Enquiries

The PCB X3 Enquiries Module is what is commonly known as a Client/Customer Relationship Management (CRM) module.

One of the key purposes of the PCB X3 Enquiries Module is to capture and record a client's initial request to provide a quote or do a job or project. It does this in a structured workflow oriented way right through the quoting stages and on to the job or project.

The module provides a graphical interface that displays the different workflow stages a client request is in at any point in time.

A further part of the PCB X3 Enquiries Module are the Client Register and Site Register. Both provide a comprehensive overview on and access to a client's associated items such as a client's sites, initial requests, quotes and jobs and projects and more.

At the heart of the Enquiries Module are the client and the relationships to sites. The following is an overview of the in-built database structure and enforced data relationships.

- A Client can have many Sites
- A Site can have many Client Requests, Quotes and Jobs or Projects
- A Quote requires a Client Request
- A Job or Project requires a Quote

Although occasionally a client may want to proceed to a job without a quote, PCB X3 still produces a quote "on the fly". These types of quotes are referred to Auto-Quotes.

The advantage of the above data structure is that it is always possible to "drill" down from a job to the underlying quote and further to the initial call/client request.

The Key Enquiries Modules:

1. Client Request Module
2. Client Module
3. Site Module
4. Vendor Module

Additional items found in the Enquiries Module:

- HR Register (see Admin Overview)
- Quote Register (see Quote Overview)
- Service Job Register (see Service Overview)
- Project Register (see Projects Overview)

The above registers are described in their respective Module Overviews.

The PCB X3 Enquiries Module Overview starts with the Client Request Module.

Client Request Module

The PCB X3 Client Request Module consists of the following:

- New Client Request Wizard
- Client Request Details
- Client Request Register

New Client Request Wizard

The PCB X3 New Client Request Wizard provides an easy and fast way to capture the initial client request from an existing or new client. The wizard guides the user through the following steps:

1. Select an existing client from a list or
2. Enter the details of a new client – this incudes recording all relevant client information as well as the client contact information
3. Select an existing client site or
4. Enter the details of a new site – this includes recording all relevant site information as well as the site contact details if applicable
5. Confirm all details and create the Client Request

Key Features of the New Client Request Wizard

- Data-entry conventions are enforced via predefined input masks in order to provide a consistent data set.
- Drop-down menus are provided where possible to prevent spelling mistakes and to provide consistent data values
- Forward and backward stepping allows the user to review data entered

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Client Request Detail

The PCB X3 Client Request Detail is made up of three distinct areas that mark the beginning of a structured workflow process.

Only the first section needs completing initially. The workflow processes are:

1. **New Client Request** – this section records the client contact date, the contact name, how and by whom the request was received and the request details
2. **Request Allocation** – this section is to record the date and to whom the request was allocated – ie a service person
3. **Request Assessment** – this section records the date and who did the initial assessment. Notes and time spent on site can be captured as well as any meetings with a site contact

Once the first section is filled in and saved, the request is in the "system". This means it is clearly visible to anyone that a request has arrived and that it needs allocating and assessing.

At this stage, the user is required to decide how to proceed with the initial client request.

Proceeding with the initial Client Request – the options:

1. **One-off Service Call - without Quote**. This option is used if the job was done already or is done shortly and you want to immediately invoice the client without going through the costing and quote approval stages
2. **One-off Service Call - including Quote.** This option is for one-off service, maintenance, emergency or warranty type of jobs that require an initial costing and quote approval
3. **Recurring Service Call - including Quote.** This option is for periodic maintenance or service jobs where an initial costing and quote approval is required
4. **Project - including Quote.** This option is for one-off projects that require an initial costing and quote approval

A client request can also be put on-hold or flagged "no further action".

Key features of the Client Request Details

- Select a request description from a list of previously entered requests
- Fast track a request from section one to invoicing
- Easy access to client and site details
- Easy access to the site history and external site folder
- Fast data-entry for a succession of different requests for the same client
- Workflow status indicator that lets user proceed to the quote status only if all stages of the workflow were completed
- Associate/link client request to an in-house marketing campaign
- Add a user task for the selected client request or view the task list

Client Request Register

The Client Request Register provides a clear overview of all requests logged and the different workflow stages they are in. The register allows searching for request and provides easy access to all client and site related items.

The Key features of the Client Request Register:

- Provides three different views for each workflow stage
- Easy access to client and site details incl their respective registers
- Easy access to the site history and external site folder
- Provides access to quote – if applicable
- Allows searching
- Provides access to the Request Analyser

Client Request Analyser

The Client Request Analyser provides a key performance indicator (KPI) tool that tracks client requests and their various workflow stages. The analyser provides a weekly, monthly and year-to-date and last year overview.

The analyser also calculates the monthly, weekly, daily and hourly averages and provides a forecast for the year.

End of Request Module

Client Module

The PCB X3 Client Module consists of the following items and each is described in more details below:

- Client Details
- Client Contacts
- Client History
- Client Register
- Client Manager

Client Details

The Client Details allows the capturing of key data elements such as name, address and phone numbers as well as Email and web-site address. It contains sales summary and aged balance summary with access to the underlying respective data.

Key Client Details Features:

- Set the Client entity type – Private, Company, Trust and many more
- Set the industry type – user definable
- Set a client rating flag – user definable
- Create new Email from within PCB X3
- Visit Web-site from within PCB X3
- Allocate/create unlimited number of client contacts
- Key system alerts for Client Contact Type: Principle, Site Contact Type: Principal and Client Credit Hold
- Access to each client contact's allocations – to requests, quotes and jobs or projects
- Sales summary and aged balance summary
- Access to sales invoice and payment history
- Add a user task for the selected client or view the client's task list

Client Contacts

A Client's Contacts can be accessed anywhere in PCB in order to provide instant access to phone numbers or sending an Email.

The data elements captured when creating a new client contact consist of title, position, contact type, address, Email & Web-site and phone numbers.

Key Client Contact Features:

- Create new Email from within PCB X3
- Visit Web-site from within PCB X3
- Contact Type "Principle" allows addressing quotes and sales invoices to the client contact. This becomes useful for example when an architect acts on behalf of a client. The architect can be set-up as the client contact and flagged as principle. All correspondence is addressed to the architect and the ultimate client simply receives a copy

Client History

The Client History consists of the sales invoices and payments history with drill down access to the underlying source documents.

The history also includes a monthly sales breakdown with drill down access to the sales invoices per month and further to the actual sales invoice.

Client Register

The PCB X3 Client Register provides a comprehensive Client overview and allows access to all related items such as client sites, requests, quotes and jobs or projects.

The register provides fast on-register search capabilities as well as advanced search options. Numerous clients can be shown and key fields can be sorted.

Key Client Register Features:

- Comprehensive overview of all items associated with a client
- Drill down access to all sites or directly into a site's details
- Drill down access to all requests or directly into a request's details
- Drill down access to all quotes or directly into a quote's details
- Drill down access to all jobs/projects or directly into a job/project's details
- Visit the client's Web-site from within PCB X3
- Add a user task for the selected client or view the client's task list
- Client Register can be accessed conveniently from the application's tool-bar
- Key system alerts for Client Contact Type: Principle, Site Contact Type: Principal and Client Credit Hold
- Retrieve Clients based on post-code distribution

Client Manager

The PCB X3 Client Manager allows batch-updating key client flags such as industry type, entity type and client ratings.

End of Client Module

Site Module

The PCB X3 Site Module complements and works similar to the Client Module. The module consists of the following items and each is described in more details below:

- Site Details
- Site Contacts
- Site History
- Site Register
- Site Location Rating
- Move Site Option

Site Details

The Site Details allows the capturing of key data elements such as site strata plan number (if applicable) site name, address and phone numbers as well as external folder path.

Key flags indicate the site/location rating, who the site is looked after (PCB X3 entity HR), who the client contact is and any previous client contacts that were responsible for the site.

The Site Details allows storing additional industry specific information that depend and become available once an entity is set-up in PCB X3. Industry specific details currently in place accommodate the building and IT industries.

Key Site Details Features:

- Set a site rating flag – user definable
- Access to external Site Folder
- Allocate/create unlimited number of site contacts
- Key system alerts for Site Contact Type: Principle, Recurring Site Jobs and Site Credit Hold
- Access to site history
- Add a user task for the selected client or view the client's task list

Site Contacts

A Site's Contacts can be accessed anywhere in PCB in order to provide instant access to phone numbers or sending an Email.

The data elements captured when creating a new site contact consist of title, position, contact type, address, Email & Web-site and phone numbers.

Key Site Contact Features:

- Create new Email from within PCB X3
- Visit Web-site from within PCB X3
- Contact Type "Principle" allows addressing quotes and sales invoices to the Site Contact – see Client Contact for more details. The Site Contact Principal ranks higher than a Client Contact Principal.

Site History

The PCB X3 Site History consists of summary record entries for each request, quote, job or project and sales invoice. It allows adding user notes and provides access to all underlying source documents.

Site Register

The PCB X3 Site Register provides a comprehensive Site overview and allows access to all related items such as requests, quotes and jobs or projects.

The register provides fast on-register search capabilities as well as advanced search options. Numerous sites can be shown and key fields can be sorted.

Key Site Register Features:

- Comprehensive overview of all items associated with a site
- Drill down access to all requests or directly into a request's details
- Drill down access to all quotes or directly into a quote's details
- Drill down access to all jobs/projects or directly into a job/project's details
- Access to the external Site Folded
- Add a user task for the selected site or view the site's task list
- Site Register can be accessed conveniently from the application's tool-bar
- Key system alerts for Site Contact Type: Principle, Recurring Site Jobs and Site Credit Hold
- Retrieve Sites based on post-code distribution

Site Location Rating

The Site Location Rating is part of the PCB X3 Rating Options that can be allocated to Clients, Sites and Quotes.

The Site Location Rating allows setting up simple code based entires (x, xx, xxx etc) that are then allocated to Sites and allow the user to filter or sort records by these codes. A user determined default rating is automatically allocated to new sites.

The Site Location Rating differs from the Client and Quote Ratings in that it features a more advanced option whereby it allows the allocation of the over 13,000 PCB X3's in-built post-codes to a Site Location Rating.

The number of post-codes that can be allocated to a Site Rating is unlimited.

The system detects if this advanced feature is implemented and automatically allocates a Site Location Rating for a new site depending on the post-code of the site.

Move Site Option

The PCB X3 Move Site Option is designed to move a site to a new client and preserve and disable the existing site. The option reflects and handles situations that occur for example in the strata management industry.

In this industry a strata manager from one day to the next will no longer manage a site. PCB X3 allows for this and preserves any transactions including out-standing sales invoices to stay with the original site and the user cannot allocate new transactions to the original site. PCB X3 allows transferring a site to a different registered PCB X3 entity.

End of Site Module

Vendor Module

The PCB X3 Vendor Module consists of the following items and each is described in more details below:

- Vendor Register
- Vendor Details
- Vendor Contacts
- Vendor Purchases Reconciliation
- Vendor Purchase and Payment History
- Vendor Analysis

Vendor Register

The PCB X3 Vendor Register provides on-register search functions as well as an Advanced Vendor Finder.

Key Features of the Vendor Register

- Two level Vendor Category hierarchy for organising Vendors
- Predefined Vendor search function includes Vendors with accounts, with transactions and many more
- Vendor name finder by speed buttons
- Add Vendor Category or sub-category
- Create new Vendor
- Visit the Vendor Web-site
- Write an Email to a Vendor

Additional Vendor Features

- Vendor can be flagged as "Super Fund" and accessed by the HR module
- Vendor can be flagged as "Subcontractor"
- Vendor can be flagged as "Tax Department" for automatic creditor ledger posting
- Vendor Register can be called from the application tool-bar
- Vendor contact information contains Email and Web-site addresses

Fast Access from Vendor Register to:

- Reconcile Purchase Invoices
- Purchase Invoice and Payment History
- Process new Payment
- View General Ledger Journals

The below listed Vendor items are not covered in this Overview:

- Vendor Details
- Vendor Contacts
- Vendor Purchases Reconciliation
- Vendor Purchase and Payment History
- Vendor Analysis