Documenting a Pre-Show Call in OASIS

Purpose

The purpose of documenting the pre-show call in OASIS is to easily reference/communicate whether the work order has No Information, Partial Information, or Complete Information. This allows for a targeted and more productive workflow for the base city team. This information, including the number of attempts a pre-show call is made, will also be used for reporting and research purposes.

Outline

To document a Pre-Show Call within OASIS, please take the following steps:

1. Navigate to Notes-Activities section of work order
2. Click “+” icon in timeline
3. Choose “Pre-Show Call” option
4. Pre-Show Call details automatically populate, defaulting to the source contact
    a. Change “Select Contact” as necessary to record the specific person on the work order you are attempting to reach
5. Record any pre-show call notes in the “Notes” section. These notes are best served as a reminder for outstanding action items or expectations of when to receive updates as promised by the person you contacted
6. At the conclusion of the call, make sure to update the “Pre-Show Status” field
    a. 0 – No Information = Work Order is missing majority of the information that is necessary to successfully completing the job. A follow-up call is necessary. Key information is defined as:
        i. Daily Requirements, Booth Number, Booth Size, Booth Height, Equipment request, Show Contact with Cell Number, Install Freight (Advanced or Direct), Setup Prints with Electrical Plan, and Outbound Shipping Information
    b. 1 – Partial Information = Work Order has some key information, but there is still key information missing (even if it’s just one thing). A follow-up call or email is necessary.
    c. 2 – Complete Information = All key information is received. A follow-up call is not necessary.
7. Save & close record

8. Repeat above steps as many times as necessary to ensure all necessary/key information is received as outlined in Operation's "Pre-Show Communication with the Source Client" SOP
9. Keep up with the pre-show call status by reviewing the Pre-Show Information fields. Any of these fields can be added to a list view for ease of review.
    a. Pre-Show Status = Last "Pre-Show Call Status" documented in the Pre-Show call note
    b. Pre-Show First Attempt = Frist Date/Time a pre-show record was created
    c. Pre-Show Last Attempt = Last Date/Time a pre-show record was created
    d. Pre-Show Number of Attempts = Count of pre-show records created

General Support

If this component is not working as described above, please escalate to OASIS Support (oasissupport@nthdegree.com) so that it can be fixed.

Other questions or need additional assistance? Contact:

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