



# **ICE Business System**

## **Fixed Line - Connection History**

(Version – v2.0)

## **Learning Unit Guide**

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## I : Introduction

This Learning Unit Guide is reference-based, in that most of the information for the tasks can be found in the **Signature Learning Centre**.

This guide is designed as a workbook to be used during facilitator led learning. It includes instructional materials, descriptions of business processes and details of demonstrations to be undertaken by the facilitator.

There are references to **menu paths** for accessing the functions within **ICE** application and **SLC References** for locating additional information in the **Signature Learning Centre**.

## II : Objectives

To demonstrate steps required to view details of existing fixed line connections in the ICE Fixed Connections module.

## III : Target Audience

Sales and Administration staff requiring review of existing Fixed Connections.

## IV : Prerequisites

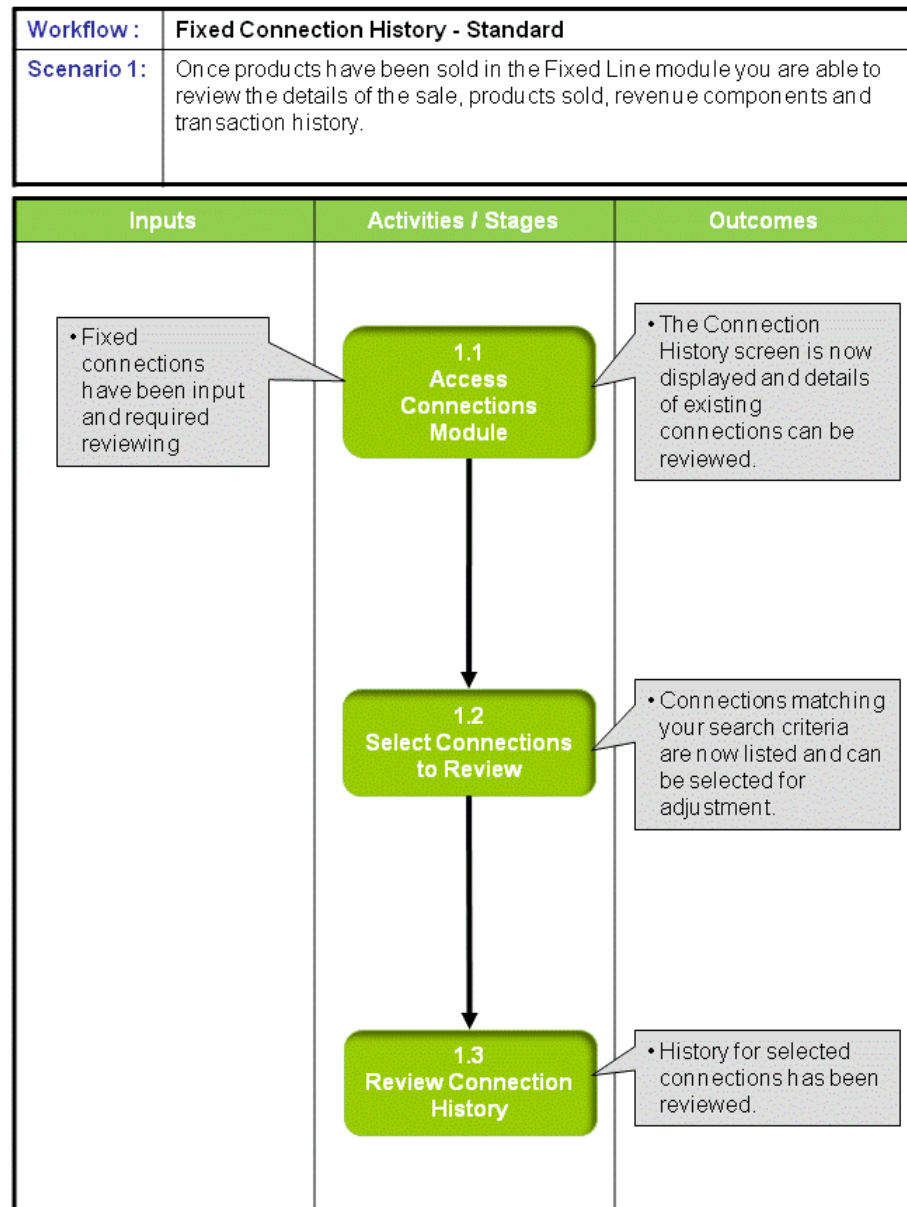
- Fixed Connections Processing Activities

## V : Scenarios

### V.1 : Fixed Connection History - Standard



#### Workflow



**Scenario 1: Fixed Connection History - Standard**

Once products have been sold in the Fixed Line module you are able to review the details of the sale, products sold, revenue components and transaction history.

**1.1: Access Connections Module****Objectives:**

- Log in to Fixed Connections module to review Fixed Line Connection History.

**SLC Reference:**

- N/A

**Work Instructions****Screen: ICE Main**

1. Access **Fixed Connections**.

Select menu path:

**Operations > Connections > Fixed Connections**

or

The **Fixed Connections** icon.

**Screen: Enter Access Code**

2. Enter your **Access Code** and press **OK**.

**Screen: Select Branch**

3. Select the appropriate Branch from the drop-down menu.
4. Press **OK**.

**Note:**

*If your system has only one Branch set up you will not be required to select a Branch.*

**Screen: Connections Main**

5. Click the **Connection History** icon on the left of screen.

**Outcomes:**

- The Connection History screen is now displayed and details of existing connections can be reviewed.

**Notes:**

- Access to areas within the Fixed Connection module is dependent on user security setup. See your system administrator if additional access is required.



## 1.2: Select Connections to Review

### Objectives:

- To select existing fixed line connections in order to review them.

### SLC Reference:

- N/A

### Work Instructions

#### Screen: Connection History Main

- Search for the connection you wish to review by using one or more of the following filters:
  - Customer Trading Name:** Type in part of a Customer's name to view connections for that Customer, or search for a specific Customer by:
    - Clicking the button labeled **Find**.
    - In the **Customer Search** screen, type the Customer's individual or trading name in to the box labeled **Trading Name**.
    - Select the desired Customer from the list presented and click **OK**.
  - Service Number:** Search for a particular phone number.
  - Premise Code:** Select a specific Premise Code to search on.
  - Sold Product Status:** Show any services that are marked with a particular status, i.e.: Pending, Acknowledged, Cancelled etc.
  - Sales Person:** Will show connections by a specific staff member.
- Select a range of dates that the desired service was connected within, **or** tick the box labeled **All** to include all connection dates in your search.

### Outcomes:

- Connections matching your search criteria are now listed and can be selected for adjustment.

### Notes:

- N/A



### 1.3: Review Connection History

#### Objectives:

- To review the history of a selected connection.

#### SLC Reference:

- N/A

#### Work Instructions

##### Screen: Connection History Main

- Click the checkbox next to the service that you wish to review.
- On the left hand side of the screen, click the type of history you wish to view:
  - Sales Job Details** displays the sales job number, Customer name and connection date for the selected connection.
  - Connection Details** displays details of the actual products connected.
  - Revenue Components** displays remuneration information for the selected connection.
  - Transaction History** displays the financial transactions associated with the sale and payment of the selected connection.
  - POS History** is not used in the Fixed Line Module.
  - Edit Non-Financial Details** can be used to change the service number or Customer attached to a sold product.
- Details for the selected connection will be displayed in a pop-up window. Information can also be reviewed on the main screen by scrolling left to right.
- When you have reviewed the history of the selected connection, click the **Close** button.

#### Outcomes:

- History for selected connections has been reviewed.

#### Notes:

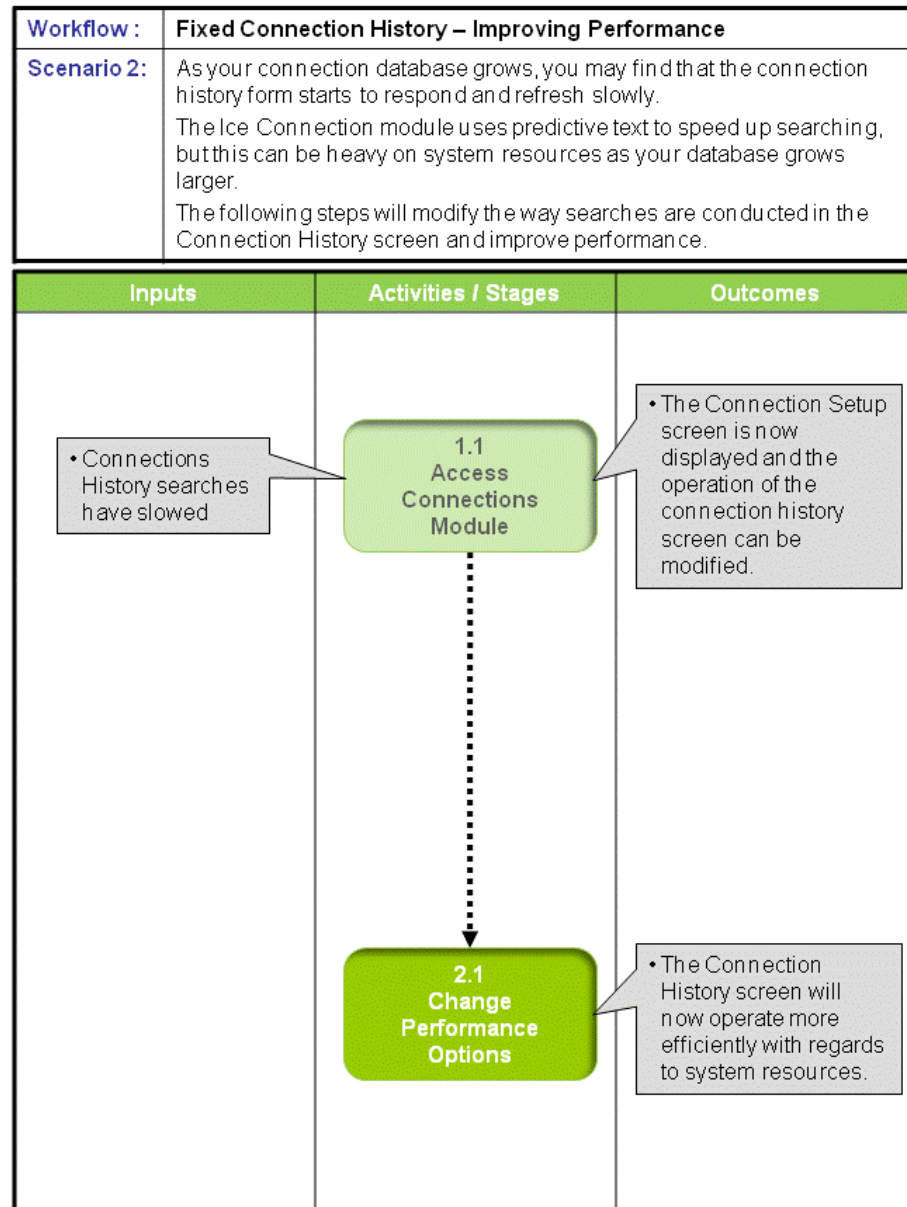
- N/A



## V.2 : Fixed Connection History – Improving Performance



### Workflow



## Scenario 2: Improving the Performance of the Connection History Form.

As your connection database grows, you may find that the connection history form starts to respond and refresh slowly.

The Ice Connection module uses predictive text to speed up searching, but this can be heavy on system resources as your database grows larger.

The following steps will modify the way searches are conducted in the Connection History screen and improve performance.



### 1.1: Access Connections Module

#### Objectives:

- Log in to Fixed Connections module to review Fixed Line Connection History.

#### SLC Reference:

- ICE Business Systems > Fixed Connections > Setup Activities > Setup.

#### Work Instructions

#### Screen: ICE Main

1. Complete Scenario "Fixed Connection History – Standard" Stage 1.1.

#### Outcomes:

- The Connection Setup screen is now displayed and the operation of the connection history screen can be modified.

#### Notes:

- Access to areas within the Fixed Connection module is dependent on user security setup. See your system administrator if additional access is required.



### 2.1: Change Performance Options

#### Objectives:

- To change the operation options relating to the Connection History Screen.

#### SLC Reference:

- ICE Business Systems > Fixed Connections > Setup Activities > Setup.



### Work Instructions

#### Screen: Connection Setup Main

1. On the left hand side of the screen, click the **History** icon.
2. Untick the box labeled **Enable Predictive Search**. This will mean that rather than filtering progressively as you type search criteria, you will need to enter your search criteria and then press the button labeled **Search** on the connection history screen.
3. Untick the box labeled **Allow Selection of All Dates**. This will require users to enter a specific date range rather than see all dates in the system, and will ease the burden on system resources.
4. Change the **Default Date Range** to a smaller number of days. This will require the system to display less connection data when you first enter the History screen, and therefore place less of a burden on system resource.
5. Click the button labeled **Accept All Changes**.
6. Click the **Close** button.



#### Outcomes:

- *The Connection History screen will now operate more efficiently with regards to system resources.*

#### Notes:

- N/A