Call Center Panel

CallCenterXpnl.dnax
Extension ID: 55796d8c-f51e-4eb3-b447-0c6bd33a0659

Overview:
The Call Center Xpnl is a simple slide out screen which allows users to view, create, and inactivate notes pertaining to Call Center activity. The sub classes of Call Center notes may be customized to fit any hierarchy or criteria, and allow the user to easily record the purpose of a call in real-time. The Note class and subclasses are maintained through the existing Core DNA screens.

Key Benefits:
- Allows users to find and attach Call Center specific notes to persons and organizations
- Consolidates all notes for the entity which are created using the call center note type for easy reference and management
- Provides a single panel that slides out to allow the user to create notes without obstructing important account or member information on the screen
- Offers a convenient history of previous call center contact which allows longstanding or persisting issues to be addressed

Processing:
Call Center Xpnl contains:
- A single slide-out panel that is used to
  - View Call Center notes
  - Create Call Center notes
  - Inactivate Call Center notes

This panel may be accessed from three DNA screens:
- Person/Member
- Organization
- Relationship Profile

When the Call Center panel is opened all existing and active Call Center notes are displayed. Those notes may then be inactivated, or new notes may be created.

When creating a new note, select the desired 'Reason for Call' from the dropdown menu. Each value in the drop-down menu corresponds to a Note SubClass. This value will become the text of the note. After a reason has been selected click the Save button to create a new note which uses:
- The 'Reason for Call' text
- The name of the user currently logged into the DNA session
- The date/time stamp from when the Save button is clicked

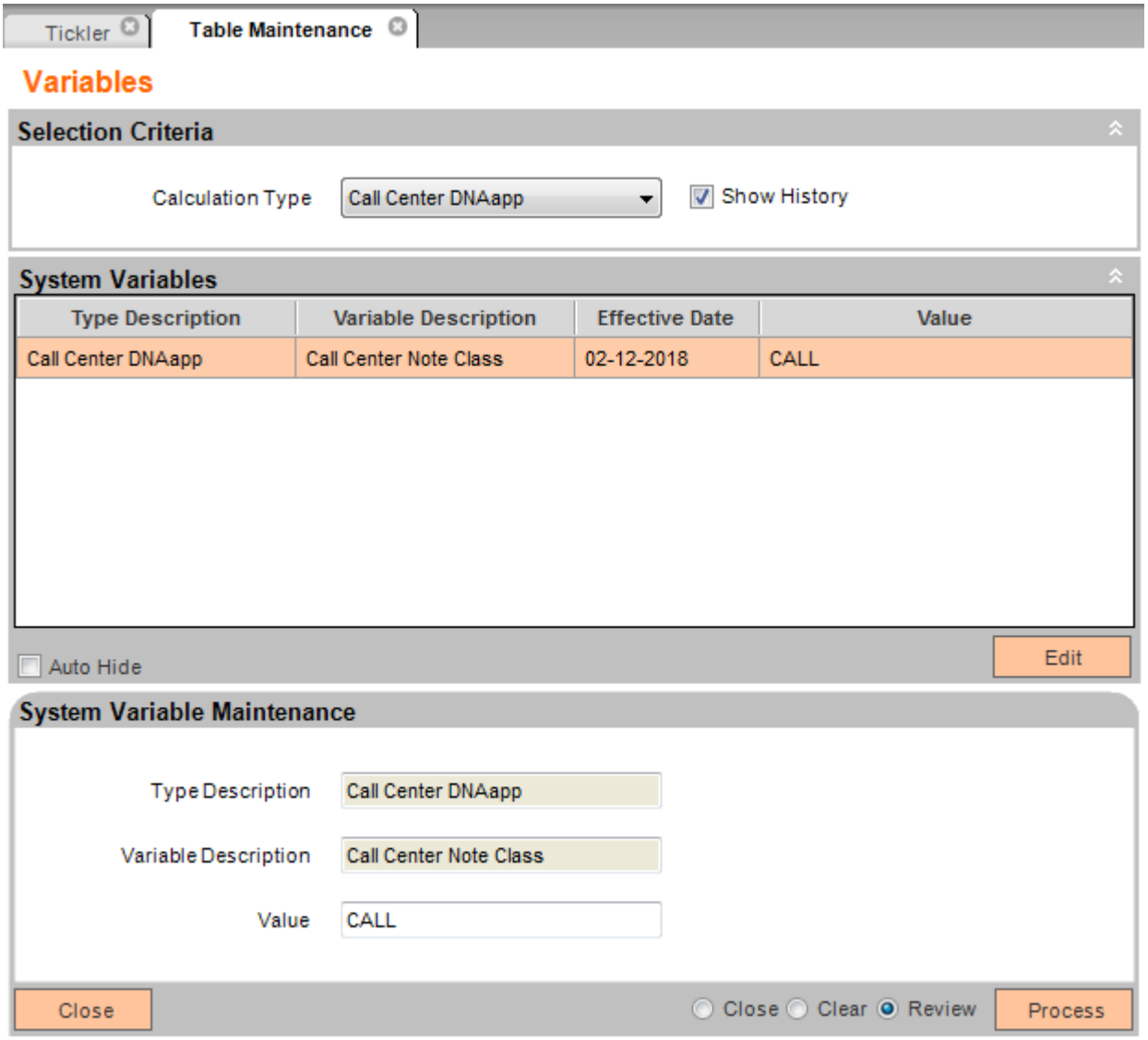
The new Call Center note is then added to the list of active notes in the grid on the panel.

When inactivating an existing Call Center note first select the desired note from the grid on the slide-out panel. Then click the Inactivate button, and the note will be removed from the list of active notes.

It is important to note that the permissions given to each user will determine whether a user may create new notes or inactivate existing ones. The panel may be opened, and the active notes viewed by users with note inquiry permissions, but not all users will have permission to maintain the notes.

Variables:
These calculation variables are created in the Calculation Type Call Center DNAapp in the Inst Processing calculation category.

Variable	Code	Description (how used)	Data Type	Default
Call Center Note Class	CCTR	Denotes what Note Class Code will be used for the Call Center Note Class; All Call Center Note SubClasses will be attached to this code.	VC	'CALL'



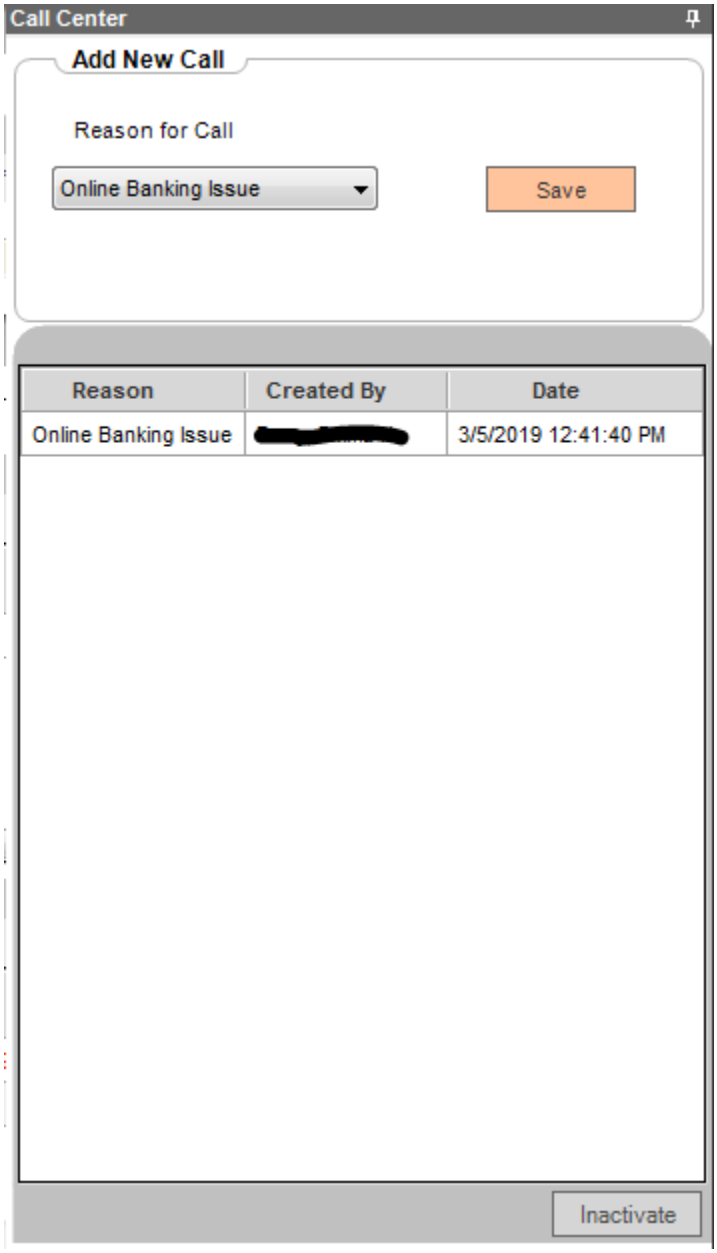
Screens:

Call Center:

Navigation:

Relationship Module:
Relationships > Maintenance > Person/Member
Relationships > Maintenance > Organization
Relationships > Quick Inquires > Relationship Profile

Screen Appearance:



Field Listing:

Field	Description
Fields	
Reason for Call	Drop-down containing a list of all available Call Center Note SubClasses which may be used in creating Call Center Notes
Save	Creates a new note using the currently selected Reason for Call value as the Reason value, the name of the user currently logged into the DNA session as the Created By value, and the current date/time stamp as the Date value

Reason	The note subclass description from the drop-down
Created By	The name of the person who created the note
Date	The date and time at which the note was created
Inactivate	Sets the inactive date for the current selected note to the current date/time stamp, and removes the note from the table

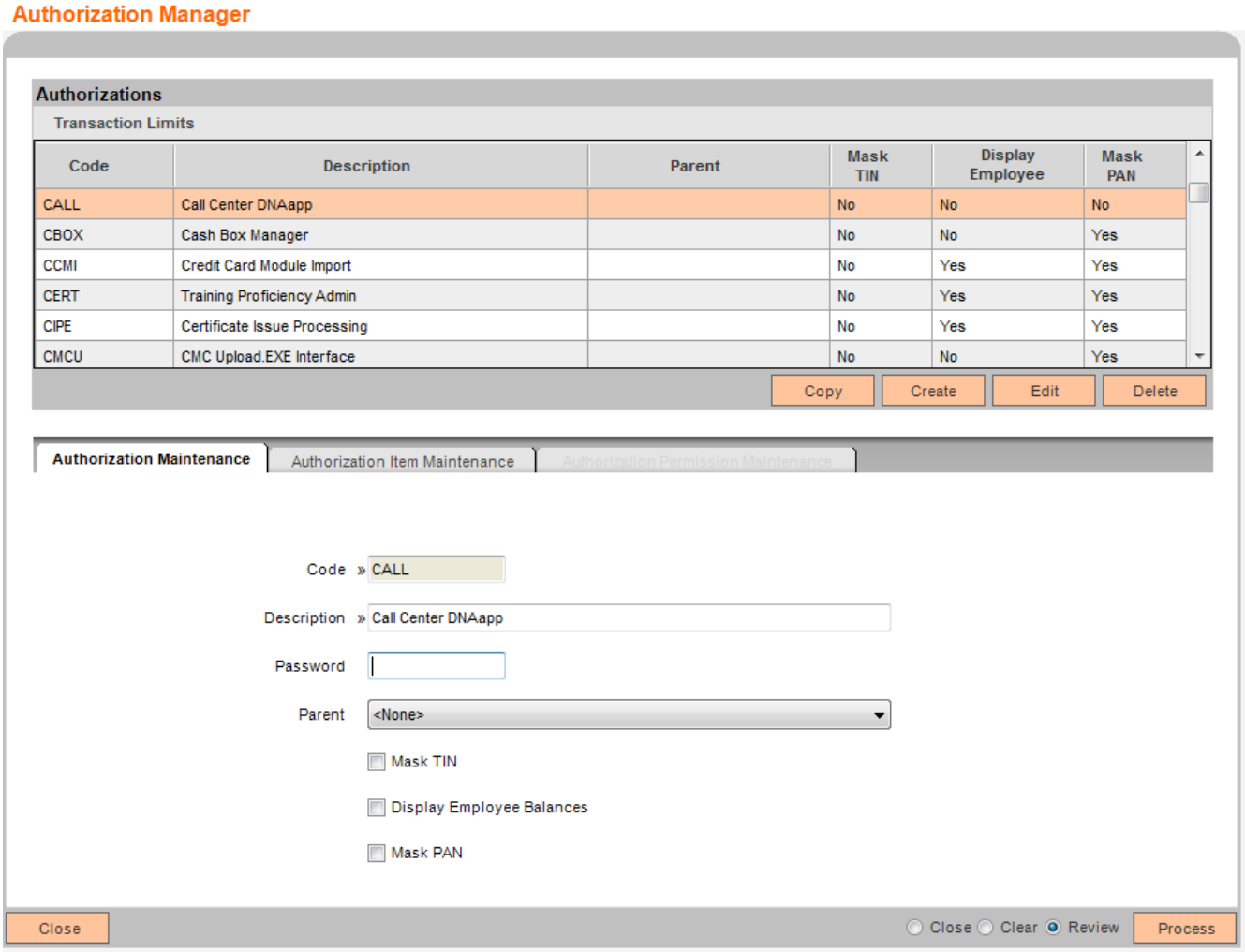
Additional Requirements:
DNA™ 4.2.1 or above
.NET Framework 4.5.2 (minimum)
CoreAPI 2.1.0.5

Authorizations:
Users may choose to either add all required AuthItems to their existing AuthCodes as needed, or to create a new AuthCode containing all three AuthItems. The new AuthCode or the individual AuthItems must be added to users who require full access to the panel. The following example creates an AuthCode with all three AuthItems.

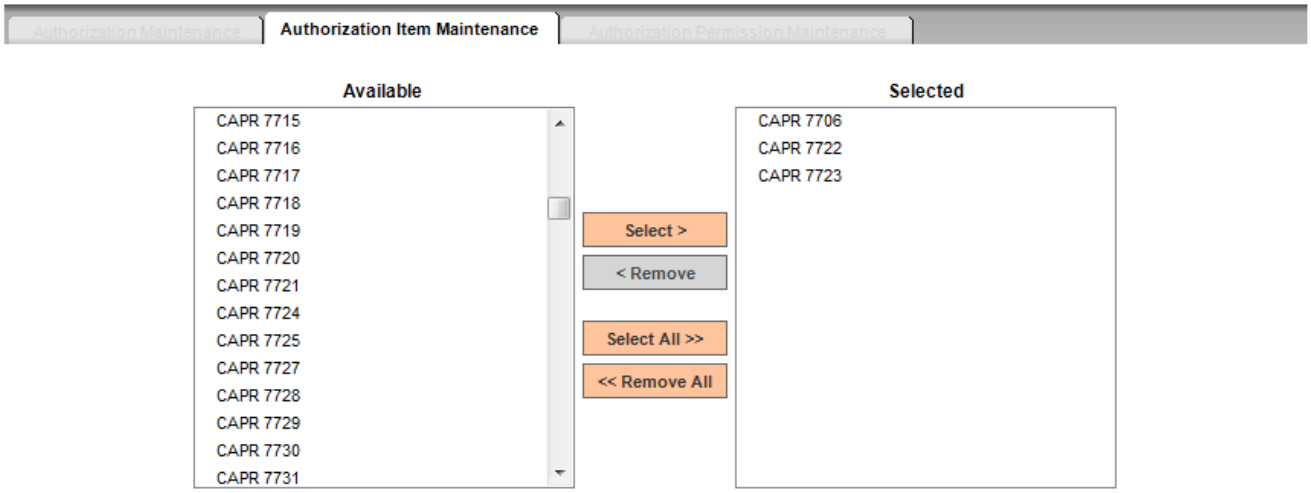
Required AuthItems:

- CAPR 7706
- CAPR 7722
- CAPR 7723

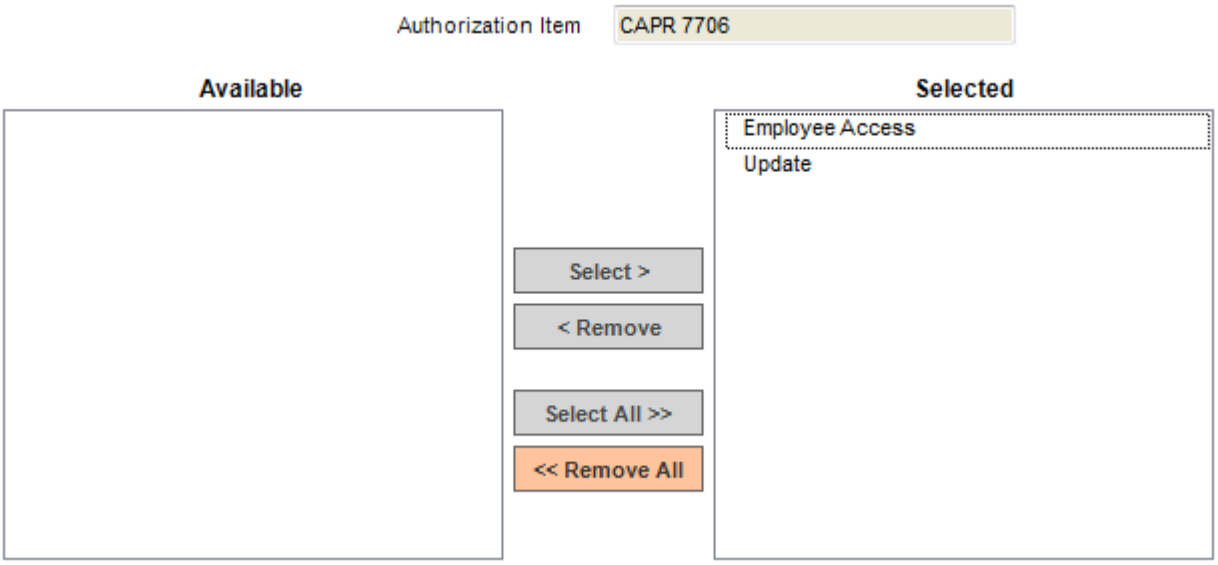
The example AuthCode will be ‘CALL’.



Add the AuthItems



Ensure all auth item permissions are attached to each auth item. The below example shows auth item CAPR 7706



Troubleshooting:

I can open the panel, but the 'Reason for Call' drop-down does not populate.

> Ensure that Note Subclasses exist, and that they are attached to whatever code the Financial Institution has set for the Call Center Note Class variable. This guide uses the default code 'CALL', but the institution may change this variable value.

I can open the panel, but notes do not display/the save button does not save new notes/the inactivate button does not remove old notes.

> Ensure that the user attempting to use the panel has all three CAPR Auth Items listed in the Authorizations section. A user missing any one of the Auth Items will be unable to view notes, update notes, or create notes depending on which item is missing.

Configuration Checklist:

Item	Test Environment	Production Environment
Authorizations		
Variables		

Revisions

Date	App Version #	Change
04/2019	1.0.0.0	Application Created