Odoo Training Part II

Mastering Customer and Case Management

5 different screens

- Customer Card
- Tracing Screen
- Battery Screen
- Helpdesk Ticket
- Compensation Screen
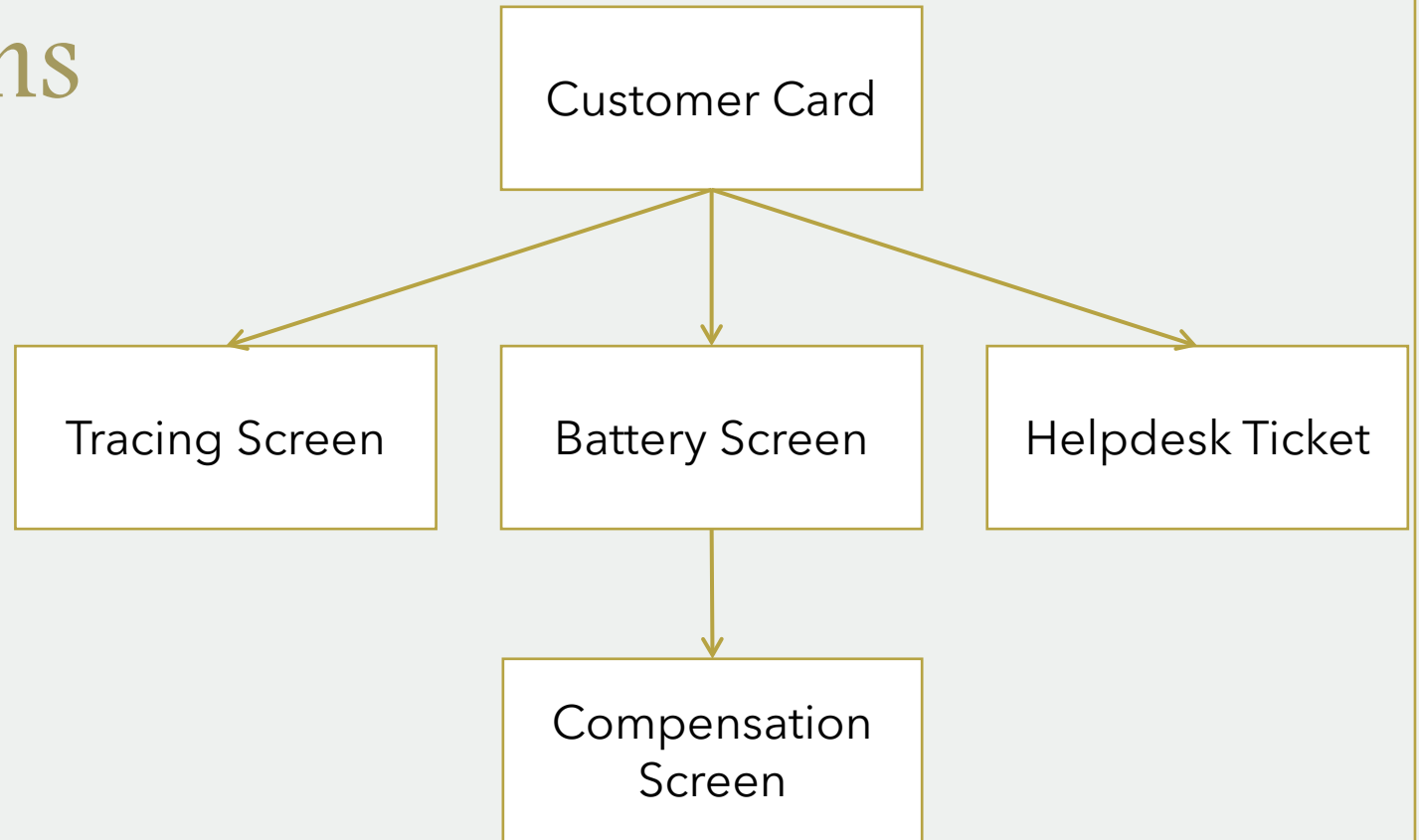
Customer Card

- The customer card is special because it ties together **tracing screen, battery screen, helpdesk ticket** under a single **Customer Card**. This means the customer card is the best place to find all information.

Search for customers via Contact ~ Customer

- When you are on inbounds, please copy the phone number from Ring Central and put it in the search bar and search via phone/mobile. This will show you ALL customer cards with that associated number.

Discuss
Recalls
Helpdesk
Website
Employees
Apps
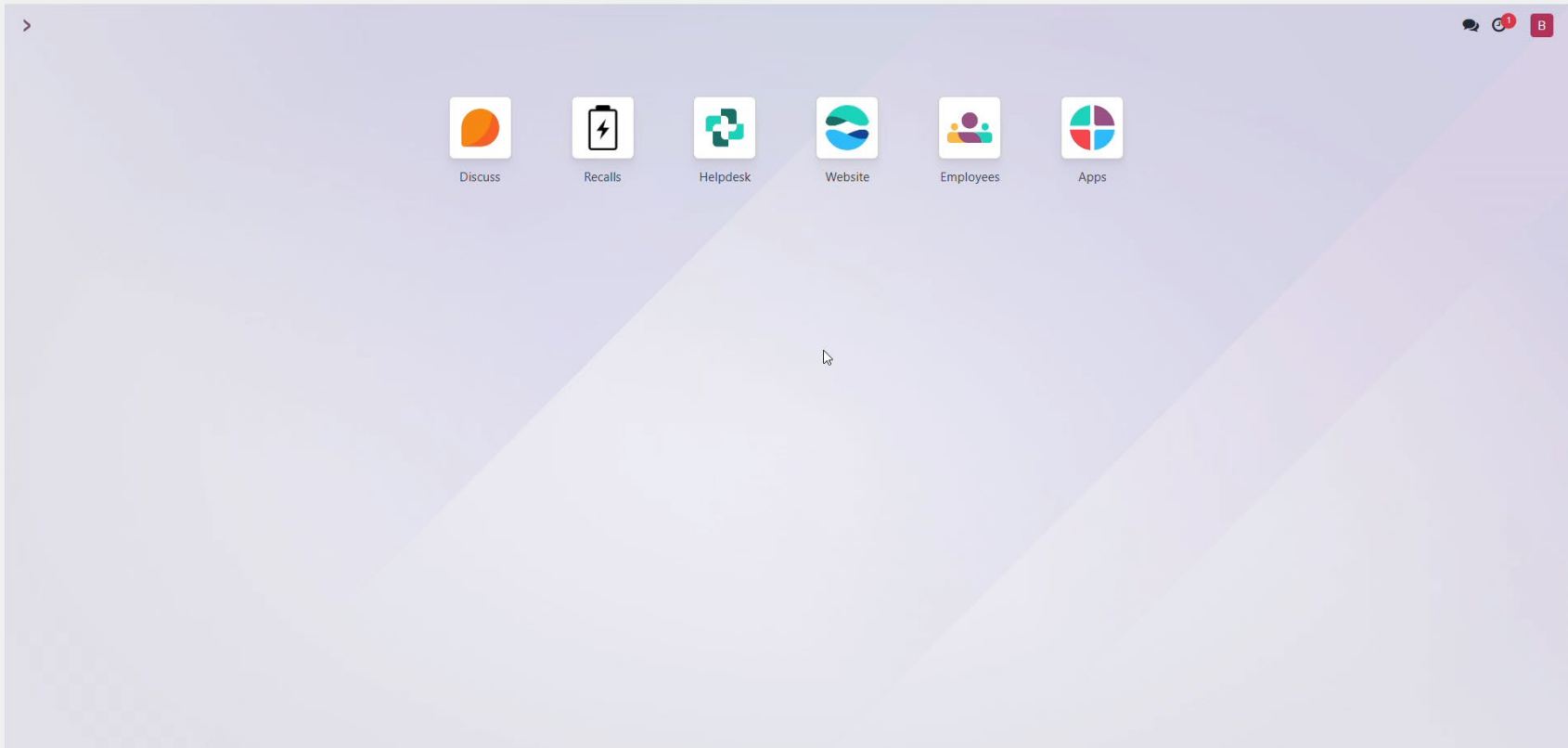
Customer Card

Individual or Company

- **First Name & Last Name:** Primary contact's full name.
- **Company Name:** For business clients, capturing the organization's name.
- **Address Details:** Street, Street 2, City, State, ZIP, Country for complete address.
- **Phone:** The primary contact number, matching the Ring Central format.
- **Mobile:** Secondary contact number.
- **Email:** Essential for digital correspondence.
- **Tags:** Managed by the data team for categorizing customers, aiding segmentation and analysis.

Minimum (including non-affected)

- Individual or Company
- Name
- Postcode
- Contact information (phone/email)

Affected Customers

- Full Address

○ Individual ○ Company

First name |

Last name

Company Name...

Contact   Street...   Phone
           Street 2...   Mobile
           City   State   ZIP Email
           Country   Tags   e.g. "B2B", "VIP", "Consulting", ...

Put phone or mobile number in exactly how it is shown in ring central

Company Card

Individual or Company
- **Company Name:** For business clients, capturing the organization's name.
- **Employee's Name:** Primary contact's full name.
- **Address Details:** Street, Street 2, City, State, ZIP, Country for complete address.
- **Phone:** The primary contact number, matching the Ring Central format.
- **Mobile:** Secondary contact number.
- **Email:** Essential for digital correspondence.
- **Tags:** Managed by the data team for categorizing customers, aiding segmentation and analysis.
- **Agreed to perform rectification works:** dropdown yes or no

Minimum

- Individual or Company

- Company Name

- Postcode

- Contact information (phone/email)

Creating a Tracing Screen

- On the customer card, scroll down to Tracing Screens and click on "Add a line".

- If there is already a tracing screen it will show in the table or it will have a number at the top button called "Tracing".

Tracing Screens	Installer	Supplier	Site Address	Lead Source	Stage	Phone	
Add a line							

New ··· / Partner Tracing / GIS Letter - Bevan   ⭐ Tracing 1   🗄 Battery 0   ◎ Helpdesk 0   1 / 1 ‹ ›
Bevan ⚙

Tracing Screens	Installer	Supplier	Site Address	Lead Source	Stage	Phone	
GIS Letter - Bevan				LG GIS Letter	No Further Action	0416 249 455	🗑
Add a line							

Tracing Screens

There are 6 different sections inside of the Tracing Screen.

- Customer Information

- Tracing Information

- Setup

- Investigation Checklist

- DSW Update Offer

- Marketing Information

Customer Information

Name or INSTALLER - Name

CUSTOMER INFORMATION

IMPORTANT INFORMATION ?

Customer ?   Create and link a customer. Check for duplicates first

Customer Phone ?

Customer Email ?

Customer Address ?

Battery at Customer Address? ?   ◯ Yes ◯ No

Battery Site Address ?   Address where the battery is located.

Preferred Contact Method ?   No Preference

Preferred Contact Person ?

Installer ?   Ask who installed the battery

Rectification Work Conducted By ?   ◯ Installer Job ◯ SSG Job

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Screen Name: Customer's name or INSTALLER than name

Important Information: Do Not Contact, Battery on Boat, Does Not Speak English

Customer: Pulled from Customer Card

Customer Phone: Pulled from Customer Card

Customer Email: Pulled from Customer Card

Customer Address: Pulled from Customer Card

Battery at Customer Address?: Yes or No

Battery Site Address: Create Address Card

Preferred Contact Method: Email, Phone, SMS, Letter, Do Not Contact

Preferred Contact Person: Search and Link or Create Customer Card

Preferred Contact Relationship: Tenant, Real Estate Agent, Child, Neighbour, Caregiver

Installer: Search and Link or Create Customer Card

Supplier: Search and Link or Create Customer Card

Rectification Work Conducted By: Installer Job or SSG Job

MINIMUM
- Screen Name
- Customer
- Battery at Customer Address?

Tracing Information

Assigned To: Call Ops Name

Response Required: Yes or No

Tracing Source: Consumer Email, Consumer Inbound Call, Consumer Letter, Consumer SMS – There are other options but please only choose from the above 4 (do not edit if already assigned)

Calls Attempted: Manually change after each call while tracing

Emails Sent: Manually change after each email while tracing

SMS Sent: Manually change after each SMS while tracing

Letters Sent: Manually changed after each letter sent while tracing

Send Tracing Letter and/or SMS: Tick box when a letter is required to be sent

MINIMUM
- Assigned To
- Response Required
- Tracing Source

TRACING INFORMATION

Assigned To

Response Required   ☐

Tracing Source ?

Calls Attempted   0

Emails Sent   0

Sms Sent   0

Letters Sent   0

Send Tracing Letter and/or SMS ?   ☐

Setup Information

SETUP

Cabinet Type

Inverter Make   e.g. SolarEdge

New Inverter Model

Inverter Online?   ○ Yes ○ No ○ Unsure

System   ○ On-Grid ○ Off-Grid

Med Devices On-Site?   ☐

Fire Risk Area?   ☐

Battery Isolated?   ☐

Battery Isolation Date   Date the customer isolate the battery

MINIMUM
- Cabinet Type
- Battery Isolated?

Cabinet Type: Dropdown - RESU, SolaX, Opal Storage

Inverter Make: Dropdown - SolarEdge, SolaX, GoodWe

Inverter Model: SE500, SK-SU5000E, SH5K, SI 6.0H

Inverter Online?: Yes, No or Unsure

System: On-Grid or Off-Grid

Med Devises On Site?: Yes or No

Fire Risk Area: Yes or No

Customer Aware of Isolation Required: Yes or No

Pre-Rectification Isolation: Yes, No or Techs

Battery Isolation Date: Date provided by customer

Job Proceeding Issues: What notes does Scheduling, or the technicians need?

Investigation Checklist

Investigation Start Date:

Property/Real Estate Page: Tick box when done

White Pages: Tick box when done

Deceased Estate: Tick box when done

Open-Source Search: Tick box when done

Social Media: Tick box when done

LinkedIn: Tick box when done

Investigation Finish Date:

INVESTIGATION CHECKLIST

Investigation Start Date

Property/Real Estate Page	☐
White Pages	☐
Deceased Estate	☐
Open-Source Search	☐
Social Media	☐
LinkedIn	☐

Investigation Finish Date

Investigator's ONLY

DSW Update Offer

DSW UPDATE OFFER

Customer Aware of Additional Switch Off ☐

Interim DSW Switch-Off Date - Line One

Customer Sent DSW Offer ☑

DSW Offer ○ DSW ○ Replacement ● Neither

Customer asked for Refund ☐

Only for DSW customers

Customer Aware of Additional Switch Off: Yes or No

Interim DSW Switch-Off Date: Date provided by customer

Customer Sent DSW Offer: Yes or No

DSW Offer: Option the customer chose

Customer asked for Refund: Yes or No

Marketing Information

How Did You Hear About the Recall?: Television, Radio, LG GIS Letter

Lead Source Found Date: The date the call centre found out

First Contact Method: Letter, Inbound Call, Outbound Call, Email

MARKETING INFORMATION

Where Did You Hear About The Recall? — ASK EVERY TIME

Lead Source Found Date ? — Date the call centre find out

First Contact Method

MINIMUM
- ALL

If the information comes through the website ensure that the lead source found date is the website submission date

Log Notes and Activities

This is one of Odoo's most powerful tools. Here is where you can leave all of your note and leave "To Do's", this will either be on the right of the tracing screen or underneath, depending on the size of your screen. This will also keep a record of all changes that have occurred on the page and all emails sent to customer. Please also leave call notes.

Scheduling Activities

There are several options when it comes to scheduling activities, there are several preset activity types with different due dates. Management or TL's will usually set the High Priority. When creating activities please leave enough information that if you are away that someone else can pick up where you left off. You can find all of your activities can be found by clicking on the clock in the top right corner of your Odoo screen.
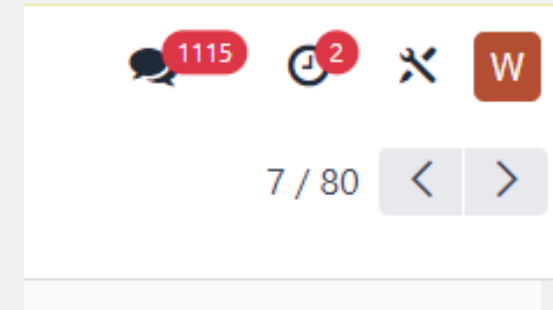
Communication Log

- It is a requirement through the EU to track all of our communications inbound and outbound. We have an incredible tool called Communication Log where you can leave a quick note in just 7 clicks!

- Enquiry Date: Prefilled to today's date

- Direction: Inbound or Outbound

- Method: Call, Email, SMS, Social Media or Letter

- Enquiry Type: Compensation, Refund, Complaints/Escalation, Scheduling, Simple Q&A, RMA, Other

Battery Recall Information	Communication Log		
Enquir...	Direction	Method	Enquiry Type
Add a line			

Battery Recall Information	Communication Log		
Enquiry Date	Direction	Method	Enquiry Type
28/10/2024	Inbound	Call	Simple Q&A

Battery Recall Information

Battery Recall Information	Communication Log				

Serial Number		Job Type	Identified Date	Recall Type	ACCC Status
R15563P3SSEG12007071165	🔋	Job Not Required	26/03/2024	Not Affected	EXCLUDE

Add a line

Serial Number

- There are 4 expectable serial numbers
    1. Starting with R or E, between 22-26 digits longs
    2. OBSTRUCTED SN
    3. NO BATTERY
    4. NON LG BATTERY

- The Serial Number will directly tie into the cabinet type.
    1. NO BATTERY = Not Affected by Recall
    2. NON LG BATTERY = Not Affected by Recall
    3. OBSTRUCTED SN = RESU
    4. Starting with R or E, between 22-26 digits longs = RESU unless it starts with EM0

EMO = emo

Job Types

- **Site Visit – Check SN:** Site visit required to confirm serial number.

- **Site Visit – Isolate:** Isolation of the battery at the site.

- **Replace:** Replacement of the affected battery.

- **DSW Update:** Update specific to DSW cases.

- **Remove for Refund:** Removal process for cases eligible for refunds.

- **Job Not Required:** No further action necessary for this case.

- **To be Raised:** Data Team ONLY

- **Job Raised:** Data Team ONLY

- **Remediation Completed:** The battery recall remediation has been completed.

- **Old Homeowner:** Case associated with a prior property owner, requiring special handling.

Identified Date

- Is required for all Job Types besides Site Visit – Check SN

- Date we have confirmed contact with customer and confirmed SN

- This date is used for ACCC reporting and subsequent actions in the recall process.

Battery Recall Information	Communication Log				
Serial Number		**Job Type**	**Identified Date**	**Recall Type**	**ACCC Status**
R15563P3SSEG12007071165	🔋	Job Not Required	26/03/2024	Not Affected	EXCLUDE
Add a line					

Recall Type and ACCC Status

- These automatically refill once the serial number has been linked to the Battery Screen. This is done when you double click the battery icon.

- Only for serial numbers starting with R, E or S (newer models), between 22-26 digits longs

Battery Recall Information	Communication Log				
Serial Number		**Job Type**	**Identified Date**	**Recall Type**	**ACCC Status**
R15563P3SSEG12007071165	🔋	Job Not Required	26/03/2024	Not Affected	EXCLUDE
Add a line					