

Gomocha FSP Portal | Improved Visibility of Customer Tree Depth Service Center

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FSP Portal | Improve Visibility of Customer Tree Depth in Call Intake

 37288 FSP Portal | Improve Visibility of Customer Tree Depth in Call Intake | Done

Description

What its

- New Menu Layout Service Center.
- This is a remake of the call intake screen which makes it clearer what the hierarchy of assets and customers is.
- We migrated the screen to React a modern frontend technology which makes the UI more responsive and load quicker.
- Icons were added for both customer and asset trees so that it is clear what level each of those is.
- Note: This page is only accessible from the new menu layout. The old call intake screen still exists and is used in the old menu layout

What it does

- The Service Center screen gives a clear overview of customers, their level, their assets, and the asset's level. It gives options to quick search, use filters, and use saved searches.
- Both asset and customer records can be open in an edit or details screen where all of the usual call intake options for customers and assets work (like creating orders for customer/asset or opening quote)

Why it Matters

- The new screen makes the customer and asset hierarchy clearer, and it is faster than the old call intake screen

Value

- Icons make the hierarchy clear
- The layout is cleaned up making it clearer what is being searched and what the results are

- Customer and asset items open an entire page for viewing and editing, this enables the user to open multiple assets and customers in other tabs

Where it Fits in Gomocha FSP

- Dispatch Scheduling

Configuration

Select an Icon for Customer/Asset Tree Depth Items:

1. In the **Gomocha FSP Portal**, go to: **Administration > Master Data > Customer Tree / Asset Tree Depth**.
2. Select the desired **Depth item**.
3. Choose an **icon** to represent the selected depth item > Save Item

Customer Tree Depth

The screenshot shows the Gomocha FSP Portal interface. The sidebar on the left contains navigation options: Dashboard, Analytics, Customer management, Planboard, Service center, Service orders, Field quotes, Timekeeping, Service agreements, Resource management, Asset management, Material management, Purchase Management, Message center, Configurators, Administration, App groups, Device Management, Master data (highlighted with a red arrow), Import export, and Audit logs. The main content area is titled 'Master data manage' and shows a table of 'Customer Tree Depth' items. The table has columns for 'Depth / level' and 'Description'. The first row is '1' with description 'Customer'. The second row is '4' with description 'Customer Tree Depth 4'. The third row is '3' with description 'Unit'. The fourth row is '2' with description 'Outlet'. A red arrow points to the 'Customer' row. To the right of the table is a modal for selecting an icon. The modal has a 'Depth / level*' field set to '1' and a 'Description*' field set to 'Customer'. Below these fields is a grid of icons. The first icon is 'fa-mountain'. The grid contains various icons including numbers, letters, and symbols. A green box highlights the icon selection area.

Depth / level	Description
1	Customer
4	Customer Tree Depth 4
3	Unit
2	Outlet

Asset Tree Depth

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Administration > MasterData

Master data manage

Select master data type

Asset Tree Depths

Search

☒ Show active items only ☒ Use translation

+ ADD NEW MASTER DATA ITEM

Depth / level	Description	
1	Asset Tree Depth 1	
2	Asset Tree Depth 2	
3	Asset Tree Depth 3	

SAVE ITEM ARCHIVE ITEM

Depth / level* 1

Description* Asset Tree Depth 1

Icon fa-tree

SEARCH ICONS...

TRANSPORTE R0	TRANSPORTE R1	TRANSPORTE R2	TRANSPORTE R3	TRANSPORTE R4	TRANSPORTE R5
TRANSPORTE R6	TRANSPORTE R7	TRANSPORTE R8	TRANSPORTE R9	TRANSPORTE R10	TRANSPORTE R11
TRANSPORTE R12	TRANSPORTE R13	TRANSPORTE R14	TRANSPORTE R15	TRANSPORTE R16	TRANSPORTE R17
TRANSPORTE R18	TRANSPORTE R19	TRANSPORTE R20	TRANSPORTE R21	TRANSPORTE R22	TRANSPORTE R23
TRANSPORTE R24	TRANSPORTE R25	TRANSPORTE R26	TRANSPORTE R27	TRANSPORTE R28	TRANSPORTE R29
TRANSPORTE R30	TRANSPORTE R31	TRANSPORTE R32	TRANSPORTE R33	TRANSPORTE R34	TRANSPORTE R35
TRANSPORTE R36	TRANSPORTE R37	TRANSPORTE R38	TRANSPORTE R39	TRANSPORTE R40	TRANSPORTE R41
TRANSPORTE R42	TRANSPORTE R43	TRANSPORTE R44	TRANSPORTE R45	TRANSPORTE R46	TRANSPORTE R47
TRANSPORTE R48	TRANSPORTE R49	TRANSPORTE R50	TRANSPORTE R51	TRANSPORTE R52	TRANSPORTE R53
TRANSPORTE R54	TRANSPORTE R55	TRANSPORTE R56	TRANSPORTE R57	TRANSPORTE R58	TRANSPORTE R59
TRANSPORTE R60	TRANSPORTE R61	TRANSPORTE R62	TRANSPORTE R63	TRANSPORTE R64	TRANSPORTE R65
TRANSPORTE R66	TRANSPORTE R67	TRANSPORTE R68	TRANSPORTE R69	TRANSPORTE R70	TRANSPORTE R71
TRANSPORTE R72	TRANSPORTE R73	TRANSPORTE R74	TRANSPORTE R75	TRANSPORTE R76	TRANSPORTE R77
TRANSPORTE R78	TRANSPORTE R79	TRANSPORTE R80	TRANSPORTE R81	TRANSPORTE R82	TRANSPORTE R83
TRANSPORTE R84	TRANSPORTE R85	TRANSPORTE R86	TRANSPORTE R87	TRANSPORTE R88	TRANSPORTE R89
TRANSPORTE R90	TRANSPORTE R91	TRANSPORTE R92	TRANSPORTE R93	TRANSPORTE R94	TRANSPORTE R95
TRANSPORTE R96	TRANSPORTE R97	TRANSPORTE R98	TRANSPORTE R99	TRANSPORTE R100	TRANSPORTE R101

Output & Use

View the Customer/Asset Tree Depth and Icons in Service Center:

1. In the **Gomocha FSP Portal**, go to: **Service Center > Select Customer tab** or **Asset tab** (top of display).
2. Icons will display for **Depth 1** items.
3. Use the **dropdown depth arrows** to expand and view additional depths with their icons.
4. When you **single-click/select a customer**, the customer's assets and depth details will be shown on the **right side of the screen**.

Customer Tree Display

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Dashboard Customers Assets

Quick search

	Name	Number	Location
	215237143	215237143	
Adriaanse	NL1059BT-73		Generaal Vetterstraat 73 Amst
Adriaanse 2	NL2289OC-51		Laan van Zuid Hoom 51 Rijsw
Beek BV	Beek BV		De landweer 5 Barneveld
Advoaat	NL1043CB-227		De landweer 5 Barneveld
Anders	NL1211MS-2		Laan van de Heelmeesters 2 H
Albert Heijn XL - Sint Jacobslaan	AH-1122558		De landweer 5 Barneveld
Amstel	NL1422CB-29		Wiegerbruinlaan 29 Uithoorn
AndersimportTest	1000		De landweer 5 Barneveld
Andersonn	Andersonn		De landweer 5 Barneveld
another new prospect	10005		
Another Prospect	10003		
Apple	ParksonAdminf9ae6ba19433464388e40e8a333820b4		De landweer 5 Barneveld
Apple Stores	1585921		31
AprilTestGeocoder	9908521		Laan van Zuid Hoom 51 Rijsw
Arends	NL2311HB-2A		Doezastraat 2 Leiden
Ascom	123456789876		De landweer 5 Barneveld

Customer: Adriaanse

Quick search

	Id	Serial number	Description	Location
	htrdcvuj		lbhiyno	
A1_Test	S-BM-123456789		Brandmelder 1 TEST	Generaal Vetterstraat21 7312 1059 BT
333820b4L	S-BM-123456000		Brandmelder 100	Generaal Vetterstraat 73 Amsterdam
A10_test	S-BM-123456798		Brandmelder 10	Generaal Vetterstraatt 73 1059 BT
A1000	S-BM-123457788		Brandmelder 1000	Generaal Vetterstraat 73 1059 BT
A101	S-BM-123456889		Brandmelder 101	Generaal Vetterstraat 73 Amsterdam
A102	S-BM-123456890		Brandmelder 102	Generaal Vetterstraat 73 Amsterdam
A103	S-BM-123456891		Brandmelder 103	Generaal Vetterstraat 73 Amsterdam
A104	S-BM-123456892		Brandmelder 104	Generaal Vetterstraat 73 Amsterdam
A105	S-BM-123456893		Brandmelder 105	Generaal Vetterstraat 73 Amsterdam
A106	S-BM-123456894		Brandmelder 106	Generaal Vetterstraat 73 Amsterdam
A107	S-BM-123456895		Brandmelder 107	Generaal Vetterstraat 73 Amsterdam
A108	S-BM-123456896		Brandmelder 108	Generaal Vetterstraat 73 Amsterdam
A109	S-BM-123456897		Brandmelder 109	Generaal Vetterstraat 73 Amsterdam
A11	S-BM-123456799		Brandmelder 11	Generaal Vetterstraat 73 Amsterdam
A110	S-BM-123456898		Brandmelder 110	Generaal Vetterstraat 73 Amsterdam

Asset Tree Display

Gomocha FSP Portal - GoDemo - Acc.

Customers Assets

Quick search

	Id	Serial number	Description	Location
	htrdcvuj		lbhiyno	
A1_Test	S-BM-123456789		Brandmelder 1 TEST	Generaal Vetterstraat21 7312 1059 BT
333820b4L	S-BM-123456000		Brandmelder 100	Generaal Vetterstraat 73 Amsterdam
A10_test	S-BM-123456798		Brandmelder 10	Generaal Vetterstraatt 73 1059 BT
A1000	S-BM-123457788		Brandmelder 1000	Generaal Vetterstraat 73 1059 BT
A101	S-BM-123456889		Brandmelder 101	Generaal Vetterstraat 73 Amsterdam
A102	S-BM-123456890		Brandmelder 102	Generaal Vetterstraat 73 Amsterdam