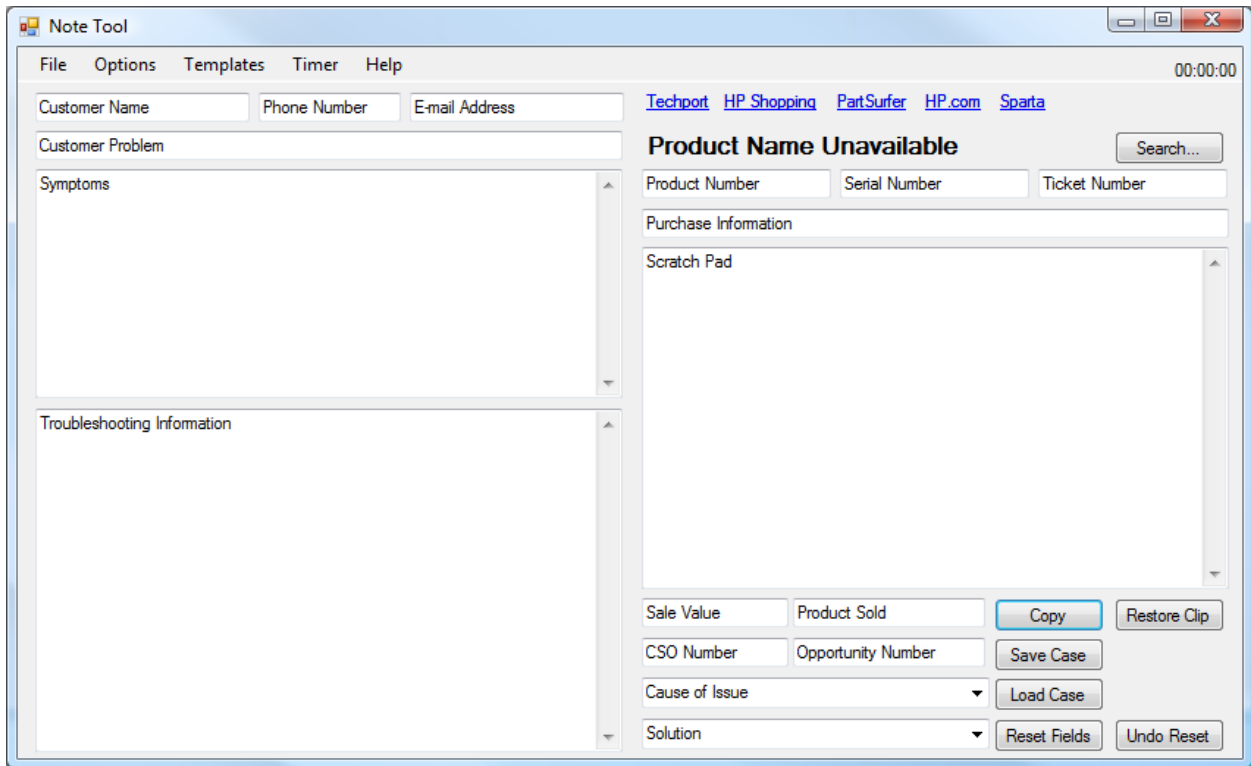


Specialty Note Tool

User's Guide

Produced by: Nick Bolhuis



Purpose

The purpose of this program is to:

- Provide the HP Specialty Support group with a tool in which allows for easy, formatted note taking.
- To allow agents to perform regular activities with less work.
- To provide the quick access to tools necessary during customer interactions.
- To be able to accommodate for user error during note taking.
- To have a straight-forward and intuitive design for easy understanding and use of the program.
- To be customizable by the user to accommodate for user's needs and preferences.

Overview

The screenshot shows the 'Note Tool' application window. The title bar reads 'Note Tool' and the menu bar includes 'File', 'Options', 'Templates', 'Timer', and 'Help'. A timer in the top right corner shows '00:00:00'. The main interface is divided into several sections:

- Customer Information:** Text boxes for 'Customer Name', 'Phone Number', and 'E-mail Address'. Below these is a 'Customer Problem' text box.
- Product Information:** A section titled 'Product Name Unavailable' with a 'Search...' button. Below it are text boxes for 'Product Number', 'Serial Number', and 'Ticket Number'. A 'Purchase Information' text box is also present.
- Text Areas:** A large 'Symptoms' text area and a 'Scratch Pad' text area, both with vertical scrollbars.
- Troubleshooting Information:** A text area at the bottom left.
- Control Buttons:** A cluster of buttons in the bottom right, including 'Copy', 'Restore Clip', 'Save Case', 'Load Case', 'Reset Fields', and 'Undo Reset'. There are also text boxes for 'Sale Value', 'Product Sold', 'CSO Number', and 'Opportunity Number', along with a 'Cause of Issue' dropdown menu and a 'Solution' dropdown menu.
- Quick Links:** A row of links at the top right: 'Techport', 'HP Shopping', 'PartSurfer', 'HP.com', and 'Sparta'.

- The program is composed mostly of text boxes for the user to fill out for normal note taking.
 - To save space the fields are identified by their original content which is cleared upon selecting the field.
- Product Information is clearly shown in the top right for easy reference.
 - This information retrieved by entering product number or using 'Search'
- Quick Links to often used websites are also on the top right
 - HP Shopping, Part Surfer and HP.com will take you directly to the currently entered Product.
- All buttons to manipulate the input fields are conveniently located together in the lower right.
- First glance added features from previous note tool are:
 - 'Restore Clip' - Restores what was in user's Windows Clipboard before user clicked Copy.
 - 'Save Case' and 'Load Case' - Save the case for future reference.
 - Undo Reset - Ability to undo accidental reset.

Basic Operation

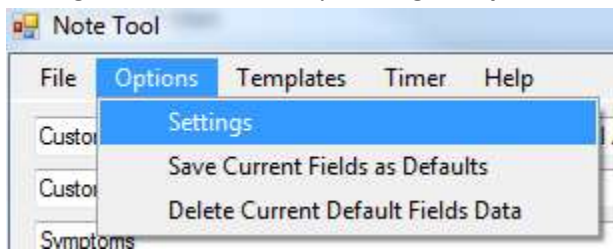
Basic operation is made to be as simple as possible. No customization is needed to use this tool.

1. During a customer interaction use the program to document any notes necessary in the appropriate fields. Fill out all fields required for the interaction.
 - a. As you fill in fields the colour of the field changes to let you know it has been filled.
2. When done press 'Copy' to copy your notes to the Windows Clipboard.
 - a. When 'Copy' is pressed the fields change colour again to show which were copied.
3. Return to ICWC and Paste your notes into the required field.
4. Press 'Reset Fields' to clear the fields for the next customer interaction.

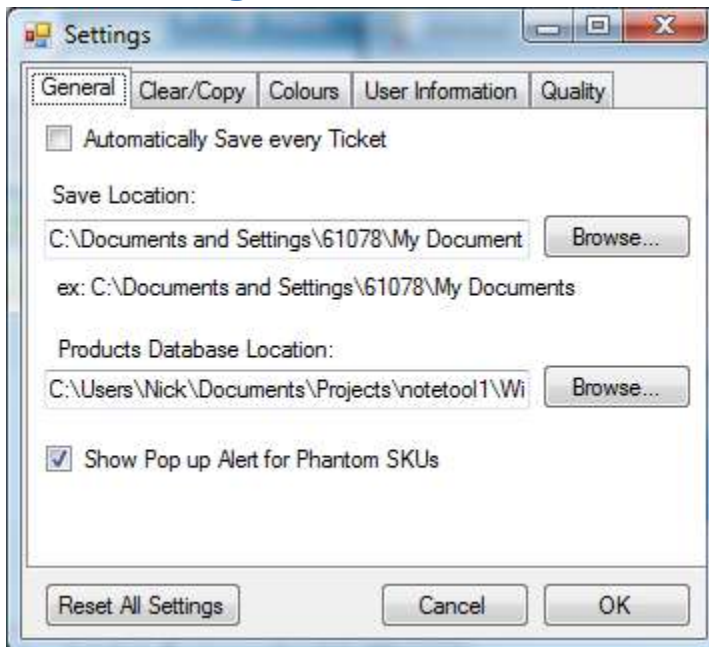
Settings

No settings are necessary for normal operation but are available for users to customize the tool to their preferences or needs.

Settings can be accessed by clicking on **Options > Settings**



General Settings



Automatically Save Every Ticket

Saves your case in the Save Location automatically every time 'Reset Fields' is pressed or the program is exited. (Saves in the format <Ticket Number> - <Customer Name>)

Save Location

Select where to Automatically Save ticket when previous option is enabled.

Products Database Location

In order for the program to display product information, or product search it requires a product database. Specify the location of the database here. (Default setting should work fine)

Show Pop up Alert for Phantom SKUs

Gives user an alert if a Phantom SKU was entered. (If option is disabled user will still receive actual SKU but will not receive the pop up.

Reset All Settings

Resets ALL settings and preferences within the program (not just this page)

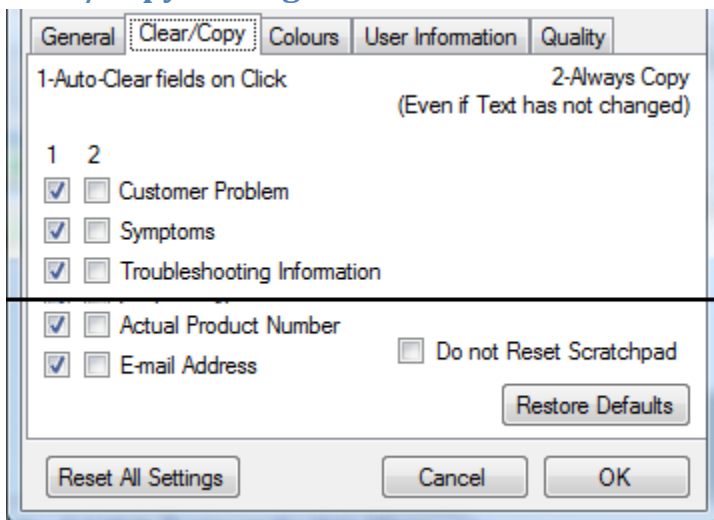
Cancel

Closes Settings without saving changes.

OK

Saves changes and closes Settings.

Clear/Copy Settings



This page allows you to cause the program not to clear a field's default values when selecting the field as well to always copy the field to the clipboard when 'Copy' is clicked. Default action is to copy only fields changed. For use in conjunction with **Options > Save Current Fields as Defaults**

Also there is an option to not reset the 'Scratchpad' when pressing reset.

This may be desired if the user uses the scratchpad for notes they may want to keep beyond the current call. (call back information, break schedules, etc.)

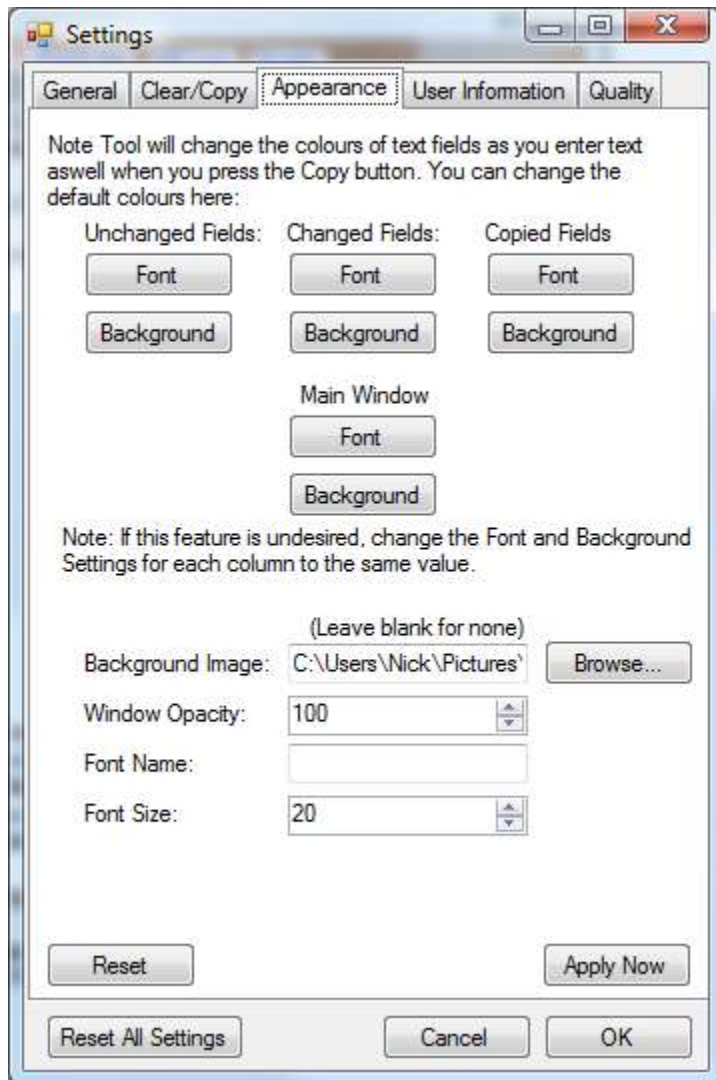
Restore Defaults

Restores the settings on the current page to recommended defaults

Other options are self explanatory.

Appearance Settings

These Settings change the appearance of the application. A user can change the colour scheme, add a background image, add transparency, (Cosmetic Changes) and change the font type and size (Functionality Changes)



Font Button

Changes the color of the font for the above field type or Main Window.

Background Button

Changes the background color of the above field type or Main Window.

Background Image

Lets the user specify a background image for the program. (Note: May cause slight performance drop)

Window Opacity

Lets the user add transparency to the program. (Note: May cause slight performance drop)

Font Name

Allows the user to change the font used for text fields (Font must be typed correctly and installed on the system)

Font Size

Allows the user to change the font size used for text fields.

Reset Button

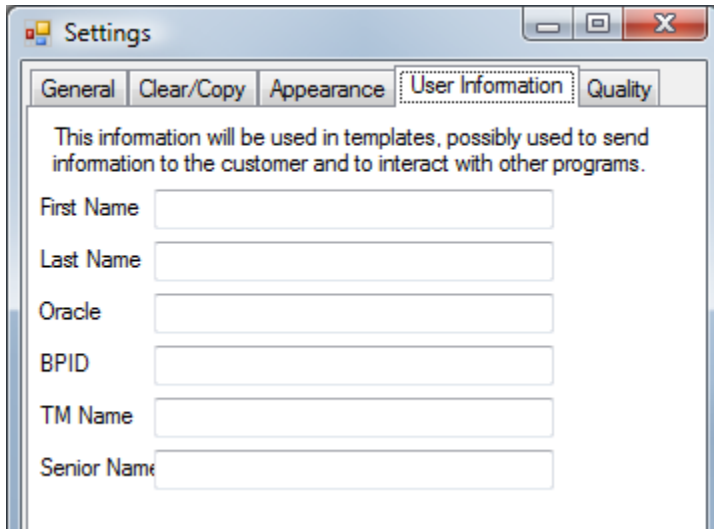
Resets the settings only in the Appearance tab

Apply Now

Applies the selected settings to allow a preview without closing the settings dialog.

User Information Settings

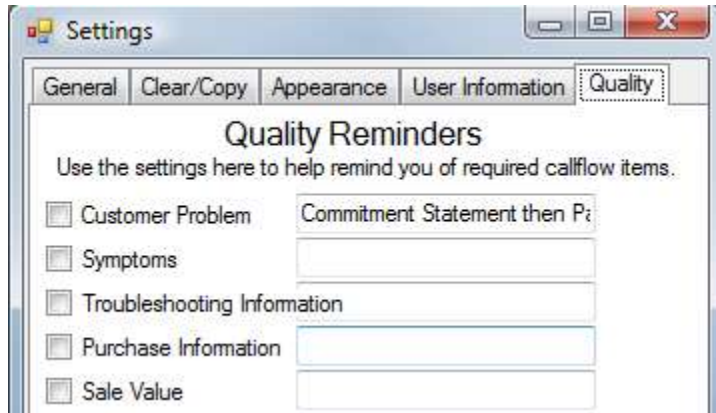
This page allows the user to enter their personal information for use in templates.



Settings are Self Explanatory.

Quality Settings

This page allows for 'Quality Reminders' to remind the user of required call flow items as the user fills in the text fields



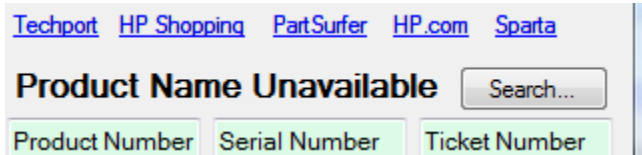
A pop up window will be displayed showing the text box contents upon leaving the checked field name.

For example If 'Customer Problem' in the screenshot were checked then the user would be reminded with a pop up 'Commitment Statement then Paraphrase' after entering the customer problem field.

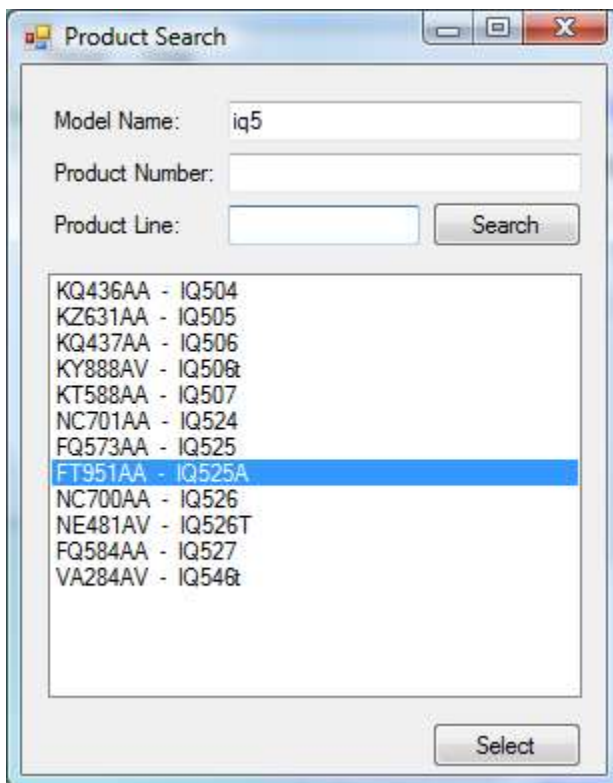
Advanced Features

Product Search

The Program includes a product search for the case in which the user has a model name but not the number, or needs to refer to a series of models.



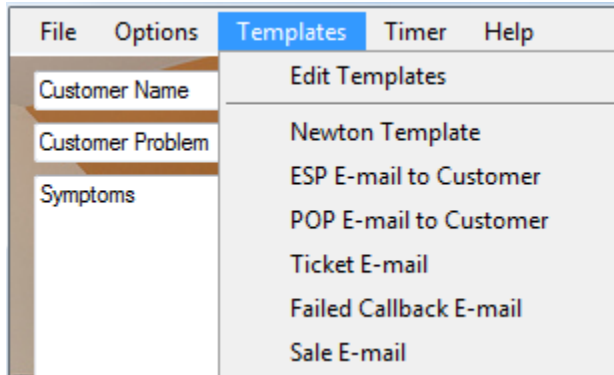
To search for a product the user would click on the 'Search' button in the main program.



The Product Search window will appear.

1. Enter any part of any information known and press enter, or the search button .
2. A list of matching products will appear.
3. Select the desired product in the list
4. Click on the select button to have that product populate in the main program.

Templates



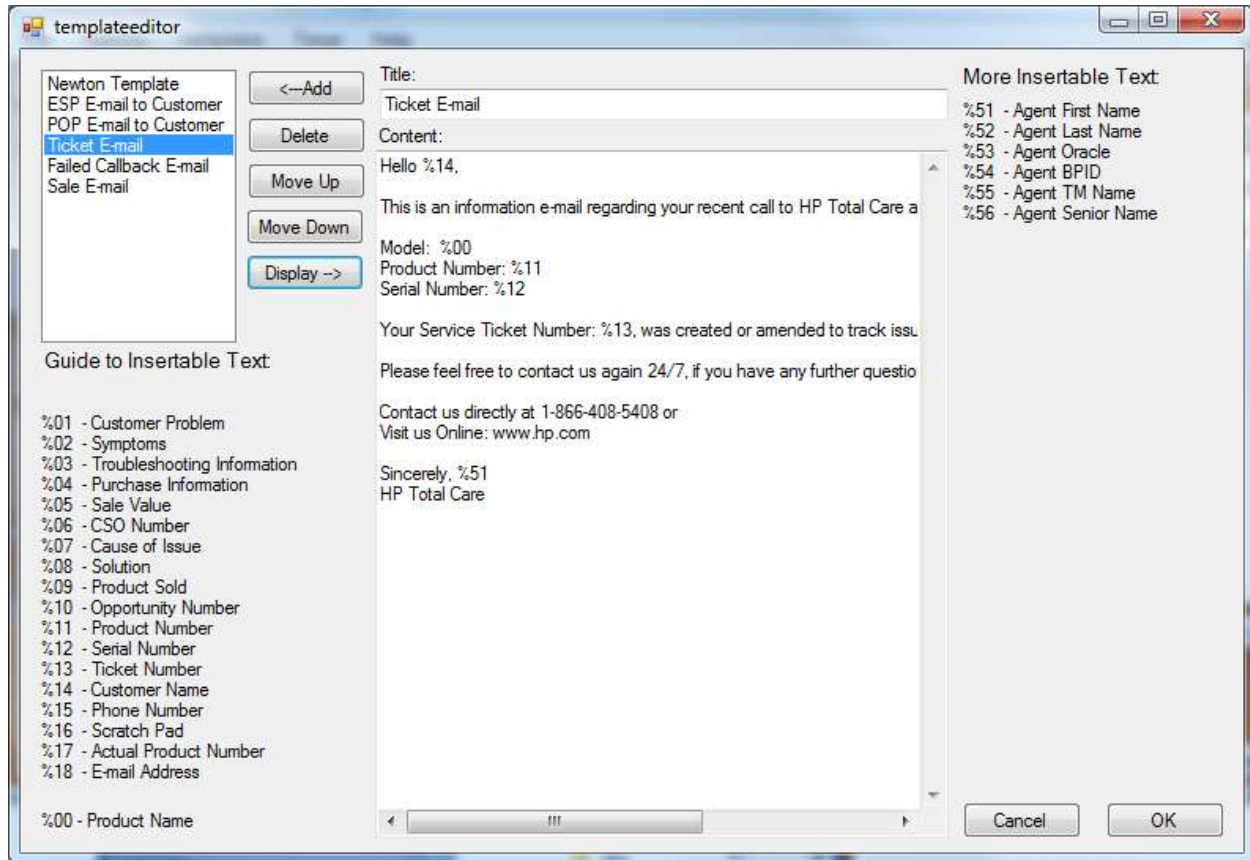
Templates are a simple way to have the program output any information the user has entered in a user defined pre-formatting.

Common templates are included with the program. To use templates first fill out the required text fields on the current case and in Options > Settings > User Information, then click on Templates, and select the desired template to use. The template is now copied to your Windows Clipboard. Use paste to output the template in the desired program.

For example: The 'Ticket E-mail' template pre-formats an e-mail to send the customer including the customer's product name, product number, serial number, service ticket number, giving salutations to the customer's name and signing with the user's first name. All of the above information is entered automatically and requires no user editing.

If the template requires a field in which the user has not entered the user will be notified via a pop up that the program had required that field and has left the connected information blank.

Templates can be added, removed and edited by clicking on **Templates > Edit Templates**



Above is a screenshot of the Template Editor.

Template editing is for more advanced users.

- To display a already stored template select it on the left and click display.
- To edit an existing template: display the template, edit it, click add, then delete the original on the left.
- The Template Title is to Identify the template in the Templates menu of the main program.
- Two templates of the same Title cannot exist. (If they do, one will not be accessible)
- Make sure to add a created or edited template to the list on the left before exiting the template editor to save changes to that template.

To create a Template follow the above example, create a title for the template under 'Title', write the preformatted text in the 'Content' text field, and at any location in which the program should enter user entered information (either user information, or case information) enter the desired %## indicated on the sides.

Timer

The program has a built in hold/break timer which gives an extra large display and causes a PC beep in a distinctive pattern when the timer is up. Timers are accessible via the Timer menu.

Other Features:

- Program supports 'undo' in text fields for the case of user error. (ctrl-z, right click>undo)
- Program checks serial number for invalid characters to avoid improper product registration.
- Features an Availability Timer in the top right. (Starts when user presses reset, stops when field data is entered)
- Auto Save will, in the case of <Service Ticket> - <Customer Name> already existing, add sequential numbers to the end of the file to avoid data loss.
- Users can be alerted to product alerts via a pop up window upon a product being selected. This information is retrieved from the product database