) ▼                       |            |
| <u>Cancel</u> Next >>  |            |

**UI RULES** - general rule, elements are displayed dynamically based on what was specified by the user

The following requirements must be completed before users are allowed to proceed to the next screen/view:

- 1. BBCRM-21
- 2. BBCRM-23
- 3. BBCRM-24
- 4. BBCRM-25
- 5. BBCRM-26
- 6. BBCRM-38

# Create New Account Wizard - Billing Details

| Company  |                | 1 |
|--|----------------|---|
| Trading Name                                   |                | Į |
| Business ABN/ACN                               |                | J |
| Title ▼ First Name                             |                | 1 |
| Middle Initial Surname                         |                |   |
| Business Phone                                 | O main contact |   |
| A/Hours Phone                                  | O main contact |   |
| Mobile Phone                                   | O main contact |   |
| Email Address                                  |                |   |
| Date of Birth DD / MM / YYYY                   |                |   |
| Personal Id {select type} ▼ {identity details} | + x            | 3 |
| Use above details for 'Account Name'           |                | 1 |
| Account Name                                   |                | J |
| <u>Cancel</u> << Previo                        | Next >>        |   |

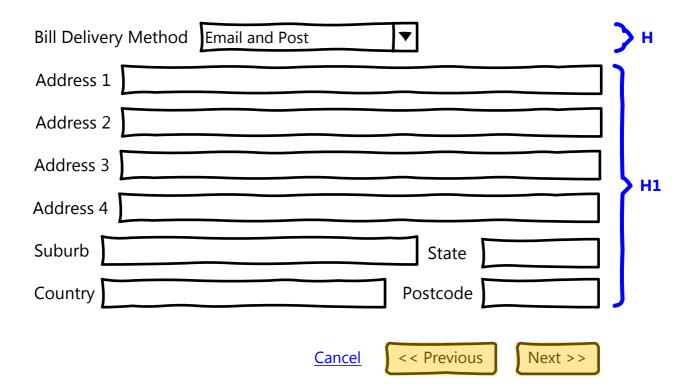
**UI RULES** - general rule, elements are displayed dynamically based on what was specified by the user

The following requirements must be completed before users are allowed to proceed to the next screen/view:

- 1. BBCRM-28
- 2. BBCRM-27
- 3. BBCRM-39
- 4. BBCRM-29
- 5. BBCRM-30

NB: if the service model select is *billing agent*, the user will not be required to complete anything else after completing the *account name* details. In that situation, the <u>Next</u> button should change it <u>Save</u> (BBCRM-36).

# Create New Account Wizard - Bill Delivery



**UI RULES** - general rule, elements are displayed dynamically based on what was specified by the user

The following requirements must be completed before users are allowed to proceed to the next screen/view:

- 1. BBCRM-31
- 2. BBCRM-32

# Create New Account Wizard - Direct Debit

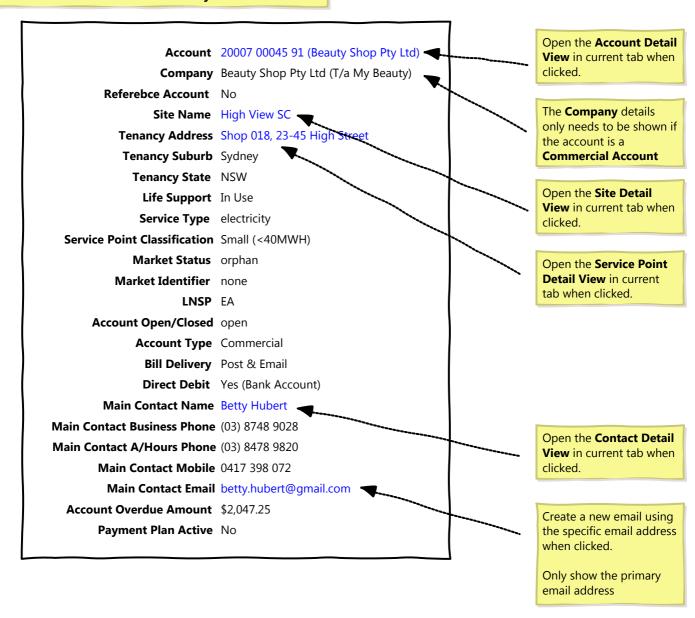
| ☐ Direct debit account   |
|--|
| O Direct Debit via Bank Account O Direct Debit via Credit Card |
| Account Name   |
| BSB Number Account Number                                      |
| Name on Credit Card  |
| Card Type {select type} ▼ Expiry Date {month} ▼ {year} ▼       |
| Credit Card Number   |
| <u>Cancel</u> << Previous Save                                 |

**UI RULES** - general rule, elements are displayed dynamically based on what was specified by the user

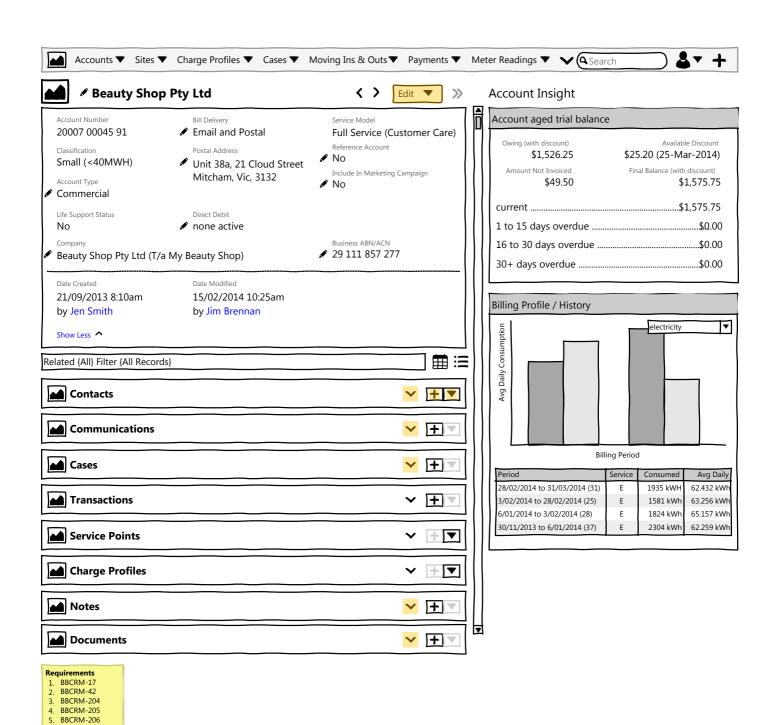
The following requirements must be completed before users are allowed to proceed to the next screen/view:

- 1. BBCRM-31
- 2. BBCRM-32
- 3. BBCRM-33
- 4. BBCRM-34
- 5. BBCRM-36

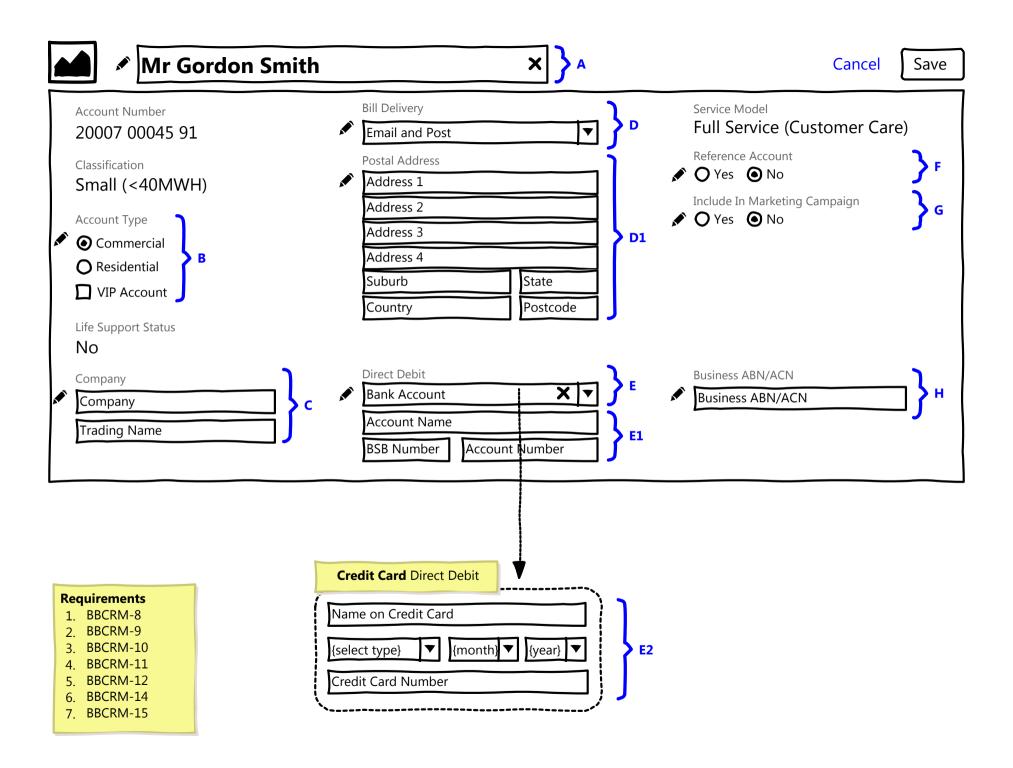
#### **Preview Account - Tenancy Account**

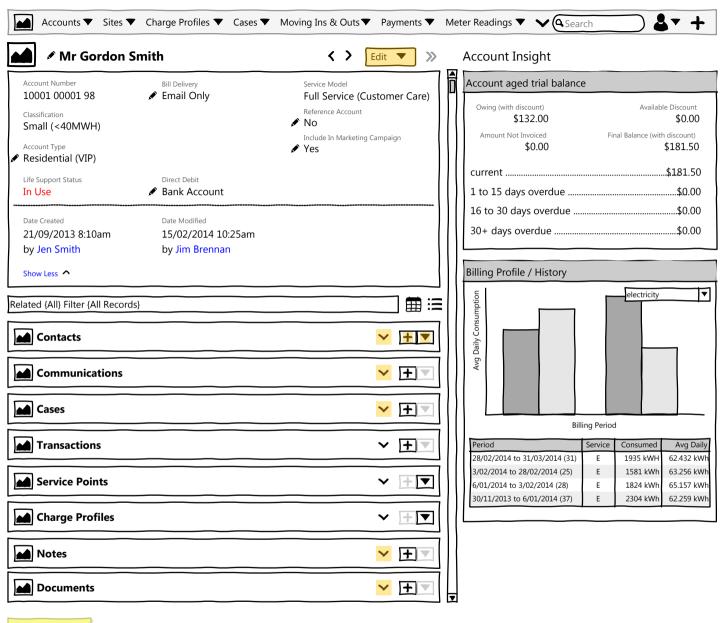


- 1. BBCRM-160
- 2. BBCRM-164
- 3. BBCRM-165
- 4. BBCRM-166
- 5. BBCRM-167
- 6. BBCRM-168



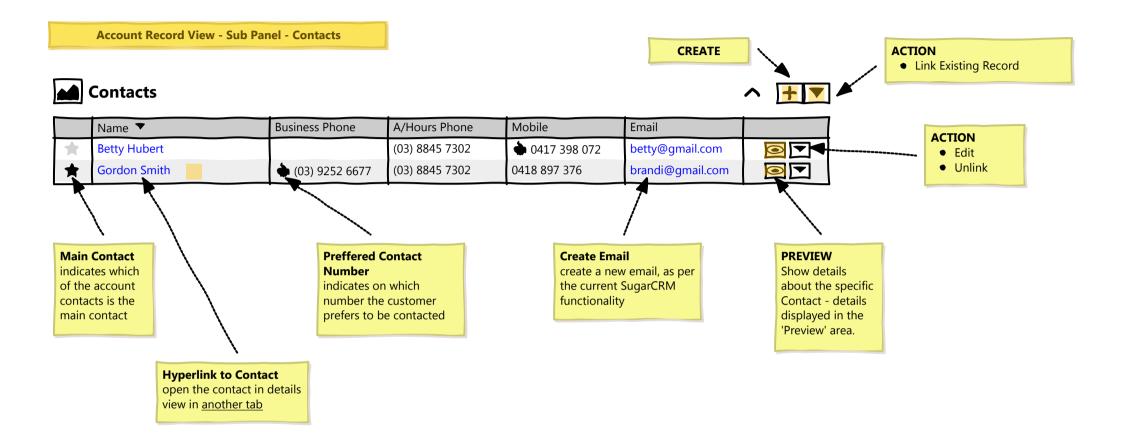
6. BBCRM-207 7. BBCRM-208 8. BBCRM-209 9. BBCRM-210 10. BBCRM-211 11. BBCRM-212





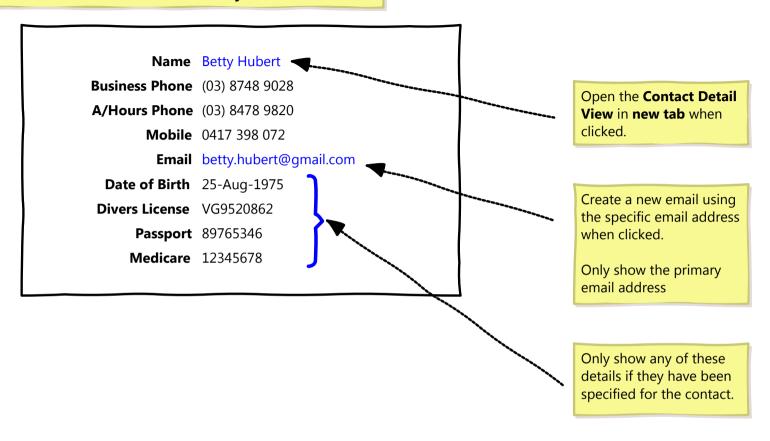
Requirements

1. BBCRM-17 2. BBCRM-42



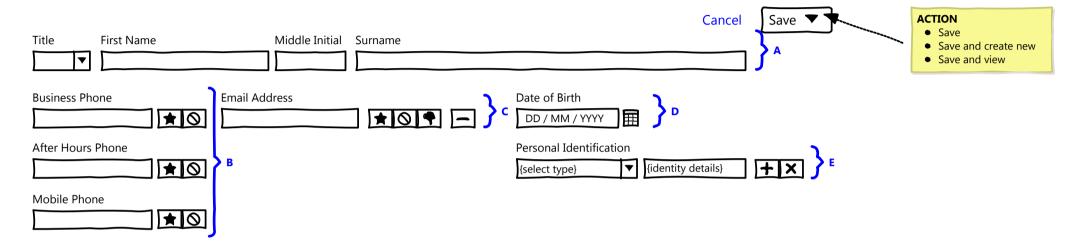
- 1. BBCRM-174
- 2. BBCRM-42
- 3. BBCRM-162
- 4. BBCRM-175
- 5. BBCRM-176
- 6. BBCRM-177
- 7. BBCRM-178
- 8. BBCRM-179

## **Preview Contact - Tenancy Account**



- 1. BBCRM-169
- 2. BBCRM-171
- 3. BBCRM-172

#### **New Contact - Account Contact**



#### Requirements

1. BBCRM-42

The requirements related to editing account contact should also be view for consitancy; they are:

- 1. BBCRM-193
- 2. BBCRM-194
- 3. BBCRM-195
- 4. BBCRM-196
- 5. BBCRM-197
- 6. BBCRM-198

Cancel

Create

Link

# Filter (Create) Search by first name, last name ...

|   | Name   | ▼         | Business Phone                                   | A/Hours Phone  | Mobile                | Email            |   | l   |
|---|--|-----------|--|----------------|-----------------------|------------------|---|---|
| Γ | Betty  | Hubert    |  | (03) 8845 7302 | <b>•</b> 0417 398 072 | betty@gmail.com  | 0 | 1   |
|   | ☐ Jonat                                      | nan Steel | (03) 9252 6677                                   | (03) 8845 7302 | 0418 897 376          | brandi@gmail.com |   |   |
|   |  |           |  |                |                       |                  | · |   |
|   | Select Conable to selenumber of contacts the | t a       | Preffered<br>Number<br>indicates on<br>number th |                |                       |                  | ć | PREVIEW Show details about the specific Contact - details |

prefers to be contacted

# Requirements

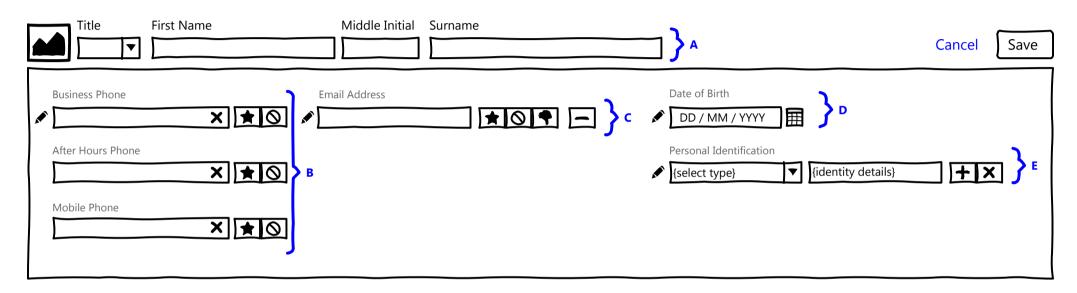
1. BBCRM-162

to be linked to

the account

- 2. BBCRM-169
- 3. BBCRM-170
- 4. BBCRM-191

displayed in the 'Preview' area.



- 1. BBCRM-193
- 2. BBCRM-194
- 3. BBCRM-195
- 4. BBCRM-196
- 5. BBCRM-197
- 6. BBCRM-198

#### **Account Record View - Sub Panel - Communication**

Status 🔻

**Planned** 

Sent

Sent

Sent

Sent

Date Created ▼

1-Feb-2014 8:10am

3-Mar-2014 4.25pm

21-Mar-2014 8:01AM

31-Mar-2014 9:31AM

System Generated

Type ▼

Email

Call

SMS

SMS

Letter

# **Communications**

Subject ▼

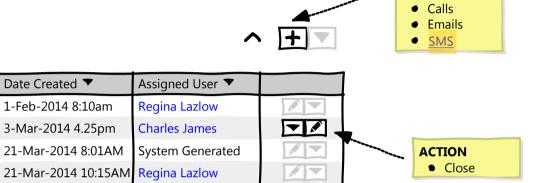
Copy of Previous Bill

Update contact details

**Call Customer Service** 

Disconnection Warning

**Account Overdue Notification** 



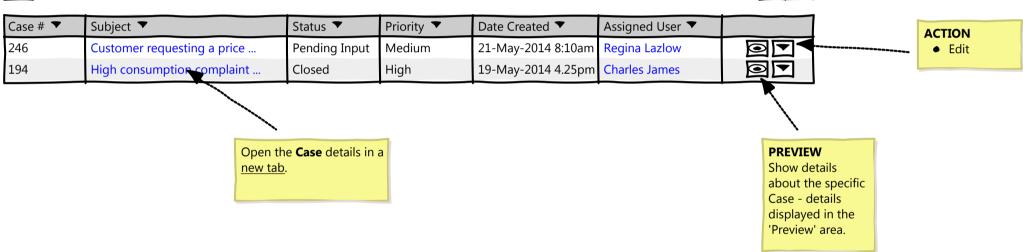
CREATE

- 1. BBCRM-180
- 2. BBCRM-183
- 3. BBCRM-184
- BBCRM-185
- 5. BBCRM-186
- BBCRM-187
- 7. BBCRM-188
- 8. BBCRM-189
- 9. BBCRM-201
- 10. BBCRM-202
- 11. BBCRM-203

#### **Account Record View - Sub Panel - Cases**



# Cases

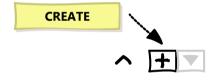


CREATE

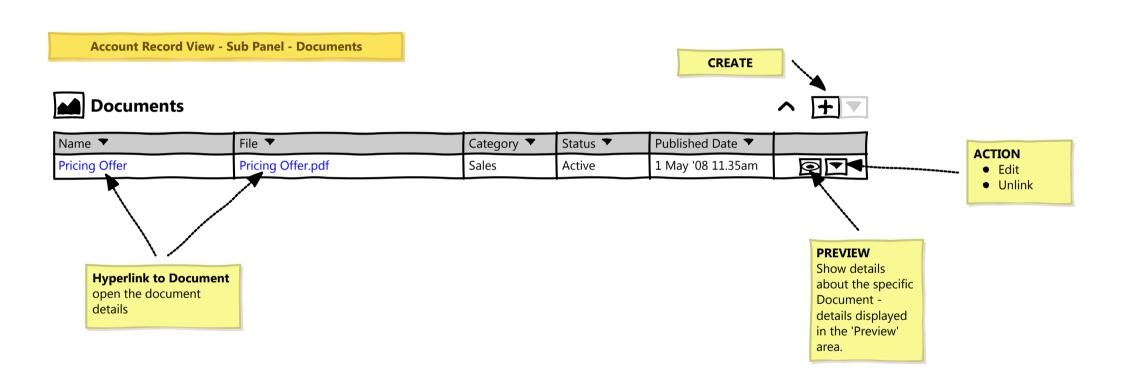
- 1. BBCRM-204
- 2. BBCRM-205

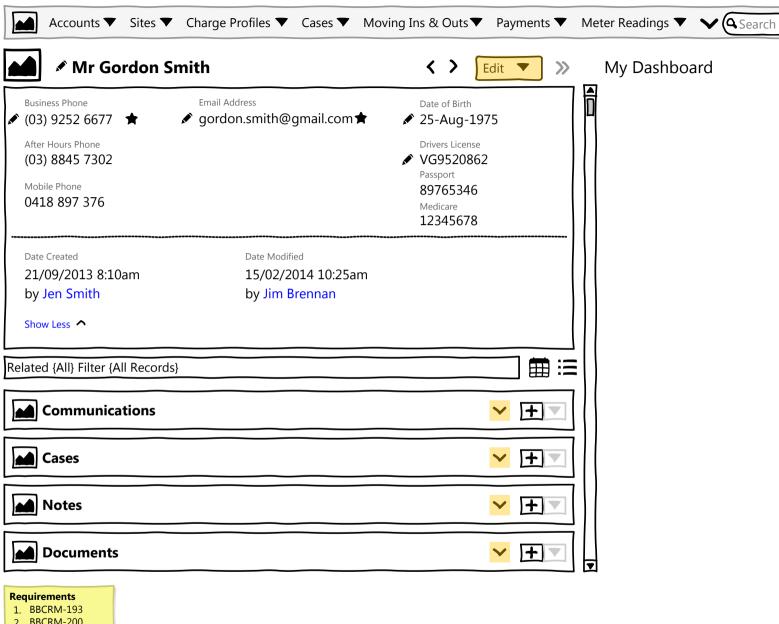
## **Account Record View - Sub Panel - Notes**





| Subject ▼                  | Date Created ▼   | Last Modified ▼  | Assigned User ▼ |   | ACTION |
|----------------------------|------------------|------------------|-----------------|---|--------|
| Account VIP Status Details | 1 May '08 9.56am | 1 May '08 9.56am | Sarah Smith     |   | • Edit |
|                            |                  |                  |                 | • |        |



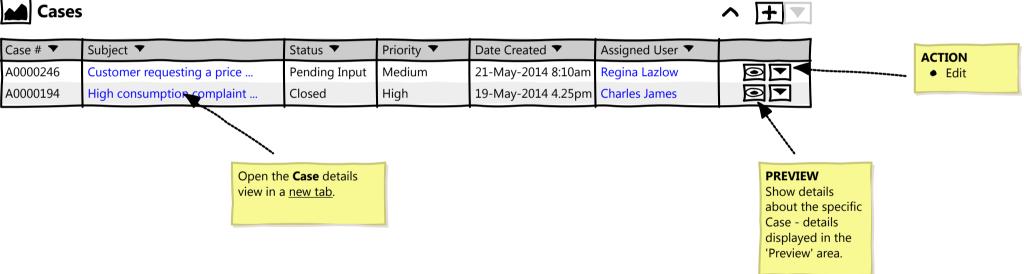


& **+** +

- 2. BBCRM-200
- 3. BBCRM-214
- 4. BBCRM-215
- 5. BBCRM-216
- 6. BBCRM-217

## **Contact Record View - Sub Panel - Cases**





CREATE

# **Contact Record View - Sub Panel - Communication**

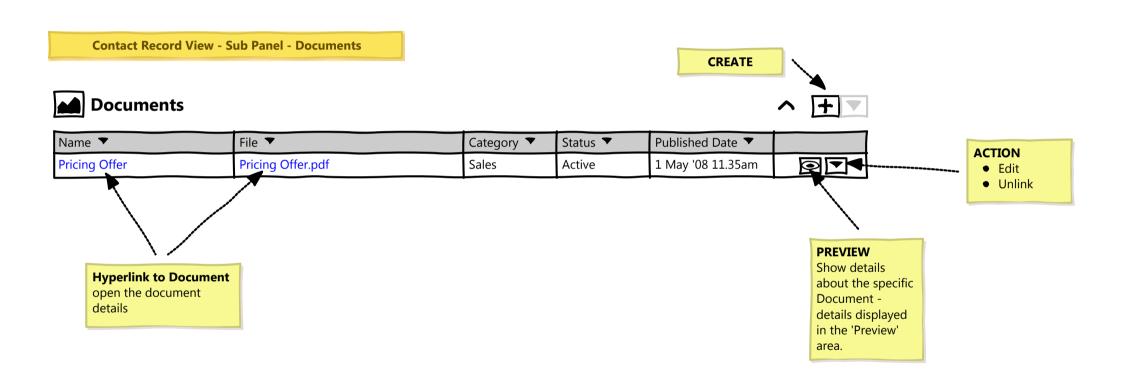


| Type ▼ | Subject ▼                    | Status ▼ | Date Created ▼      | Assigned User ▼  |  |
|--------|------------------------------|----------|---------------------|------------------|--|
| Email  | Copy of Previous Bill        | Sent     | 1-Feb-2014 8:10am   | Regina Lazlow    |  |
| Call   | Update contact details       | Planned  | 3-Mar-2014 4.25pm   | Charles James    |  |
| SMS    | Account Overdue Notification | Sent     | 21-Mar-2014 8:01AM  | System Generated |  |
| SMS    | Call Customer Service        | Sent     | 21-Mar-2014 10:15AM | Regina Lazlow    |  |

SMS

# Requirements

1. BBCRM-



## **Contact Record View - Sub Panel - Notes**





| Subject ▼                  | Date Created ▼   | Last Modified ▼  | Assigned User ▼ | 1 | ACTION |
|----------------------------|------------------|------------------|-----------------|---|--------|
| Account VIP Status Details | 1 May '08 9.56am | 1 May '08 9.56am | Sarah Smith     |   | • Edit |
|                            | •                |                  |                 | _ |        |

## **New Communication - SMS Compose SMS** Send ▼ Cancel **ACTION** Send • Save Draft {display the sender details} From m То Text field Open the address book, the same way done when Templates \_\_\_ Signatures Characters Entered 4 clicked in the standard email creation dialog Hello Open the template dialog, allow the user to select predefined template; same way done in standard email dialog Requirements 1. BBCRM-203 Open the signature dialog, allow the user to select SMS content entry area predefined signature; same way done in standard email dialog