Portal Prodigy™
Requests and Help Desk Features in Detail

Chapter Excerpt from Software User & Administration Guide
January 2007 Update
www.portalprodigy.com

1.1 Introduction

The Requests and Help Desk feature is designed to help you more efficiently manage requests and improve customer and member satisfaction. As you will quickly discover, the Portal Prodigy Requests and Help Desk feature's flexibility makes it applicable for a wide variety of applications. The Portal Prodigy Requests and Help Desk feature provides a complete request management system for capturing, processing and managing a variety of interactions including general information requests, warranty claims, maintenance service requests, maintenance and support contracts, product information requests, project requests, requests for quotes, consulting requests, training requests, resource requests, research requests, event planning, questions and assistance with problems and more.

The Requests and Help Desk feature integrates with Work Order Management so you can create cost estimates, capture customer approval, and bill for services. Services can be priced based on hourly rates or flat fees. The system can be used both to automatically log time and manually enter time and produce invoices for billable services. Work Orders can include both services and products. Work Orders fully integrate with the Product Catalog, Inventory Management, Order Management, Fulfillment and Payment Processing features. For additional information about Work Orders see the Chapter titled Work Order and Time Billing Features in Detail in the PortalProdigy Administration Manual..

All Request information can be indexed and made searchable as part of your organizations Help Desk knowledgebase. Requests and Help Desk integrates with Document and Resource Management so you can attach documents and other file types to Requests. Requests and Help Desk also integrates with Task Management so you can assign tasks, track activities, and track both billable and non-billable time.

Independent of Work Orders, Requests and Help Desk integrates with Item and Order Management and the Shopping Cart to provide a complete transaction management solution for capturing RFQs (requests for quotes), bid requests, and customized order requests. Customers can add Items without pricing from the Product Catalog to their Shopping Cart. Upon checkout the customer is then presented with a Request form for capturing whatever information you require. These Requests can later be priced and converted to Quotes. An automated email notification can be sent to the customer notifying them that their price quotes is ready and include a link back to your website where the customer can place an order for the quoted items and complete the required payment process. Once approved the Quote is automatically converted to an Order and placed in the queue for fulfillment.

Request Types are used to classify requests. Each Request Type has its own custom form and configuration options. The number of possible request types is virtually unlimited. So, it's up to you to find creative ways to provide paid and/or unpaid access to the many benefits offered by the Requests feature.

For each Request Type you create a customized form for collecting information. Forms are created using Form Builder. Form Builder allows you to define each of the information (data fields) that you want to collect. Form Builder is very flexible, allowing you to define fields of a variety of data types including:

- Text
- Date
- Number
- Dollar
- Memo
- List box selections
- Radio button selections
- Check box selections
- PortalProdigy Fields

Form Builder allows you to include PortalProdigy fields such as contact name, company name, addresses, phone numbers and other information such as product codes, product names, etc. The values entered into PortalProdigy fields can be used to locate products, search for and link to existing contact and company records, and create and link to new contact and company records.

Form Builder also supports sub-forms which are grid sections containing columns and rows (spreadsheet style). This is useful for capturing information for multiple items on a single form such as products.

The Requests and Help Desk feature also provides everything needed to manage the submitted requests including automated email notifications, task assignment, tracking of billable time, creation of contact records, creation of work orders, and integration with PortalProdigy's other features. It supports both a self service model and an operator/administrator entry model. The self service model provides users with online entry of requests along with the ability to view the status of their requests, submit documents and files, approve work orders, search your help desk knowledgebase, and more. The operator/administrator model permits operators and administrative users to enter requests received by phone or other means and to manage all aspects of the requests. You can even define and display operator scripts to instruct the operator what to say while on the phone with the customer.

Various Feature Components of PortalProdigy utilize Request Types for special purposes. The Sales & Opportunity feature component utilizes Request Types to define Opportunity forms which are managed directly using Opportunity Management rather than Request Management. The Shopping Feature Component utilizes Request Types to define RFQ forms and Bid forms for products. Each of these special purposes is described in the Special Situations sub-chapter of this Chapter.

Requests and Help Desk feature benefits include:

- Self service customer request entry screen – used by customers/members to initiate requests and report problems.
- Self service customer request status reporting screen – used by customers to check status of requests and work being performed, and to provide additional information.
- Administrative help desk request entry screen – streamlined for quick input of requests and initial troubleshooting by help desk (support) staff.

- Administrator (help desk support operators) scripts – provide instructions and scripts for client interaction, applicable to specified type of request.
- Definable data elements (questions and input values) for Request entry forms for both Customers and Administrators.
- Help Desk Knowledgebase – provide access to prior requests and descriptions of resolutions via keyword search.
- Track billable time and non-billable time.
- Create Work Orders for authorizing and tracking billable time.
- Support service (maintenance and support) agreements as blanket Work Orders covering costs for specific request types and tasks.
- Automated time entry and manual time entry.
- Assign tasks to staff based on requests.
- Assign separate rates permissible by task type and customer.
- Assign default rates to each customer.
- Billable time approval process that allows manual adjustments by permissible staff.
- Print customer invoices for billable time.
- Ability to include Products on invoices for billable time.
- Scheduled recurring billing for service agreements.
- Define project schemas as hierarchal description of design or expected output (such as feature components, fields, options, and functions/processes).
- Copy Schema Template option – copies pre-existing project schema definition to new project.
- Define project deliverables with estimated and actual dates.
- Attach documents to requests and projects.
- Define project milestones with estimated and actual dates.
- Send automated email notification with link to request to customer (requestor) when new requests are entered.
- Send automated email notification with link to request to members of specified group or individual when new requests are entered by customers.
- Option to send automated email notification to requestors with solution or as notification that request has been completed and link to request in customer request status page.
- Quick view of customer request history available from Administrative Help Desk.
- Copy Tasks option – timesaver to copy Tasks such as standardized milestone tasks, deliverable tasks and document requirement tasks (without dates and time log entries) from a template into a new Request.
- View tasks and project by vendor, staff, and hierarchal structure (timeline/dependency order).

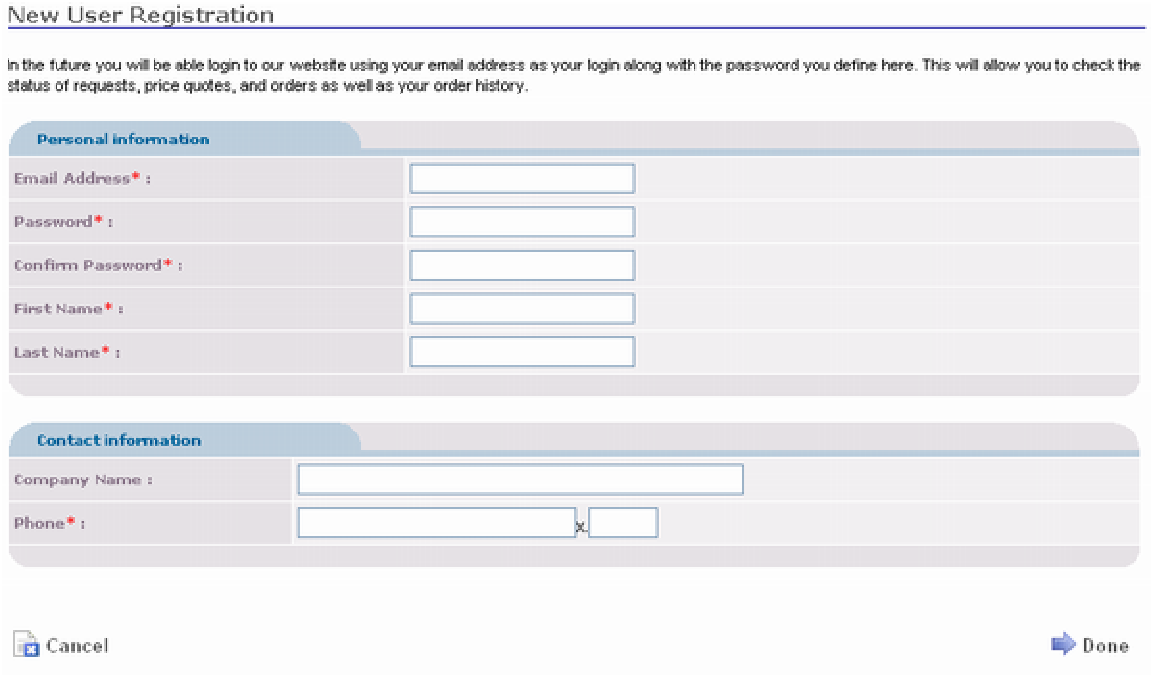
- Quick payment entry from Administrative Help Desk for billable requests not covered by a service agreement.
- Integrates with Product Catalog and Shopping Cart to create automated RFQs (Request for Quotes) and Requests for Bids.
- Provides ability to price an RFQ and automatically convert to an Order
- Provides ability to define Opportunity Types used by Sales and Opportunity Management.

1.2 The Visitor Experience

The Request and Help Desk feature's flexible design allows it to be configured for a wide variety of applications ranging from operating a Help Desk to managing Customer Requests for Quotations. As a consequence of this, visitors can experience the feature in many different ways. If you have set it up as a self service model, their experience may begin with a prompt to login or signup as a new user as shown below:

- After clicking on a Request link, user is prompted to either login or signup as new user.

- When signing up as a new user, they will be directed to a designated quick registration form like the one shown below:

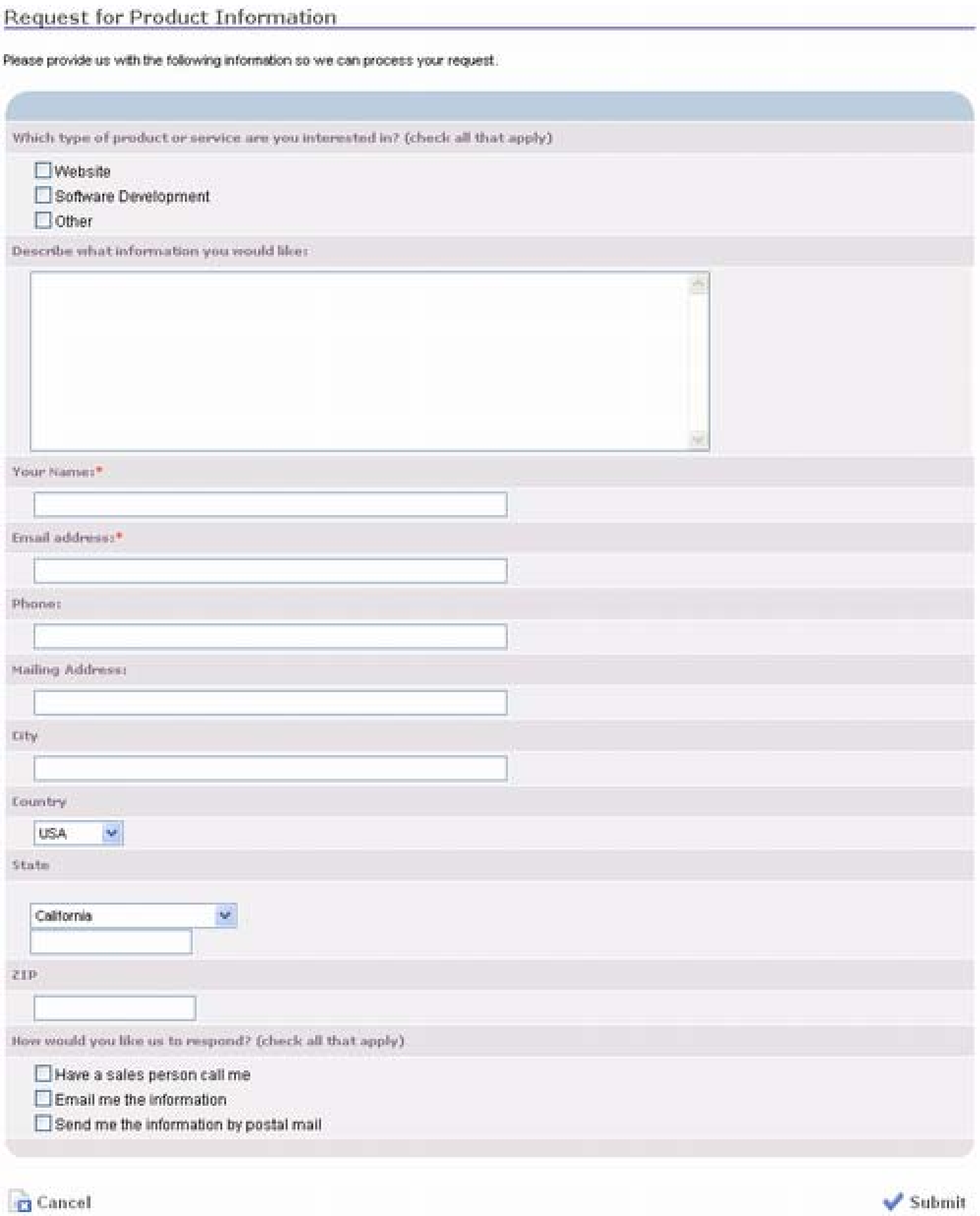


- Or the user may be taken directly to the Request Entry form.

1.2.1 Request Entry Form

The user enters information using the visitor Request Entry Form. Each Request Type can have a unique form. The Form's questions (fields) that are set to "Administrator Only" will not be shown on the visitor Request Form. During initial entry the Form's questions (fields) that are set to "Solution" also will not be shown. Solution fields are shown to the visitor only when the user returns to check the status of their Request.

- The following is an example of a Request Entry form:


Request for Product Information

Please provide us with the following information so we can process your request.

Which type of product or service are you interested in? (check all that apply)

☐ Website
☐ Software Development
☐ Other

Describe what information you would like:

Your Name:*

Email address:*

Phone:

Mailing Address:

City

Country

USA

State

California

ZIP

How would you like us to respond? (check all that apply)

☐ Have a sales person call me
☐ Email me the information
☐ Send me the information by postal mail

Cancel Submit

- The user clicks the ✔ Submit option and is taken to next step.

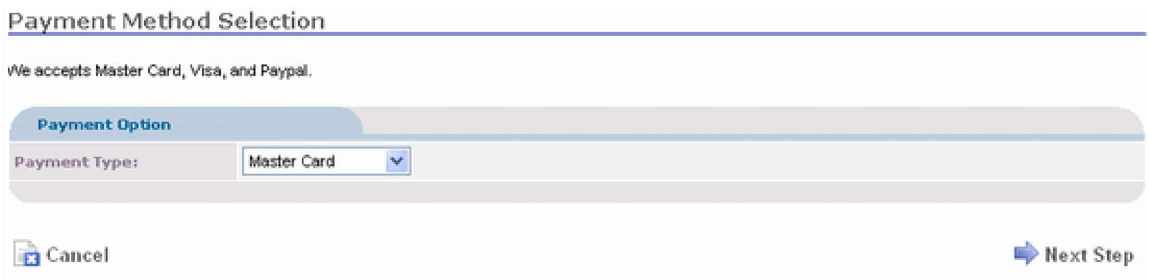
1.2.2 Optional Work Order Approval

This is used by the visitor to authorize work. Depending on the Request Type's configuration, the Work Order can be automatically created by the Request Entry process or it may be manually created as a separate process. In either case, the visitor may view the Work Order online and review and agree to the terms and conditions. The visitor may also print a copy of their Work Order.

1.2.3 Optional Payment Entry

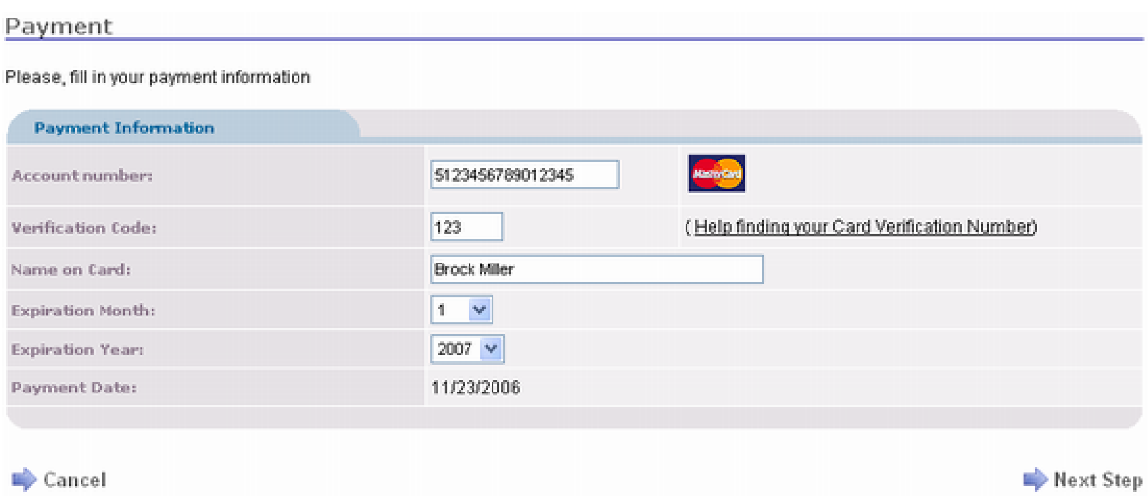
This is used by the visitor as part of the Work Order Approval process to select a payment method and provide their payment information online. If automated credit card processing is enabled, credit card payments are approved as part of the process. If the customer has been granted credit terms, the process will verify their credit status and verify that the Work Order amount does not exceed their available credit.

- When payment is required at time of entry the user will be presented with the following page in order to select a payment method:



- The Payment Type list box will only display the Payment Types that you have enabled. They are enabled in Payment Features Management.

- When paying by credit card the user will be presented with the following page in order to enter their payment information.



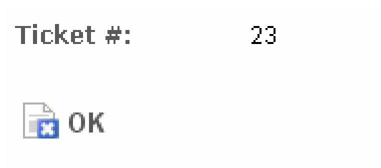
- The user clicks Next Step to continue the process. If you have automated payment authorization enabled, the payment will be electronically submitted to your processor and gateway for approval. If the charge is declined, the user will be notified; otherwise they will be taken to the next step.

For additional payment options see the chapter titled Payments Features in Detail

1.2.4 Confirmation of Submittal

This page confirms to the user that their information has been saved and assigns them a Ticket # for future reference.

- User sees the following:



You may also include instructions on this page. The Instructions are defined in Request Type Management.

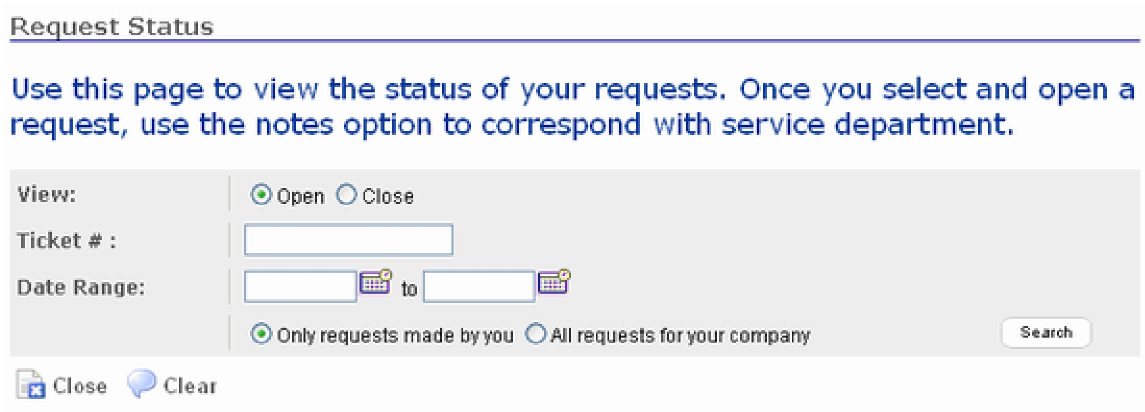
1.2.5 Automated Email Notification of Submittal

Requests can be configured to send a personalized email notification to the user confirming receipt of their Request. A template for the email notification is configured using Broadcast Management. It can be configured to provide a complete recap of the submitted information along with Ticket # and link to view the status of their Request.

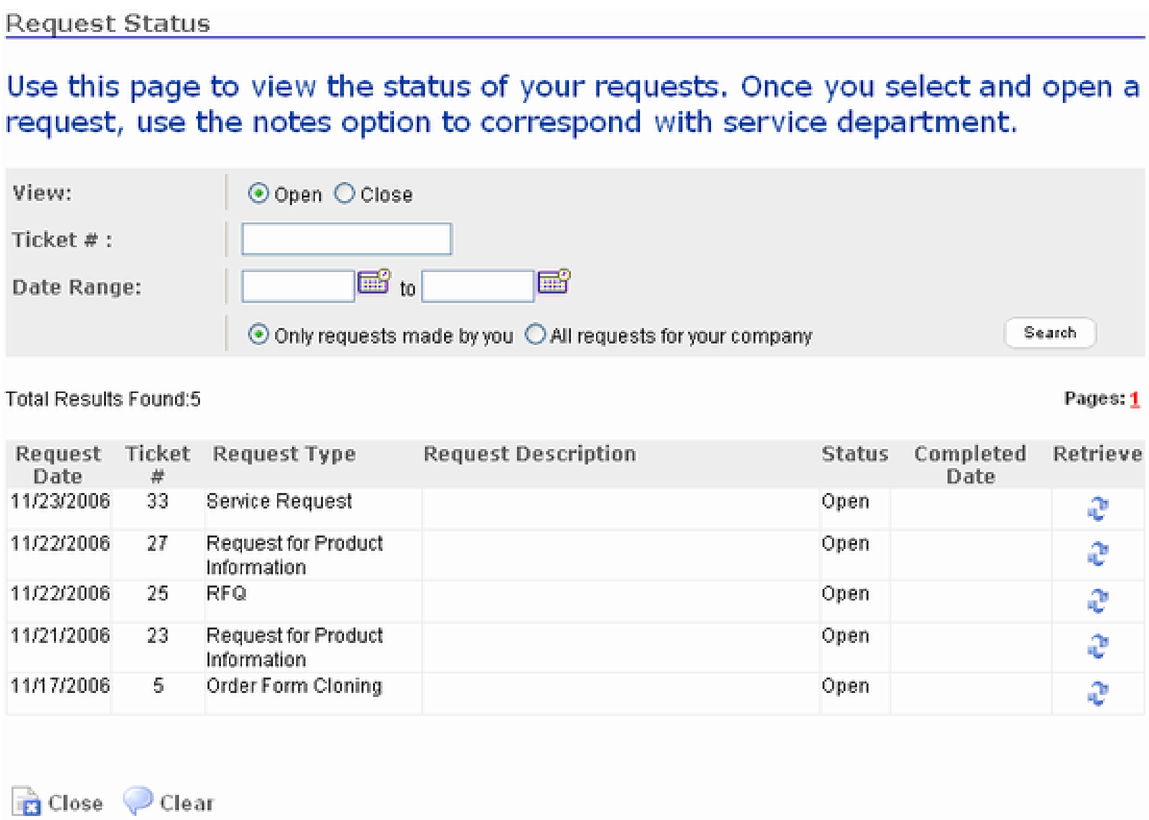
1.2.6 Check Status of Request

The user can view the Status of their Requests at any time using the Request Status page. This page allows the user to view all requests including both open and closed requests. The user may view the details of each of their Requests. When viewing the details of a Request, the user will be able to view all Questions (fields) and their corresponding Answers (values) configured as Solutions. The user can view the attached notes history, enter new notes, attaché documents and other files, and search the Help Desk Knowledgebase.

- The following is an example of the Request Status page. You define the instructions that the user sees. The instructions are defined in the Request and Help Desk Features Management page.

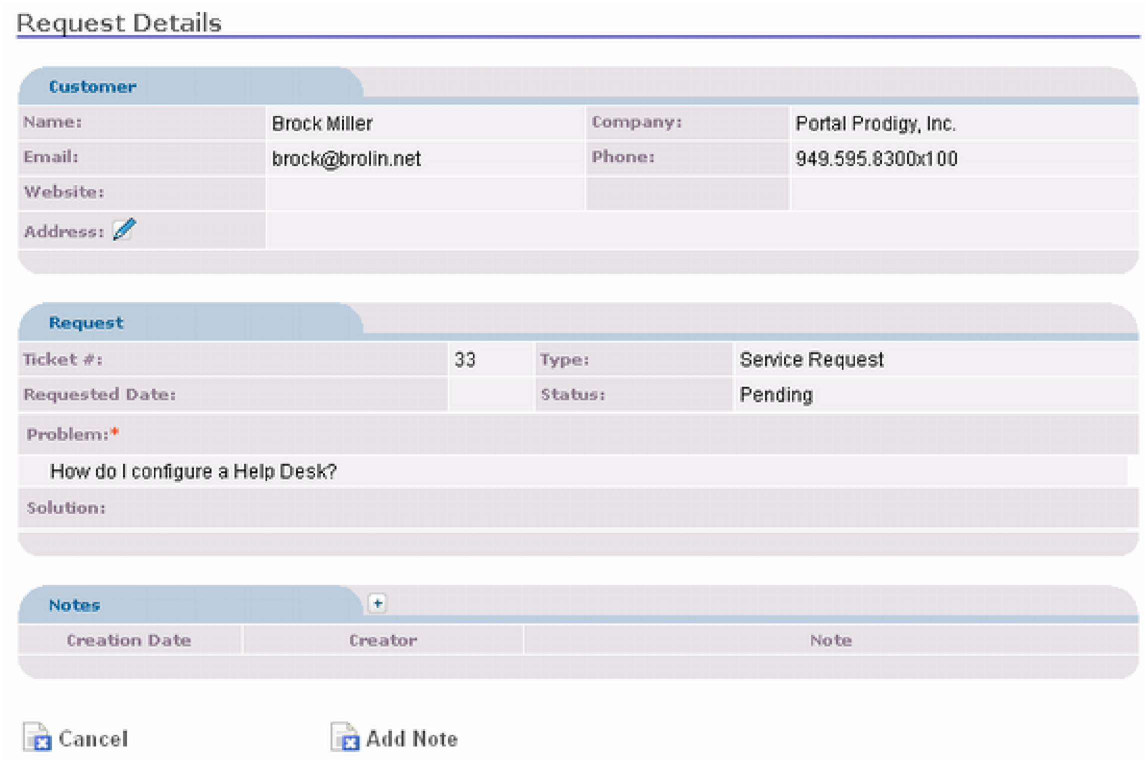


- The user clicks the Search button to display matching Requests as shown below:



Request Date	Ticket #	Request Type	Request Description	Status	Completed Date	Retrieve
11/23/2006	33	Service Request		Open		
11/22/2006	27	Request for Product Information		Open		
11/22/2006	25	RFQ		Open		
11/21/2006	23	Request for Product Information		Open		
11/17/2006	5	Order Form Cloning		Open		

- The use clicks on the Retrieve icon to open the Request in Request Details page as shown below:

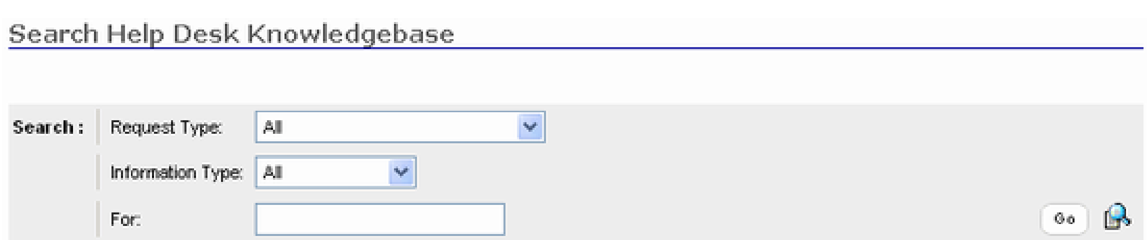


- The Add Note icon is used to attach notes. It opens a memo field for entering notes. The user clicks Save Note to save and submit their note. Their note is then displayed in the Notes list. An unlimited number of notes may be added. When a note is saved, a Task is assigned to review the note and an email notification is sent to the specified administrative individual or group. Notes provide a convenient method of documenting correspondence.

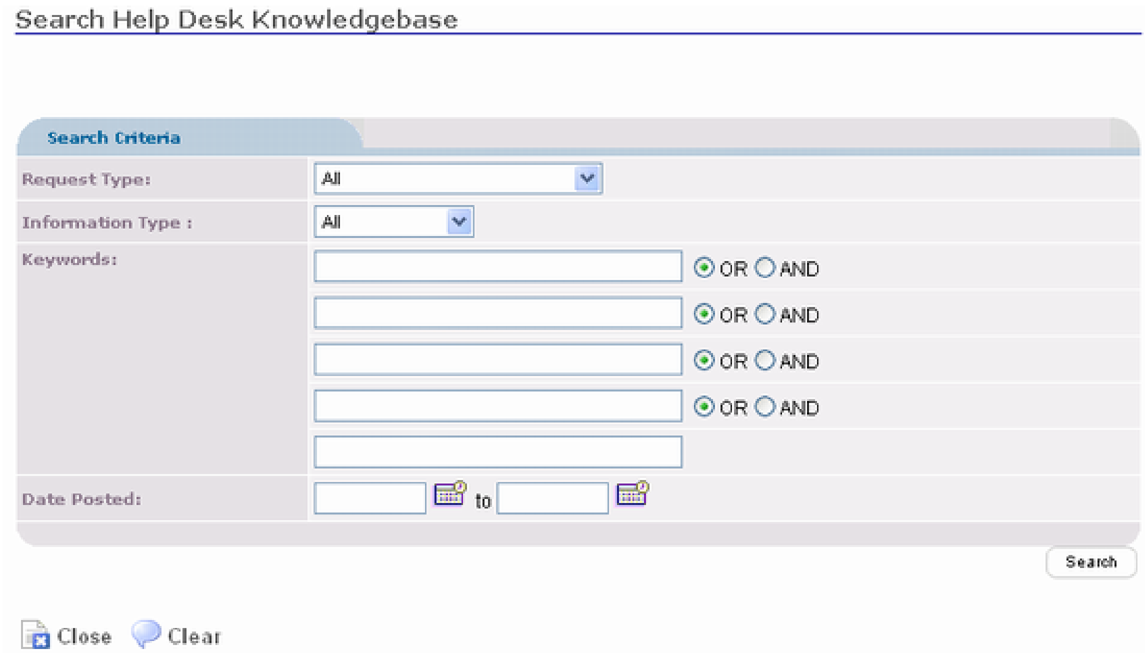
1.2.7 Search Request Knowledgebase

Either from the View Request Status page or by direct link, users can be given the ability to search your Request and Help Desk Knowledgebase. Users will only be able to search and view fields that have Include in Knowledgebase set to Yes. The Search feature permits users to limit their search to specific Request Types and Information Types (questions/fields).

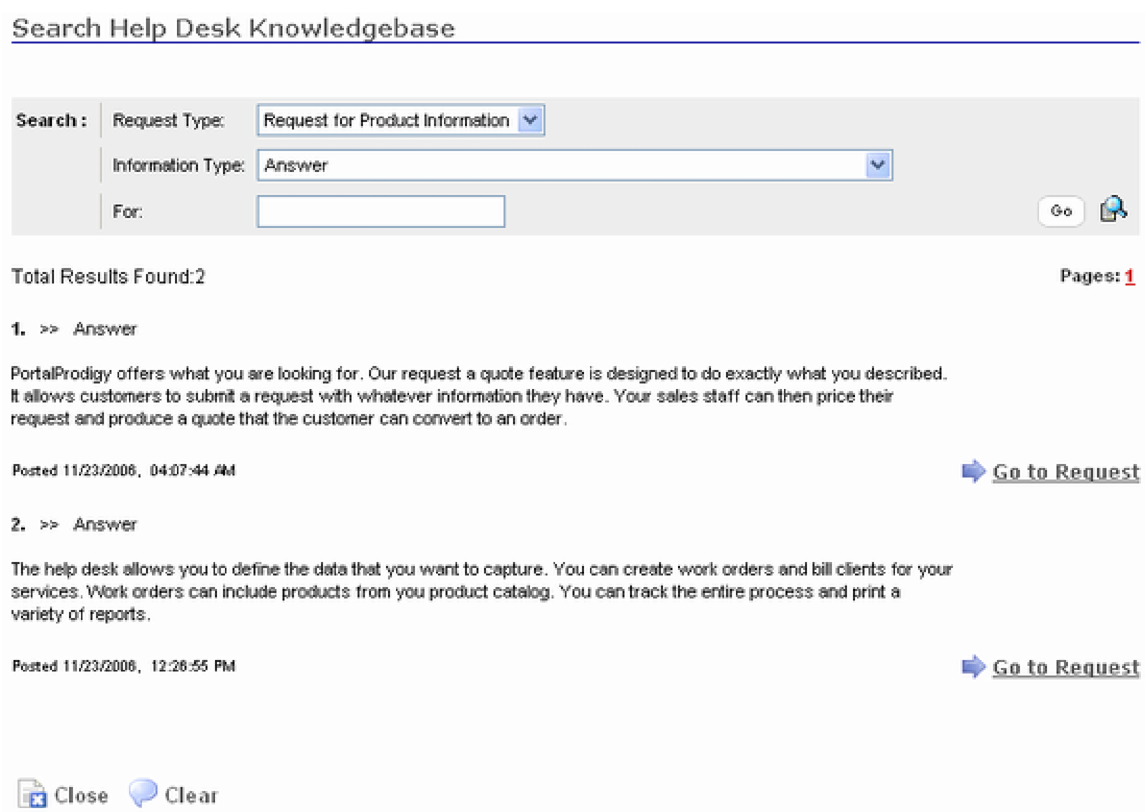
- The user enters their search word or phrase in the For field and clicks Go.



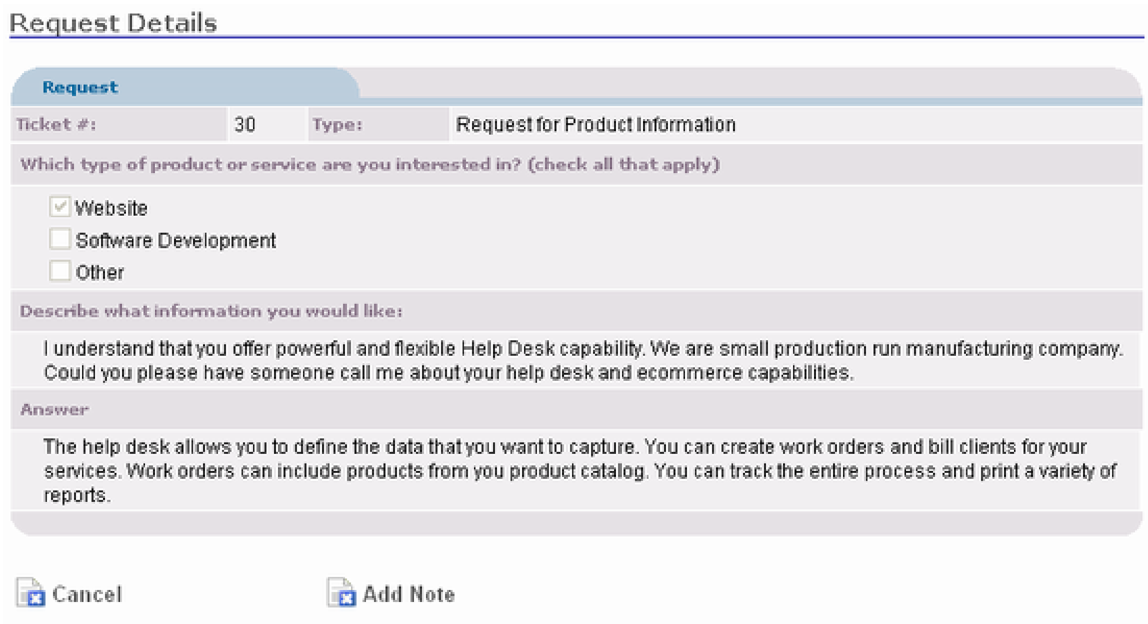
- An Advanced Search option provides additional search capability which is shown below:



- Search results appear as follows:



- To view a Request's details, the user clicks on Go to Request:



Request Details

Request

Ticket #:	30	Type:	Request for Product Information

Which type of product or service are you interested in? (check all that apply)

- [x] Website
- [ ] Software Development
- [ ] Other

Describe what information you would like:

I understand that you offer powerful and flexible Help Desk capability. We are small production run manufacturing company. Could you please have someone call me about your help desk and ecommerce capabilities.

Answer

The help desk allows you to define the data that you want to capture. You can create work orders and bill clients for your services. Work orders can include products from you product catalog. You can track the entire process and print a variety of reports.

Cancel Add Note

1.2.8 Optional Work Order Approval for Change Orders

The customer can approve Work Order Change Orders using the same process used to approve the initial Work Order.

1.2.9 Invoice for Billable Time

The customer can receive their invoices either by email or printed form.

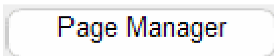
1.3 Components

Request Features Management page

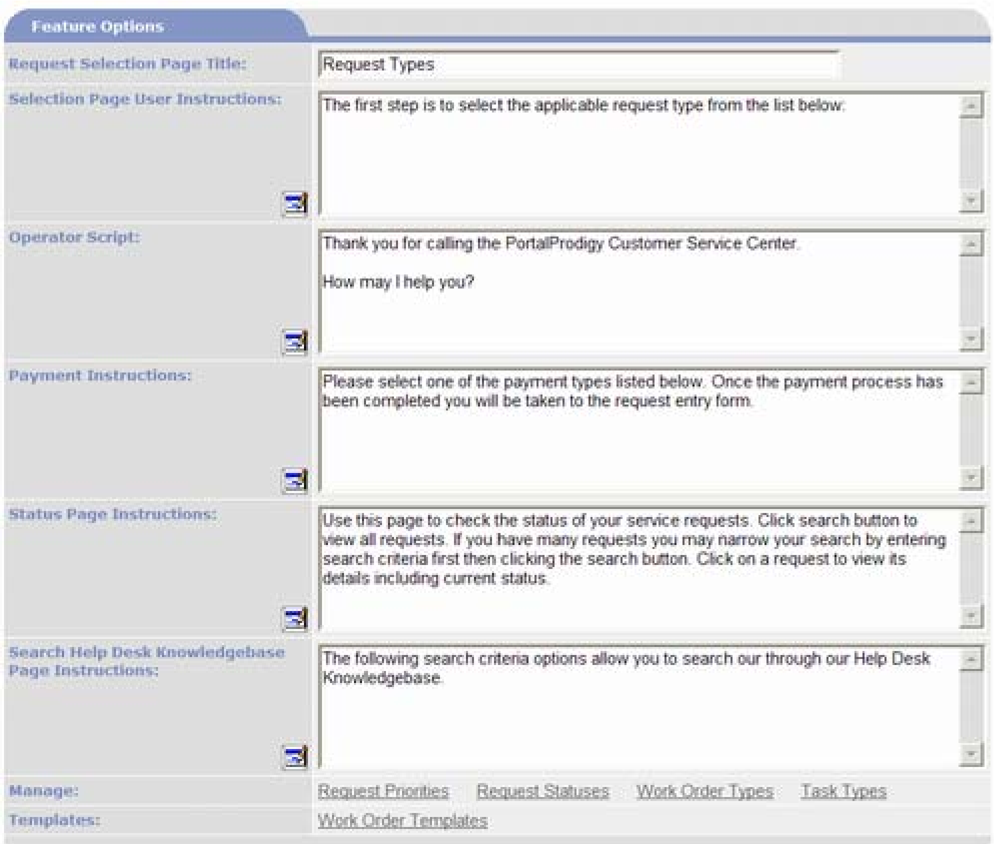
To reach the Request Features Management page select the Features Edit Icon Features located in the Site Management menu column of the Main Administration page (Ctrl-Alt-m) then click on **Requests & Help Desk** link.

Used to setup and configure the options that will be used by all Request Types.

- **Use –** used to select default page settings for Request Entry pages in the visitor portion of your website.

- 

 - used to open Page Manager. See the ‘Page Manager’ section of the Chapter titled ‘Web Page Design and Management’ for a detailed description of Page Manager and usage instructions.



- **Request Selection Page Title –** used to define the page title displayed on the Request Selection page. The Request Selection page lists all active Request Types and is displayed in the Visitor portion of the site.

- **Selection Page User Instructions** - used to define instructions that are displayed on the Request Selection page in the Visitor portion of the site. Excepts either text or HTML. Click on  to use the PORTALPRODIGY Document Editor.

- **Operator Script** - used to define a call center script displayed at the top of the Administrative Request Entry page. Help Desk Call Center operators use this script when greeting customers. Excepts either text or HTML. Click on  to use the PORTALPRODIGY Document Editor.

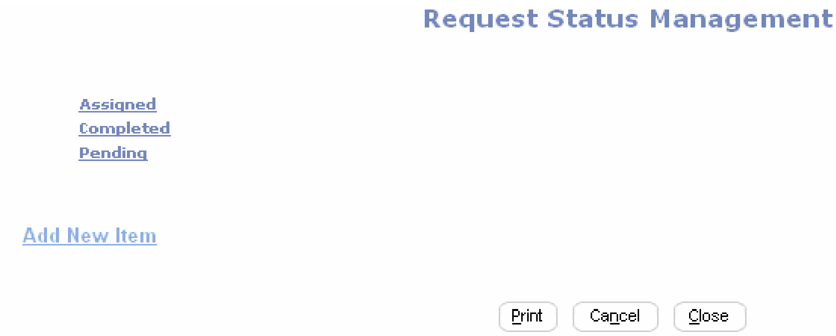
- **Payment Instructions** - used to define default Payment Instructions copied to new Request Types. Payment Instructions are displayed on the Payment Entry page in both the Visitor portion of the site and Administrator portion of the site. Each Request Type can have unique Payment Instructions. Excepts either text or HTML. Click on  to use the PORTALPRODIGY Document Editor.

- **Status Page Instructions** - used to define instructions that are displayed on the Request Status page in the Visitor portion of the site. The Request Status page is used to view the status of requests, view request details, and add notes to requests. Excepts either text or HTML. Click on  to use the PORTALPRODIGY Document Editor.

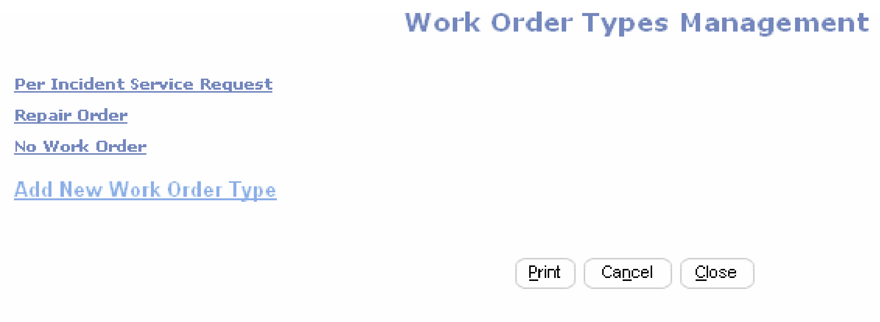
- **Search Help Desk Knowledgebase Page Instructions** - used to define instructions that are displayed on the Search Help Desk Knowledgebase page in the Visitor portion of the site. Excepts either text or HTML. Click on  to use the PORTALPRODIGY Document Editor.

- **Manage options:**
    - Request Priorities **link** – used to open the Request Priorities Management page where you can define a standard list of priorities. E.g. *Low*, *Medium*, & *High*.

    - Request Statuses **link** – used to open the Request Status Management page where you can define a standard list of statuses. E.g. *Pending*, *Assigned*, & *Completed*.



- **Work Order Types link** – used to open the Work Order Types Management page where you can define Work Order Types. Work Order Types are used to classify Work Orders and assign Work Order Duration and Template for default values. E.g. *Maintenance Agreement*, *Project*, & *Per Incident Request*.

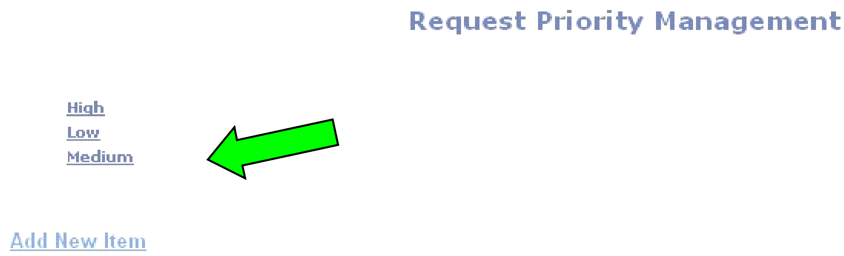


- **Task Types link** – used to open the Task Types Management page where you can define Task Types. Task Types are used to classify tasks by type of activity and assign to billable item. E.g. *Review Request*, *Programming*, & *Design*.

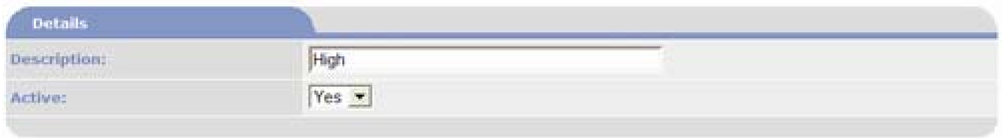
- **Templates:**
  - **Work Order Templates –** used to create and manage Work Order Templates. Using Work Order Templates Management you define the layout and physical appearance of your Work Orders. For additional information about Work Orders see the Chapter titled Work Order and Time Billing Features in Detail in the PortalProdigy Administration Manual.

Request Priorities Management page:

Used to define a standard list of priorities that can be assigned to Requests.



Create Request Priority Selections - Click on Add New Item link to create or click on existing description to edit a Request Priority.

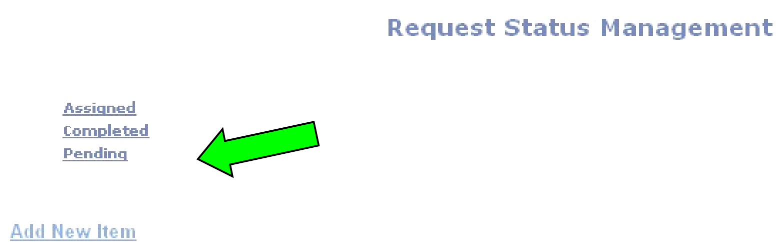


- **Description:** enter the Request Priority. E.g. *Low*, *Medium*, & *High*.

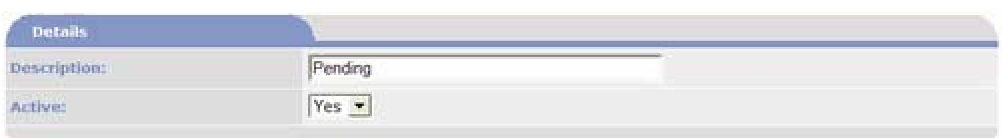
- **Active:** defaults to "Yes". Set to "No" to deactivate the Request Priority, removing it as a selection from lookup list boxes.

Request Status Management page:

Used to define a standard list of statuses that can be assigned to Requests.



Create Request Status Selections - Click on **Add New Item** link to create or click on existing description to edit a Request Status.

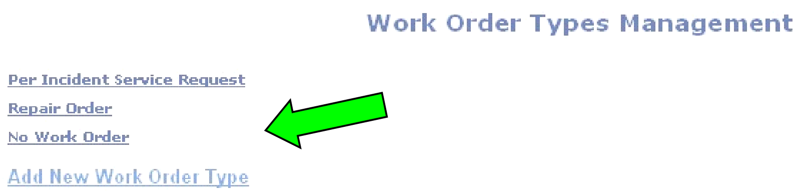


- **Description:** enter the Request Priority. E.g. *Pending*, *Assigned*, & *Completed*.

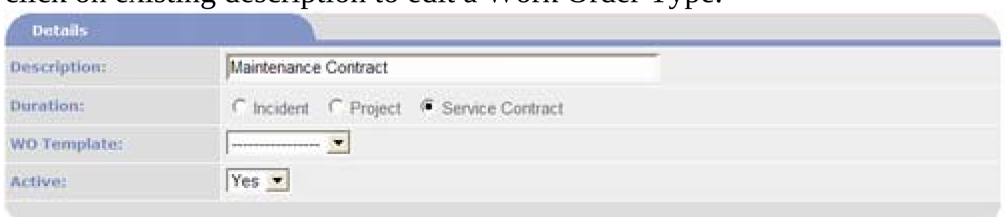
- **Active:** defaults to "Yes". Set to "No" to deactivate the Request Status, removing it as a selection from lookup list boxes.

Work Order Types Management page:

Work Order Types are used to categorize Work Orders for searching and reporting purposes. E.g. “Service Agreements”, “Consulting”, “Support”, “Repairs”, etc.



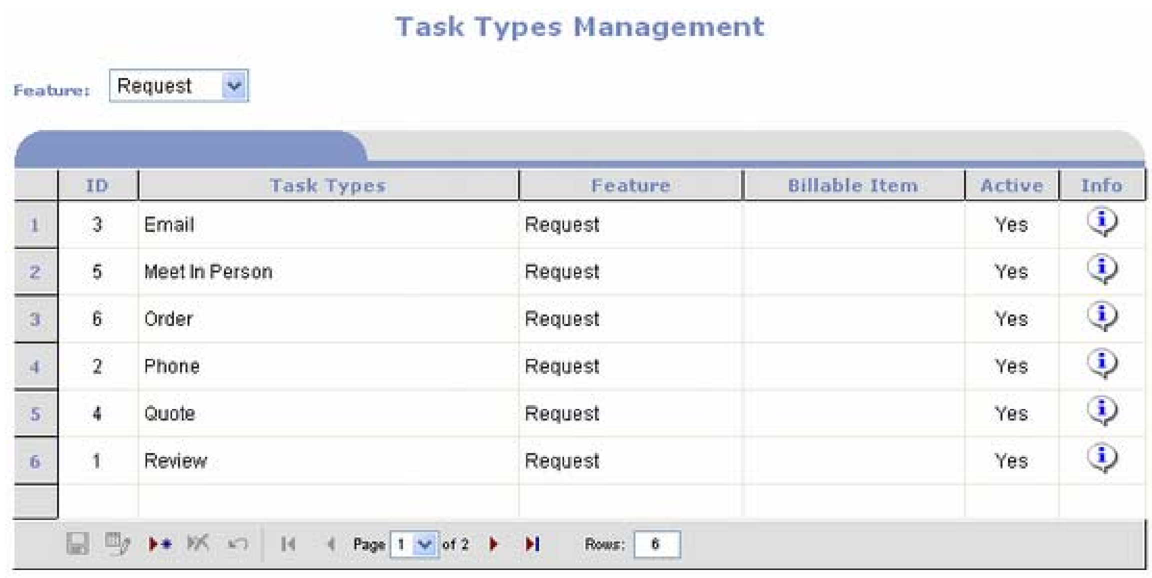
Create New Work Order Type - Click on **Add New Work Order Type** link to create or click on existing description to edit a Work Order Type.



- **Description:** enter the Work Order Type. E.g. *Maintenance Agreement*, *Project*, or *Support Request*.
- **Duration:** select one of the following:
    - **Incident** – select when the Work Order applies to a single request that is billed one time.
    - **Project** – select when the Work Order applies to a single request that may be billed multiple times.
    - **Service Contract** – select when the Work Order remains open and applies to many requests.
- **WO Template:** select a pre-defined template from the list box. WO Templates are used to define default values for new Work Orders.
- **Active:** defaults to “Yes”. Set to “No” to deactivate the Work Order Type, removing it as a selection from lookup list boxes.

Task Types Management page:

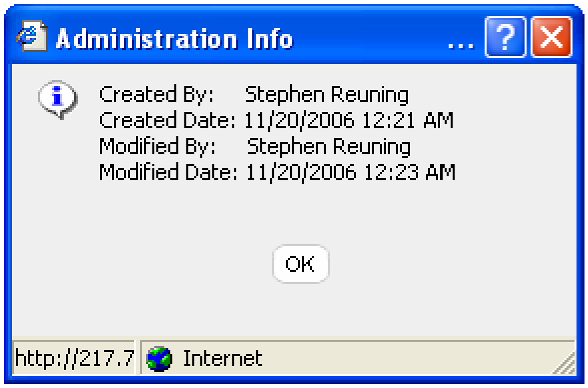
Used to define Task Types for categorizing Tasks. Accessed by clicking on the **Task Types** link of the Requests Feature Management page.

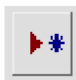


- **Feature:** list box for filtering view of Task Types by Feature.

Task Types grid contains the following columns:

- **ID:** this is the record ID that is automatically assigned by the system.
- **Task Types:** used to enter the name of the Task Type. E.g. *Review Request*, *Programming*, and *Design*.
- **Feature:** select a Feature from the list box. The Task Type will only be available to Tasks set to this Feature.
- **Billing Item:** enter the Item ID or click on  to select an Item using the Search For Items page.
- **Active:** defaults to "Yes". Set to "No" to deactivate the Task Type, removing it as a selection from lookup list boxes.
- **Info:** displays a pop-up dialog box with record information. See picture below:



Click the  Add New Record icon to add a new Task Type. Click  Save Current Record icon to save it. Repeat to create additional Task Types.

Search For Request Types page:

- **Include deactivated records in search results:** when unchecked, only active records are included. Check to include deactivated records.
- **Request Type ID -** search on the record ID assigned to Request Types.
- **Request Type -** search on the Request Types Title (name).
- **Date Created Range -** entering a date in the first text box only retrieves all Request Types with Created Date greater than or equal to the entered date. Entering a range is inclusive of entered date values.
- **Date Modified Range –** used to search by date last modified range. Works the same as Created Date Range.
- **Items Per Page** – used to control how many matches are listed at a time. Defaults to **10**. If the number of matches is greater than the specified Items Per Page, PORTALPRODIGY provides navigation options for the additional pages of matches This feature minimizes network traffic.

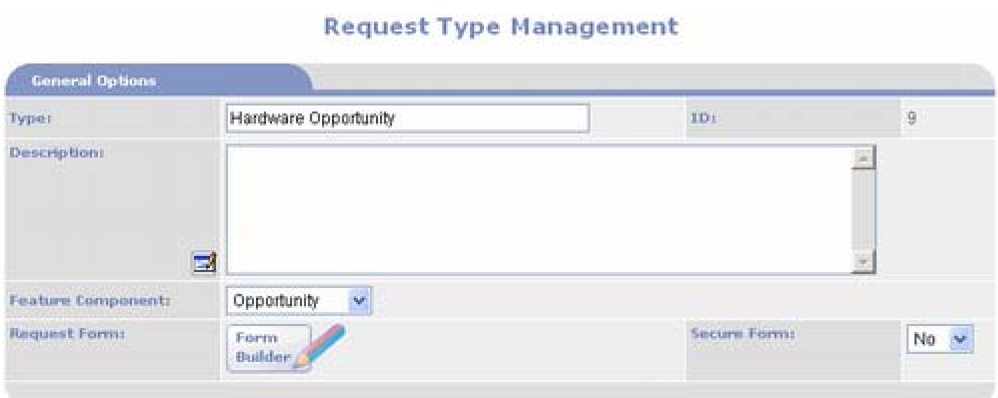
- Search : the **Search** button submits the entered search criteria and displays the matches.

Add New	Opens the Request Type Management page to create a new Request Type.
Clear	Clears the search criteria.
Print	Prints the website page to the user's local printer.
Main Menu	Closes the page and returns to the Site Administration Menu.

Request Type Management page:

Used to define Request Types. You may define an unlimited number of Request Types such as "Help Desk", "RMA Request", "Product Information", etc. The only required field in Request Type Management that you must manually enter a value into is Type. All other fields will either default to a value or do not require a value.

General Options section:



- **Type:** this is the name that will be displayed for the Request Type. It is displayed as a link on the Request Selections page which lists all the Request Types offered by your organization.
- **Description:** this description is displayed on the Request Selection page underneath the Request Type. It is used to describe the purpose of the Request Type along with selection instructions. Click on  to use the PORTALPRODIGY Document Editor.
- **Feature Component:** used to link a Request Type to a specific Portal Prodigy feature component including "Events", "Memberships", "Opportunity", "Products", "Return", "RFQ", and "RFQ from Cart". Note that only one "RFQ from Cart" Request Type can be

created. Leave Feature Component blank if you are not linking the Request Type to a specific feature component.

- **Request Form:** used to create a Request Entry form. Click on the Request Form Builder 

icon to open the Request Form Builder (Request Form Management page). Request Form Builder is used to build a customized request form. See the Request Form Management section of this chapter for additional information.

- **Secure Form:** when set to "Yes" the Request form is encrypted using SSL 128 bit encryption. Only set to "Yes" if the form will contain sensitive data because encrypting the Request form will cause the page to download slower and places a greater burden on the web server.

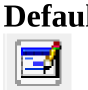
Entry Options section:
This section is used to configure data entry options for entry of new Requests.

- **Require Login:** used to require the user to login before they can access the Request form. When set to "Yes" you should set Create Contact Record to "No".

- **Signup Form:** used to specify the user registration form to use when requestors are required to login to enter request. When payment is required, requestors are required to login or register as new user during the Request Entry process.

- **Auto Create Contact Record?** set to "Yes" to create contact record based on information collected on the Request form. When set to "Yes" it is necessary to include Contact fields on the Request form, such as name and email address; and you set Require Login to "No".

- **Allow Document Attachments:** set to "Yes" to allow documents to be attached to Requests. Set to No to disable the ability to attaché documents to Requests.

- **Default Priority:** provides default Priority value when new requests are added. Click on the  icon to open Request Priority Management to add and edit Request Priorities.

- **Default Status:** provides Default Status value when new requests are added. Click on the icon to open Request Status Management to add and edit Request Statuses.

- **Operator Script:** this script is displayed on the Administrative Request Entry page when adding new Requests. It is used to display a script for help desk operators answering the phones in your call center. Click on to use the PORTALPRODIGY Document Editor.

Project Schema Options section:
This section is for future use. Project Schemas have not been implemented yet.

- **Schema Option:** used to specify how Default Schema is used. Schemas are used to describe projects. Select one of the following choices from list box:
    - o **No Schema –** select when Schema is not used.
    - o **Copy (template) –** select to use copy of specified Schema. This option is used when it is desired for each Request to have its own Schema.
    - o **Link (reusable)** – select to link to an existing Schema. This is option is selected when it is desired to have all Requests share the same Schema.

- **Default Schema:** select the Schema to either be copied or linked to.

Assignment Options section:
This section is used to configure Request and Task assignment.

- **Assignment Method:** used to specify how new Requests are assigned to people. The following choices are available:
    - o **Manual –** use when you do not want the system to automatically assign the Request. This option allows you to manually assign the Request using Request Management.

    - **Assign to Individual and/or Assign to Group –** use when you want the system to automatically assign the Request to the person specified as the Assigned to Individual and/or everyone belonging to the selected Assign to Group.

- **Assigned To Individual:** used to specify the Contact ID of a staff member to automatically assign the Request to. Click on the icon to lookup a Contact. The specified person will be assigned the Assigned Task Type.

- **Assigned To Group:** used to specify a Group. Everyone in the group will be assigned the Assigned Task Type.

- **Assignment Notification Template:** used to specify the broadcast template to use for sending automated notification of Request Assignment.

- **Assigned Task Type:** the selected Task Type will be used to assign the Request. The Assigned To Individual and everyone belonging to the Assigned To Group will be assigned a Task of this Task Type. You will need to define Task Types using Task Type Management. E.g. you may want to create a Task Type named "Investigate Service Request".

- **Task Scheduled Start Date:** use to select a method for setting the Scheduled Start Date for the Assigned Task. The following choices are available:

    - **Manual –** use when you do not want the system to automatically set the Start Date. This option allows you to manually set the Start Date using Task Management.

    - **Assignment Date –** use to set the Start Date to the date the Request is assigned.

- **Task Scheduled End Date:** use to select a method for setting the Scheduled End Date for the Assigned Task.

    - **Manual –** use when you do not want the system to automatically set the Start Date. This option allows you to manually set the Start Date for the Task using Task Management.

    - **Assignment Date –** use to set the Task's Start Date to the date the Request is assigned. This is usually the date the Request record was created; unless the Assignment Method is set to Manual, then it's the date the Request is manually assigned.

    - **Requested Response or Completion Date –** use to set the Task's Start Date to the Request's Requested Response/Completion Date. This date is usually entered at the time the request record is created.

Task Options section:
This section is used to configure automated Tasks.

- **Requestor Notes Task Type:** used to specify the Task Type to automatically assign to notes added by the requestor. Notes are linked to Tasks and each Task must have a Task Type.

- **Admin Entry Task Type:** used to assign a Task Type for logging administrator (call center staff) time while entering Requests and working with the requestors on the phone.

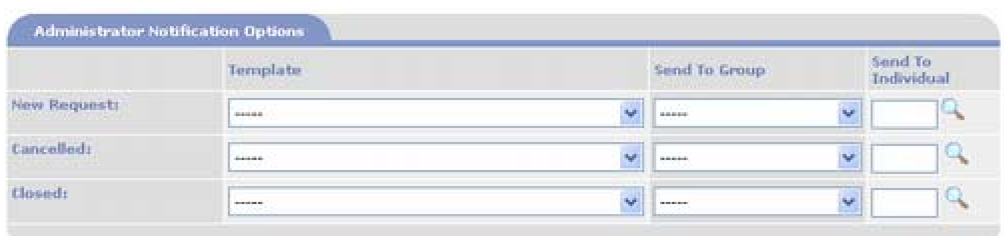
- **Task Template:** specify a Task Template used to copy a set of pre-defined standard tasks including milestones and deliverables to a Request. Task Templates are a special type of Request flagged as a Task Template. They are created as a Request. You must create the Request Type first, then using Administrator Request Entry create the Task Template, then return to the Request Type to assign the Task Template.

- **Include:** used to select the following for inclusion as part of Task Template.

  - **Milestones** – when checked, the Milestones from the Task Template are copied to the Request.

  - **Deliverable** – when checked, the Deliverables from the Task Template are copied to the Request.

Administrator Notification Options section:
Select the email template to use and the Group and/or Individual to notify.



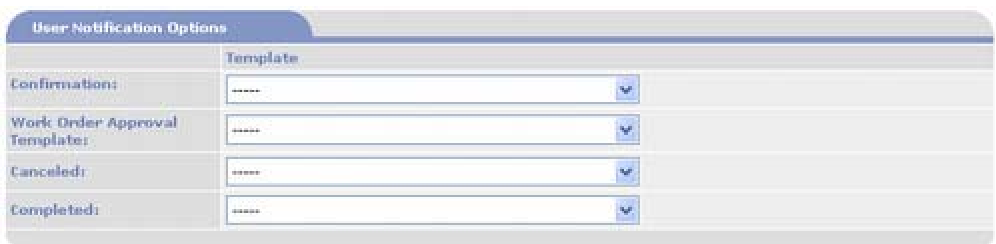
- **New Request Notification Template:** used to specify the broadcast template to use for sending automated notification for each new Request.

- **New Request Send To Group:** an automated email notification will be sent to all members of the specified Security Group for each new Request. The Group is typically one or more persons that are responsible for reviewing and assigning Requests.

- **New Request Send To Individual:** an automated email notification will be sent to the specified individual for each new Request. The individual is typically a person that is responsible for reviewing and assigning Requests.

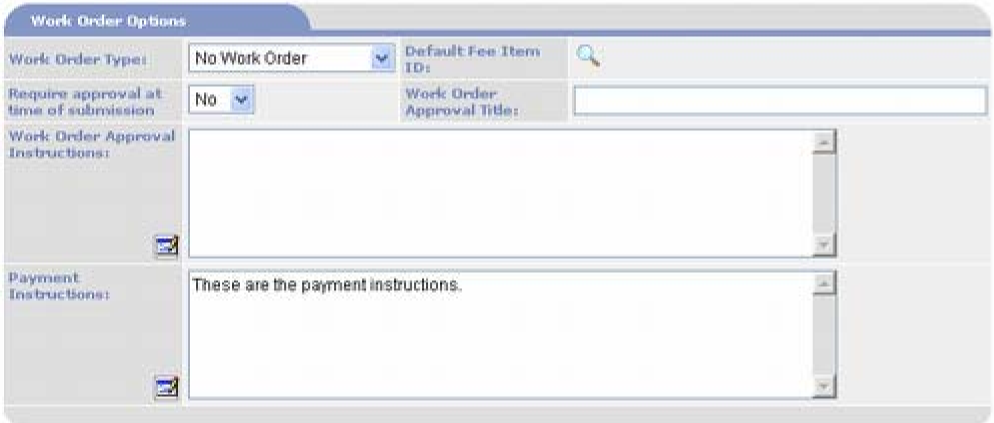
- **Canceled Notification Template:** used to specify the broadcast template to use for sending automated notification that a Request has been canceled.
- **Canceled Send To Group:** an automated email notification will be sent to all members of the specified Security Group for each Request that is canceled.
- **Canceled Send To Individual:** an automated email notification will be sent to the specified individual for each Request that is canceled.
- **Closed Notification Template:** used to specify the broadcast template to use for sending automated notification when a Request is closed.
- **Closed Notification Group:** an automated email notification will be sent to all members of the specified Security Group when a Request is closed.
- **Closed Send To Individual:** an automated email notification will be sent to the specified individual when a Request is closed.

User Notification Options section:
This section is used to specify email templates to use for sending notifications to the requestor.



- **Confirmation Template:** used to specify the email template to use when sending the requestor an email confirming submission of their request and provide the assigned Ticket #.
- **Work Order Approval Template:** used to specify the email template to use when sending requestor an approval (authorization) of a Work Order.
- **Canceled Template:** used to specify the email template to use when sending the requestor an email confirming cancellation of their request.
- **Completed Template:** used to specify the email template to use when sending the requestor an email notifying them of the completion of their request.

Work Order Options section:
This section may be skipped if you are not billing the customer. Otherwise you need to configure the Work Order Options in order to estimate, authorize work and bill for services.



- **Work Order Type:** used to select a pre-defined Work Order Type. Work Orders are required if you are going to bill the customer. If you will not use Work Orders set to "No Work Order". If you plan to use Work Orders select one of the types that you defined using Work Order Management. For instructions on how to define Word Orders see the section of this chapter titled 'Work Order Types Management page'.

- **Default Fee Item ID:** Used when Billing Type is set to "Fixed" Fee" or "Fixed Rate". The Item specified here is the default item on the Work Order that defines the fee or rate for billing purposes. Click on the icon to open Search for Product Items. Use search to select an Item or use Add New to create a new Item. For instructions on how to define new Items see the section of this chapter titled 'Item Management (for requests) page'.

- **Require Approval at Time of Submission:** when set to Yes, a Work Order authorizing work on the Request must be approved by the requestor. This should be set to No when the Request Type is non-billable or when an estimate of the work is required before it can be approved.

- **Work Order Approval Title:** used to specify a title to be displayed on the Work Order Approval page.

- **Work Order Approval Instructions:** used to specify instructions that are displayed on the Work Order Approval page. Click on to use the PORTALPRODIGY Document Editor.

- **Payment Instructions:** used to specify instructions that are displayed on the Payment Type Selection page as part of Payment Entry. Click on to use the PORTALPRODIGY Document Editor.

Billing Options section:
This section may be skipped if you are not billing the customer. Otherwise you need to configure the Billing Options.

- **Billing Status:** select one of the following choices:
  - **Non Billable:** select when the Request Types is not billable, such as for an information request. Payment entry and Work Order approval will be deactivated.
  - **Internal:** select when the Request Type is not billable but you want to track the time spent on the request. You may want to do this for the purpose of tracking cost. This will cause a Work Order to be created which will be used to track time but Payment entry and Work Order approval will be deactivated.
  - **Estimate:** select when the Request Type is billable and you need to provide the customer with an estimate of the billable amount based on the specific requirements of their request. Payment entry and work order approval will be deactivated during initial Request entry. I.e. they are deferred until an estimated amount can be manually entered for the Work Order.
  - **Billable:** select when the Request Type is billable and the billable amount is known up front such as when you charge a fixed dollar amount for a service request. Payment entry and Work Order approval will be activated.
- **Fee Type:** only applicable when Billing Status is not "Non-Billable". Used to set the default fee on the Work Order. Select one of the following choices:
  - **No Fee –** select to not set a default fee. This allows the Request to be submitted without requiring a Work Order. A Work Order can be created later.
  - **Fixed Fee –** select to set a fixed fee per Request. This fee is determined by the Item selected for Item ID field.
  - **Fixed Rate –** select to set a fixed rate for all billable time logged for the Request. This causes all time regardless of Task Type to be billed at the same rate. This rate is determined by the Item selected for Item ID field.
  - **Item Pricing –** select to set unique pricing for each billable task based on the task's task type.
- **Billing Method:**
  - **Pre-Payment –** select to require pre-payment at time request is submitted. This activates the secure online payment entry process as part of the Request entry and submittal process.
  - **Pre-Authorized** – select to require the customer's pre-authorization to be billed for work performed on the Request.

- **Retainer** – select to require the customer to pre-pay a set dollar amount or some percentage of the total estimated amount before work will commence. As work is performed it will be paid by deducting from the retainer. It will allow billing of additional retainer amounts. The system also support a scheduling of retainer payments based on fixed dates or completion of milestones.
- **Invoice –** select to invoice the customer for billable work.

▪ **Not To Exceed Label:** If you are using Work Orders and want to allow the customer to limit the approved dollar amount, then enter a label here that will correspond with the entry field for the dollar amount. E.g. “Not to Exceed:” or “I approve the following dollar amount:”.

▪ **Cancellation Fee Item ID –** use if you desire to charge a fee when a customer cancels an approved Work Order. Either enter the Item ID for the Cancellation Fee or lookup the Item ID by clicking on the icon to open Search for Product Items. Use may use search to select an existing Item or use Add New to create a new Item. For instructions on how to define new Items see the section of this chapter titled ‘Item Management (for requests) page’.

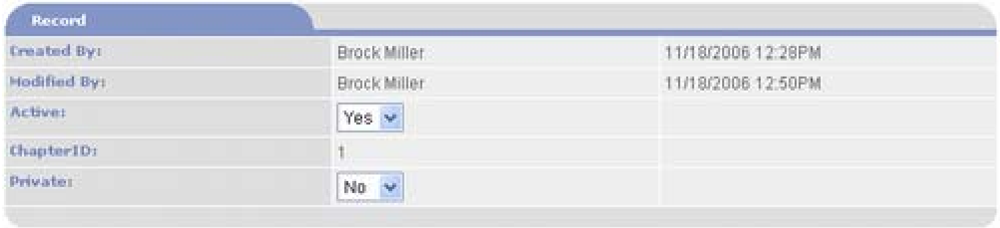
▪ **Require approval before billable time may be entered?** Yes/No list box. Select “Yes” to prevent staff from entering billable time prior to Work Order approval.

Confirmation Options section:
This section is used to configure the Confirmation page that is shown to the user/requestor after submission of their request and to specify where to take the user when they click Ok on the Confirmation page.

▪ **Request Confirmation Instructions:** used to specify instructions that are displayed on the Request Confirmation page. This page is displayed after entering a Request. The page also displays the Ticket # assigned to the Request. Click on to use the PORTALPRODIGY Document Editor.

▪ **After Confirmation Go To:** used to enter the URL of the page to go to after the user clicks Ok on the Request Submittal Confirmation page. If left blank, the Request Selection page is displayed.

Record section:



- **Created By –** the name of the user that created the record and the date it was created. Lists user's first name followed by last name.

- **Modified By –** the name of the user that last modified the record and the date it was last modified. Lists user's first name followed by last name.

- **Active –** by default this value is set to "Yes", which means the record is active and available for use. To deactivate a record, set it to "No". Deactivating a record is a logical form of deletion. It is used to remove the record from future use, yet maintain the relationship with existing data. Reports by default only include active records; however, there is a reporting option that allows inclusion of deactivated records.

- **ChapterID –** This value is only applicable if you are using the PORTALPRODIGY Site Synchronization feature. It is used to specify the Chapter that has primary ownership of the record. For further information see the chapter on Site Synchronization.

- **Private –** by default this value is set to "No", which means the record is publicly available to all visitors of your site. To limit access to authorized users only, set to "Yes" then check each Security Group to be granted access. Security Groups are only listed when Private is set to "Yes".

Option Buttons:

Save	Saves the data and continue working on the page.
Clone	Creates a new Request Type that is a clone of the open Request Type.
Delete	Deletes the current record. PORTALPRODIGY will prompt to confirm deletion of the record. Select OK to confirm the deletion or CANCEL to abort the deletion.
Print	Prints the website page to the user's local printer.
Cancel	Close the page and discard all entries and edits.
Close	Used to close the page. PORTALPRODIGY will prompt to save changes. OK response saves changes, closes page, and returns to previous page. CANCEL response discards all entries and edits (same as Cancel button).

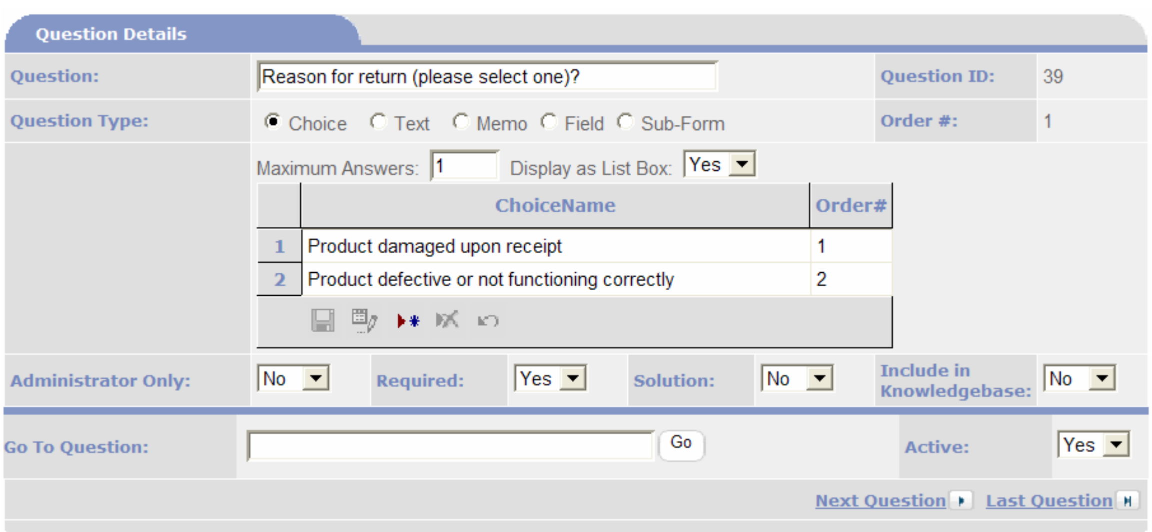
Request Form Management page:

Request Form Management is used to define a data entry form for the selected Request Type. The Request Form Management page contains two sections. The first section, Request Form Header, is used to define a title and instructions for the form. The second section, Question Details, is used to define one or more questions/fields to be included on the form.

Request Form Header section:

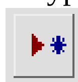
- **Request Form Title:** used to give the form a title which will be displayed on the Request entry page.
- **Description:** used to place instructions or other information the Request entry page. Click on  to use the PORTALPRODIGY Document Editor.

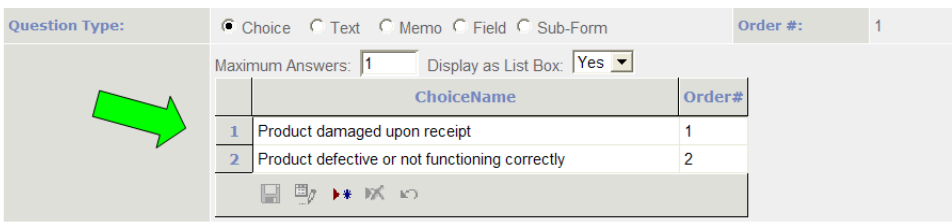
Question Details section:



- **Question:** used to enter the field label or questions such as "Name:", "Phone Number:", "Please describe your requirements:", "How many salespeople does your firm have?", etc. Allows text value of up to 255 characters.

- **Question Type:** used to select a type of field/question. The Question Type determines the type of data and input method that will be used. Note that each Question Type has different options that are explained below.

    - **Choice -** used to provide the user with multiple choices as selections. When Choice is selected as the Question Type, a grid control is displayed as shown in the screen picture below. Click the  Add New Record icon to add a Choice. Click  Save Current Record icon when finished entering the Choice. Repeat for additional choices/



        - **Choice Name:** Enter the value.

        - **Order#:** used to control the order of the Choices. Enter as integer.

    - **Maximum Answers -** This is the maximum number of selections the user is allowed. It is entered as an integer. If you want the user to select all that apply then set the value to the total number of choices, e.g. if there are 3 choices and you want to allow the user to select up to three of them, then set to Maximum Answers = 3. This will display the choices as checkboxes on the form. If you want the user to select only one choice then set to 1. When Maximum Answers = 1, it will display the choices as radio buttons. When set to more than one, it will display the choices as checkboxes. If you would rather have the choices displayed in a list box then set Display as List Box to "Yes". List box is appropriate when Maximum Answers = 1.

    - **Text -** When Text is selected select you will be given the choices to select a Data Format for the text. The choices are "Text", "Date", "Number", and "Dollars". This will display a text box on your form and format the value as specified.

    - **Memo** - This will display a memo field on your form.

    - **Field** - When Field is selected select a field name from the list box. This will display a text box on your form and format the value according to the selected field's rules. Use this Question Type when you want to link data in your form to PortalProdigy data fields. If in Request Management you set Create Contact Record to "Yes" you will need to add Questions with Question Type = "Field" for each piece of Contact information you want to collect such as Contact's Name, Company Name, Email Address, and Phone Number.

- o **Sub-Form** - Use this option to insert a sub-form within the main request entry form. Use sub-forms to collect multiple rows of information. The sub-form questions/fields are formatted as columns and the data is entered in rows with the ability to insert as many rows as needed. E.g. a Sub-Form could be included to request a quote on multiple items/products. Set Default # of Rows to 1 or higher. This determines the number of blank rows that are displayed on the Sub-Form. If your customers typically request information for 3 items at a time, then set this to 3. The system will insert a button in the Sub-Form that will allow customers to add additional rows. Click on the Sub-Form link. This will open Sub-Form Builder in new window. It works the same way as Request Form Management. When finished building your Sub-Form, click Close button to return to Request Form Management.

- **Administrator Only:** Set Administrator Only to "No" for all questions/fields that you want the customer to see on their entry form. Set to "Yes" for all questions/fields that you want hidden from the customer but visible to administrators.

- **Required:** Set Required to "Yes" to make a response to the question/field mandatory. Set to "No" to make a response optional.

- **Solution:** Set Solution to "Yes" to not include the question/field on the customer entry form, but to include it on the status form that is accessible to the customer. E.g. you may want a field for Quoted Price that your sales staff enters after the customer has submitted their request. Such a field would not be appropriate on the original entry form.

- **Include in Knowledgebase:** Set Include in Knowledgebase to "Yes" if you want customers to be able to perform public search for the Request. Typically this is set to "No" for Product and Sales Information requests.

- **Go To Question:** use to enter text to search for a question. If no match is found it will display the first question. If a match is found it will display the matching question. This is a useful tool for quickly finding questions for editing, eliminating need to scroll through them one at a time.

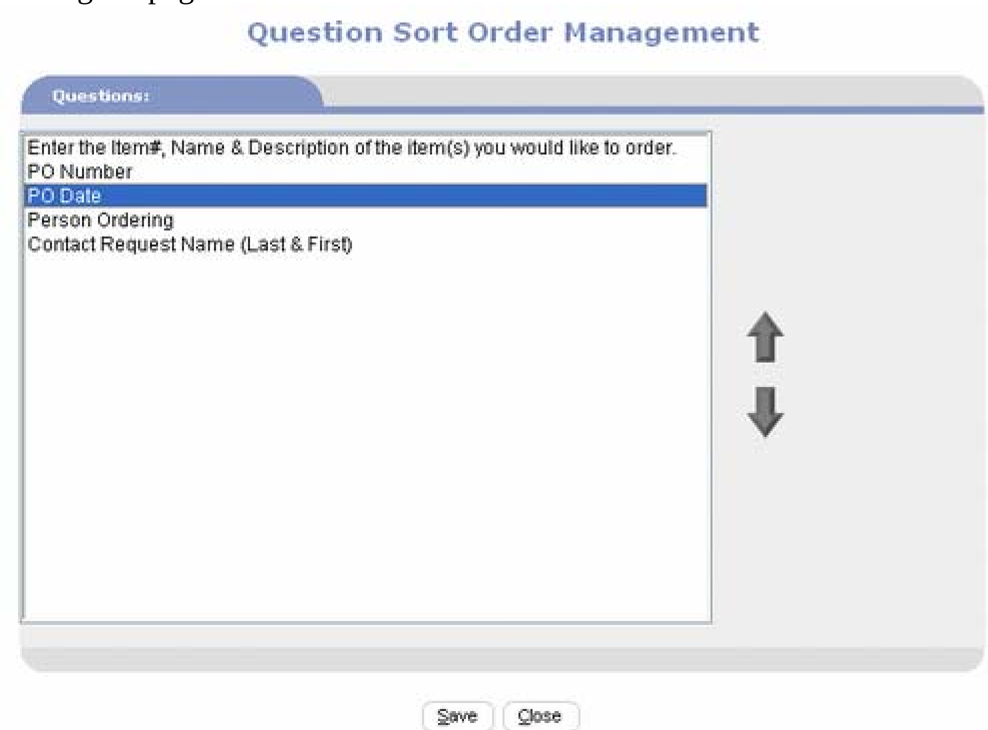
- **Active:** yes/no list box. By default it is set to "Yes". Set to "No" to deactivate the record. Deactivated questions will not be displayed on Request Entry for new requests but remain in database to store the information entered in Requests prior to deactivation.

Save	Saves the data and continue working on the page.
Add Question	Adds a new question.
Delete Question	Deletes the currently displayed question. PORTALPRODIGY will prompt to confirm deletion of the question. Select OK to confirm the deletion or CANCEL to abort the deletion.

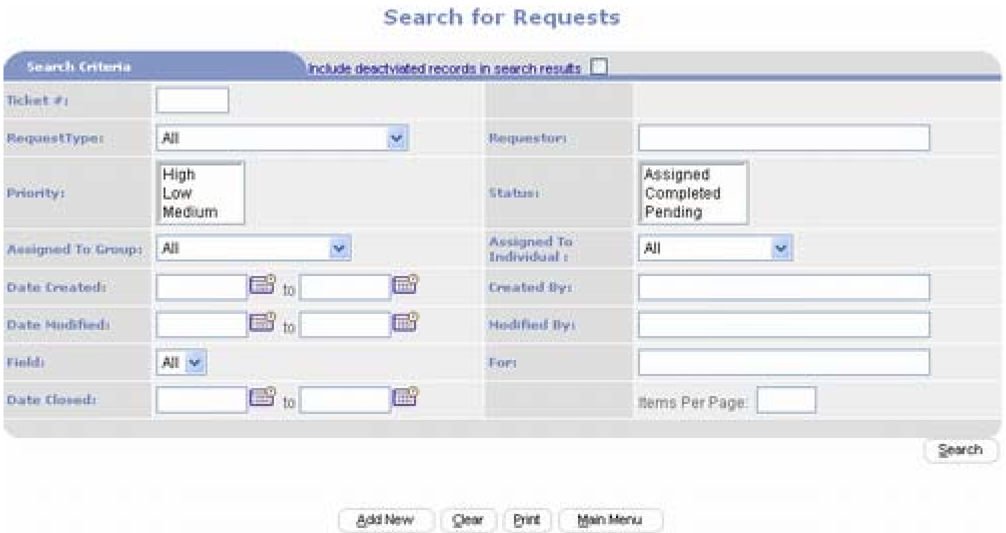
Delete	Deletes the entire Request Form. PORTALPRODIGY will prompt to confirm deletion of the form. Select OK to confirm the deletion or CANCEL to abort the deletion.
View	Displays a list of the questions and for each question lists each response (entered value).
Question Sort	Opens Question Sort Order Management page which lists all questions and provides easy method to change their sort order.
Reports	Opens Reports page where you can select and print reports.
Close	Used to close the page. PORTALPRODIGY will prompt to save changes. OK response saves changes, closes page, and returns to previous page. CANCEL response discards all entries and edits to the current page (same as Cancel button).

Question Sort Order Management page:

Used to change the sort order of your form's questions (fields). Highlight the question that you want to move and click either the up or down arrow to move it. Be sure to save your changes before closing the page.



Search for Requests page:



Search Criteria section:

- **Include deactivated records in search results:** when unchecked, only active records are included. Check to include deactivated records.
- **Ticket #:** searches Request ID.
- **Request Type:** used to limit search results to the selected Request Type.
- **Requestor:** searches on both requestor (customer) contact name and company name.
- **Priority:** search by Priority Type. Multiple types can be selected and deselected by holding down the Ctrl key while clicking the type.
- **Status:** search by Status Type. Multiple types can be selected and deselected by holding down the Ctrl key while clicking the type.
- **Assigned To Group:** search by assigned Security Group. Allows one group to be selected. List box lists all Security Groups.
- **Assigned To Individual:** search by assigned Individual. Allows one contact to be selected. List box lists all Contacts with Contact Type set to “Employee”.
- **Date Created Range:** enter a starting and ending date to search for a range of dates for the Created Date field.
- **Created By:** search by the person who created the request record. Enter the first and last name.

- **Date Modified Range –** used to search by date last modified range. Works the same as Created Date Range.

- **Modified By:** search by the person who last modified the request record. Enter the first and last name.

- **Field:** allows you to select a specific form field to search on if you have selected a Request Type. You must first select a Request Type to have this list box list field names. If Request Type is set to "All", nothing will be listed.

- **For:** allows you to search for a word or phrase in the request form. It searches the form field selected for Field. If set to "All" it will search all form fields.

- **Date Closed:** you may enter a starting and ending dates to search for a range of Closed Dates.

- **Items Per Page –** used to control how many matches are listed at a time. Defaults to **10**. If the number of matches is greater than the specified Items Per Page, PORTALPRODIGY provides navigation options for the additional pages of matches This feature minimizes network traffic.

- Search : the **Search** button submits the entered search criteria and displays the matches.

Options section:

Add New	Opens the Request Management page to create a new Request.
Clear	Clears the search criteria.
Print	Prints the website page to the user's local printer.
Main Menu	Closes the page and returns to the Site Administration Menu.

Found Requests section:

Found Requests

Page 1 of 2 — Total matches: 12

Ticket #	Created Date	Priority	Status	Company Name	Contact Name	Assigned To
38	11/23/2006	Medium	Pending		Oxana Welkova	Brock Miller
37	11/23/2006	Medium	Pending	Portal Prodigy, Inc.	Brock Miller	Brock Miller
36	11/23/2006	Medium	Pending	Portal Prodigy, Inc.	Brock Miller	
35	11/23/2006	Medium	Pending		Administrator Account	
34	11/23/2006	Medium	Pending		Administrator Account	
33	11/23/2006	Medium	Pending	Portal Prodigy, Inc.	Brock Miller	
30	11/22/2006	Medium	Pending		Joe Donnavon	Brock Miller
29	11/22/2006	Medium			Oxana Welkova	
27	11/22/2006	Medium	Pending	Portal Prodigy, Inc.	Brock Miller	
24	11/21/2006	Medium		Portal Prodigy, Inc.	Stephen Reuning	

- Click on the Ticket # to open the Request

.

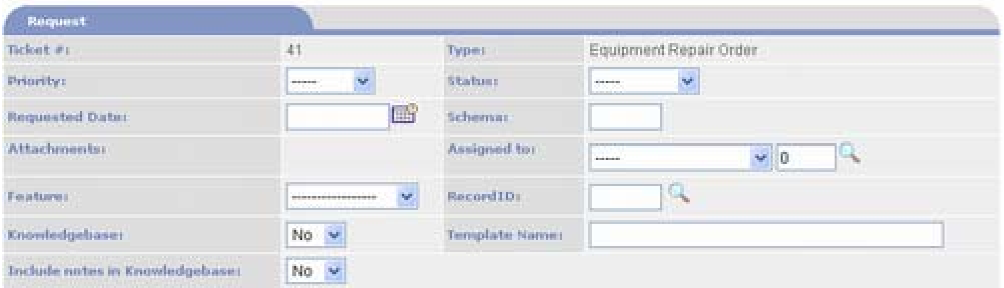
Request Management page:

Customer section:

- **Name:** the requestor (customer) name is displayed.
- **Company:** the requestor company name is displayed.
- **Email:** the requestor's email address.
- **Phone:** the requestor's email address.
- **Contact Notes:** use to enter notes that the requestor will not see.
- **Address:** by default the address is hidden. Click on the icon to view the requestor's address.

Request section:

The upper portion of this section contains standard fields shared by all Request Types. This is followed by the unique fields defined using Form Builder for the specific Request Type.



- **Ticket #:** the Request ID which is automatically assigned.
- **Type:** the Request Type.
- **Priority:** use to assign a priority to the Request.
- **Status:** use to assign a status to the Request.
- **Requested Date:** use to enter the date the requestor needs a response to their request.
- **Schema:** this is for a planned feature that has not been implemented yet.
- **Attachments:** if the Request Type is configured to allow attachments, the attachment options are displayed here. These options allow you to attach documents and files to the Request.
- **Assigned To:** creates an Assignment Task and sends and email notification to the specified person.
- **Feature:** relates the Request to a specific feature. E.g. for an RMA request you may want to set Feature to “Products” and select a Product Item using the Record ID field. Request Types that are set up for a specific Feature such as “RFQ from Cart” will auto set this field. No value is required in this field.
- **Record ID:** used when a Feature has been specified. Either enter the ID or use the Lookup  icon to search and select a record.
- **Knowledgebase:** set to “Yes” to include the Request record in the Help Desk Knowledgebase; otherwise leave it set to “No” to exclude it. Only records set to “Yes” can be searched on and retrieved in the Knowledgebase. Notes are excluded from Knowledgebase unless you set the Include notes in Knowledgebase field to “Yes”.
- **Template Name:** normally this field should be left blank. It is used to create a Task Template that will copy pre-defined tasks to new request records. To create a template, enter

a name in this field and when the Request is saved, the Template will be created and listed in Task Template field in Request Types Management.

- **Include notes in Knowledgebase:** set to "Yes" to include the Request record's notes in the Help Desk Knowledgebase; otherwise leave it set to "No" to exclude them.

Work Order section:

- **Work Order #:** click on the Work Order # to open the Work Order in Work Order Management.

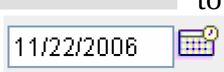
- **Approval Date:** the date the Work Order is approved by the customer.

- **Description:** the description of the scope of work that was entered in the Work Order.

Closed section:

- **Closed to Request ID:** used when you want to close the Request in order to consolidate it with another Request. Enter the Request ID of the other Request that want to become the open Request and enter a Closed Date.

- **Closed Date:** used to close the Request because it has been completed. Click on the the  icon for 

to auto insert today's date. You may also click on the date lookup  icon 

to select a date from the pop-up calendar or manually type in the date.

Option buttons:

Save	Saves the data and continue working on the page. If an Assigned to person was entered or changed, saving the page will create an assignment task and send email notification.
Print	Prints the website page to the user's local printer.
Cancel	Close the page and discard all entries and edits.
Tasks	Opens Request Tasks page in new browser Window

	displaying list of all Tasks related to the Request. Each Task can be clicked on to open it in Task Management page where it can be edited, time logged, and notes attached. New Tasks can also be added from Task Management.
Knowledgebase	Opens Search Help Desk Knowledgebase page in new browser Window. Used to search Requests and view requests. This is the same page that visitors see when they user the Search Help Desk Knowledgebase feature.
Close	Used to close the page. PORTALPRODIGY will prompt to save changes. OK response saves changes, closes page, and returns to previous page. CANCEL response discards all entries and edits (same as Cancel button).

Work Order Management page:

Work Orders are contracts with customers that define and authorize work and describe the terms. You must set up Work Orders in order to bill customers for services related to requests. In addition to services, Work Orders can include products from your product catalog.

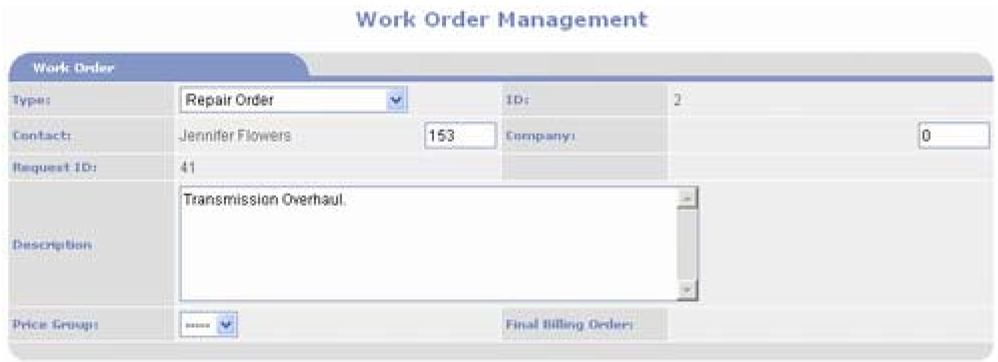
Work Orders can be used in conjunction with Memberships for maintenance and support contracts; providing a blanket for all requests meeting the conditions of a contract.

Work Orders can be used for projects to define separate scopes of work, for dividing projects into phases, and for defining an original scope of work and then defining separate scopes of work for change orders.

Work Orders can be used when a retainer is required (pre-payment that is held as credit and deducted as work is completed).

Work Orders can also be used for internal purposes to create and approve budgets and to aggregate actual time and cost.

Work Order section:



- **Type:** Specifies the Work Order Type. This is automatically set by the Request Type settings.
- **ID:** this is the record ID which is automatically assigned to the Work Order when it is initially saved.
- **Contact:** this is the requestor contact specified in the Request record.
- **Company:** this is the requestor company specified in the Request record.
- **Request ID:** this is the Request the Work Order is linked to. All Work Orders are linked to a Request.
- **Description:** this is a memo field for describing the work.
- **Price Group:** use to assign Price Group pricing. For more information about Price Groups and how to create them, see the chapter titled Items/Product Catalog Feature in Detail.
- **Final Billing Order:** when the Work Order is closed the final Order # is displayed here. Work Orders can have more than one Order. E.g. if you are performing progress billing an Order will be created each time you bill the customer.

Request Types section:

- This grid is used to record the originating Request Type and to specify how fees will be charged. When the customer approves the Work Order they are authorizing these charges. It contains the following columns:
  - **Description:** the name of the Request Type.
  - **Fee Type:** defaults to the Fee Type specified in the Request Type record. This value can be manually changed.

- **Rate:** defaults to the rate specified in the Request Type record. This value can be manually changed.
- **Qty Limit:** the not to exceed quantity authorized by the customer.
- **Qty Used:** the actual quantity to charge the customer.

Service Items section:

- This grid is used to enter each charge for service or to list the services covered under a maintenance agreement. The Request Type's Fee Type must be set to Item Pricing in order to enter Service Items. The grid contains the following columns:
  - **Item ID:** the ID for the service charge Item. All service charges must have an Item record.
  - **Description:** the name of the service charge. This is the Product Name from the Item record.
  - **Pricing Method:** specified how to charge the customer for this service charge. The following methods are listed:
    - **Free** – select if the Task/Item is covered at no charge. This choice will be commonly used for Service Contracts.
    - **Price Group** – select to bill the Item/Task Type at the Price Group rate specified for the WO.
    - **Specified** – select to bill the Item/Task Type at the rate entered in the Rate field.
  - **Rate:** the rate specified in the Request Type record.
  - **Qty Limit:** the not to exceed quantity authorized by the customer.
  - **Qty Used:** the actual quantity to charge the customer.

Product Items section:

Product Items

	Item ID	Description	Pricing Method	Rate	Qty Limit	Qty Used
1	6	Tramission Overhaul Kit	Specified Rate	$200.00	1	1
2	7	Gear Assembly with Syncros	Specified Rate	$350.00	1	1
3	8	Clutch Plate & Disk	Specified Rate	$125.00	0	1

- This grid is used to enter Products that either to be billed as part of the Word Order or covered as part of a maintenance contract. The Request Type's Fee Type must be set to Item Pricing in order to enter Product Items. The grid contains the following columns:
    - **Item ID:** the ID for the Product Item. All Products must have an Item record. This field is auto filled when Item is selected from Product Search and may not be manually edited.
    - **Description:** the name of the Product. This is the Product Name from the Item record. This field is auto filled when Item is selected from Product Search. It can be manually edited.
    - **Pricing Method:** specifies how to charge the customer for the Item. This field is auto filled when Item is selected from Product Search. The following methods are listed:
        - **Free** – select if the Item is covered at no charge. This choice will be commonly used for Service Contracts.
        - **Price Group Rate –** select to bill the Item at the Price Group rate specified for the WO.
        - **Specified Rate –** select to bill the Item at the rate entered in the Rate field.
        - **Fixed Fee –** select to bill the Item at the rate entered without multiplying it by Quantity Used.
    - **Rate:** the price to be charged for one unit. This field is auto filled when Item is selected from Product Search. It can be manually changed.
    - **Qty Limit:** the not to exceed quantity authorized by the customer or by the service agreement.
    - **Qty Used:** the actual quantity to charge the customer.

Billing Options section:

- **Billing Status:** select one of the following choices:
  - **Internal:** select when the Work Order is not billable but you want to track the time spent on the request. You may want to do this for the purpose of tracking cost.
  - **Estimate:** select when the Work Order is billable and you need to provide the customer with an estimate of the billable amount based on the specific requirements of their request. Payment entry and work order approval will be deactivated during initial Request entry. I.e. they are deferred until an estimated amount can be manually entered for the Work Order.
  - **Billable:** select when the Work Order is billable and the billable amount is known up front such as when you charge a fixed dollar amount for a service request. Payment entry and Work Order approval will be activated.
- **Billing Method:**
  - **Pre-Payment:** select to require pre-payment at time request is submitted. This activates the secure online payment entry process as part of the Request entry and submittal process.
  - **Pre-Authorized:** select to require the customer's pre-authorization to be billed for work performed on the Request.
  - **Retainer:** select to require the customer to pre-pay a set dollar amount or some percentage of the total estimated amount before work will commence. As work is performed it will be paid by deducting from the retainer. It will allow billing of additional retainer amounts. The system also support a scheduling of retainer payments based on fixed dates or completion of milestones.
  - **Invoice:** select to invoice the customer for billable work.
- **Pre-Payment Amount:** the dollar amount that has been paid at the time of Request entry. I.e. the amount required prior to performing the work.
- **Tax Exempt:** Set to "Yes" if the customer is exempt from sales tax charges; otherwise, leave it set to "No".

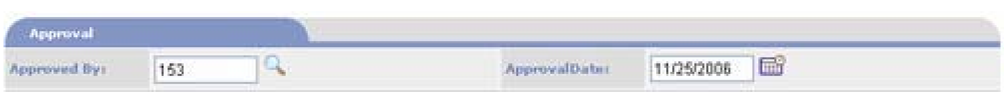
Calendar section:

- This section is used to record both the scheduled and actual start and end dates.
  - **Scheduled Start:** the estimated start date.
  - **Scheduled End:** the estimated end date.
  - **Actual Start:** the actual start date.
  - **Actual End:** the actual end date.
  - **Actual Closed:** entering a date in this field causes the Work Order to be closed.

Cost Summary section:

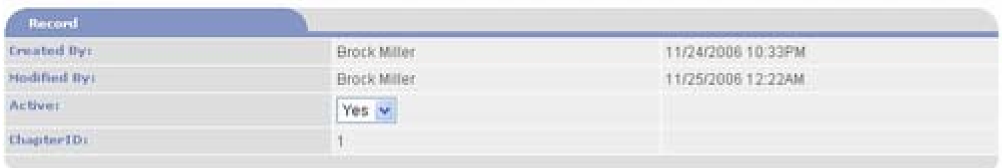
- This section is used to record both budgeted and actual dollar amounts.
  - **Budget Hours:** used to enter an estimate of the total billable hours. Entered in hour and minutes format. E.g two and one half hours is entered as 2:30.
  - **Budget Cost:** used to enter an estimate of the total cost.
  - **Budget Billable:** used to an estimate of the total billable amount.
  - **Actual Hours:** used to either enter or calculate the total billable hours.
  - **Actual Cost:** used to either enter or calculate the total cost.
  - **Actual Billable:** used to either enter or calculate the total billable amount.
  - **Actual Billed:** auto calculated by the system, this is the total amount invoiced.
  - **Calculate button:** used to calculate billable hours and amount based on logged time and items.

Approval section:



- This section is used to record the customer's approval of the Work Order. It is auto filled if the customer approves the Work Order online; otherwise it should be manually entered.
  - Approved By: used to enter the Customer's Contact ID. Use the lookup option to search for and select an existing contact as well as to add a new contact. Auto filled when approved online by Customer.
  - Approval Date: used to enter the date the Customer approved the Work Order. Auto filled when approved online by Customer.

Record section:



- **Created By** – the name of the user that created the record and the date it was created. Lists user's first name followed by last name.
- **Modified By** – the name of the user that last modified the record and the date it was last modified. Lists user's first name followed by last name.
- **Active** – by default this value is set to "Yes", which means the record is active and available for use. To deactivate a record, set it to "No". Deactivating a record is a logical form of deletion. It is used to remove the record from future use, yet maintain the relationship with existing data. Reports by default only include active records; however, there is a reporting option that allows inclusion of deactivated records.
- **ChapterID** – This value is only applicable if you are using the PORTALPRODIGY Site Synchronization feature. It is used to specify the Chapter that has primary ownership of the record. For further information see the chapter on Site Synchronization.

Save	Saves the data and continue working on the page.
Print	Prints the website page to the user's local printer.
Cancel	Close the page and discard all entries and edits.
Print WO	Opens new browser Window displaying printable version of Work Order.
Close	Used to close the page. PORTALPRODIGY will prompt to save changes. OK response saves changes, closes page, and returns to previous page. CANCEL response discards all entries and edits (same as Cancel button).

For more information see the Chapter titled Work Order and Time Billing Features in Detail.

1.4 Feature Administration

1.4.1 The Request Process Explained:

The process begins by entering a request. Requests can be entered by the customer using the Customer Request Entry page or by an Administrator using the Admin Request Entry page.

If more than one Request Type has been configured, the user must select a Request Type. The Request Type determines if the user must login (or signup) and determines the fields and questions displayed on the Request Entry page. The Administrative Request Entry pages may be configured to have additional fields that the Customer page does not have. A direct link to Request Entry for a specific Request Type can be configured using Menu Builder or the user can be taken to a generic Request Entry page where the first step is to select a Request Type. Admin Request Entry can include an Operator Script to describe to a Help Desk Operator what to say to the customer.

The Request Entry process can be broken down into 6 major steps:

1) Identify Request Type (Problem Type or Type of Requested Service).
2) Identify Customer (Optional).
3) Collect payment or acquire authorization for work (Optional).
4) Track Time (Optional).
5) Collect Request information.
6) Resolve Problem, provide Requested Service, or assign to staff as one or more Tasks.

The first major step of identifying the problem type or requested service is denoted by selecting a Request Type. E.g. Request Types might include the following three choices “Report an Error Message”, “Request Assistance with a Problem or Question”, and “Request for Programming and Development Engineering Services”. The user would select one of the three choices.

Based on the user’s Request Type selection the applicable Request Entry screen is displayed. The information collected on the Request Entry page is determined based on the settings for the selected Request Type in Request Types Feature Management.

The second major step of identifying the customer is optional. This is determined by settings for each Request Type in Request Type Feature Management. If the Help Desk service is billable it is necessary to identify the customer to determine if the service is covered by an existing contract (Work Order), if a Work Order must be created, or if payment is required to continue. As part of the Customer Request Entry process, Customer’s are prompted to either login or signup as a new user. The Administrative Request Entry process provides a customer search optimized for quickly identifying existing customers as well as the ability to signup new customers. Request Types with Billing Status of anything other than "Not Billable" require customer identification.

The third major step of collecting payment or acquiring authorization for work is also optional. Non-billable Request Types skip this step. Billable Request Types can be configured to either require this step at the time of Request Entry or to skip this step at the time of Request Entry and perform it later when the price for the work has been estimated.

The third major step is to either collect payment from the customer or acquire the customer's authorization to perform the work and the charge for the services. Charges are determined by the Fee Type. When pre-payment is required, the payment entry screen is displayed and the customer must provide payment online. The Request Payment process uses PortalProdigy's standard payment processing component which can be configured to automatically connect to an electronic payment gateway/processor to authorize and settle credit card charges. Payments can also be configured for manual authorization and settlement. Additionally, Payments can be configured to not require authorization. If payment authorization is required, the payment must be authorized before the customer can continue with the Request Entry process. When payment authorization is not required, the payment information is collected and the customer continues with the Request Entry process.

Requests fall into one of the following categories at the time of Request Entry as determined by the Billing Status for the Request Type:

- Not Billable – Work Order & Payment Entry are skipped.
- Internal - Work Order & Payment Entry are skipped at time of Request Entry and are deferred until the cost of the work can be estimated. Work Order is created manually using Administrative Work Order Management. This is done after submission and review of Request.
- Provide Estimate – Work Order & Payment Entry are skipped at time of Request Entry and are deferred until the price of the work can be estimated. Work Order is created manually using Administrative Work Order Management. This is done after submission and review of Request.
- Billable – System must first check to see if customer has an applicable Service Contract. If customer has an applicable Service Contract and the Service Contact WO specifies the Request Type as "Not Billable" then Work Order & Payment Entry are skipped at time of Request Entry. If it specifies the WO as "Billable" then a Work Order is required. If there is no Service Contract then it performs according to the Request Type's Billing Method as follows:
    - Pre-Payment Required – Payment Entry is required. A separate Work Order Approval is not required because work is approved as part of payment entry. A single Work Order is created and a single Order/Invoice is created and the Payment is automatically applied to it. The Order/Invoice is fulfilled and completed at time of creation.
    - Retainer Required - Work Order is required and retainer payment is required. Approval by customer is also required. Work is then invoiced against retainer according to Billing Terms.
    - Invoicing Terms – Work Order is required including approval by customer. Work is invoiced according to Invoicing Terms. Payments for Invoices are due according to customer's Payment Terms or Payment Terms specified for WO. A Work Order

Payment Schedule can also be created to invoice and require payment on specific dates or upon completion of phases of work.

The requirement for pre-payment is determined in the second step as a result of identifying the customer. When searching for applicable Work Orders, the system shall look for oldest open Work Order first then look to see if the type of request is covered and if there is a charge for this, otherwise it repeats this for each open Work Order from oldest to most recent. If no Work Order covers the type of request, then customer is asked to pay online. If there is an applicable Work Order but it requires payment on terms, then the customer shall be asked to approve the applicable charge which will be invoiced using the customers terms specified in the Work Order.

The fourth major step is to track time. Time may be tracked for both billable and non-billable services. Time can be tracked automatically or it can be entered manually. This can be done directly from the Admin Request Entry page using the Start and Stop buttons. Start button causes a Task to be created for the Request which is then used to log the time. You must specify the Administrator Entry Task to use for each Request Type.

The fifth major step is to collect information. Request Form Builders is used in Request Types Feature Management to define an unlimited number of information data fields (or questions) to be included on the Request Entry page. This includes the following types of fields:

- Memo fields
- Limited Length Text fields
- Date fields
- Dollar amount fields
- Numeric fields
- Radio Button options
- Check Box options
- Drop down list boxes

Additional fields such as Product Code, Model #, and Event ID that are linked to various other feature component records can also be included.

The Tasks and Tickler Notes Engine is used to manage Tasks and Notes for Requests. Both Tasks and Notes can be entered directly from the Request Entry page. A default Task is created and is used to log the Administrator request entry time. An unlimited number of additional Tasks can be created; typically this is done at a later stage in the process with the default task being sufficient to log the initial request. Task Templates can also be specified in Request Type Management to automatically create a series of Tasks for the Request. E.g. you may create a Request Task Template to automatically assign the following set of tasks to all Manufacturing Requests:

- Review Manufacturing Request
- Gather Additional Requirements
- Prepare Bid
- Get Customer Approval
- Start Project
- Create Blueprints
- Customer Approval of Blueprints

- Schedule for Manufacturing
- Trial Run
- QA Testing
- Production Run
- Package Product
- Ship to Customer
- Invoice Customer

The sixth and final major step is to resolve the request or perform the requested service. What this entails can vary widely for each Request Type. E.g. for a Help Desk application, if the request is immediately resolved, a description of the solution may be entered into a solution memo field (in the Request form) and either verbally communicated to customer or emailed using automated email option; if the solution cannot be immediately resolved, one or more Tasks can be assigned. Tasks can be individually entered or a Project Type (Task Template) can be selected which will automatically create applicable Tasks. An example Project Type could be “Quote for Development Work” and it could create five tasks “Gather Requirements from Customer”, “Prepare Requirements Document”, “Customer Approval of Requirements”, “Create Design Concept”, and “Estimate Cost”. Two of these tasks “Prepare Requirements Document” and “Estimate Cost” could include deliverables; “Requirements Document” and “Price Quote”. Each task can be assigned to a group or an individual. Depending on the configuration options, the task assignees will either receive an email notification of their assignment or they will retrieve their tasks using the Task and Tickler Notes Management feature. For other applications (Request Types) the resolution could be a price quote; information sent to the customer by email, postal mail, or fax; etc.

1.4.2 Request Types Explained:

The Help Desk utilizes Request Types to define different categories of requests, each with its own unique set of business rules and requirements. E.g. you may want to create a Request Type for customers to request product information that does not require the user to login, merely to provide their name, email address and to enter their question; you may want to create another Request Type for submitting product return requests that requires the user to either create a contact record if they have not already done so or to login and then to fill out a detailed form that requires Date of Purchase, Product Code, Quantity to Return, and Reason for Return; you may want to create yet a third Request Type for billable maintenance services that not only requires the user to either create a contact record if they have not already done so or to login and then to fill out a detailed form, but to also approve a work order authorizing a minimum service fee and that provides shipping instructions for sending the product to your service center.

Request Types are created using Request Type Management. But before you start creating Request Types you will need to configure some options that are described below. After you have configured the options described below you will be ready to create Request Types.

When you are finished creating Request Types you will likely want to provide a method for users to access them. You may use Menu Builder to create direct links to each Request Type or you may create a single link to the Request Types Selection page. This page lists each of your Request Types by title along with a description that you create.

1.4.3 Configuring Requests and Help Desk

Requests & Help Desk Feature Management is used to setup and configure options that will be used by all Request Types.

Before creating Request Types you will want to create values for the following:

- Request Priorities – create standard list of priority values that will be used by all Request Types.
- Request Statuses – create standard list of status values that will be used by all Request Types.
- Task Types – create task type values for each Feature Component.

If you will be using Work Orders you must also setup the following:

- Work Order Types – create at least one type for each configuration you will need. Note that multiple Request Types can use the same Work Order Type.
- Work Order Templates – these are optional. It is better to skip them until you are more familiar with how Requests and Work Orders operate.

An Administrator user interface provides the ability to enter new Requests, search for existing Requests, view Request details and edit Requests. The Administrator user interface also allows you to assign Tasks to Requests, attach documents to Requests, create Work Orders and much more. You can control access to Request Types by making them Private and selecting Security Groups that may access them.

Automated Notifications Explained:

The Request & Help Desk feature can create a variety of automated email Notifications that are triggered by events. These events are listed below. For each Request Type you may define Administrator Notification Options and User Notification Options. You must select an Email Broadcast Template for each type of notification that you want sent. Email Broadcast Templates are created using Broadcast Management. When creating a template for Request Notifications in Broadcast Management you will need to set the Object Type to “Request”. The Request Object offers tags to insert values from the Request and Request Form record. For use in administrative notifications it provides a tag to insert a link within the email that will open the Request in Request Management. For use in user (requestor) notifications it provides a tag to insert a link in the email that will open the Request in the visitor’s Request Status page. For information how to use Broadcast Management and how to create Broadcast Templates, see the chapter Broadcasting Features in Detail.

Events that trigger email notifications:

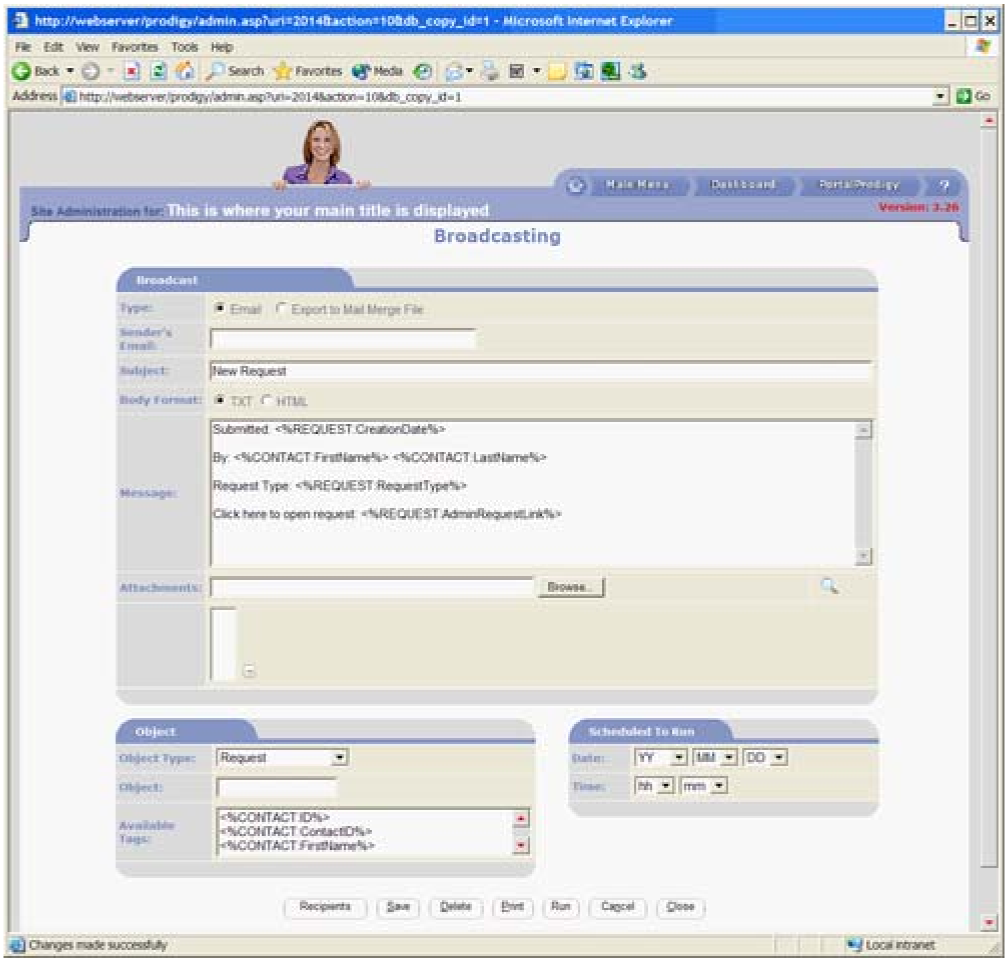
- Submission of new Request:

- Sends New Request Notification to all members of the Administrator Notification Options > New Request > Send To Group (Security Group) and the specified Send To Individual. Uses the template specified for Administrator Notification Options > New Request > Template. Its purpose is to notify the specified individual and members of the specified group that a new request has been entered.
- Sends Confirmation Notification to the requester. Uses the template specified for User Notification Options > Confirmation > Template. Its purpose is to send a confirmation to the requestor that their request has been received and provide them with a Request Ticket # and a link to view the status of their Request.

- Work Order Approval (when Work Order is set to require approval):
    - Sends Work Order Approval notification to the Approval Contact specified in the Work Order. Uses the template specified for User Notification Options > Work Order Approval > Template. Its purpose is to notify the customer contact responsible for approving work that a work order is priced and ready for approval.
- Assignment of Request:
    - Sends Assignment Notification to the Assignment Options > Assign to Individual and to all members of Assign To Group. Uses the template specified for Assignment Options > Assignment Notification Template. Its purpose is to notify the individual and/or members of the group that they have been assigned responsibility for the Request.
- Assignment of new Task related to Request (including Tasks copied from Template to new Request):
    - Sends Assignment Notification to individual specified in Task > Assigned To. Uses the template specified for Task Options > Task Template. Its purpose is to notify the assignee of the pending task.
- Canceling a Request:
    - Sends Cancellation Notification to Administrator Notification Options > Canceled > Send to Individual and to all members of the Send to Group. Uses the template specified for Administrator Notification Options > Cancelled > Template. Its purpose is to notify the individual and/or members of the group that the request has been canceled.
    - Sends Cancellation Notification to the requester. Uses the template specified for User Notification Options > Cancellation > Template. Its purpose is to send a confirmation to the requestor that their request has been cancelled.
- Closing Request (when Closed Date is entered and Request is saved):
    - Sends Closed Notification to Administrator Notification Options > Closed > Send to Individual and to all members of the Send to Group. Uses the template specified for Administrator Notification Options > Closed > Template. Its purpose is to notify the individual and/or members of the group that the request has been closed.

- Sends Completed Notification to the requester. Uses the template specified for User Notification Options > Completed > Template. Its purpose is to send a confirmation to the requestor that their request has been completed

Notification templates are defined using Broadcaster as shown below.



Object Type must be set to "Request". The tag <%REQUEST:AdminRequestLink%> can be inserted in the template to create a link to open the Request in Request Management. The Contact fields insert values from the recipient's (addressee's) contact record whereas the Request fields insert values from the Request record.

Request Payment Processing:

Request Types are either billable or non-billable. Both the Visitor/Customer Request Entry process and the Operator/Administrator Request Entry process determine how billable requests should be handled. There are two major steps. The first step is to determine what the customer shall be charged. The second step is to determine how the customer is to make payment.

The first step must determine if the customer has an applicable Work Order. An applicable Work Order is a Work Order that includes the Request Type as a Covered Request Type. If the customer does not have an applicable Work Order then the customer shall be charged according to the Request Type's settings. If the customer has an applicable Work Order then the customer shall be charged according to the Work Order's settings or not be charged if the service is not billable (covered by service contract).

Request Types allow the following billing options:

- No Charge
- Fixed Fee for Request Type (Per Incident Fee)
- Single hourly rate for Request Type
- Apply Individual Task/Service Rates

Work Orders allow the following billing options:

- No charge (covered by service agreement)
- Internal
- Fixed Fee for Request Type (Per Incident Fee)
- Single Hourly Rate for Request Type
- Apply Individual Task/Service Rates
- Fixed Schedule

<u>No Charge</u> – Request Type is free or Work Order covers this as part of paid service agreement.

<u>Internal</u> – Work Order is for internal project, not for client. Internal project costs are tracked and they can be billed to a department within the site's organization.

<u>Fixed Fee</u> – For Requests without existing Work Order this is a Per Incident Fee. For Work Orders this may be a Per Incident Fee or a fixed amount for a project. Thus the Request is billed at a single pre-determined amount.

<u>Single Hourly Rate</u> – For both Requests with and without Work Orders, the time entered into the Task Log is billed at a single pre-defined rate, thus overriding the rates set for individual Task Types.

<u>Apply Individual Task/Service Rates</u> – For both Requests with and without Work Orders, each Task Type is billed at the applicable rate. A set of rules is applied to determine whether the applicable rate is retrieved directly from the Item record or from a Work Order Item record; the rules also determine whether Price Group pricing applies or to use the standard rate. These rules are described below.

<u>Fixed Schedule</u> - For Requests with Work Orders only. One or more fixed payments are either scheduled as due on specific dates or to be billed upon completion of a milestone or deliverable.

If the customer has an applicable Work Order, the billing rates for services are determined by the Work Order. If the customer does not have an applicable Work Order the billing rates are determined by the customer's Price Group. If the customer is not assigned to a Price Group, then the billing rates are determined using the standard rate for items.

Work Orders can specify specific rates for specified billable services, they can specify a Price Group for non-specified services, and they can specify billable services that do not get billed because they are covered by a service agreement. The same applies to Product Items.

If a Request Type is billable, the system first checks for a Work Order that covers the Request Type. This is done by searching Work Orders for the Request Type plus either a Contact ID or Company ID. If Company ID match is found, but Contact ID does not match, then the system checks the Work Order Authorization list for Contact ID. If no match is found, the administrative user interface displays the message "Contact not authorized for services under Work Order #" where # is the Work Order ID (Number). In the visitor user interface it prompts for payment or customer's authorization to perform work with specified terms.

Billable Request Types allow the following payment options:

- Fixed Pre-payment by credit card.
- Authorization to charge credit card up to not to exceed amount.
- Authorization to Invoice with specified credit terms.
- Billed (Invoiced) against Retainer (Pre-payment held as Credit for Work Order).
- Billed (Invoiced) based on Work Order Payment Schedule.
- Charges covered by service agreement (Work Order), i.e. they are free.

For all billing options the system shall create a Work Order.

<u>Fixed Pre-payment by credit card</u> – requires payment to be made before Request can be completed. It causes the system to create both a Work Order and an Order. The payment is automatically applied to the Order. Upon authorization of the Payment, the Order is fulfilled, given an Invoice Date, and Status is set to "Completed". Note that credit card Payments can be configured to not require authorization, in this case the Order is fulfilled, given an Invoice Date, and Status is set to "Completed" immediately upon entry of payment. The customer is emailed a copy of their Invoice showing that it was paid using credit card.

<u>Authorization to charge credit card up to not to exceed amount</u> – requires credit card information and Work Order Authorization to be provided prior to completing Request. The Work Order Authorization page provides a field for entering a 'Not to Exceed' $ amount. Upon submission, the system creates a Work Order. When work is completed and billed, the system creates an Order and a Payment. The Payment is applied to the Order. Upon authorization of the Payment, the Order is fulfilled, given an Invoice Date, and Status is set to "Completed". Note that credit card Payments can be configured to not require authorization, in this case the Order is fulfilled, given an Invoice Date, and Status is set to "Completed" immediately upon creation of payment. The customer is

emailed a copy of their Invoice showing that it was paid using credit card. This process can be repeated until the 'Not to Exceed' amount is met. If authorization to spend more money is needed the existing Work Order can be closed and a new Work Order created to authorize the additional amount. It is common to create initial Work Order for $ amount sufficient to investigate problem and provide estimated cost to provide solution then create second Work Order to authorize the cost of providing solution.

<u>Authorization to Invoice with specified credit terms</u> – requires Work Order Authorization prior to completing Request. The Work Order Authorization page provides a field for entering a 'Not to Exceed' $ amount. Upon submission, the system creates a Work Order. Terms are either copied from an existing Contract Work Order, from the customer's Company record or from their Contact record. Using the Work Order Management page the Terms may be manually changed. When work is completed and billed, the system creates an Order using the Terms specified in the Work Order. The customer is either emailed a copy of their Invoice or printed copy is sent by postal mail (based on customer preference). This process can be repeated until the 'Not to Exceed' amount is met. If authorization to spend more money is needed the existing Work Order can be closed and a new Work Order created to authorize the additional amount. It is common to create initial Work Order for $ amount sufficient to investigate problem and provide estimated cost to provide solution then create second Work Order to authorize the cost of providing solution.

<u>Billed (Invoiced) against Retainer (Pre-payment held as Credit for Work Order)</u> – requires payment and Work Order Authorization to be provided prior to completing Request. The Work Order Authorization page provides a field for entering a 'Retainer' $ amount. Upon submission, the system creates a Work Order and a Payment record along with a Credit Memo for the Work Order Retainer. As work is completed and billed, the system creates an Order and applies the Retainer (Credit Memo) to the Order. When the Order is created the Order is automatically fulfilled, given an Invoice Date, and Order Status is set to "Completed". The customer is emailed a copy of their Invoice showing that it was paid using the Retainer. This process can be repeated until the 'Retainer' amount is met. If authorization to spend more money is needed, the existing Work Order can be closed and a new Work Order created to authorize the additional amount. This Billing Option is typically used when Request is set to Estimate.

<u>Billed (Invoiced) based on Work Order Payment Schedule</u> – requires payment and Work Order Authorization to be provided prior to completing Request. It also requires payment schedule to be created. The payment schedule can contain dates that specify when payment amounts are due or the payments can be based on completion of phases of work. These will be manually invoiced when the Phase is completed. Upon submission, the system creates a Work Order. When work is completed and billed, the system creates an Order. When Payment is received it is applied to the Order. Upon authorization of the Payment, the Order is fulfilled, given an Invoice Date, and Order Status is set to "Completed".

Request Invoice option – when Request Type is set to Invoice with specified terms and Request is closed, it will prompt you with "Create Invoice" Yes/No. Selecting "Yes" causes an invoice to be created and either printed or emailed depending on the Customer's preference setting. If it is not invoiced at that time, it can be invoiced later as a batch using Help Desk Billing feature.

Items as Billing Types Explained:

Items are used as Billing Types for Tasks. Billing Types are displayed on the Work Order and Invoice. Each Task Type is assigned a Billing Type (Item). E.g. You may have the following Task Types “Program Engineering”, “Programming”, “Testing & Debugging” that are assigned the same Billing Type named “Programming”. This will allow you to internally track the breakdown by the individual Task Types while summarizing them into a single “Programming” Billing Type.

Items are designated to be used by Request Tasks by selecting “Request” as Item Type in Item Management.

Attach Documents to Requests:

Documents and other files can be attached by customers and administrators. Options to attach documents are located on Request Entry, Request Status, Request Management, Tasks Management, and Work Order Management pages.

Create Milestones:

Milestones are entered as Tasks and flagged as Milestones by checking the Milestones checkbox on Task Management page.

Define Deliverables:

Deliverables are entered as Tasks and flagged as Deliverables by checking the Deliverables checkbox on Task Management page.

Search Help Desk Knowledgebase:

A search option similar to the Discussions Search is used to search the Help Desk Knowledgebase. Users may select a Request Type and Information Type (Field/Question) as filters to limit search and enter a keyword or phrase to search. Only Request (Question) fields marked for inclusion in Knowledgebase are searchable. See Request Form Management for configuration instructions.

Customer View Request Status & Attach Notes:

Customers can access the status of their Requests from the Request Selection page by clicking on a Status button; from a link within the site; or from a link on their contact personal menu. The link displays Request Status page with ability list their open Requests (Requests without Closed Date) or closed Requests (Requests with Closed Date). They can also search by specific Request Ticket # and Request date range. Each Request includes link to display the details of the Request and permits them to attach notes. When a note is attached, an email notification is automatically sent to each member of the specified notification group or individual.

Work Orders Explained:

Work Orders can be used for two different purposes, they can be used internally by an organization to request and approve funding for projects, and they can be used as contracts with customers for billable work (including fixed price service agreements where logged hours for covered tasks are included in fixed price).

Work Orders can be created from a link on the Admin Request Entry page which takes the user to the Work Order Management page; they can be created as a result of a customer entering payment information in Customer Request Entry for a billable request which creates a work order; they can be created as a result of a customer signing up for a Service Contract Membership Type which automatically creates a work order; and they can be created directly from the administrative Work Order Management page.

When Work Orders are created from either request entry or from membership signup, some or all of the Work Order information is automatically filled (entered) by the system.

The Work Order process can be broken down into 5 major steps:

1) Identify Customer.
2) Define Scope of Work (includes narrative and Project Schema).
3) Define covered Items (Request Types, Services & Products) and applicable Pricing.
4) Define Billing and Payment Terms.
5) Get customer approval.

There are two additional steps that are optional. They are typically applicable when the WO is for a project:

1) Calendar – enter scheduled and actual start and completion dates.
2) Cost Summary – enter budget $ amounts and either enter or calculate actual $ amounts.

The first major step of identifying the customer is performed automatically except when creating the Word Order directly from Work Order Management. The customer must have a contact record (and optionally a company record) which is linked to the Work Order. Billing information can be retrieved from the Contact or Company record or entered manually. Optionally, it provides the ability to create a list of authorized requesters. Authorized requesters are people that are authorized to place requests for work.

The second major step is to define the scope of work. This involves selecting a WO Type which assigns a Duration of either “One time”, “Project” or “Service Contract” and optionally specifies a WO Template used to copy pricing and other information to the new WO; attaching documents; and providing a written description of the scope of work which can be copied from Request Entry (we need option to flag which field this is in Request Form Builder) or attached as a document.

The third major step is to define covered Items and pricing. There are three separate entry grids, Request Types, Service Items and Product Items. If a WO Template was specified, these grids are pre-loaded with Items from the template.

Request Types covered by the WO are entered by the user and a Fee Type is specified for each one.

Fee Type – choices displayed as radio buttons:

- No Fee – select if the work for the Request Type is covered at no charge. This choice will be commonly used for Service Contracts.
- Fixed Fee – select if the work for the Request Type is covered for a single per incident fee.
- Fixed Rate – select if work for the Request Type is billed at a single hourly rate.
- Item Pricing – select if work for the Request Type is billed according to the individual Task/Item rates. This selection causes all work for the specified Request Type to retrieve the rates from the covered Service Items or when not covered, directly from the Items table.

A limit can be placed on the number of Requests per Request Type. Up to the limit, each request is billed according to the Fee Type and applicable rate. Once the limit has been reached, additional requests are billed at the Request Types default rate.

Service Items covered by the WO are added by the user and a Pricing Method is specified for each one. Service Items are necessary for Request Types that have their Fee Type set to “Item Pricing”. When a Request Type’s Fee Type is set to either “No Fee”, “Fixed Fee”, or “Fixed Rate”, Service Items are ignored. When a Service Item is not listed, it is billed at the Standard Rate/Price specified in Item Management.

Pricing Methods – choices displayed as radio buttons:

- Free – select if the Task/Item is covered at no charge. This choice is commonly used for Service Contracts.
- Price Group – select to bill the Item/Task Type at the Price Group rate specified for the WO.
- Specified – select to bill the Item/Task Type at the rate entered in the Rate field.

Product Items covered by the WO are added by the user and a Pricing Method is specified for each one. Product Items use the same Pricing Methods as Service Items. When a Product Item is not listed, it is billed at the Standard Rate/Price specified in Item Management.

If the “Price Group” Pricing Method has been selected for any of the Covered Items, a Price Group needs to be selected. The Price Group defaults to the customer’s Price Group if they have been assigned one in their Company or Contact record. Note that Work Orders for Companies use the Price Group specified in Company Management; whereas, Work Orders for individuals use the Price Group specified in Contact Management.

The fourth major step is to define the Billing Options and Terms. This begins with selecting a Billing Status of either “Internal”, “Estimate” or “Billable”. Billing Status defaults to value specified for the Request Type. Note that when a Request Type's Billing Status is set to "Not Billable", a work order is not created. When Billing Status is set to "Internal" the project is internal to the organization and dollar amounts are only calculated for purposes of tracking costs and no orders or invoices are created. The "Estimate" Billing Status is used when the price for the work is not known at the time of the request and the customer requires an estimate (quote). If the customer approves the estimate, the Work Order's Billing Status is changed to "Billable".

The next selection is Billing Method. Billing Method choices include "Pre-Payment", "Pre-Authorized", "Retainer", and "Invoice". When "Invoice" is selected, Invoicing Terms must also be selected. Invoicing Terms choices include "Periodic", "Schedule", and "Upon Completion". Other information collected include: Not to Exceed amount when applicable; the Contract Period; Payment Terms. Payment terms are applicable when Billing Method is set to "Invoice". They include choices such as "Net 10", "Net 30", etc. Work Order Payment Schedule entry is used to setup a fixed payment schedule such as for billing for completion of project phases where each record represents a phase. A Work Order can be specified for each Request and separate Work Order Payment Schedule Item records assigned to each Task to track and bill the logged time for the Task.

Billing Status – choices displayed as radio buttons:
- Internal
- Estimate
- Billable

Billing Method – choices displayed as radio buttons:
- Pre-payment
- Pre-authorized
- Retainer
- Invoice

Invoicing Terms – choices displayed as radio buttons. Only available when Billing Method is set to "Invoice":
- Periodic
- Schedule
- Upon Completion

Payment Terms – choices displayed in list box. Only available (enabled) when Billing Method is set to "Invoice". Default to Customer's Payment Terms.

Not to Exceed – text box for $ amount. Only available (enabled) when Billing Method is set to "Pre-authorized" or "Invoice".

Not to Exceed Label – 30 character text box for defining label other than "Not to Exceed Amount" such as "Deposit Required", "Minimum Charge", etc. Only available (enabled) when Billing Method is set to "Pre-authorized" or "Invoice".

When the Billing Method is set to Retainer, the customer is required to make a payment that is held as a credit on account. Work is then billed against the retainer. Only billed work is recorded as sales. The Retainer is linked to a Work Order and may only be applied as payment for the work performed on Requests linked to the Work Order. It may not be applied to other types of orders. The unapplied amount of the Retainer is stored in the Work Order.

The fifth major step is to get approval for the Work Order. Pre-paid Work Orders are automatically approved. All other Work Orders require the Approval Date and Approved By fields to be completed before work is authorized. Billable Requests that have not been approved shall display a warning message on all pages listing Tasks; the message should state that the work has not been approved. If the Request Type has been configured to require Work Order approval, the warning message will state that “Approval is required” and user will be limited to entering non-billable time until approval has been entered. Work Order Management shall include a button to email an approval notification to a specified person. This can be used to send approval request to a customer or to an Administrator for approval of internal projects.

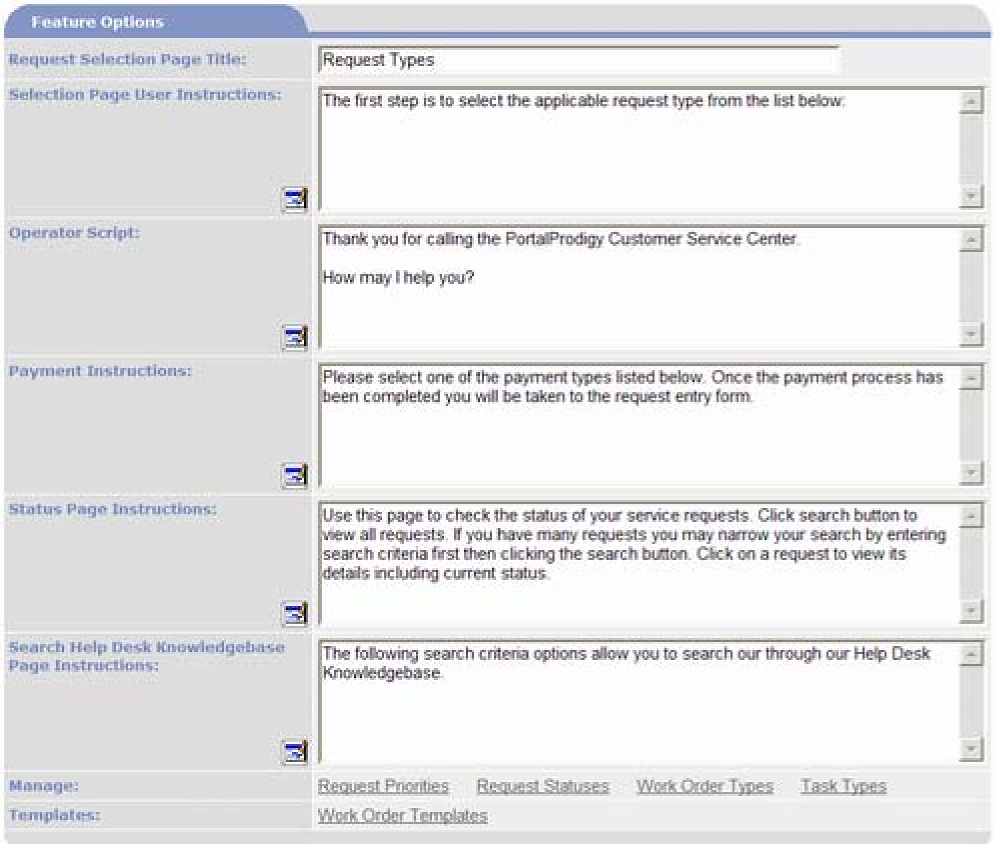
When a new Work Order is automatically created it sets Work Order Type to the value specified for the Request Type. The Membership Types Management page contains a list box that lists all Work Order Types that have Work Order Duration set to "Service Contract". When Work Order Duration is set to "Incident" the Work Order cannot be used with other Requests and when the Request's Closed Date is entered this is copied to the Work Order Closed Date, thus closing the Work Order. When Work Order Duration is set to "Project", closing a Request does not close the Work Order. When Work Order Duration is set to "Service Contract", closing a Request does not close the Work Order. The Work Order is closed when the Membership expires. If a Membership expires and is later renewed, then the Work Order Closed Date is removed, thus re-activating the WO.

When new Work Order is auto created from a Request there are two possibilities:,
a) If Request Item ID contains a value, it will create a Work Order Item with Work Order Item Type set to "Service Item" and it will not copy any Work Order Items that are attached to Work Order Types Work Order Template ID.
b) If Request Item ID is empty, it will create copies of all Work Order Items specified in Work Order Types Work Order Template ID.

1.5 Tutorials

How to Enable and Configure the Requests and Help Desk Feature:

- The first step is to go to Features Management and check the Request and Help Desk option then save the page.
- Next click on the Request and Help Desk link and configure Request Feature Management Options as follows:



- If you plan to use a Request Selection page, enter a Title to be displayed on the page. E.g. “Our Services”.

- If you plan to use a Request Selection page, enter Selection Page User Instructions. These instructions are displayed immediately below the Request Selection Page Title. They can be entered directly into the memo field or you may use the HTML Editor by clicking on the icon.

- If you plan to use Operator Scripts, you may enter a default script here. It will be copied to each new Request Type that you create. The script can be entered directly into the memo field or you may use the HTML Editor by clicking on the icon. You may modify it later for each Request Type.

- If you plan to bill for your services, you may enter Payment Instructions. The instructions will be displayed to the customer as part of the Work Order approval process. They can be entered directly into the memo field or you may use the HTML Editor by clicking on the icon.

- If you plan to provide customers/requestors with access to the Request Status Page, you may enter Status Page Instructions. They can be entered directly into the memo field or you may use the HTML Editor by clicking on the  icon.

- If you plan to provide customers/requestors with access to the Help Desk Knowledgebase, you may enter Search Help Desk Knowledgebase Page Instructions. This is typically used to provide instructions for using the search capability including how to limit or expand the scope of their search. The instructions can be entered directly into the memo field or you may use the HTML Editor by clicking on the  icon.

- If you would like to define a common set of Request Priority values that will be used by all Request Types, click on Request Priorities link and use Request Priority Management to add values. E.g "High", "Medium", and "Low".

- If you would like to define a common set of Request Status values that will be used by all Request Types, click on Request Statuses link and use Request Status Management to add values. E.g. "Pending", "Assigned", and "Completed".

- If you plan to bill for your services or you want to track time working on Requests, click on Work Order Types link and use Work Order Types Management to create Work Order Types. You will need to create at least one Work Order Type for each Duration type. Duration refers to the duration of the Work Order; "Incident" means the Work Order is used for only one Request; "Project" means the Work Order is used for numerous Requests that are related to a single project; and "Service Contract" means the Work Order is used to create a service contract that can apply to multiple Requests.

- Click on Task Types then click Add to create Task Types such as "Input Request", "Investigate Request", "Design", "Programming", "Testing & Debugging", etc. Billable Task Types are assigned to an Item. New Items can be added directly from Task Type Management similar to how Event Items and Membership Items work. Items created by Task Type Management are automatically created as Service type Items.

- You can skip Work Order Templates for now. For more information about Work Order Templates see the chapter titled Work Order & Time Billing Features in Detail.

* The next step is to create templates for email notifications, as follows:

  - For each Administrator and User notification type, you will need to create an email broadcast Template. Notification templates are defined using Broadcaster. See the chapter titled Broadcasting Features in Detail for additional information. It is important to set the Object Type to "Request" for each of the notification templates.

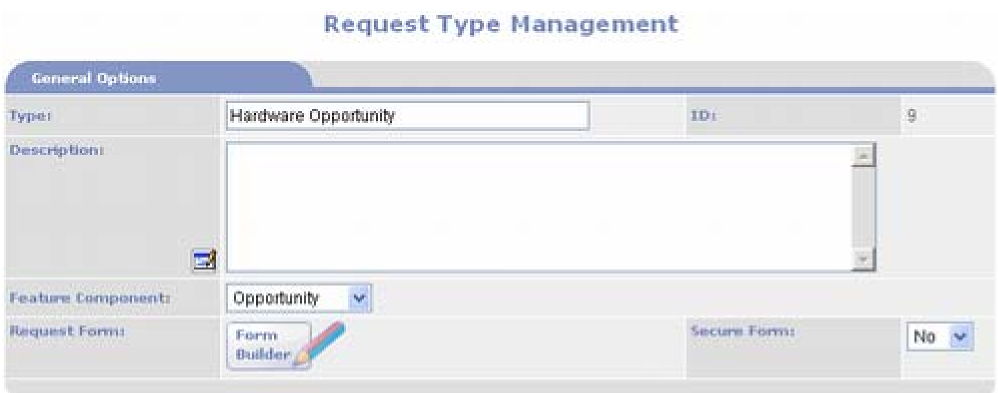
- If you have not already done so, the next step is to create Security Groups and Contact records for your staff that either need to be notified of Request events or assigned tasks related to Requests. See the chapter titled Contacts, Members, Vendors, & Companies Features in Detail and the chapter titled User Groups and Security in Detail for additional information.

- You are now ready to create Request Types.

1.5.1 How to Add a New Request Type

- Go to the Site Administration menu.

- Click the Request Types  icon. Note that you may also select the Add New option on the Search for Request Types page.



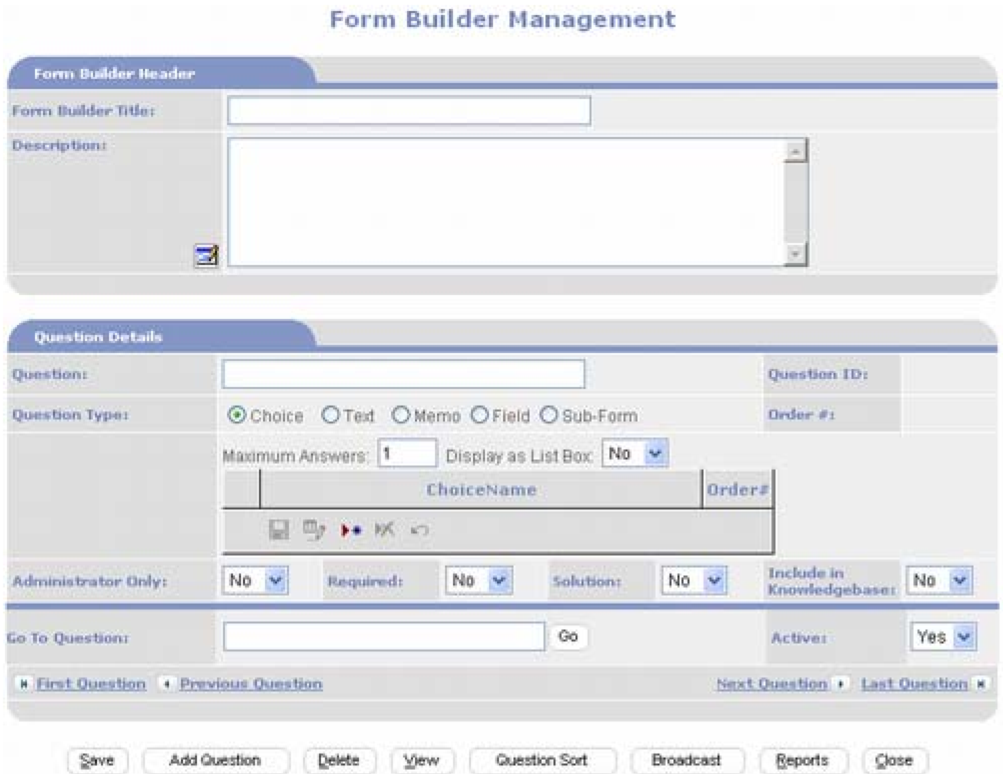
- Enter a name for the Request Type. E.g. "Request for Product Information". This name will be displayed on the Request entry page.

- You may enter a Description; however it is not required. It can be entered directly into the memo field or you may use the HTML Editor by clicking on the  icon.

- If the Request Type will be used in conjunction with a specific Feature, select the Feature Component from the list box, otherwise leave it blank.

- You are now ready to start building your form. Click on the Request Form Builder 

icon to open the Request Form Builder (Request Form Management page).



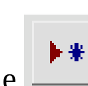
- Enter a name for your form into Form Builder Title field. Note that his name is not displayed on the form.

- You may enter instructions in the Description field to be displayed on the Request entry form; however they are not required. They can be entered directly into the memo field or you may use the HTML Editor by clicking on the  icon.

- For each input field (question on your form) you will need to complete the Question Details section as follows:

  - Enter a label name in the Question field. This is the label that you want displayed on the form.

  - Select a Question Type.

  - For Question Type "Choice" add each choice as a row in the grid. Click on the  Add New Record icon to add a Choice. Click  Save Current Record icon when finished entering the Choice. Use the Order # field to control the order that the choices are listed. If you want to display the Choices as checkboxes set Maximum Answers to a number greater than 1; otherwise they will be displayed as radio button choices. You may alternatively display them in a list box by setting Display as List Box to "Yes".

- For Question Type = "Text" select a Data Format for the response.

- For Question Type = "Memo" there are no additional options.

- For Question Type = "Field" select a field from the list box.

- For Question Type = "Sub-Form" click on the link Create Subform to open Sub-Form Builder. For each column that you want in your sub-form repeat the same steps as adding Questions in your main form. Sub-Form Builder contains one additional field Width. Use this field to control the width of the column. This will not affect the length of the entries into the fields, but it will limit how much visible at a time. When finished defining your Sub-Form close and save Sub-Form Builder. Set Default # of Rows to the number of data entry rows you want visible when the user is in Request Entry. The user will be presented with a button to add additional rows.

- Set Administrator Only list box to "Yes" if you do not want the Question to be visible in the Visitor user interface; otherwise leave is set to "No".

- Set Required list box to "Yes" if you want to require an answer to the question; otherwise leave it set to "No".

- Set Solution list box to "Yes" if you want the field to be hidden during initial Request entry. Solution fields are only visible for editing from the Administrative user interface. I.e. they are for entering responses to questions after they have been submitted. Visitors will see the Solution fields on the Request Status page. E.g. your help desk could have a Question with label = "What would you like to do?". The user submits their question "How do I set up my website for PayPal?". One of your support staff using Request Management enters "Complete instructions for setting up PayPal can be found on page 278 of the User Guide and Administration Manual." into the solution Question field with label "Answer". The user will not see the Question field "Answer" during initial submittal of their question, but when they visit the Request Status page and view the details of their Request it will be shown.

- Set Include in Knowledgebase to "Yes" if you want the field to be searchable using the Requests Knowledgebase feature; otherwise leave it set to "No".

- Click Save.

- If you want to add another question click Add Question; otherwise click Close.

▪ Configure the Entry Options as follows:

  - Set Require Login to "Yes" if you want the user to either login or signup as a new user; otherwise leave as "No". Setting to "Yes" forces each Request to be linked to a Contact record.

  - If you set Require Login to "Yes" you should select a Signup Form. Signup forms are created using Quick Registration Builder. For more information see the Chapter titled Features Management Menu in Detail sub-chapter Feature Administration – Quick Registration Builder.

  - Another method of linking each Request to a Contact record is to set Require Login to "No" and set Auto Create Contact Record to "Yes". This configuration requires that you include the Contact Name and Contact Email fields in your Request form. The user will enter their name and email address directly into the Request form. When saved, the system will perform search for email address in Contacts. If an exact match is found it will link the Request to the Contact record; otherwise it will create a new contact record using the information from the Request form.

  - If you want to permit users to attach documents and files to Requests set Allow Document Attachments to "Yes"; otherwise leave it set to "No".

  - If you want to have the Request to have a Default Priority value, define values and select one; otherwise leave blank. To define Priority values click on the Edit icon to open Request Priority Management and add new items.

  - If you want to have the Request to have a Default Status value, define values and select one; otherwise leave blank. To define Status values click on the Edit icon to open Request Status Management and add new items.

  - If you want to display instructions in the first step of the Administrator Request Entry, enter them in Operator Script. They can be entered directly into the memo field or you may use the HTML Editor by clicking on the icon. These instructions are displayed when a Request Type is selected.

- Skip the Project Schema Options. These are for future feature that is currently not available.

- Configure Assignment Options as follows:

  - Select an Assignment Method. This is the method that will be used for assigning each new Request to an individual or to a group of people.

  - If you want to assign the Request to a specific person, either enter their Contact ID into Assign to Individual field or click on the Lookup icon to search and select an existing Contact or add a new one.

  - If you want to assign the Request to a group of people, select a group from the Assign to Group list box. This list box lists all Security Groups. Security Groups are created using Group Management. For additional information see the chapter titled User Groups and Security in Detail.

  - If you want an email sent to each person that the Request is assigned to, select an Assignment Notification Template from the list box. Assignment Notification

Templates are created using Broadcast Manager. For additional information see the chapter titled Broadcasting Features in Detail.

- If you are auto assigning Requests you need to select an Assigned Task Type from the list box. Assigned Task Types are created using Task Types Management which can be accessed from Request Features Management or Tasks Feature Management.

- If you want a Task Start Date to be automatically created, set Task Scheduled Start Date to “Assignment Date”; otherwise leave set to “Manual”.

- If you want a Task End Date to be automatically created, set Task Scheduled End Date to either “Assignment Date” or “Requested Response or Completion Date”; otherwise leave set to “Manual”.

- Configure Task Options as follows:

  - When a Requestor submits a note the system creates a task to alert someone that the note has been submitted. If you want to assign a specific Task Type to this auto created Task, select a Task Type from the Requetor Notes Task Type list box. Task Types are created using Task Types Management which can be accessed from Request Features Management or Tasks Feature Management. E.g. you may want to create the Task Type “Respond to Requestor Note”.

  - When a Request is entered by an administrative user, the system provides the ability to track the user’s time. It does this by creating a Task and logging the time spent on the Task. To enable this, select a Admin Entry Task Type from the list box. Task Types are created using Task Types Management which can be accessed from Request Features Management or Tasks Feature Management.

  - When you want to auto create more than one Task for a Request, select a Task Template from the list box. See the How to Create a Task Template sub-chapter of the Requests and Help Desk Features in Detail chapter for more information.

  - If you select a Task Template you may include “Milestones” and “Deliverables” by checking each of these options. A check mark causes the system to copy them from the Task Template to the Request.

- Configure Administrator Notification Options as follows:

  - For each event select an email broadcast Template, Send to Group, and/or Send to Individual.

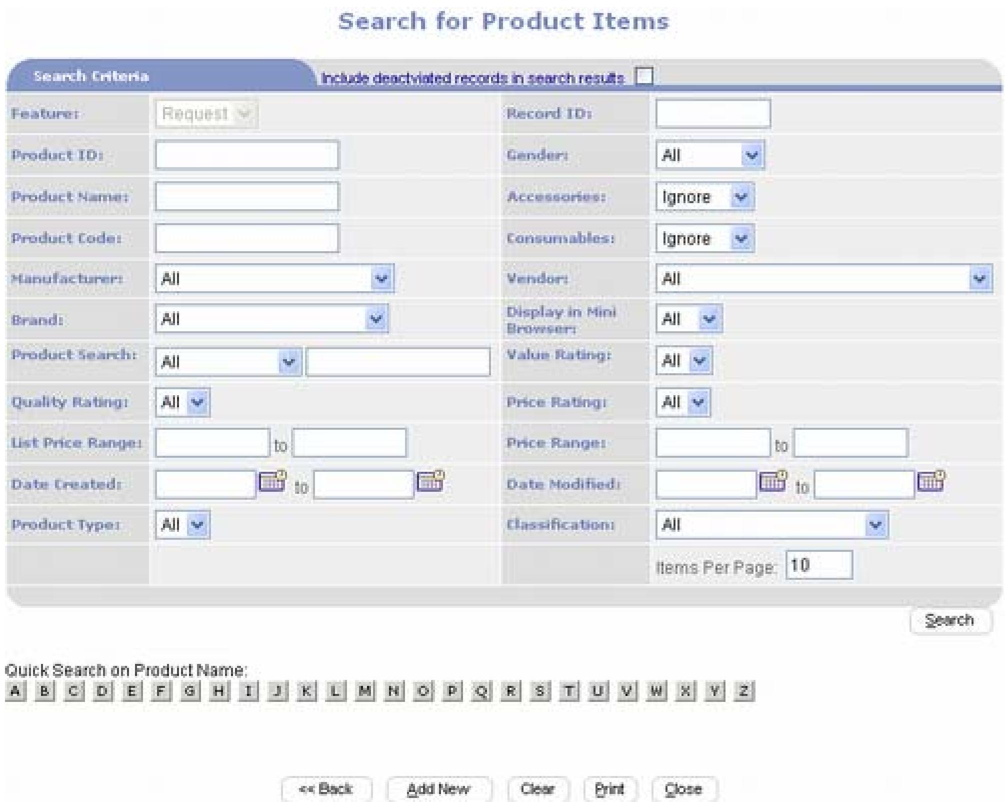
- Configure User Notification Options as follows:

  - For each event select an email broadcast Template.

- If you intend to bill for your services or you want to track time working on Requests, configure Work Order Options as follows; otherwise skip the Work Order Options section:

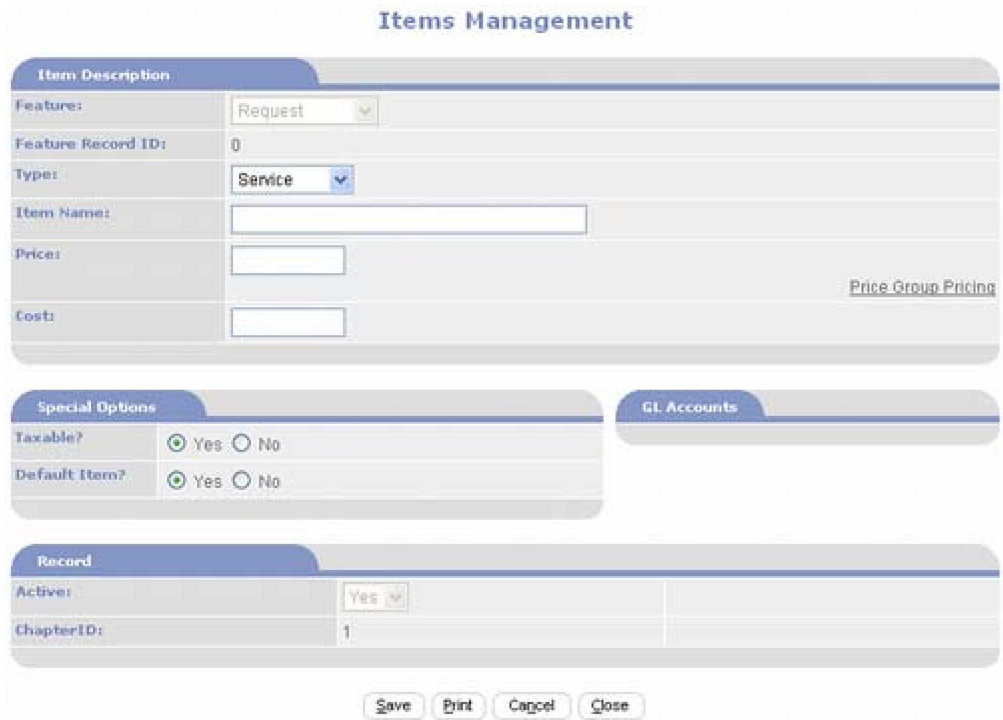
- Select a Work Order Type from the list box. Work Order Types are defined using Work Order Type Management which can be accessed from Request and Help Desk Features Management. The default value is “No Work Order”. Leave it set to “No Work Order” if you will not be using Work Orders.

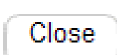
- Select a Default Fee Item ID by clicking the Item Lookup icon.



- Using Search for Product Items either search and select an Item or click the Add New button to create a new Item.

- Item Management for Request Work Order Items appears as follows:



- Enter the name of the service charge in Item Name field.
- Enter the fee in Price field.
- If you want to track a fixed cost for the Item, enter it in the Cost field.
- If you want to set up different pricing for different groups of customers, you will use the Price Group Pricing option. See the chapter titled Items/Product Catalog Feature in Detail.
- Specify whether the fee is taxable or not.
- Click 

 button and confirm save.
- You will be returned to Request Types Management. The Item name will be displayed similar to the following:

- If you want the customer to authorize a Work Order at the time of submitting their Request, set Require Approval at Time of Submission to “Yes”; otherwise leave it set to “No”. It is typically set to yes when you have a fixed fee or minimum fee. It is typically set to “No” when you need to estimate the cost based on the submitted information.

- If you set Require Approval at Time of Submission to "Yes", enter a title in Work Order Approval Title field. E.g.

  You may also enter Work Order Approval Instructions. The instructions can be entered directly into the memo field or you may use the HTML Editor by clicking on the icon.

- If you charging the customer, enter payment Instructions. The instructions can be entered directly into the memo field or you may use the HTML Editor by clicking on the icon.

▪ If you intend to bill for your services you will also need to configure Billing Options as follows; otherwise skip the Billing Options section:

- Select a Billing Status. Select "Internal" if you just want to track time and costs but will not bill the customer. Select "Estimate" if you are billing the customer but don't know what the fees will be up-front. Select "Billable" if you know what the fees will be up-front or if you intend to charge a minimum fee.

- Select a Fee Type if Billing Status is set to either "Estimate" or "Billable".

- Select a Billing Method to determine how you will bill the customer.

- If you plan to have the customer authorize work prior to knowing the charges, you may enter a Not to Exceed Label. This label will be used on the Work Order Approval page where the customer enter the maximum dollar amount they are authorizing.

- If you want to charge a cancellation fee when the customer cancels an already approved work order, click on the Cancellation Fee Item ID Lookup icon and either select an existing cancellation Item or add a new one. This works the same as the Default Item.

- If you plan to track billable time for a Request, set Require Approval Before Billable Time May Be Entered to "Yes"; otherwise, leave set to "No".

- Configure Confirmation Options as follows:
    - You may enter Request Confirmation Instructions which are displayed to the customer after they have submitted their Request. You probably want to provide the user with instructions for checking the status of their Request and how to contact your organization. The instructions can be entered directly into the memo field or you may use the HTML Editor by clicking on the  icon.
    - If you want to control the page the user is sent to after clicking Ok on the Confirmation page, enter the URL in the After Confirmation Go To field. E.g.

    - Click the Save button to save the Request Type.

How to Add a New Request:

- From Site Administration Main Menu, click on the Add Requests 

icon to open the Add Request page shown below.

- To track your time while entering the request click the Start button. If at any time you want to stop the time log, click the Stop button. When the Request entry process is completed the system will automatically enter a stop time and save to the time log.

- Operator instructions are displayed directly below the Request Entry heading. This can be the script that you want your help desk operators to use when answering support calls. Operator instructions are defined in Request & Help Desk Feature Management.

- You need to determine from the customer the nature of their request so you can select a Request Type. Request Types are listed as radio button options. When a Request Type is selected, the operator instructions are refreshed to display specific instructions for the selected Request Type.

- If the Request Type requires it to be linked to a contact record, you need to find the customer's contact record. If they don't have one, you will need to add them as a new customer. To search for a customer you may enter any of the following into the Customer criteria text box:

    - **First Name + Last Name**
    - **First Name**
    - **Last Name**
    - **Company Name**
    - **Phone Number:** enter in format 999.999.9999
    - **Email Address**

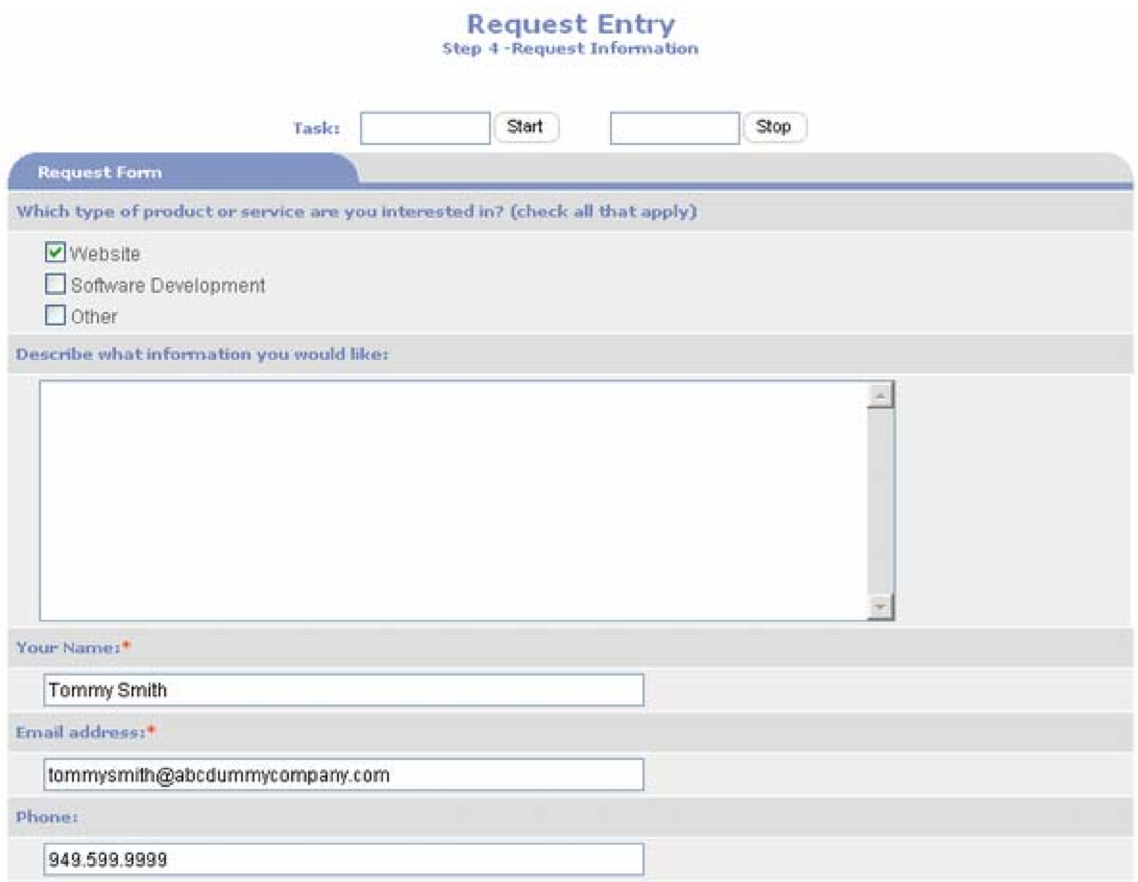
- Click Submit to perform search. Matches are listed on Request Entry Step 2 page as shown below.

- If the Customer is shown click Select to go to next step. You can modify your criteria and press enter key to submit new search.

- If the Customer is new, click Add New Customer to create a new Contact record. After saving the Contact record you will be taken to the next step.

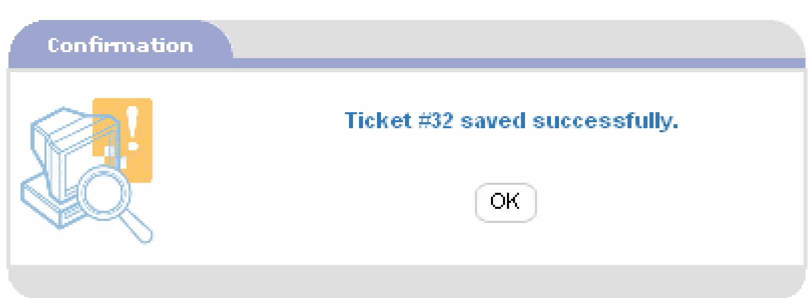
- If payment is required you will be prompted to enter the customer's payment information, Step 3, otherwise this step will be skipped.

- Fill in the Request form, Step 4.

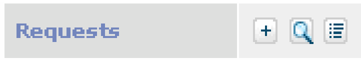


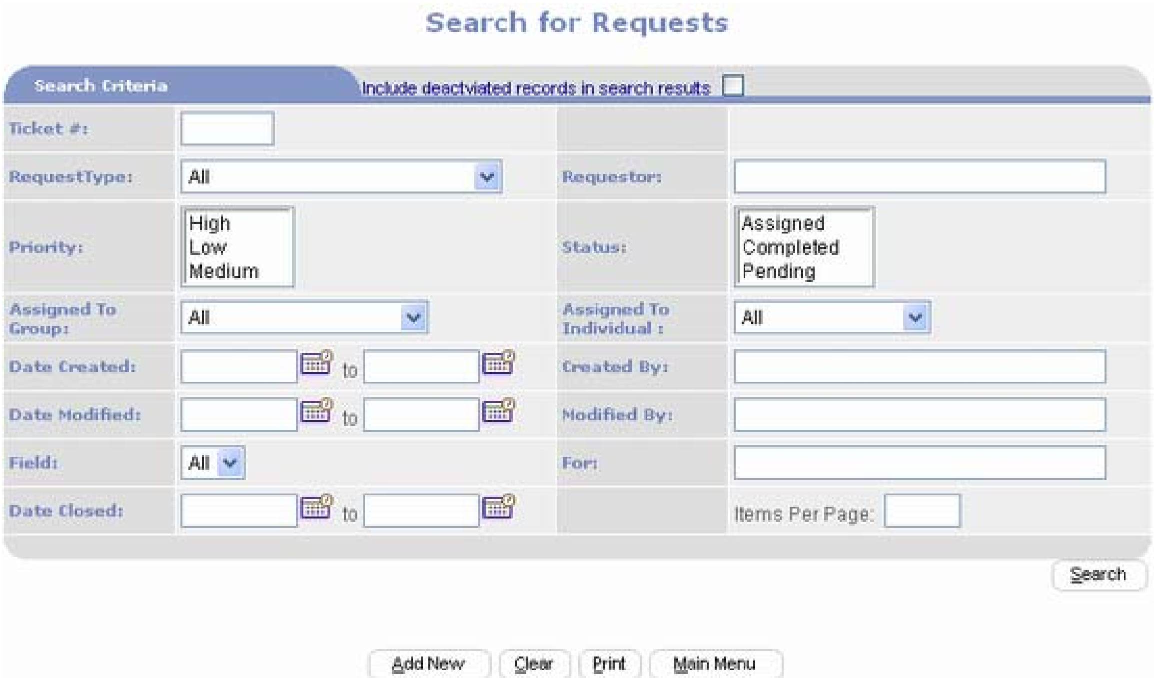
- Click Submit when you have completed the Request form.

- The last step in the Request Entry process is the confirmation page. This page displays the assigned Ticket #. If you have the customer on the phone during the entry process, be sure to give them their Ticket # which they can use to check the status of their Request online.



How to Search and Browse Requests:

- From Site Administration Main Menu, click on the Browse Requests  icon to open the Search for Requests page.

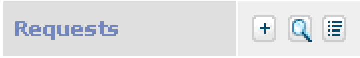


- Enter your search criteria and click the  button. See the Components section of this chapter for an explanation of each search criteria field.

- All Requests matching your search criteria are displayed in Found Requests section as shown above.

- To view a Request click on the Ticket #.

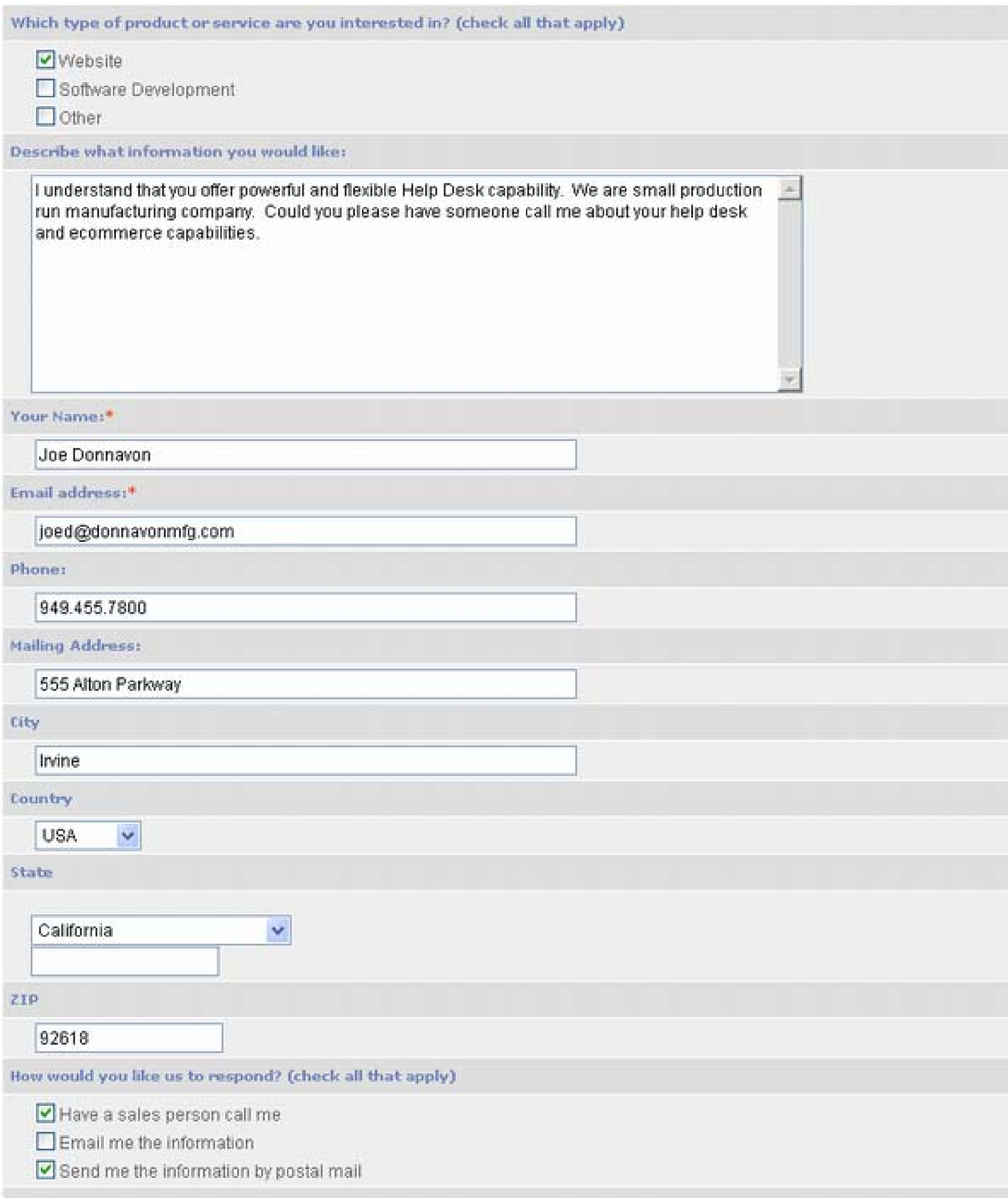
How to Edit a Request:

- From Site Administration Main Menu, click on the Browse Requests 

icon to open the Search for Requests page.
- Search and select a Request to edit.
- The Request Management page is opened. The first section allows you to view and edit Requestor contact information.

- Click on Name to open the Requestor's contact record in Contact Management.
- Click on Company to open the Requestor's company record in Contact Management.
- Click on Email to sent and email to the Requestor.
- Click on Website to open the Requestor's website.
- Click on the icon to view the requestor's Address.
- The upper portion of the Request section, shown below, contains standard Request fields.

- If the Request's Priority or Status has changed, select the applicable value from each list box.
- You may change the other values in this section as well as add and edit attachments to the Request.
- The lower portion of the Request section, shown below, contains the Form fields created using Request Form Builder. Consequently it is unique to each Request Type.



Which type of product or service are you interested in? (check all that apply)

- [x] Website
- [ ] Software Development
- [ ] Other

Describe what information you would like:

I understand that you offer powerful and flexible Help Desk capability. We are small production run manufacturing company. Could you please have someone call me about your help desk and ecommerce capabilities.

Your Name:*

Joe Donnavon

Email address:*

joed@donnavonmfg.com

Phone:

949.455.7800

Mailing Address:

555 Alton Parkway

City

Irvine

Country

USA

State

California

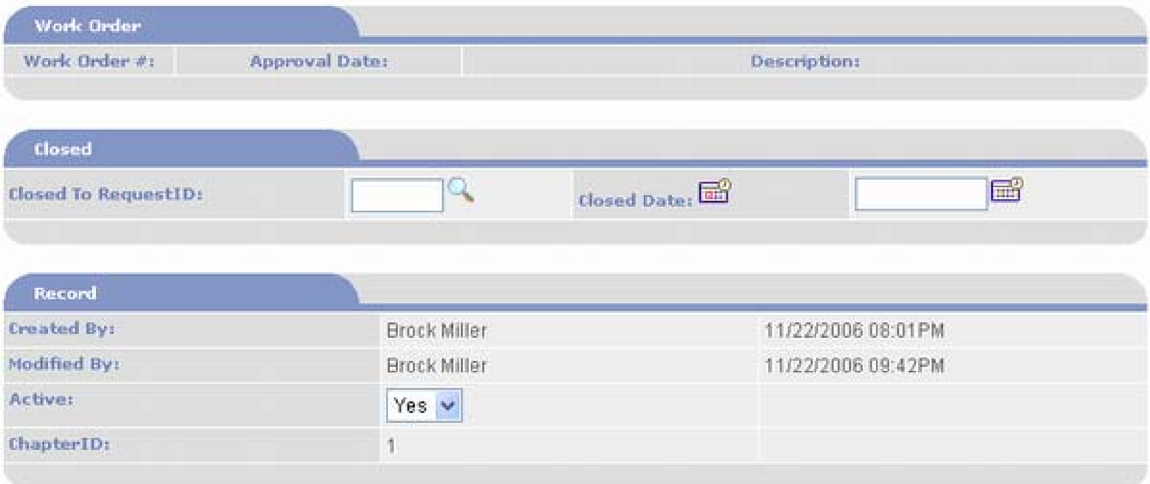
ZIP

92618

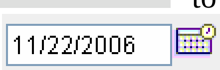
How would you like us to respond? (check all that apply)

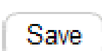
- [x] Have a sales person call me
- [ ] Email me the information
- [x] Send me the information by postal mail

- You may change any of the values in this section. Note that changes to contact information in this section will not update the Requestors Contact record.
- The last three sections on the page, shown below, are standard sections for all Request Types.



- If the Request Type uses Work Orders, each Work Order for the Request will be listed in the Work Order section. Click on a Work Order # to open and edit the Work Order.
- If you want to close the Request in order to consolidate it with another Request, enter the Request ID of the other Request and enter a Closed Date. Click on the the  icon for 

to auto insert today's date. You may also click on the date lookup  icon 

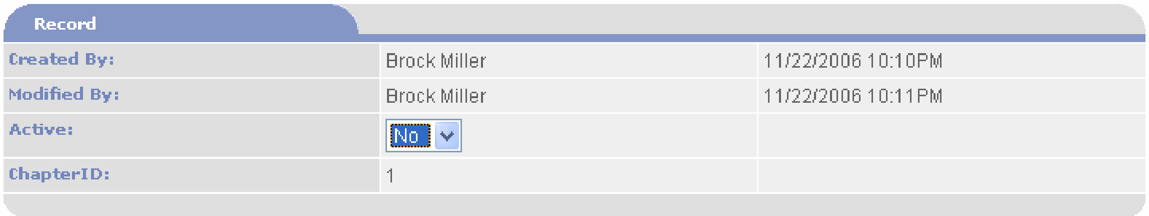
to select a date from the pop-up calendar.
- To just close the Request because it has been completed, enter a Closed Date.
- Click 

button to save your changes.

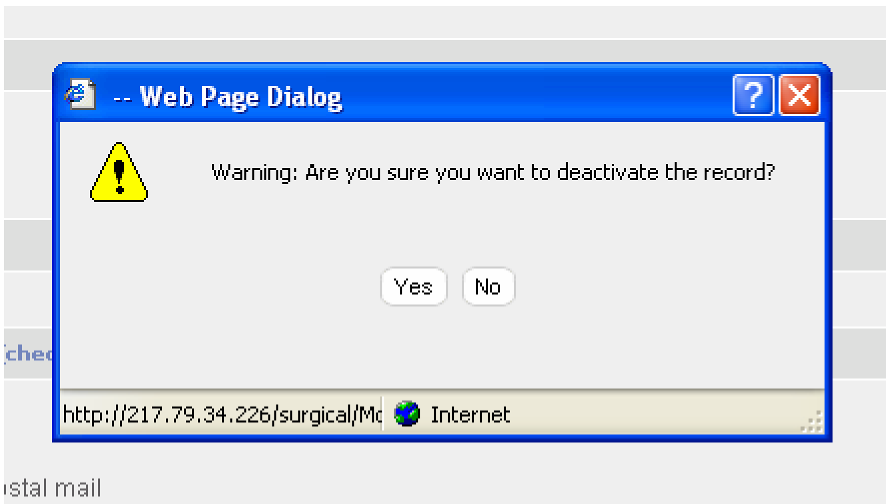
How to Delete a Request:

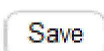
- From Site Administration Main Menu, click on the Browse Requests 

icon to open the Search for Requests page.
- Search and select a Request to delete.
- In the Record section at the bottom of the page set Active = "No" as shown below.



- You will be prompted with the following dialog box.



- Click Yes.
- Click  button to save your changes.

Create and Assign Tasks to Requests:

Tasks can be manually created from Administrative Request Entry, Request Administration, and Tickler Notes. Tasks can also be automatically created when new Requests are entered. This is done using a Request Template. All tasks are copied from the Request Template to the Request.

Creating Tasks involves selecting a Task Type from a list box, entering an additional description in a memo field and optionally assigning the Task to a group or individual. Additionally a Task may be flagged as a Milestone, flagged as Deliverable, and have documents (files) attached to it. Scheduled Start and Completion dates may be entered as well as budgeted hours and budgeted cost.

How Log Time to Requests and Work Orders:

Time can be logged both automatically and entered manually.

When entering new Requests, time can be automatically logged by clicking the Start button. Clicking the Stop button or closing the Request Entry page causes the entry of an ending time.

Tickler Management and Task Management also have Start and Stop buttons for automatically logging time.

Manual entry of time is accomplished by clicking on a Task from anyone of the pages listing tasks, then clicking Log Time button. The start and end dates are automatically entered along with the Request and the Task. You can select different dates and different Request and Task. You can manually enter the start and end times and save the entry. The page automatically prepares the next entry. When finished making entries, select Close.

How to Invoice Customers for Work Orders:

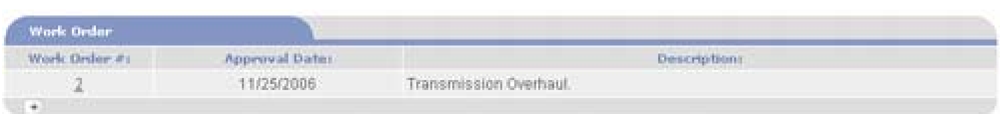
When Pre-payment in full is required (Request Fee Type = per incident fee), an order is automatically created and immediately invoiced; otherwise Invoicing customers is done using the 

option accessed from the Site Administration Main Menu. The invoicing process invoices according to the terms specified for each Work Order.

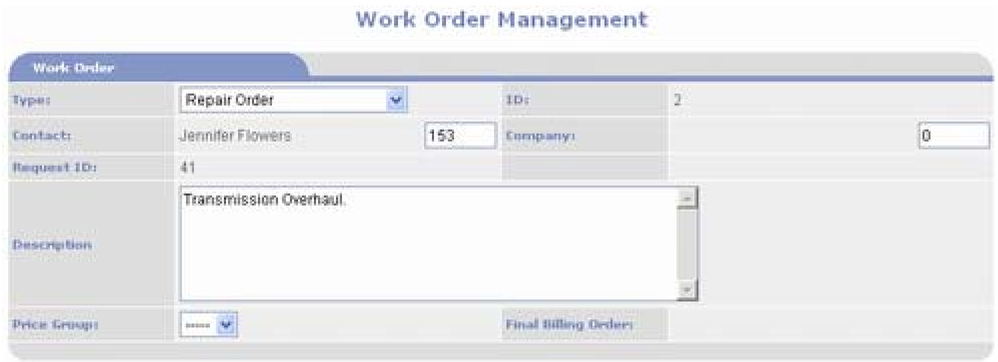
Prior to invoicing, a Billing Adjustment Report can be printed. This report can be used to manually review and write down adjustments then given to someone to record the adjustments in the system. Adjustments are entered using the Billing Adjustments Entry page.

How to Create Work Orders for Requests:

- First retrieve the Request in Request Management. If you do not know how to search for Requests, see the section of this chapter titled How to Search for Requests.
- Go to the Work Order section and click the  button to create a new Work Order.



- The new Work Order is opened in Work Order Management.

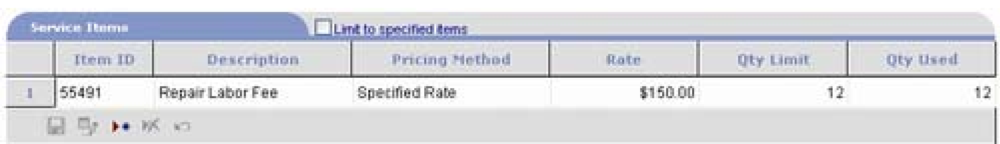


- Many of the fields will default to values defined for the Request Type.
- You may enter a description of work in the Description memo field.
- Go to Request Types section. If the Fee Type is not correct, change it.

Request Types

	Description	Fee Type	Rate	Qty Limit	Qty Used
1	Equipment Repair Order	Item Pricing	$0.00	0	0

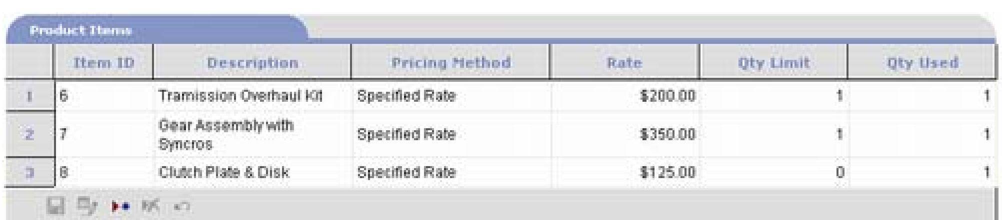
- If the Fee Type is set to “Item Pricing” enter the billable service items in the Service Items section.



Service Items ☐ Limit to specified items

	Item ID	Description	Pricing Method	Rate	Qty Limit	Qty Used
1	55491	Repair Labor Fee	Specified Rate	$150.00	12	12

- Quantity Limit is the estimated quantity which is used to estimate the total cost of the Work Order to be approved by the customer. Quantity Used is the actual quantity which is entered once work begins.
- If there are Products, enter them in the Product Items section.



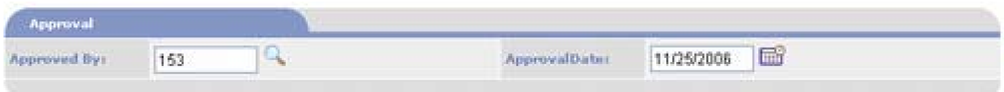
Product Items

	Item ID	Description	Pricing Method	Rate	Qty Limit	Qty Used
1	6	Tramission Overhaul Kit	Specified Rate	$200.00	1	1
2	7	Gear Assembly with Syncros	Specified Rate	$350.00	1	1
3	8	Clutch Plate & Disk	Specified Rate	$125.00	0	1

- Select Billing Options

- You may enter scheduled start and end dates in the Calendar section.

- If the customer has approved the Work Order, enter the customer's Contact ID that approved the work along with the Approval Date in the Approved section.



- Click the Save button.
- If you want to print a copy of the Work Order click the Print WO button.
- When finished you may click the Close button.

1.5.2

1.5.3 Hot To Print a Work Order:

- Work Orders are printed from Work Order Management.
- Click on Print WO to create a printable version of the Work Order.
- A Print dialog box will open automatically. Click Cancel button to close the Print dialog box without printing. Click Print button to print.
- The Work Order will appear as follows:

Work Order # 2 Date: 11/24/2006

PortalProdigy Test Site

ABC Company - PortalProdigy Test Site
510 Horizon Center
Robbinsville, NJ 08691

Transmission Overhaul.

Bill To:

Name:	
Attn:	
Address 1:	
Address 2:	
C.S.Z.:	
Country:	
Phone:	
Fax:	
Email:	

Service Items:

Item #	Description	Price Method	Quantity	Unit Price	Extended Price
	Repair Labor Fee	Specified Rate	12	$150.00	$1,800.00
Product Items					
85-101	Tramission Overhaul Kit	Specified Rate	1	$200.00	$200.00
Product Items					
85-103-9	Gear Assembly with Syncros	Specified Rate	1	$350.00	$350.00

Billing Method:	Pre-Authorized	Total Estimated Amount:	$2,350.00
Terms:			
Payment Terms:			
Purchase Order #:			
Scheduled Start	11/27/2006	End Date:	11/30/2006

WorkOrder Approval Instructions:

Approved By:	....
Date:	....
Signature:	....

Create and Assign Tasks to Requests:

Tasks can be manually created from Administrative Request Entry, Request Administration, and Tickler Notes. Tasks can also be automatically created when new Requests are entered. This is done using a Request Template. All tasks are copied from the Request Template to the Request.

Creating Tasks involves selecting a Task Type from a list box, entering an additional description in a memo field and optionally assigning the Task to a group or individual. Additionally a Task may be flagged as a Milestone, flagged as Deliverable, and have documents (files) attached to it. Scheduled Start and Completion dates may be entered as well as budgeted hours and budgeted cost.

Log Time to Requests and Work Orders:

Time can be logged both automatically and entered manually.

When entering new Requests, time can be automatically logged by clicking the Start button. Clicking the Stop button or closing the Request Entry page causes the entry of an ending time.

Tickler Management and Task Management shall also have Start and Stop buttons for automatically logging time.

Manual entry of time is accomplished by clicking on a Task from anyone of the pages listing tasks, then clicking Log Time button. The start and end dates are automatically entered along with the Request and the Task. The user can select different dates and different Request and Task. The user manually enters the start and end times and saves the entry. The page automatically prepares the next entry. It is common practice at Brolin for programmers to enter their time at the end of the day for each project they have worked on that day. When the user is finished and has no more entries they select Close.

Invoice Customers for Work Orders:

When Pre-payment in full is required (Request Fee Type = per incident fee), an order shall be created and immediately invoiced; otherwise Invoicing customers shall be done using our existing invoicing process. The invoicing process invoices according to the terms specified for each Work Order.

Prior to invoicing, a Billing Adjustment Report can be printed. This report can be used to manually review and write down adjustments then given to someone to record the adjustments in the system. Adjustments are entered using the Billing Adjustments Entry page.

Attach Documents to Requests:

Documents and other files can be attached by customers and administrators. Options to attach documents are located on Request Entry, Request Status, Request Management, Tasks Management, and Work Order Management pages.

Create Milestones:

Milestones are entered as Tasks and flagged as Milestones by checking the Milestones checkbox on Task Management page.

Define Deliverables:

Deliverables are entered as Tasks and flagged as Deliverables by checking the Deliverables checkbox on Task Management page.

Search and Manage Requests:

Search and management of Requests is performed by selecting Request Management. This displays a standard criteria page for entering search criteria with search button to display matches in our standard format. Each match in matches grid shall contain link to manage the Request.

Search Help Desk Knowledgebase:

A search option similar to the Discussions Search is used to search the Help Desk Knowledgebase. Users may select a Request Type and Information Type (Field/Question) as filters to limit search and enter a keyword or phrase to search. Only Request (Question) fields marked for inclusion in Knowledgebase are searchable. See Request Form Management for configuration instructions.

Customer View Request Status & Attach Notes:

Customers can access the status of their Requests from the Request Selection page by clicking on a Status button; from a link within the site; or from a link on their contact personal menu. The link displays Request Status page with ability list their open Requests (Requests without Closed Date) or closed Requests (Requests with Closed Date). They can also search by specific Request Ticket # and Request date range. Each Request includes link to display the details of the Request and permits them to attach notes. When a note is attached, an email notification is automatically sent to each member of the specified notification group or individual.

Special Situations

1.5.4 Creating Opportunity Types using Request Types Management.

Opportunities are a special Request Type. They are managed using a separate feature component called Sales & Opportunity Management. Request Type Management is used to create the Opportunity Types. Setting the Request Type's Feature Component to "Opportunity" designates them as an Opportunity Type.

The Request Type is used to define your own customized opportunity form. You may create as many Opportunity Types as you need. E.g. you may want to collect different information from large accounts versus small accounts, or you may want to collect different information for different product opportunities.

The Request Type is also used to define the auto assignment of Opportunities to your sales staff.

See the chapter titled Sales & Opportunity Feature in Detail for additional information.

1.5.5 Configuring RFQ from Cart using Request Types Management.

RFQ from Cart is a special Request Type that is used to configure a feature that allows customers to request quotes for items that are listed in your Product Catalog with price set to either "Request a Quote" or "Submit a Bid". When the customer is finished shopping and selects checkout, the system checks their shopping cart for items with Price set to either "Request a Quote" or "Submit a Bid" and if it finds any, it takes the customer to the RFQ form that you defined using Form Builder for the RFQ from Cart Request Type. The customer fills out the form and submits it. Using Request Management the RFQ items can be priced and a Quote automatically created. It can be configured to email the quote to the customer with a link to your website so approve an order.

See the chapter titled Quotes Feature in Detail for additional information.

1.5.6 Configuring RFQ from Cart using Request Types Management.

RFQ is a special Request Type similar to Request from Cart that is used to allow customers to request quotes for items. Rather than selecting items from your product catalog, the user manually enters the item information into the form that you defined. You can design your form to collect as little or as much information as you like to help you identify the item. The customer submits their request. Using Request Management the RFQ items can be priced and a Quote automatically created. It can be configured to email the quote to the customer with a link to your website so approve an order.

See the chapter titled Quotes Feature in Detail for additional information.

Configuring and Processing Service Contracts:

Service Contracts are comprised of a Membership and a Work Order. Service Contracts are created by signing up for a Membership Type. When the membership is approved, a Work Order is automatically created. The Membership Type contains a Work Order Type which is used to create a Work Order for the Service Contract. The Request Types, Items and pricing are copied from the Work Order Template specified for the Work Order Type. The Work Order remains valid as long as the Membership is active. When the Membership expires and is not renewed, the Work Order Active flag is to “Not” to signify that it is inactive.

Configure Service Contracts:

1. Create a Work Order Type. You may name it “Service Contract”.
2. Create a Work Order Template. The template shall specify the scope of work covered by the service contract. If applicable, it shall also specify fees along with billing and payment options. E.g. a service contact may provide service for free yet charge for parts. In that case Service Items would be designated as free and Product Items would be assigned pricing.
3. Assign the Work Order Template to the Work Order Type.
4. Create a Membership Type. You may name it “Service Contact”.
5. Configure it like any other Membership Type.
6. The only difference is the selection of a Work Order Type. The Work Order Type must have a Work Order Template specified.
7. Create a link on the site to signup for the membership.

Service Contract Signup Process:

1. User signs up for membership.
2. Upon membership approval the system creates a Work Order based on the Work Order Template specified for the Membership Type’s Work Order Type.
3. The Work Order is automatically set to Approved. Approved By is set to the user that signed up for the membership.
4. As long as the Work Order remains active, the service contract remains in affect.

Renewing a Service Contract:

1. When a service contract membership is renewed, no change is required to the Work Order. As long as the service contract membership is renewed prior to expiring, the Work Order remains active.

Expiring a Service Contract:

1. When Service Contract Membership expires, the expiration process shall automatically set the Work Order to inactive.
2. If the membership is later renewed, the Work Order is automatically activated (set to active).