Hancock Cloud Training Guide

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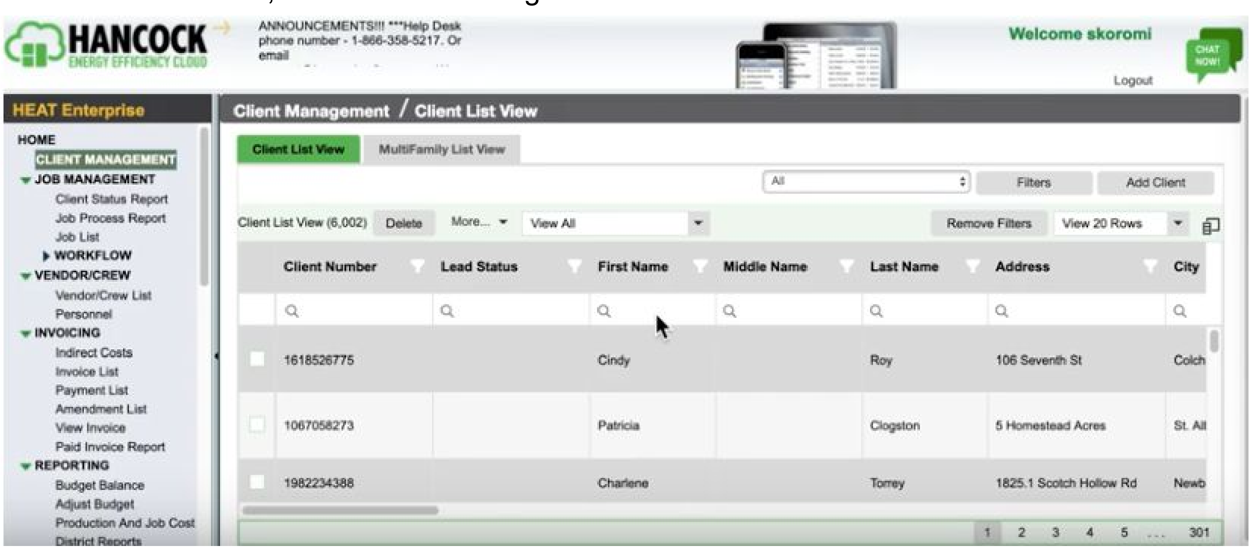
Client Management Screen

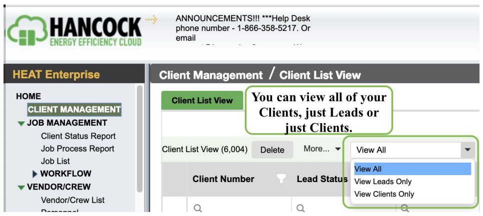
From the main menu, select Client Management.



The Client Management Screen is where you will open Client Records, delete Clients, export lists and add new Clients.

You can create custom views for your login using the “Filters” button, the Column Chooser or by selecting Funnel icon next to each Column Header. Please remember, each time you log in, the system will apply the last Filter used. If you think you’re missing Jobs or Clients, simply click “Remove Filters” to start fresh.

The Client List View count on the top left will update as you apply Filters. Next to the “More” button on the top left, you can select preset views.



To open a Client, simply double click the record. To delete a Client, check the box next to the desired record and click “Delete” on the top left-hand side of the screen.

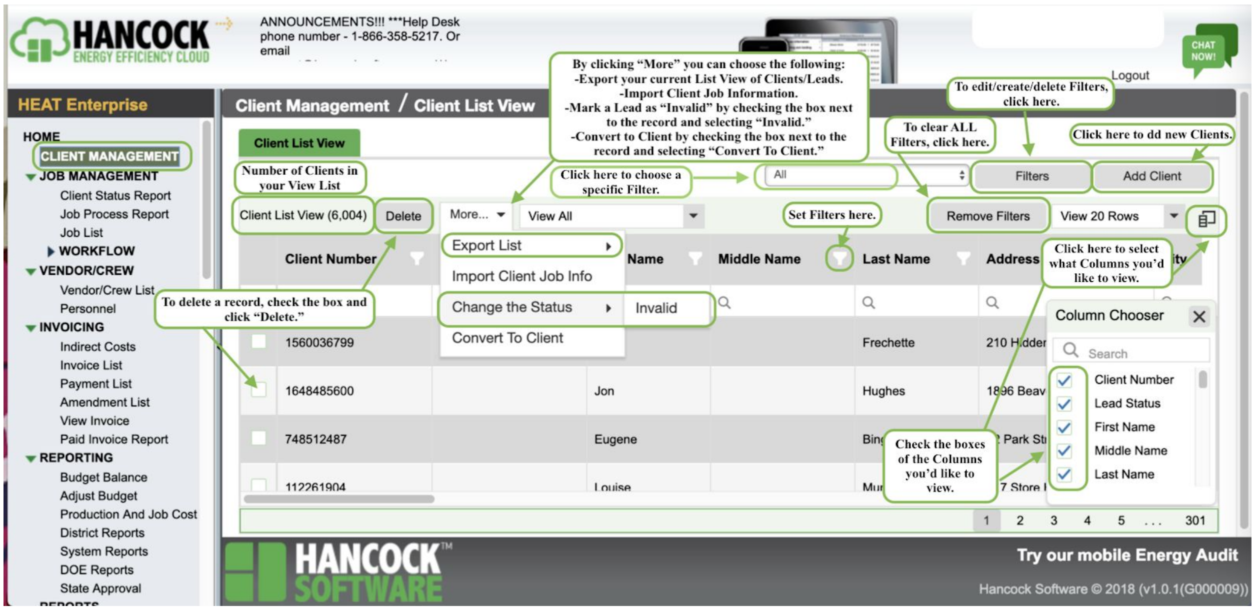
You can shift columns by dragging the column name to the left or right as desired.

By clicking “More” you can export your current List View of Clients/Leads.

To create a new Client, click on the “Add Client” button next to the Filters.

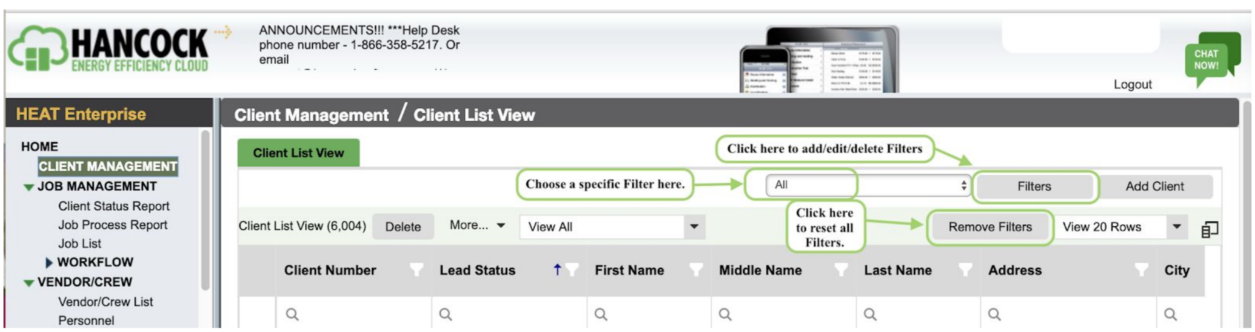
To view specific criteria in a Column, simply click on the Funnel icon next to the Column name and select your filters. Select OK at the bottom of the options.

To choose what Columns you’d like to view, click on the Column Choose icon on the far right-hand side of the screen and the Columns choices will pop up. Select which Columns you want to view by checking the box next to the name.

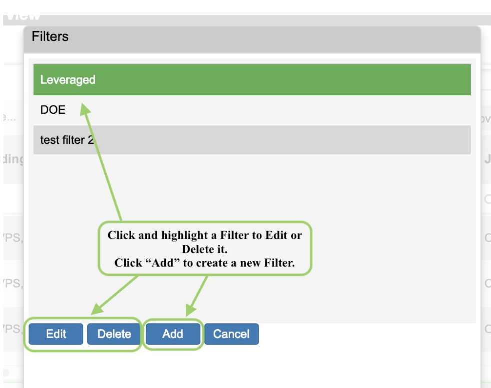


To use a specific Filter, choose from the dropdown on the top right next to the "Filters" button.

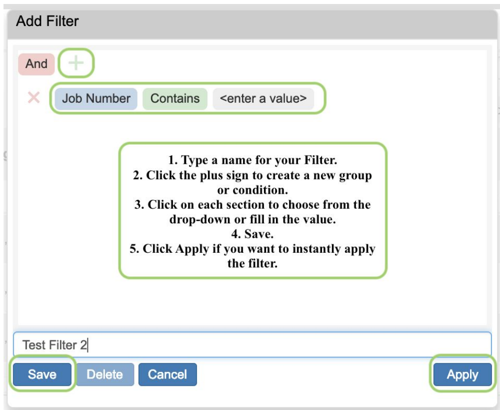
To add, edit or delete Filters, click on the "Filters" button on the top right of the screen.



To create a new Filter, click on the "Filter" button and a new window will pop up. Click "Add."

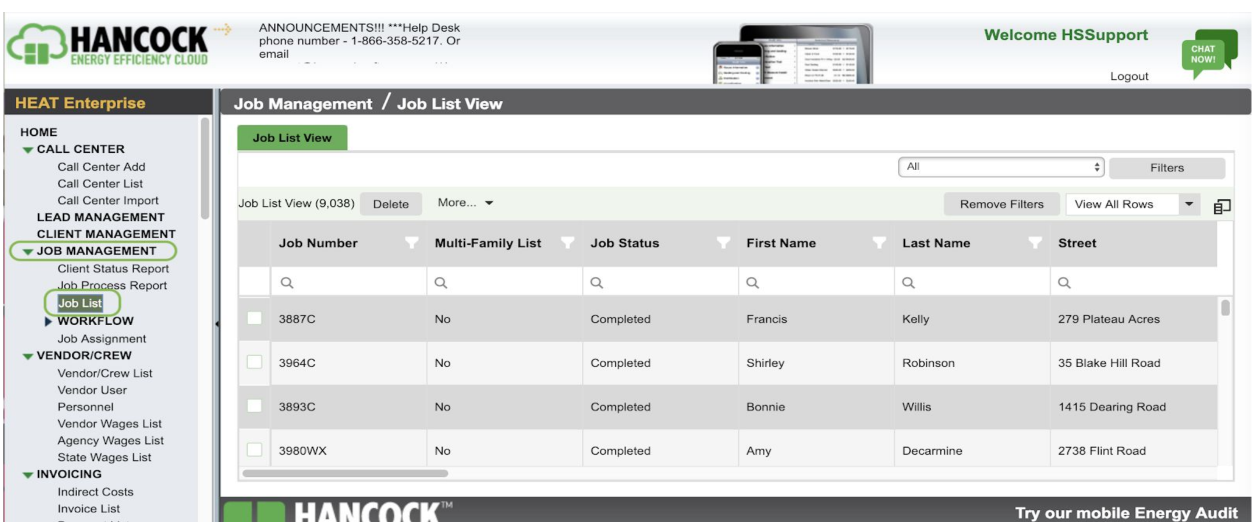


1. Type a name for your Filter.
2. Click the plus sign to create a new group or condition.
3. Click on each section to choose from the drop-down or fill in the value.
4. Save.
5. Click Apply if you want to instantly apply the filter.



Job Management / Job List Training

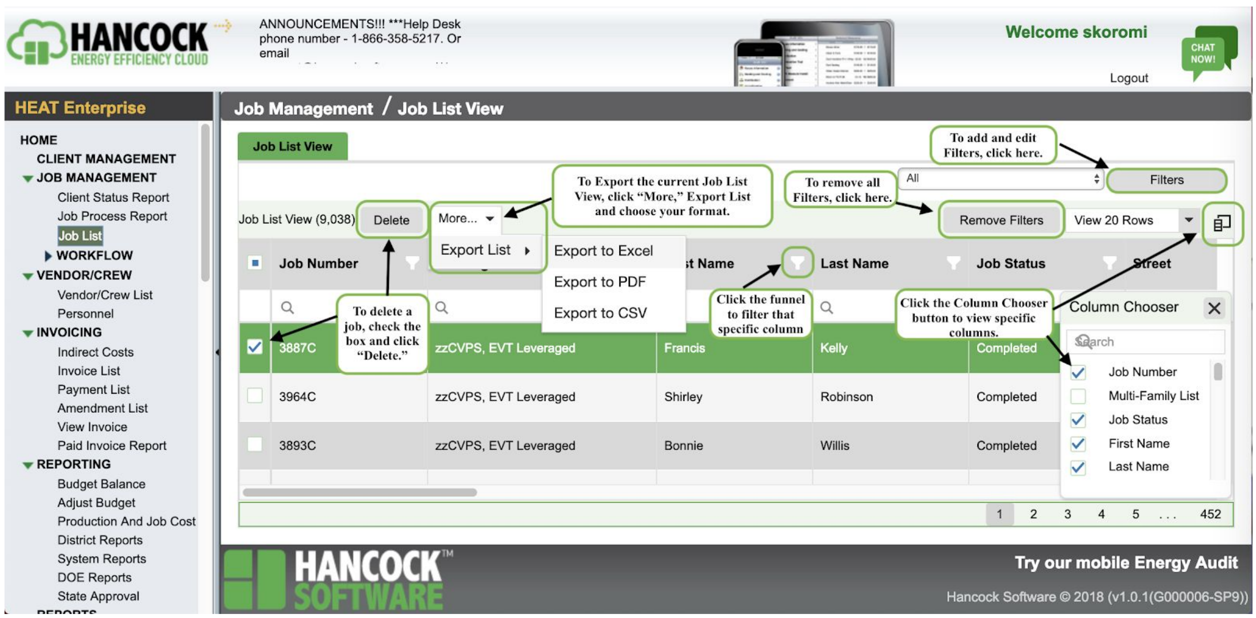
On the main menu, expand job management and select Job List.



The Job List Screen is found under the Job Management Screen.

By default, only In Process jobs will show be shown here (scheduled, audited, work ordered, installed, inspected, and deferred.) To show all jobs in your system, select the show all button.

From this screen, you can view all the Jobs for your State/Agency, delete Jobs and also export your current Job List View.



You can create custom views for your login using the "Filters" button, the Column Chooser or by selecting Funnel icon next to each Column Header.
**Please remember, each time you log in, the system will apply the last Filter used. If you think you're missing Jobs or Clients, simply click "Remove Filters" to start fresh.

The Job List View count on the top left will update as you apply Filters.

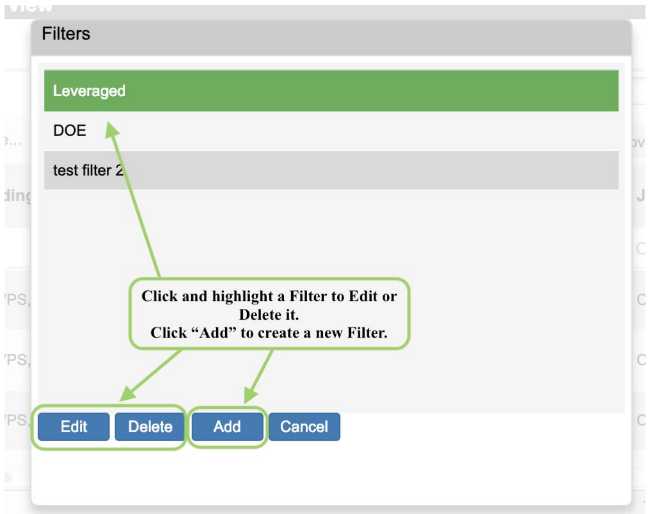
To open a Job, simply double click the record. To delete a Job, check the box next to the desired record and click "Delete" on the top left-hand side of the screen.

You can shift columns by dragging the column name to the left or right as desired.

To export your current Job List View, click on the "More" button. From that dropdown, select "Export List" and choose which way you'd like to export.

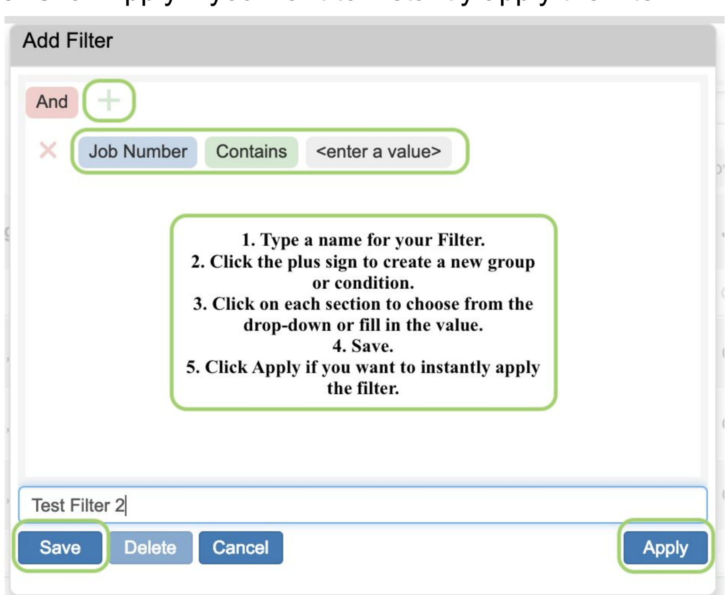
Add/Edit Filters

To add, edit or delete Filters, click on the “Filters” button on the top right of your screen.



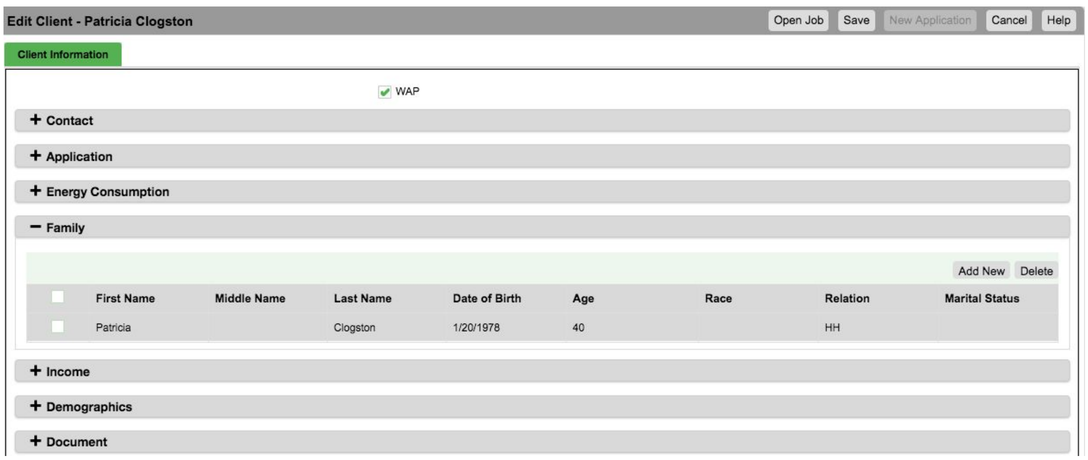
To create a new Filter, click “Add.”

1. Type a name for your Filter.
2. Click the plus sign to create a new group or condition.
3. Click on each section to choose from the drop-down or fill in the value.
4. Save.
5. Click Apply if you want to instantly apply the filter.



Hancock Cloud New Intake Screens

Enter the client's application in new expandable and collapse client intake screens. View the on-demand training here https://youtu.be/i3Bry-sh_IQ



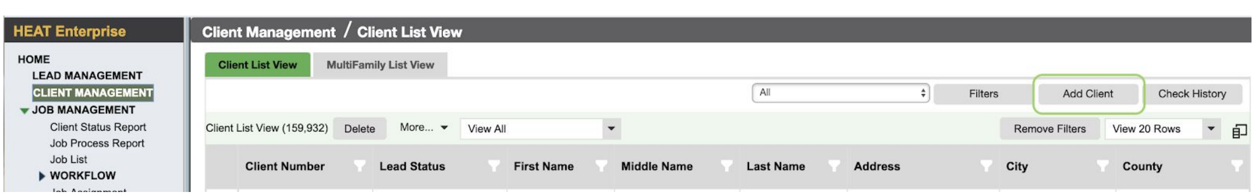
Hancock's new and improved Client Intake features, which are part of the Hancock Cloud upgrade.

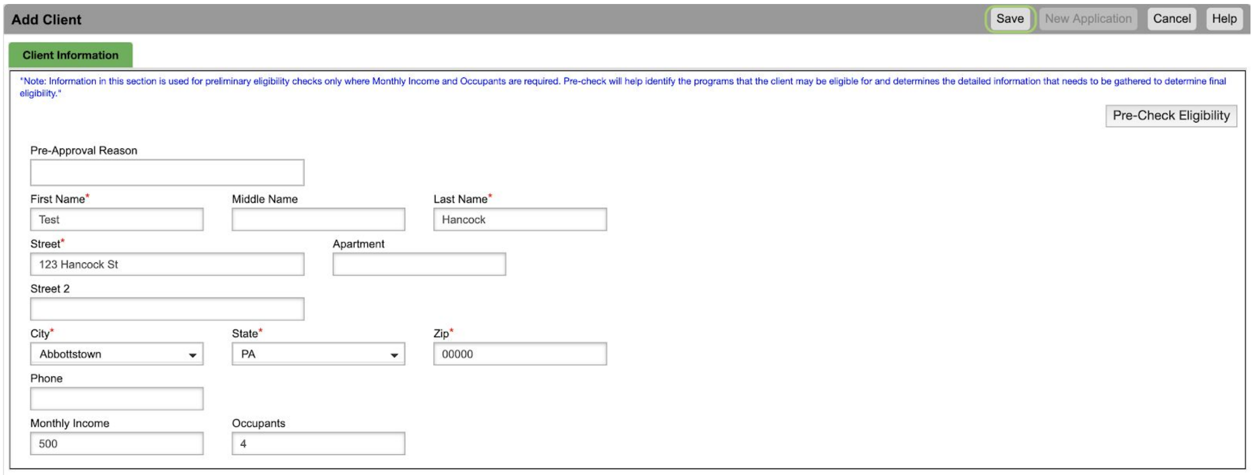
- New client intake screens make it easier to enter information
- New history section shows what type of weatherization the client has received to date
- New snapshot tabs save a history of previous year's intake forms

From the Client Management screen:

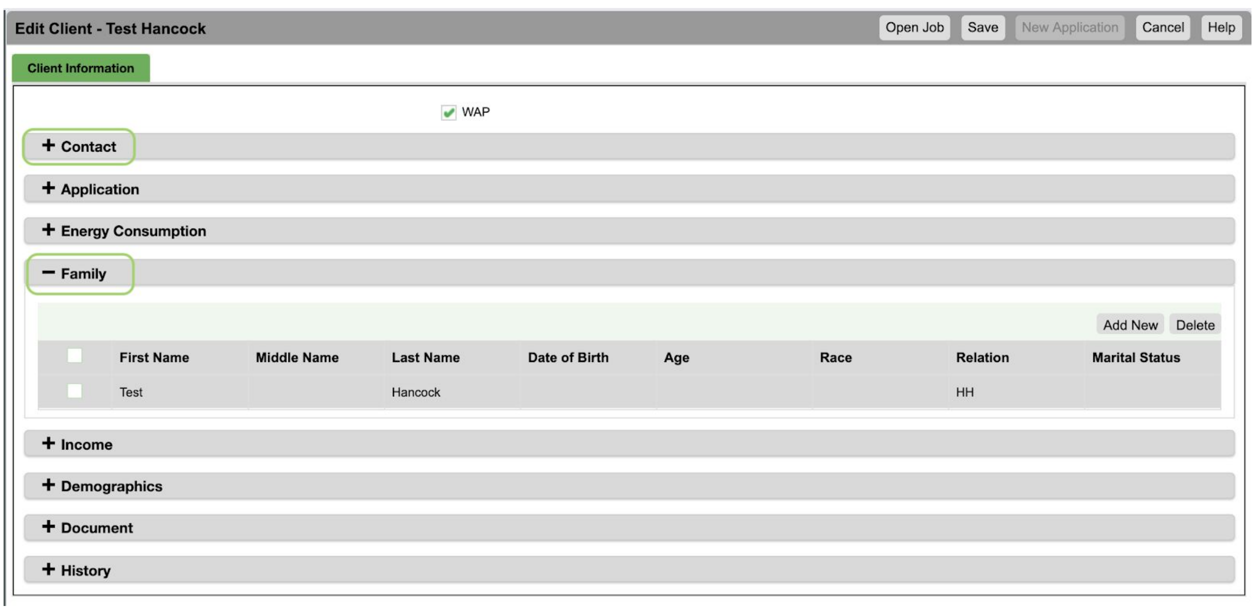
If you think the client may have applied to weatherization before, you can search the client management screen for an existing record and double click to open it.

When a new client who has never received weatherization before applies to your program, select 'Add Client'. After entering your information you will be taken to the Application section.

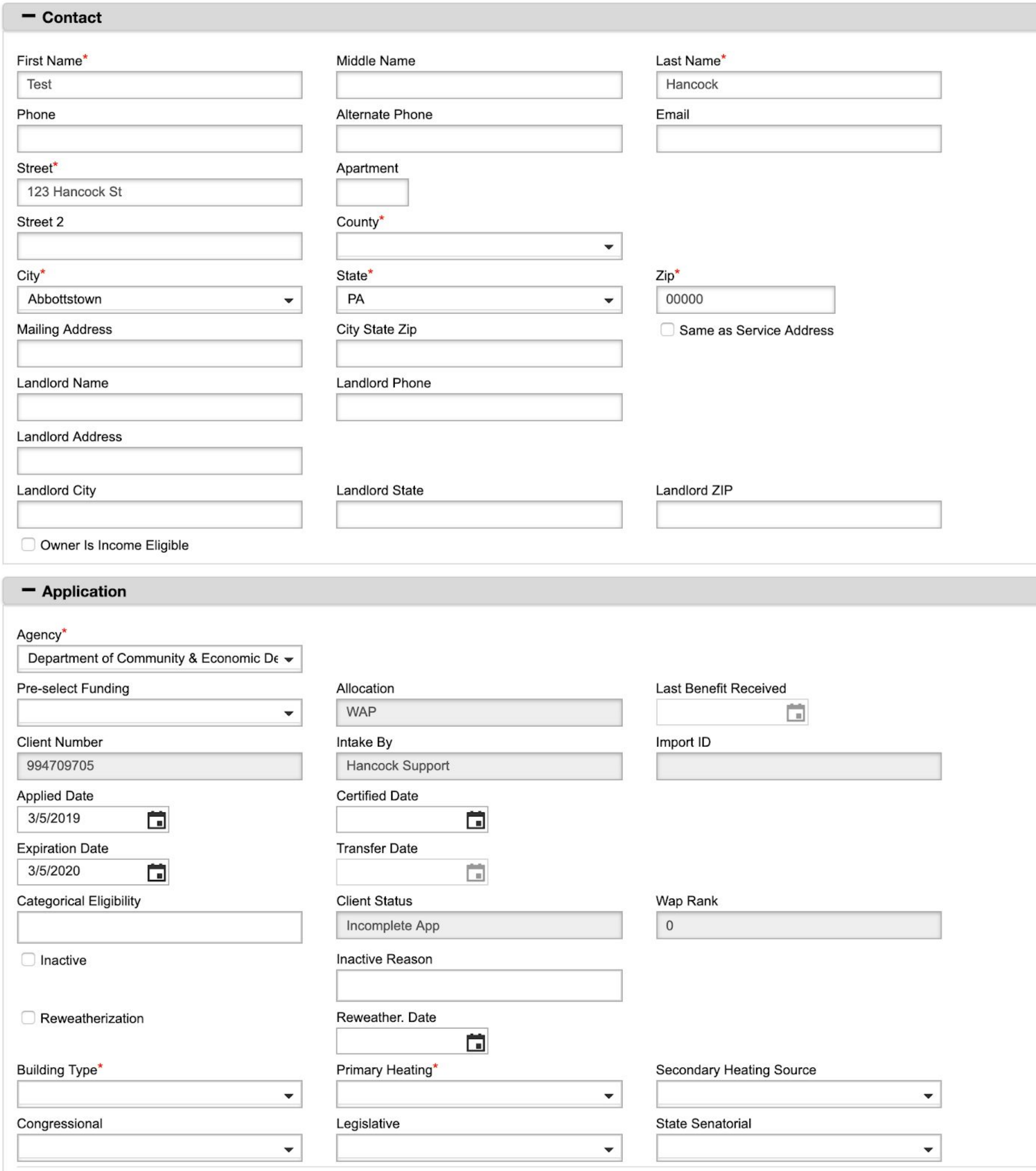




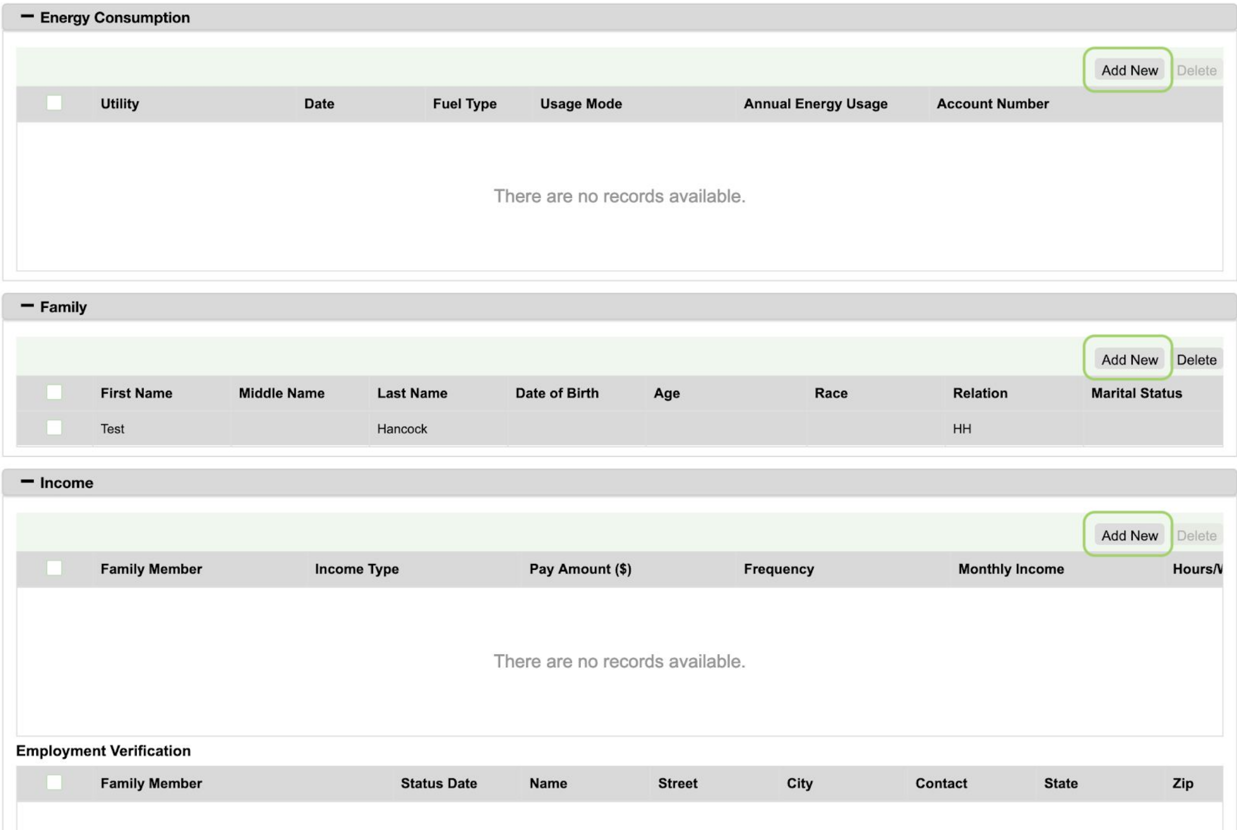
Client Information: This is the client's application. To maximize the sections you will select the +, this will expand only that area. To minimize select the **-**, and once again your section will hide. The arrows in front of the title of each section let you expand your window take up your entire computer screen.



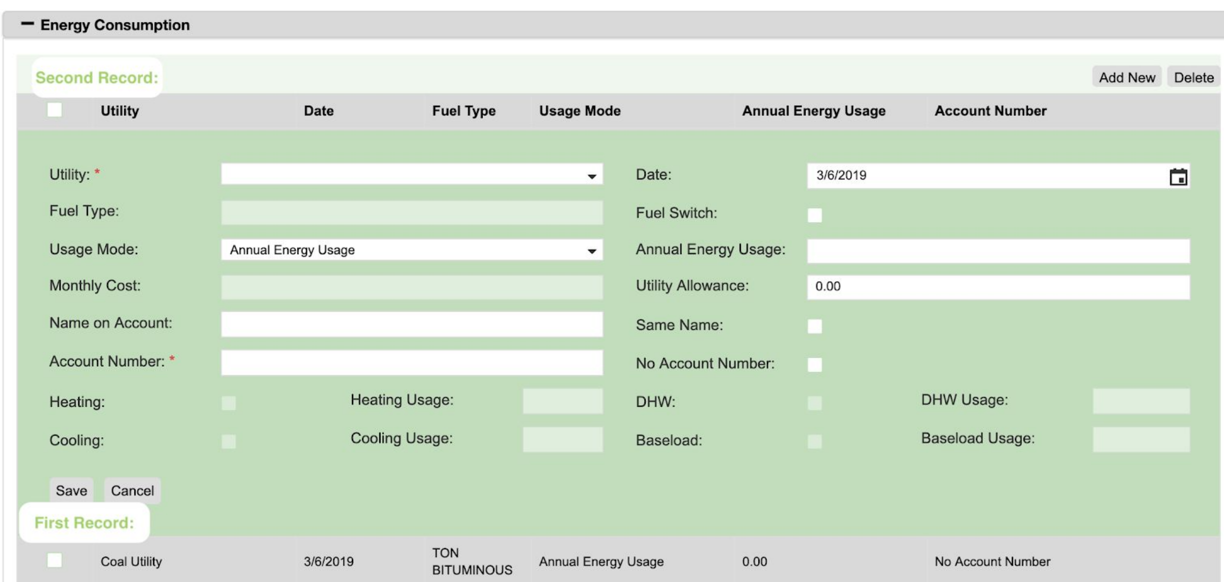
The Contact and Application sections: This is basic information about the client's application. Their address, Agency, dates, building type, and heating.



On the Energy Consumption, Family and Income sections, you will be able to select 'Add New' to enter a new record. By selecting 'Add New' the area will expand providing you the appropriate fields for each section.



The Energy Consumption section: If a household uses more than one type of fuel, add a second record.



The Family section: This section defaults to the applicant, automatically marking them as the head of the household. You will double click on the applicant to enter his or her demographic information. After the applicant is completed you can add additional family members by selecting 'Add New'.

− Family

Add New | Delete

	First Name	Middle Name	Last Name	Date of Birth	Age	Race	Relation	Marital Status
☐	Test		Hancock				HH	
☐	child	1	hancock	4/3/2008	10			
☐	child	2	hancock	12/18/2009	9			
☐	child	3	hancock	8/27/2014	4			
☐	child	4	hancock	10/14/2018	0			

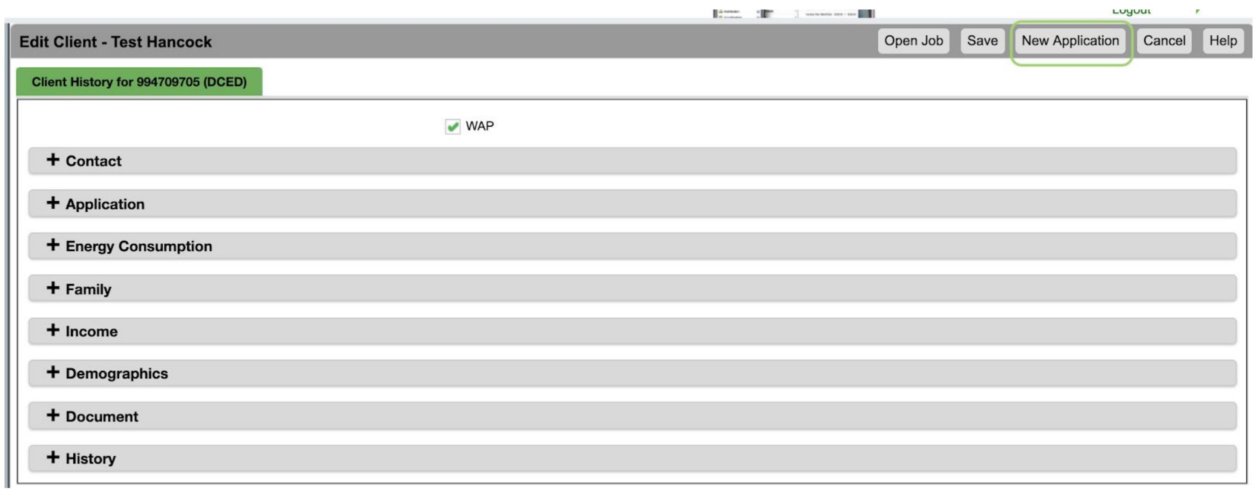
The History Section: We now offer a history section within each client record. History records will appear if the client received weatherization before. You'll see the total amount and funding source.

− History

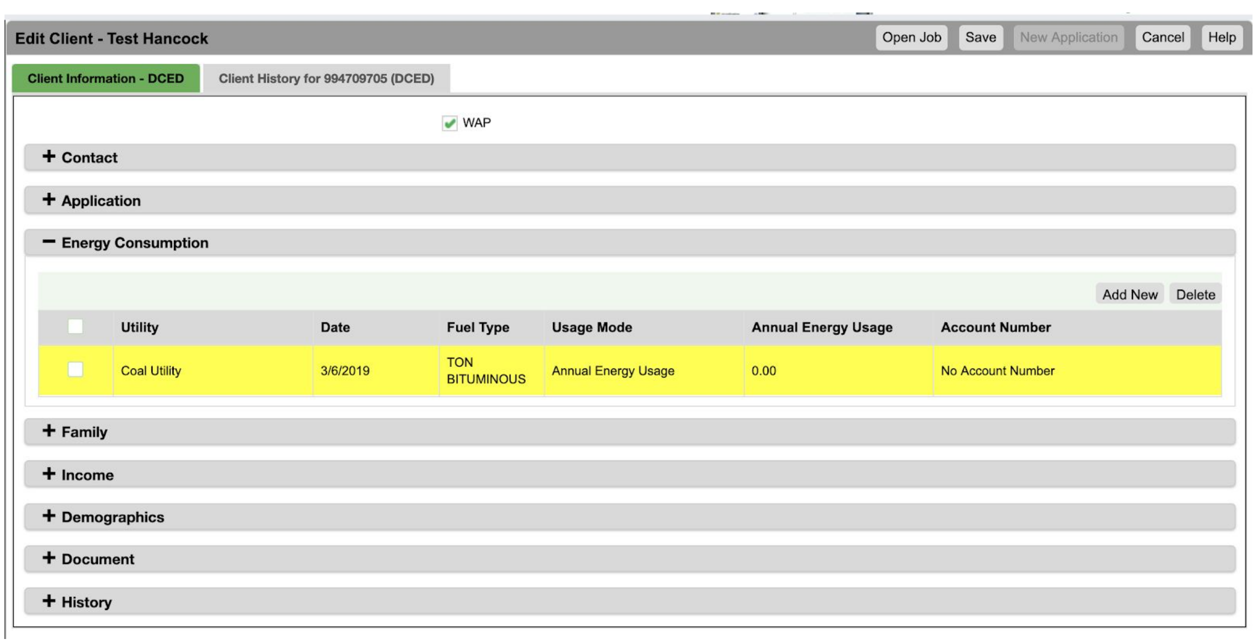
Description	Client Number	Agency	Action taken by	Date of Action	Notes
Application received	994709705	Department of Community & Economic Development	By: Hancock Support	3/5/2019	
Client assigned to Job 994709705	994709705	Department of Community & Economic Development	By: Hancock Support	3/6/2019	

Program	Funding Source/Allocation	Job/Account Number	Complete Date	Benefit Received
WAP		994709705		0.00
			Total Amount :	

New Application: If there's any case where you want to save the original client intake information and process the client for additional weatherization you can select 'New Application' while you have the new client info intake screens open.



When you select ‘New Application’, the system will make a copy of the original application and highlight everything in yellow that needs to be reviewed or update. To review the application tab through and review the fields for accuracy.



The History section will now show that the client has been duplicated.

History

Description	Client Number	Agency	Action taken by	Date of Action	Notes
Application received	994709705	Department of Community & Economic Development	By: Hancock Support	3/5/2019	
Client assigned to Job 994709705	994709705	Department of Community & Economic Development	By: Hancock Support	3/6/2019	
Client is duplicated	994709705	Department of Community & Economic Development	By: Hancock Support	3/6/2019	

Program	Funding Source/Allocation	Job/Account Number	Complete Date	Benefit Received
WAP		994709705		0.00
			Total Amount :	