

iBaan ERP 5.0c Service

**User's Guide for Notification of
Existing Calls and Related Orders**

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About this document

This document explains the notification for existing calls and related orders' functionality that was added to iBaan ERP 5.0c Service.

An existing call is defined as the call already registered for either the sold-to business partner, the configuration, or the object.

Chapter 1, "Functional explanation," describes the functional enhancements to iBaan ERP 5.0c Service related to call and related order notification.

1 Functional explanation

Introduction

Service companies always try to improve on cost reduction and to improve their customer efficiency. If a customer calls, one of the means to improve efficiency is a check to find out whether calls and related service orders already exist for that customer or product.

Based on the output of this search, the service company user can decide on either of the following options:

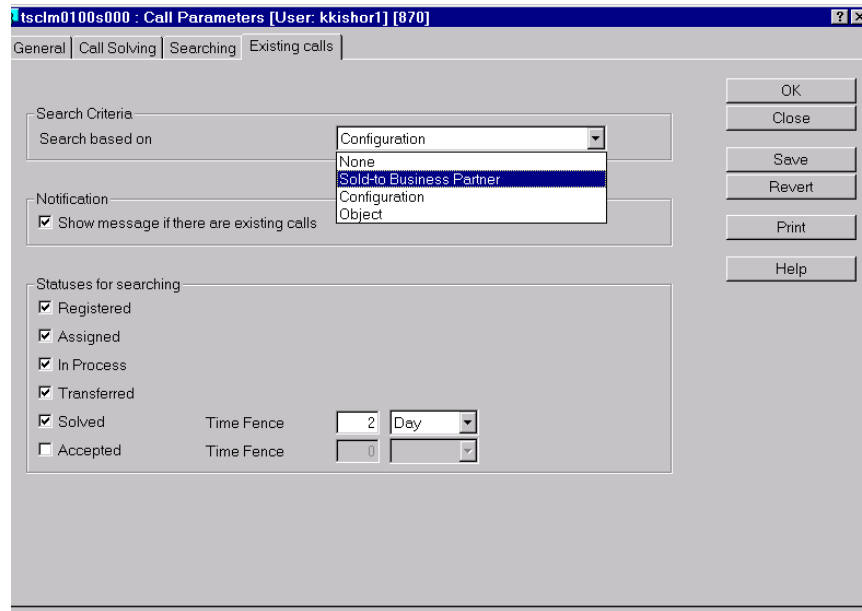
- To create a new call, even if there are existing calls.
- To inform the customer that a call or order already exists, so a new call or order will not be created. This situation can occur if multiple customer employees call the service company.
- To add information to (one of) the existing calls or orders. For calls, this may be additional information in the assigned text, while for service orders, this could mean adding an extra activity or to update the text.

This functionality is not present in iBaan ERP 5.0c Service.

Functional description

To activate notification for existing calls and related orders

For the notification for existing calls and related orders enhancement, a new tab, **Existing Calls**, is added to the Call Parameters (tsclm0100m000) session. Notification can be controlled by the parameters on this new tab, as shown in the following figure.



Call Parameters(tsclm0100m000), Existing Calls tab

Searching for existing calls can be done for each of the following:

- Sold-to business partner
- Configuration
- Object.

The **Show message if there are existing calls** check box indicates whether to notify the user if there are any existing calls for that sold-to business partner, configuration, or object.

The status parameters and the time fence are used to control the number and the status of the existing calls to be displayed in the Existing Calls sessions.

If you do not want to use notification, set the **Search based on** box to **None**.

Notification when registering a new call

When adding a new call or duplicating a call in the Calls (tsclm1100s000) session, based on the parameters defined in the call parameters, searching is performed to find out whether there are any existing calls.

EXAMPLE

In the Call Parameters (tsclm0100m000) session, the **Search based on** box is set to **Sold-to BP**, and notification will be performed as shown in the following figure.

The screenshot shows a software window titled "tsclm1100s000 : Calls [User: kkishor1] [870]". The window has a menu bar (File, Edit, View, Group, Workflow, Tools, Specific, Window, Help) and a toolbar. Below the toolbar are tabs: Register, Details, Times, Procedure, Diagnosis, RMA. The "Register" tab is active. The form contains several fields: "Call" (CLM000), "Origin" (Telephone), "Emergency" (checkbox), "Registered" (checkbox), "Reaction Time" (field), "Installed Base" (checkbox), "Sold-to B.P." (100000006), "Contact" (field), "Configuration" (field), "Address" (300000004), "Object" (field), "Number" (tsclm10023 : Calls), "Model (Item)" (field), "Description" (field), "Call Details" (checkbox), "Description" (field), "Problem" (field), "Priority" (0), "Call Type" (Melfunction), "Call Group" (field), "References" (checkbox), "Caller's Name" (field), "Telephone" (field), "B.P. Call No." (field), "Enclosures" (0). At the bottom, there are checkboxes for "Contract", "Warranty", and "Bad Fix". A notification dialog box is displayed in the center, with the message "Calls exist for this Sold-to Business Partner. Do you want to view them?" and "Yes" and "No" buttons.

While searching for existing calls, only the calls that have the statuses as defined in the Call Parameters (tsclm0100m000) session will be taken into account. If the user affirms the question (clicks **Yes**), the Existing Calls by Sold-to BP (tsclm1501m100) session appears, as shown in the following figure.

Call	Status	Config.	Description	Reference Object	No.	Serial Number
100000138	Transferred					
ATSE_W301	Transferred					
ATSE_W302	Transferred					
ATSE_W303	Transferred					
ATSE_W304	In Process					
RBLCAL047	Registered	WD5	Test call respon			
RBLCAL048	Registered	WD5A	Test call respon			
RBLCAL049	Registered	WD5A	Test call respon			

Existing Calls by Sold-to BP (tsclm1501m100), Calls tab

The important details of the call, such as configuration, object, serial number, description, appear on the **Calls** tab. The **Service Orders** tab contains information related to the service orders generated for the respective call.

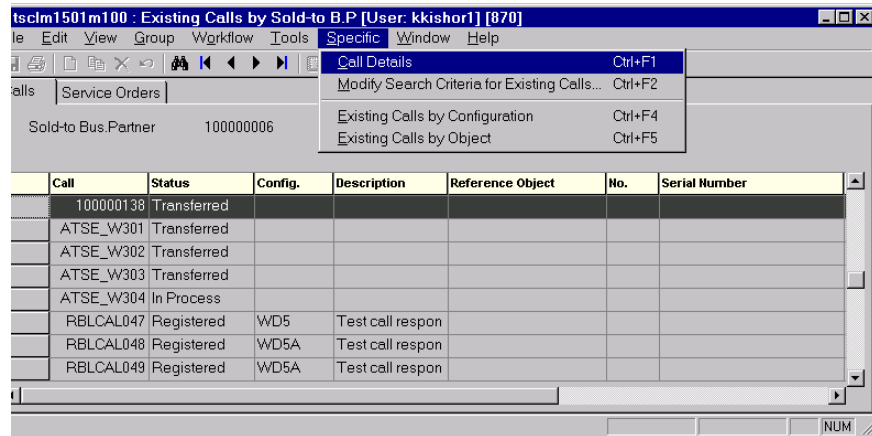
Call	Order	Engineer	Status	Planned Start Time	Planned Finish Time	Execution Start Time	Execution Finish Time
100000138	30000000	GG03	Free	10/07/02 02:5	10/07/02 02:52		
ATSE_W30	ATSE_ BALAJI	Free		26/12/04 07:0	26/12/04 09:00		
ATSE_W30	ATSE_	Planned		15/02/01 08:0	15/02/01 10:32		
ATSE_W30	ATSE_ SAN	Released		15/02/01 08:3	15/02/01 08:39		
ATSE_W30							
RBLCAL04							
RBLCAL04							
RBLCAL04							

Existing Calls by Sold-to BP (tsclm1501m100), Service Orders tab

After viewing these details, the call taker can decide one of the following actions.

- To cancel the original call entry because a call for that problem was already logged
- Continue to enter the call even though a call is already present for that problem.
- Update the call or related service order with additional details, such as text, service order activity, and so on.

The call taker can modify the selected call from the Existing Calls session by double-clicking it, or by choosing **Call Details** on the **Specific** menu, as shown in the following figure.



tsclm1100s000 : Calls [User: kkishori] [870]

File Edit View Group Workflow Tools Specific Window Help

Register Details Times Procedure Diagnosis RMA

Call: 100000138 Transferred

Service Details

Created by: Petra van de
 Logged by: LSC Service Center
 Service Center: LSC Service Center
 Support Engineer: PETRA Petra van der Winden

☐ Waiting Reason:

Service Order Details

Service Engineer: ... Page Frequency: 0
 Exe. Service Center: LSC Service Center
 Related Serv. Order: 300000094 HFL Business Partner

Related Calls

Follow-Up Call
 Parent Call

Calls(tsclm1100s000), Procedure tab

The original call entry session will not be affected. You can view the service order by clicking the ellipsis (...) button.

tsoc2500m000 : Service Orders [User: kkishori] [870]

File Edit View Group Workflow Tools Specific Window Help

Service Order	Configuration	Center	Service Engineer	Latest F
300000094 HFL Business Partne		LSC	GG03 FOREMAN = GG	01/05/0
300000095 Delil Parcel Service x		LSC		01/05/0
300000096 new BP		LSC		01/05/0
300000097 Delil Parcel Service		LSC	PETRA Petra van der W	01/05/0
300000099 Delil Parcel Service x	VISHU1 Vishakan's config	KAMAL	1251 Wvdbrink 2	21/12/0
300000100 Delil Parcel Service x	VISHU1 Vishakan's config	KAMAL	1251 Wvdbrink 2	
300000101 VEL bussiness partn	APSEB201 for structure	VELSER	1251 Wvdbrink 2	
300000102 ABN - AMRO	AK1 ak1 test configuration	CHUCKY	1251 Wvdbrink 2	
300000103 Delil Parcel Service x		KAMAL		
300000104 service center 1000		1000	1249 WVDBRINK: ON	
300000105 service center 1000		1000		
300000106 service center 1000		1000		
300000107 service center 1000		1000		

NUM

Service Orders (tsoc2500m000)

After viewing or modifying the service order, the call taker can close all sessions and cancel the original call entry.

With this functionality, the entry of duplicate calls can be eliminated and the existing calls can be updated easily.

If the **Search based on** box is set to **Configuration**, the configuration is checked to find out if there are any existing calls. If there are any calls and if the call taker responds **Yes** to the question “Calls exist for this configuration. Do you want to view them?”, the Existing Calls by Configuration (tsclm1501m100) session will appear. Similarly for the object also.

If the call taker only enters the serial number (without entering the sold-to business partner, configuration, or object) in the Call entry session, iBaan ERP also checks for existing calls based on the sold-to business partner, configuration, and object values of the serial number and value of the **Search based on** box.

EXAMPLE

If the **Search based on** box is set to **Configuration**, and the configuration serial number in the call entry session is X, searching for the existing calls will be done for configuration X.

The following figures show examples of the Existing Calls by Configuration (tsclm1501m200) and the Existing Calls by Object (tsclm1501m300) sessions.

Call	Status	Sold-to B.P.	Description	Reference Object	No.	Serial Number
ABCDEF314	Registered	100000002	MILLER & LONG			
ABCDEF316	Registered	100000002	MILLER & LONG			
ABCDEF317	Registered	100000002	MILLER & LONG			
ABCDEF323	Registered	100000002	MILLER & LONG			
ABCDEF325	Registered	100000002	MILLER & LONG			
ABCDEF328	Registered	100000002	MILLER & LONG			
CLM000003	In Process	100000002	MILLER & LONG	TR100	1	
CLM000005	Registered	100000002	MILLER & LONG	TR100	1	

Existing Calls by Configuration (tsclm1501m200)

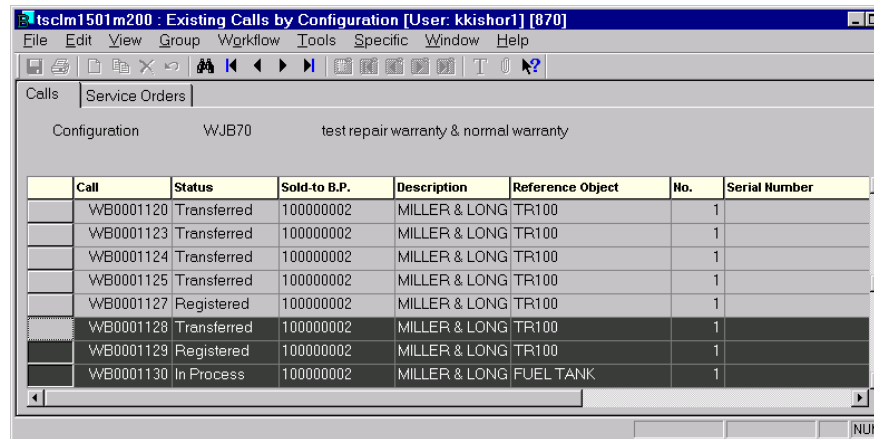
Call	Status	Sold-to B.P.	Description	Call Description	Wait
CLM000003	In Process	100000002	MILLER & LONG NA	test	☐
CLM000005	Registered	100000002	MILLER & LONG NA	test	☐
WB0001119	Registered	100000002	MILLER & LONG NA	this is repair warranty	☐
WB0001120	Transferred	100000002	MILLER & LONG NA	test on rep. warranty	☐
WB0001123	Transferred	100000002	MILLER & LONG NA	test on spent time on call + on SOH	☐
WB0001124	Transferred	100000002	MILLER & LONG NA	test invoice + warranty	☐
WB0001125	Transferred	100000002	MILLER & LONG NA	bad fix flag is yes, what goes in TF?	☐
WB0001127	Registered	100000002	MILLER & LONG NA	test invoice + warranty	☐

Existing Calls by Object (tsclm1501m300)

To temporarily modify the search criteria

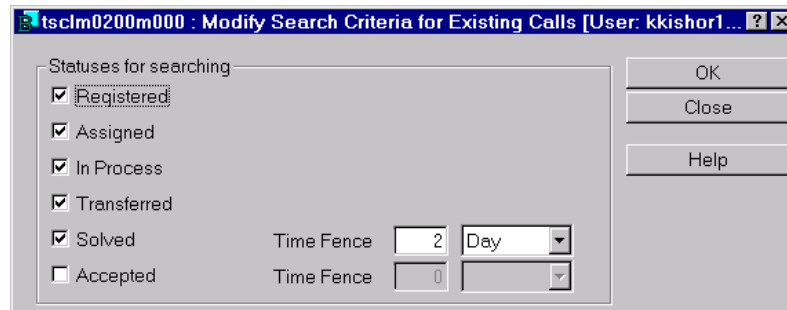
The existing calls shown in the Existing Calls by Sold-to BP (tsclm1501m100), Existing Calls by Configuration (tsclm1501m200), or Existing Calls by Object (tsclm1501m300) sessions, depend on the settings in the Call Management Parameters (tsclm0100m000) session. However, the call taker would like to modify these settings for a particular sold-to business partner, configuration, or object. The reasons for change could be a large or a small number of existing calls in the Existing Calls sessions that do not enable the call taker to take a decision. At the same time, the call taker may not want to change the parameter setting permanently, but just temporarily. This functionality is also provided. On the **Specific** menu of the Existing Calls sessions, the user can choose **Modify Search Criteria for Existing Calls**. This command opens a session whose fields receive their values from the CLM parameters. The user can modify them, and the Existing Calls session will be refreshed with the new settings. The settings in the Call Management Parameters (tsclm0100m000) session will not be updated.

The following figures illustrate how the search criteria can be temporarily modified .



Call	Status	Sold-to B.P.	Description	Reference Object	No.	Serial Number
WB0001120	Transferred	100000002	MILLER & LONG	TR100	1	
WB0001123	Transferred	100000002	MILLER & LONG	TR100	1	
WB0001124	Transferred	100000002	MILLER & LONG	TR100	1	
WB0001125	Transferred	100000002	MILLER & LONG	TR100	1	
WB0001127	Registered	100000002	MILLER & LONG	TR100	1	
WB0001128	Transferred	100000002	MILLER & LONG	TR100	1	
WB0001129	Registered	100000002	MILLER & LONG	TR100	1	
WB0001130	In Process	100000002	MILLER & LONG	FUEL TANK	1	

Note the status of the selected calls.



tsclm0200m000 : Modify Search Criteria for Existing Calls [User: kkishor1... ? X]

Statuses for searching

- ☒ Registered
- ☒ Assigned
- ☒ In Process
- ☒ Transferred
- ☒ Solved
- ☐ Accepted

Time Fence: 2 Day

Time Fence: 0

Buttons: OK, Close, Help

Modify Search Criteria for Existing Calls (tsclm0200m000)

The fields are defaulted from the CLM parameters.

Modify Search Criteria for Existing Calls (tsclm0200m000)

The fields are modified as shown earlier.

Call	Status	Sold-to B.P.	Description	Reference Object	No.	Serial Number
CLM000007	Registered	100000002	MILLER & LONG			
CLM000008	Registered	100000002	MILLER & LONG COIL		1	
CLM000010	Registered	100000002	MILLER & LONG			
SUPPOR032	Registered	100000002	MILLER & LONG			
SUPPOR033	Registered	100000002	MILLER & LONG			
WB0001119	Registered	100000002	MILLER & LONG TR100		1	
WB0001127	Registered	100000002	MILLER & LONG TR100		1	
WB0001129	Registered	100000002	MILLER & LONG TR100		1	

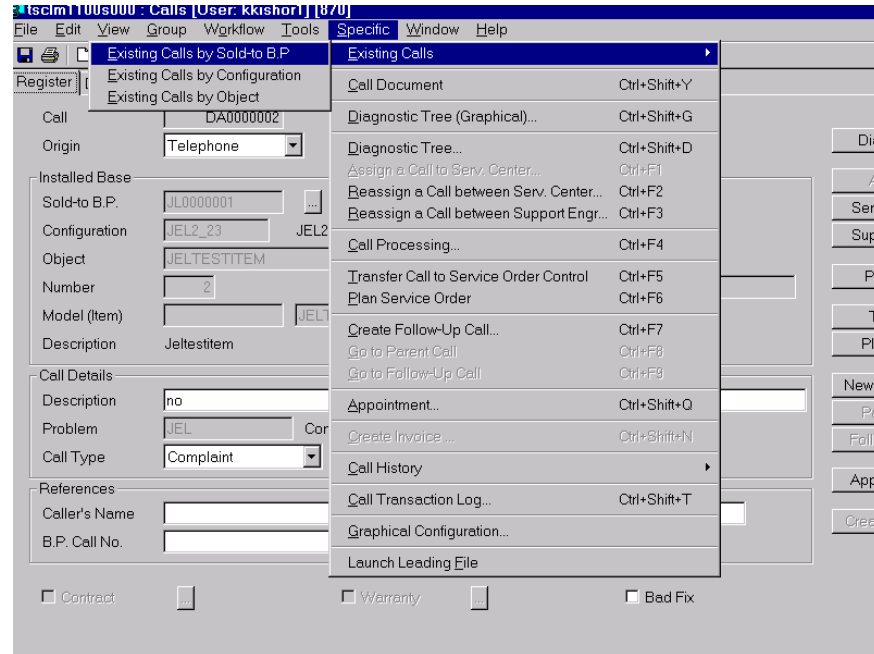
The new result set is as shown earlier.

Additional functionality for existing calls

After the call is registered, the user may like to view the existing calls for the sold-to business partner, configuration, or object defined for the call. The user may also like to view the existing calls in different views than defined in the CLM parameters. For example, if the **Search based on** box is set to **Sold-to BP**, the existing calls will be shown for that sold-to business partner. After entering the configuration or object, the user may like to view the existing calls by that configuration or object.

This functionality is provided by means of the **Existing Calls** command on the **Specific** menu in the Calls (tsclm1100s000) session. This command is always available and it contains the following subcommands (as shown in the following figure):

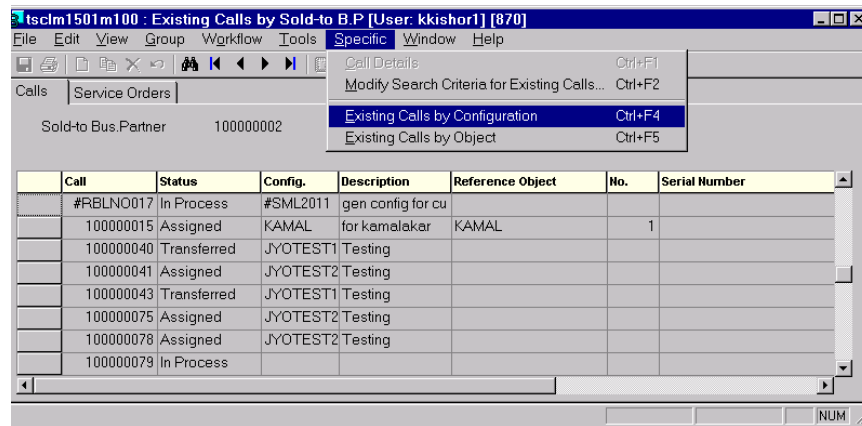
- Existing Calls by Sold-to BP
- Existing Calls by Configuration
- Existing Calls by Object



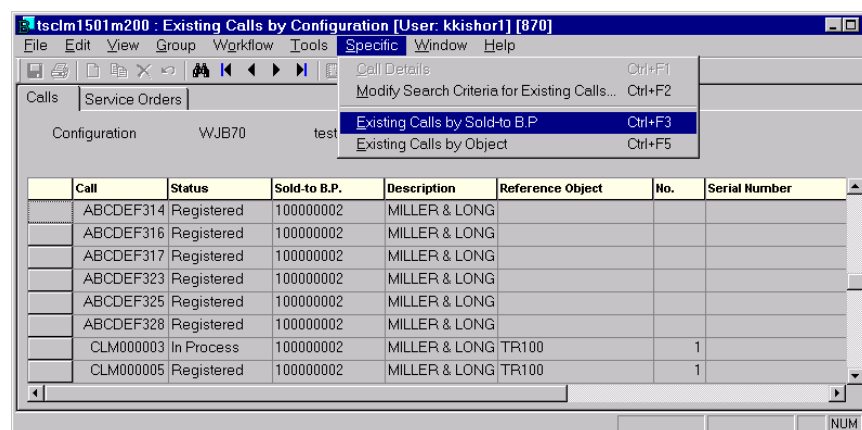
Calls session with form command "Existing calls"

Additional navigation options for Existing Calls sessions

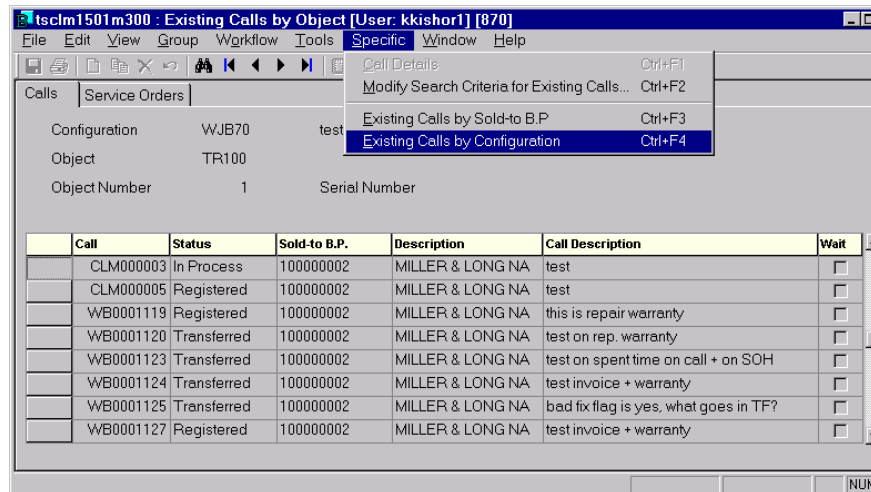
If the user wants to view the Existing Calls by Configuration (tsclm1501m200) or Existing Calls by Object (tsclm1501m300), from the Existing Calls by Sold-to BP (tsclm1501m100) session, the user can see zoom to that session without returning to the Calls (tsclm1100s000) session. From any view of existing calls, the user can zoom to the other two views. The commands are provided in the **Specific** menu of each Existing Calls session, as shown in the following examples.



Existing Calls by Configuration command in Existing Calls by Sold-to BP (tsclm1501m100) session

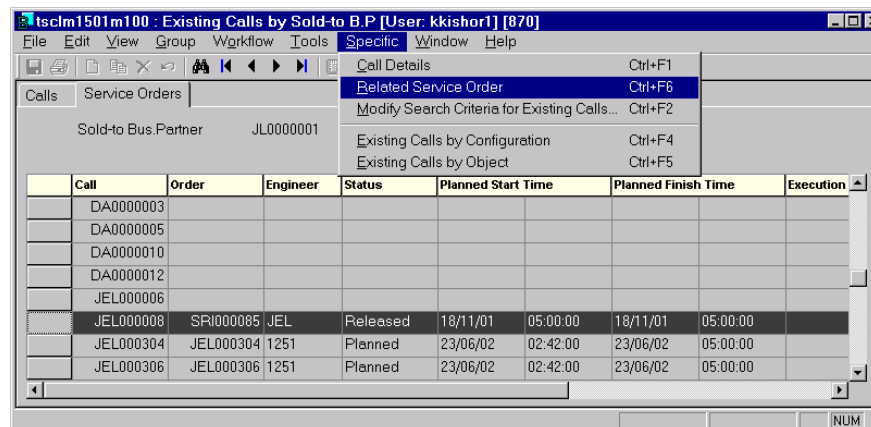


Existing Calls by Sold-to BP command in Existing Calls by Configuration (tsclm1501m200) session



Existing Calls by Configuration command in Existing Calls by Object (tsclm1501m300) session

From the Existing Calls session, the user can directly zoom to the related service order without opening the Call details session. In the Existing Calls by Sold-to BP, Existing Calls by Configuration, and Existing Calls by Object sessions, on the **Service Orders** tab, through the **Specific** menu, a **Related Service Order** command is available as shown in the following figure.



Existing Calls by Sold-to BP session with form command "Related Service Order"

