TurboDemands 2.0

User's Guide

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TurboDemands is a windows application developed to streamline the process of communicating with customers via Letter & E-mail, as well as documenting these interactions.

Purpose

This application provides the benefits of allowing the user to spend more time focusing on the specifics of the message in the communication rather than the technical and sometimes tedious process of creating, customizing and sending the communication via mail and e-mail. A considerable amount of time is saved with automation, templates are used which ensures communications are accurate, notes are automatically generated to be saved within the existing CRM software and each communication is automatically saved as a text file.

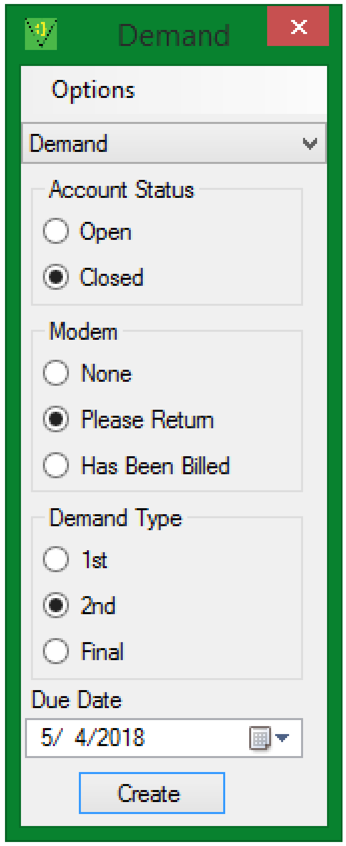
Features

- Collects user information and fills in template fields
- Template dynamically changes depending on 'Demand' form status
- E-mail and Letter sent with single button press
- CRM note generated dynamically based on template, including customer and template status information
- Modem information including brand name & restocking costs calculated
- Depending how the application is deployed, all users can be provided with the same unified set of templates or can have their own personal set.
- Checks in place to ensure multiple communications are not re-sent within the same day / month
    - Allows user to review previous communication sent before sending new
- If template calls for information that is normally collected from CRM but not collected, a warning is displayed.
- If multiple modems are detected, warns the user to ensure this is an intended action
- Automatically detect invalid demand situations and prevent additional communication in such situations (no more balance, no equipment owing)

Application Overview

Demand Window

The Demand window is the starting point of each communication.



From the top, is a menu bar with 'Options' including 'Template Editor' which allows the user to edit the communications templates as well as 'About' to view application information.

Next is a drop down which allows the user to select the communication template to be used.

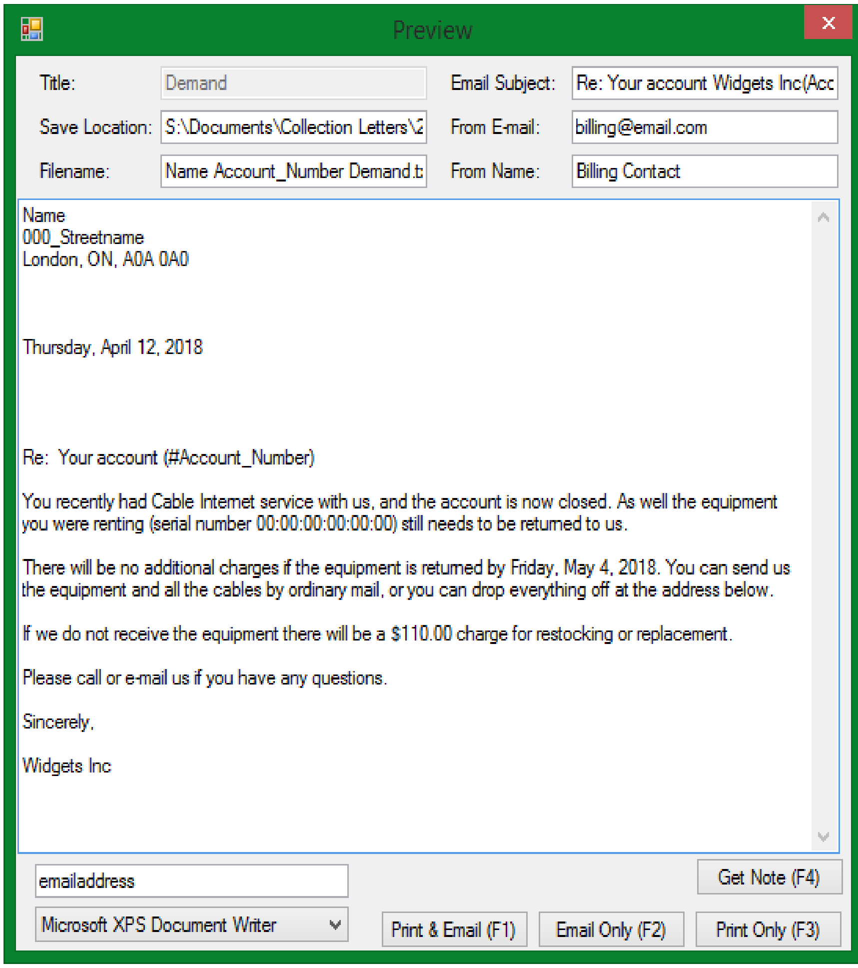
'Account Status', 'Modem', and 'Demand Type' are radio buttons which modify the output of the demand.

'Due Date' is a date field which also determines the text in the communication output by what is selected.

Last is a 'Create' button which when pressed information from the customer account is parsed and the 'Preview' window is displayed with the calculated communication text and available actions for the template.

Preview Window

The 'Preview' window displays information regarding the communication to be sent.



The first 6 fields are as follows:
Title:
The name of the template used
Save Location:
Where the message will be saved as text
Filename:
The name of the text file to be saved
E-mail Subject:
The subject line of the e-mail to be sent
From E-mail:
The e-mail address used to send from
From Name:
The display name to be shown in the recipient's inbox.

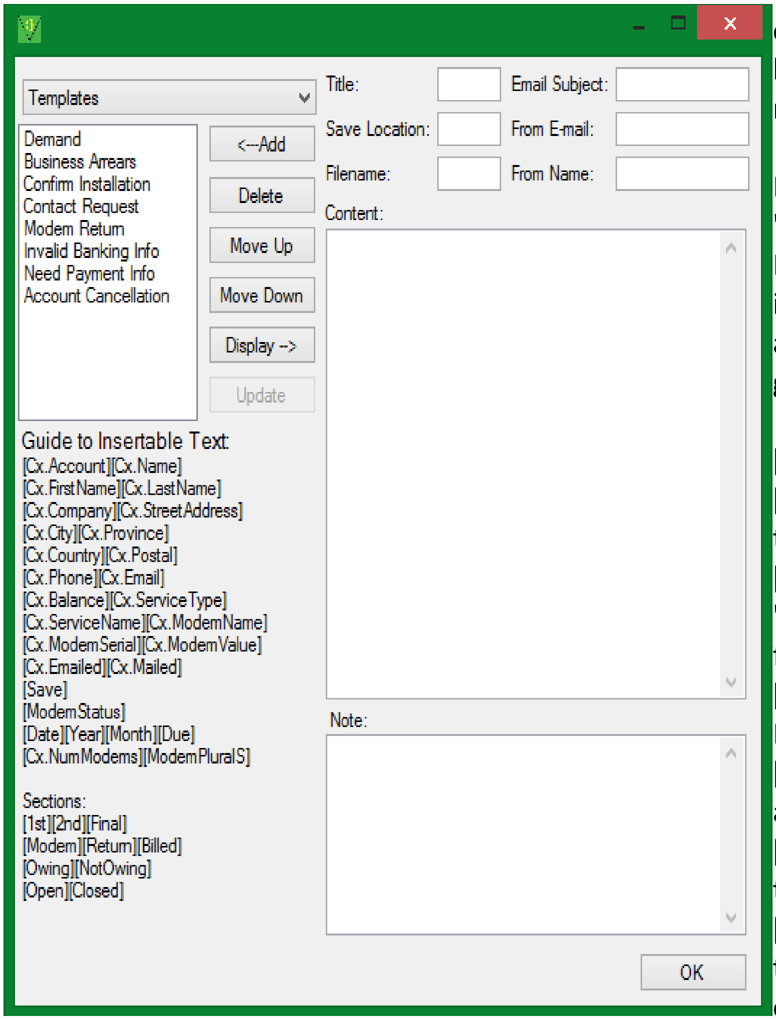
The largest text area is the message of the communication to be sent.

Below the message area on the left is a text box which will have the recipient's e-mail address as well as a drop down which indicates which printer the document will be sent to upon choosing to print.

At the bottom right are the action buttons which allow the user to “Print & E-mail”, “Email Only”, “Print Only” or “Get Note” which will perform the action(s) displayed on the button, Set the windows clipboard as the note associated with the template used, and close the 'Preview' window

Template Editor

Here we have the 'Template Editor' window This can be used to create, modify, and/or remove templates to be used with the application.



The left of this window lists all Templates currently available within the application. The buttons on the right of this list are used to manage the items in the list.

Below the list is a 'Guide to Insertable Text' and 'Sections'
Insertable text are variables which when included as part of a template are replaced with actual customer or demand information upon generation of the template.

[Cx.___] is information specific to the customer.
[Save] is the full path and filename of the output text file saved.
[ModemStatus] will output 'None' 'Return' or 'Billed' depending on how the Demand form was filled.
[Date] is today's full date such as Sunday November 19 1995
[Year] & **[Month]** are the long format of Year and Month such as 2018 and December
[Due] is the due date set in the Demand form in the same format as **[Date]**
[ModemPluralS] is replaced with 's' in the case that there is more than one modem serial found on the customer account.

Sections are areas of text which will only be displayed in their relevant situation and must have a opening and closing tag surrounding that text.
Example: “[1st]This text will only appear on the first demand[/1st]”
Sections can be nested but not staggered
“[2nd]Second demand [Modem] with a modem[/Modem][/2nd]”
“[2nd]Second demand [Modem] with a modem[/2nd][/Modem]”
In the second scenario an error will be thrown indicating an inbalance of tags was detected.

'Insertable Text', 'Sections' or variables can be used on any field except 'Title'.

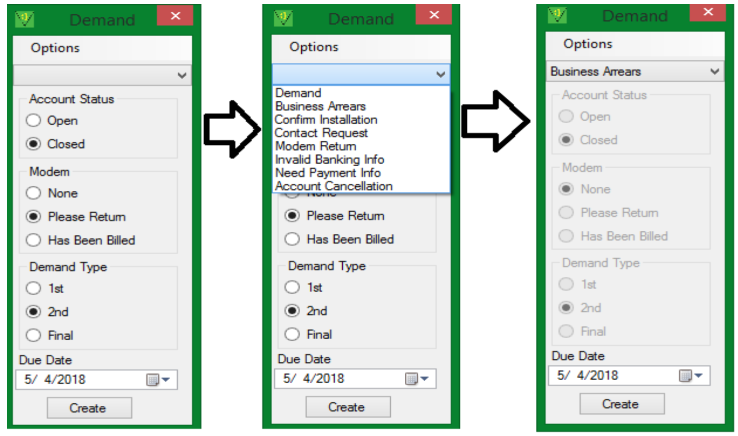
The Title field is the name of the template as will be displayed in the left list as well as in the drop down on the main 'Demand' window.

The other fields are as described in the description of the 'Preview' window.

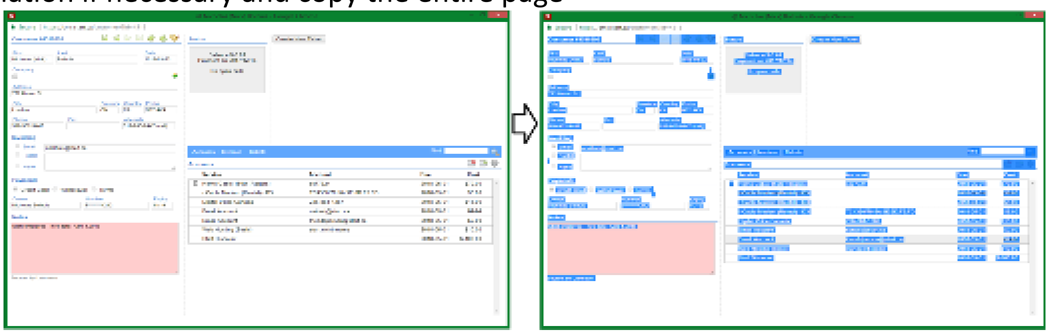
End-User Operation

1. After launching the application, use the initial drop down to select the type of communication you wish to send.

2. The appropriate fields will be enabled for you to fill out. Select the proper radio buttons and/or specify the date to be mentioned in the letter.



3. Once the application form has been filled with the relevant information, switch to your customer's account, expand the equipment/modem information if necessary and copy the entire page



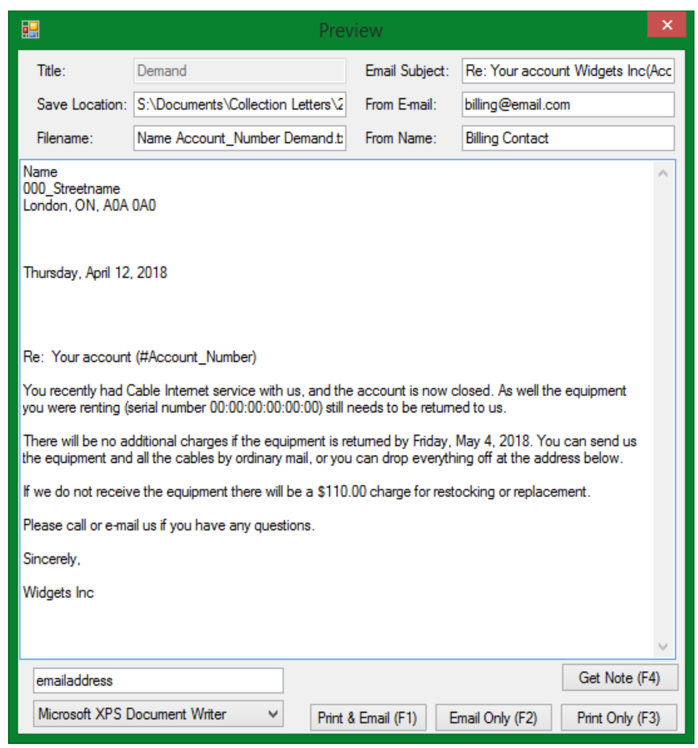
4. Switch back to TurboDemands and click on 'Create'

5. The 'Preview' window will open which will display the formatted communication to be sent. Review the message in the preview and make any corrections necessary.

6. If you are mailing the communication, make sure the selected printer in the lower left drop down is correct.

7. Press the appropriate action button to Print, Email, and/or get the outputted note.

8. Depending on which action button is pressed TurboDemands will e-mail the letter, print the letter, and will always copy the output note to the windows clipboard.



9. Return to the customer's account and paste into the note field.