Customising AdvicePro for Energy Advice

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Customising AdvicePro

Overview

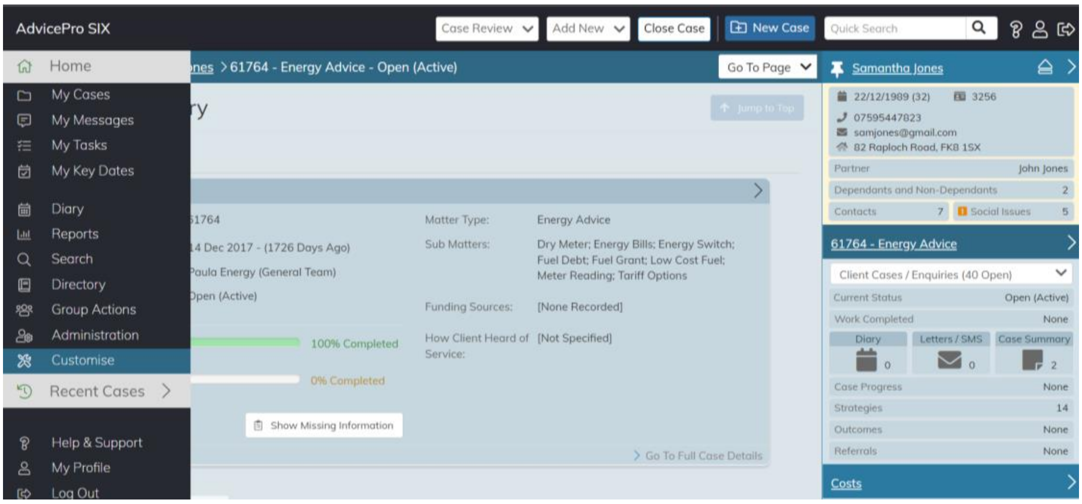
- AdvicePro is an extremely comprehensive case management system, which caters for the needs of agencies of different types, sizes and complexity.
- Customising AdvicePro to reflect the needs of Energy Advice provision and support allows you to report more accurately to the needs of the service.

ⓘ You can only customise AdvicePro if you have specific permissions. Hover your mouse over the black panel on the left-hand side of your screen and select **Customise**.

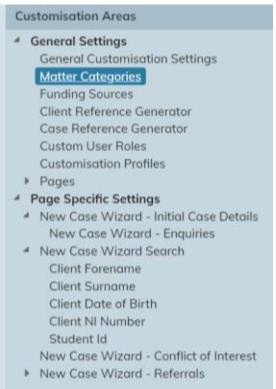
Different settings for different matter types, cases, teams or roles

You can modify the default agency profile, which applies your changes to the whole of AdvicePro. Alternatively, you can create additional configuration profiles, which enable different values and options to be available based on pre-set criteria this would be preferable if you are wanting the Energy Advice data to be different to the rest of the data.

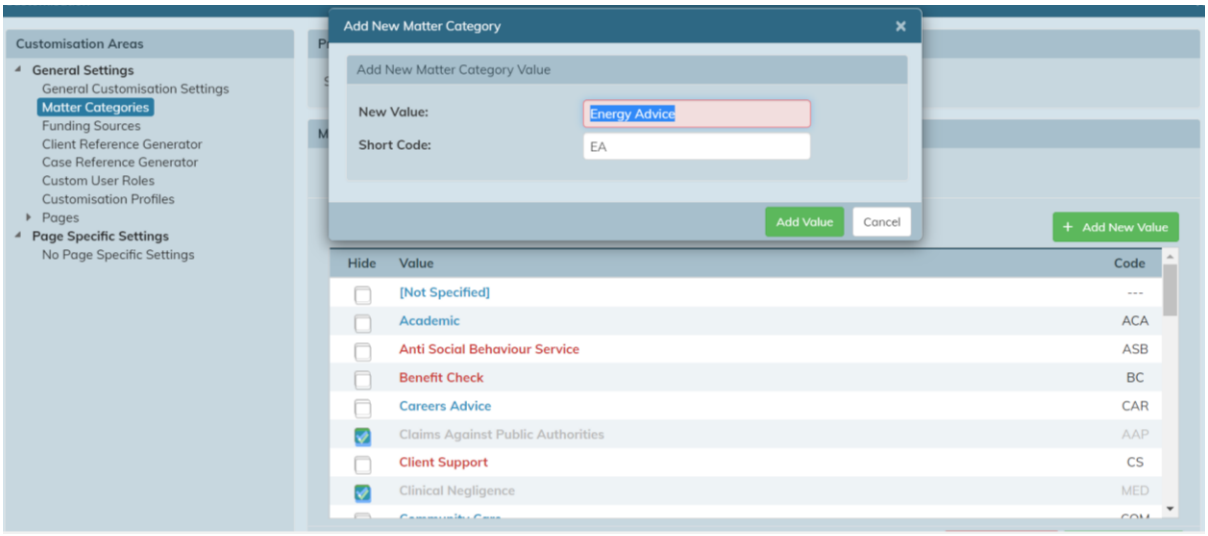
Let's get started by adding the Energy Advice Matter Category



*Over on the left-hand panel select Customise



*Select Matter Categories



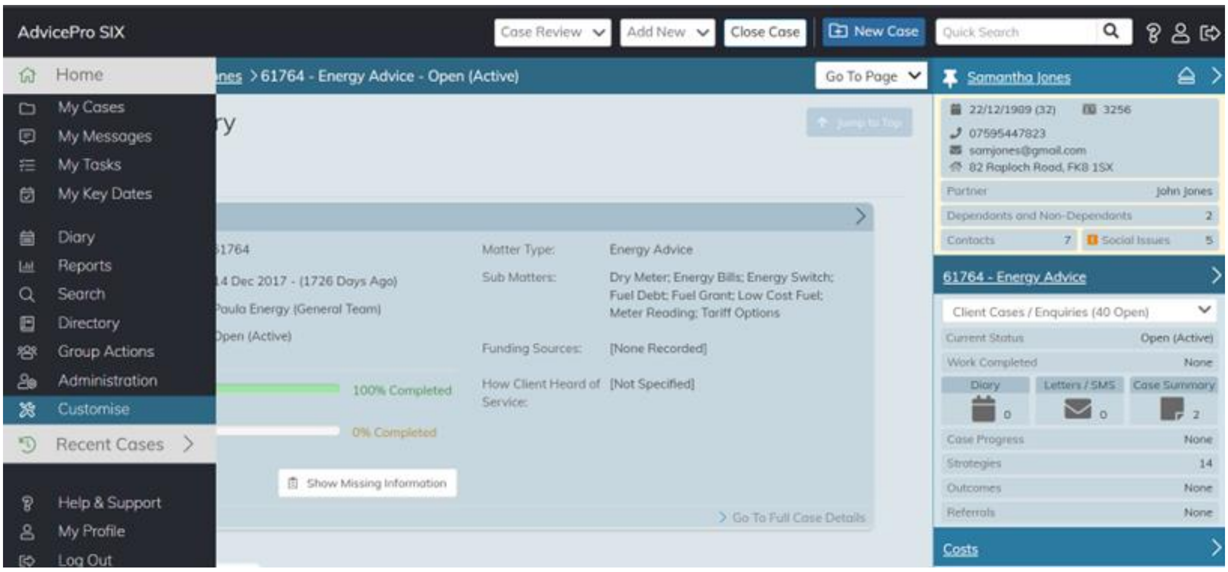
*Then Add New value ‘Energy Advice’/ Short Code ‘EA’/ Add Value and save changes

Once you have completed this the Matter Category for energy Advice will then be visible in your Matter Category drop down list, when adding a case.

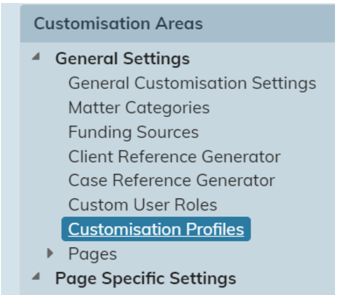
You cannot rename matter categories or funding sources. If you want to change the name of either of these: Create a new Matter Category or Funding Source with the name you want, or, hide the one you are replacing.

At this stage if all the information you are needing is the same as your other matter categories then you can proceed with customising the pages individually. However, if there are specific fields you require that you do not wish to have visible on the other Matters, such as Debt and Welfare Rights, then you will need to create a Profile.

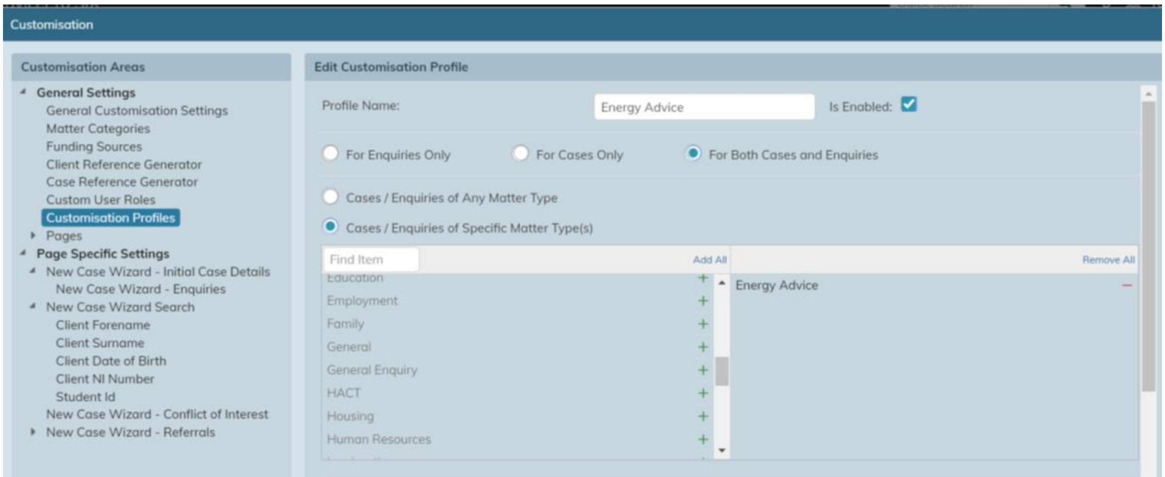
Adding a Profile



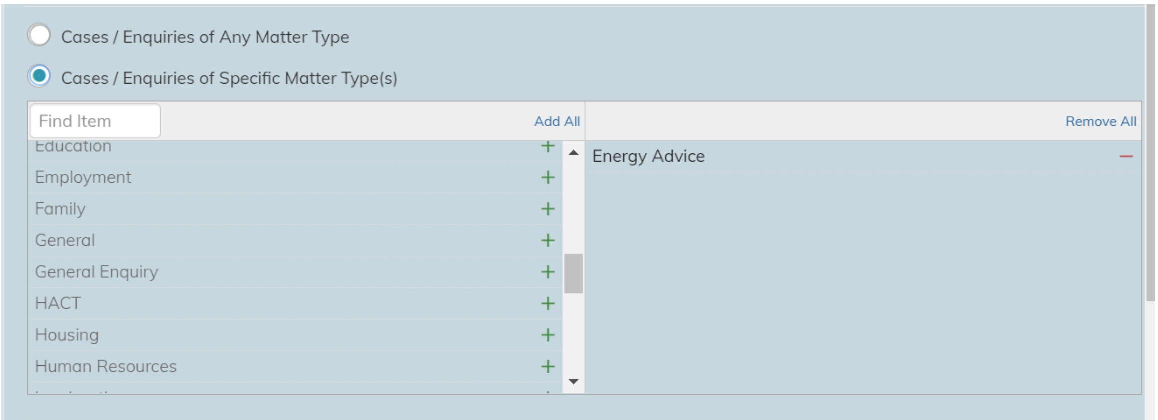
*Over on the left-hand panel select Customise



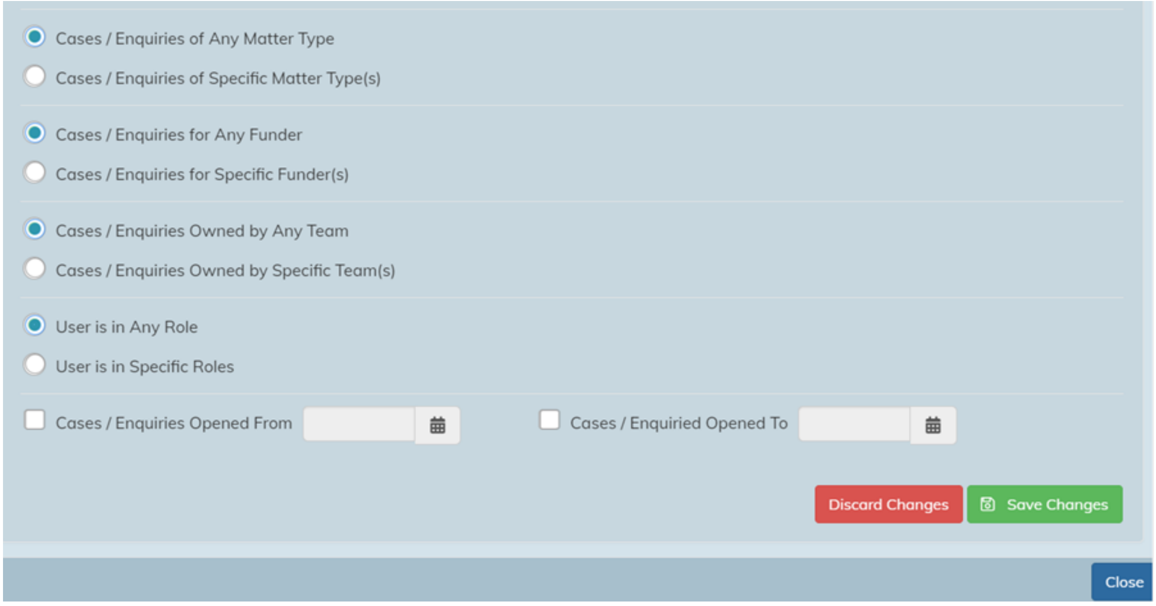
*Select Customisation Profiles/ Create New Profile



*Create your Profile Name ‘Energy Advice’ and make sure the ‘Is Enabled’ box is ticked.



*Make sure the Matter Category you want the changes to apply to is selected ‘Energy Advice’



*If you want the changes to be specific to a funder/Team or User Role then these can be selected here too. Again means the information will only appear on the selections you have made here. You can also apply the changes from a specific date.

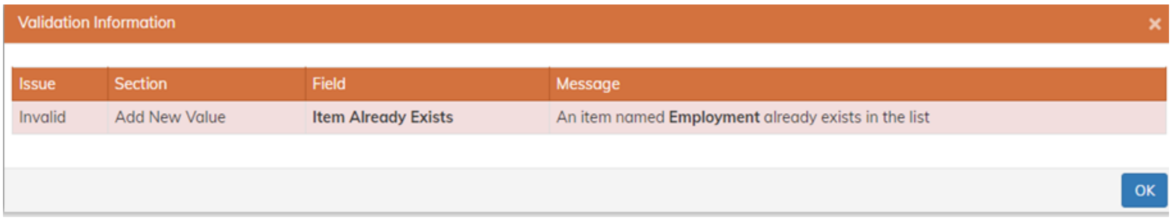
Once happy, save changes and you are ready to start customising you Energy Advice Matter Category.

Customising Energy Advice

So, this is just like customising any of your other matters that you have done, with the exception that you have put Energy Advice into a separate Profile, so changes made here should not affect any of your other Matter Categories.

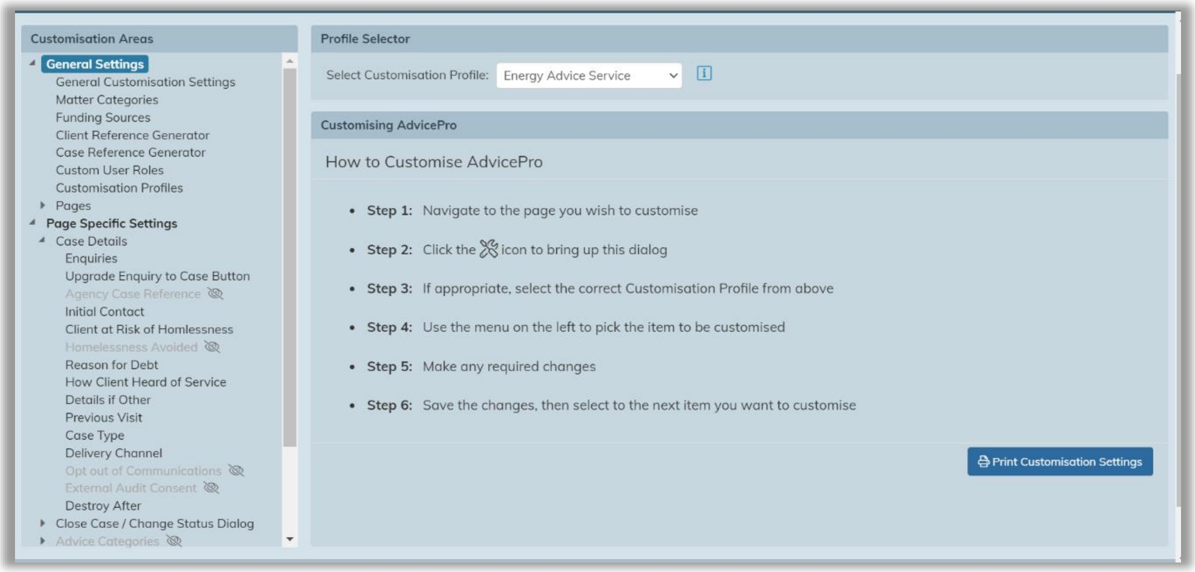
*****************Before you start Customising it is very Important that you make sure your Profile at the top is ENERGY ADVICE.***************

Changes you make to matter categories and funding sources are applied across your agency. Before adding any matter categories, check the existing list of categories and sub matter categories to make sure you are not duplicating something that already exists. You will receive a warning advising that an item already exists.

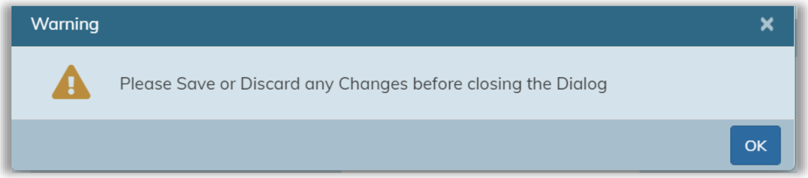


Once you are sure the top says Energy Advice then the same rules apply, if you have loaded a page within AdvicePro, the **Page Specific Settings** section reflects the contents of that page.

In the example below, the **Case Details** page was selected before clicking **Customisation**. The scroll bar indicates that there are more configuration options available.

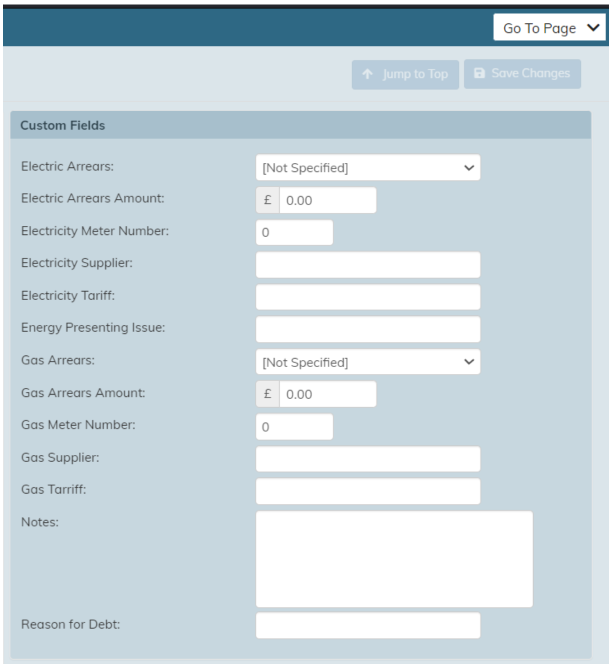


*This allows you to see what you can customise on each of the pages available.



*If you try to leave a page without saving your changes, the following message is displayed.

Here are a few examples of Customisations you might want to consider when creating your own Energy Advice Matter Category



*A few Custom fields that may be of interest like Electric/Gas meter number, reading, Supplier, Tariff and any arrears.

These would need to be addd to the case details page rather than client details page, so they are only visible to the Energy cases where appropriate.

Adding Custom Fields To A Page

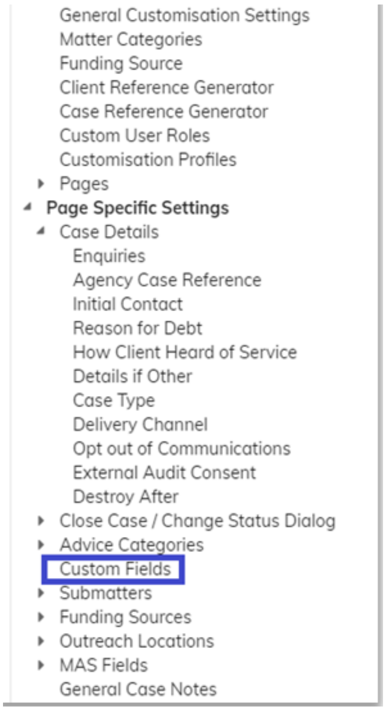
AdvicePro enables you to define your own custom fields and add them to the Client or Case Details page. Custom fields can be added to a panel in the client or case details pages.

To add a custom field:

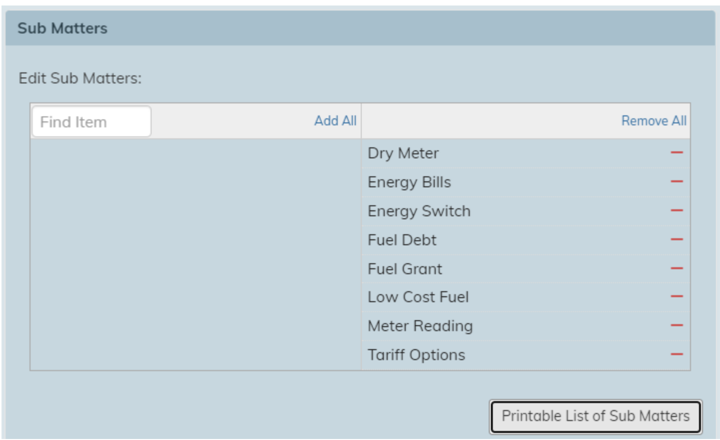
Open the page you want to add the custom fields to and click Customise from the left-hand side panel.

The Customisation Options window open and the Page Specific Settings section is populated with the sections on that page.

In the Customisation Areas, select Custom Fields.



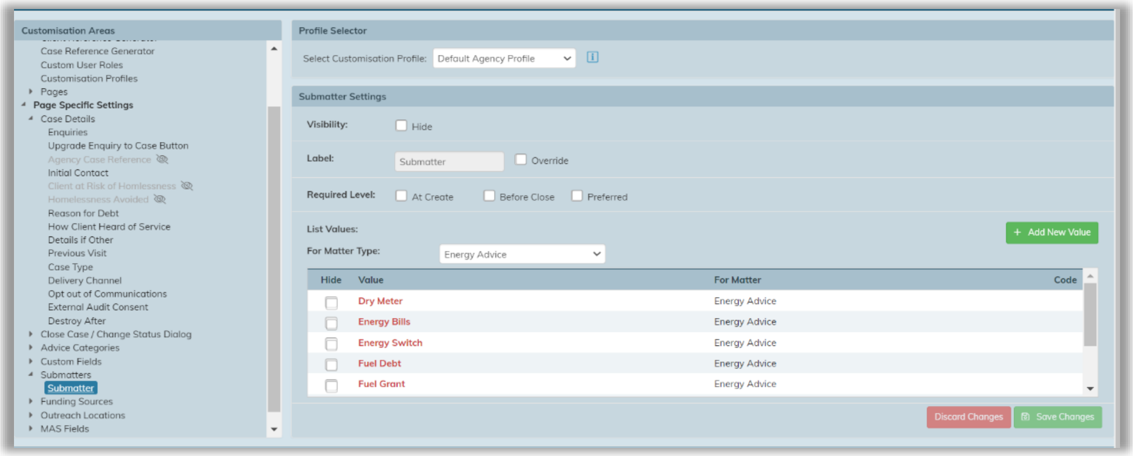
*In the panel on the right-hand side, use the up and down arrows to re-arrange the order of the items to suit, then Save Changes



*You may to add submatters to break down the Energy Advice Matter. Here are some examples you could consider.

Managing Sub Matters

Sub Matters are set on the case pages and can be associated with customisation profiles.



*Open a case and click Customise from the left-hand side panel.

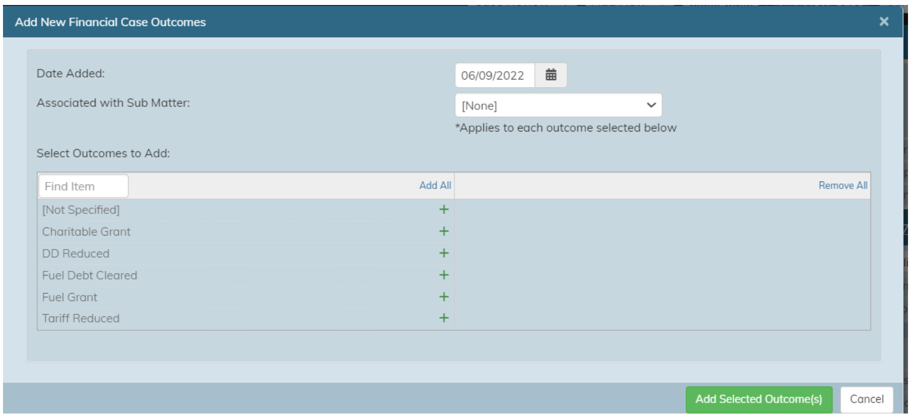
In Customisation Areas:

Select **Sub Matters** to show or hide the panel and to change the panel lable
Select **Sub Matter** (the sub-entry) to make changes to the individual sub matters.

ⓘ Sub Matter categories are associated with the matter type of the case you opened. You can change this matter type by selecting another from the drop-down list.

Outcomes

Adding outcomes in the say way as above, and here are some examples of some financial outcomes you could add;



Given the current climate, you could also consider adding: Winter Fuel Payment, Energy Savings Grant, Energy Payment, Cost of Living Payment, Disability Cost of Living Payment, Pensioner Cost of Living Payment…

For non-financial outcomes, you could consider adding: Tarriff Switching, Meter Changing, Home insulation, Cavity Wall Insulation, Boiler Cover, Boiler Replacement ….