

The CustomerCare.net application provides an efficient and reliable customer call logging, tracking and communication system.

The application is totally integrated into SuperOffice CRM5, utilising new tables within the CRM5 database and web panels within the CRM5 interface. The use of CRM5 tables ensures the application is compatible with the CRM5 travel mechanism. All data access is via the CRM5 Net server. All labels and Lists are user definable enabling the company ethos and methods to be reflected.

Support Calls

The Call detail form is shown below, the call is identified with a system generated unique number. As can be seen the call is allocated to a CRM5 Company and Contact, the contact phone number and email is reflected on the detail form. There is also a text facility for the Reported Issue, Conclusion and internal Notes.

Selected Call Details - Microsoft Internet Explorer

Call: 002594

Company...
F Bloggs Limited, Nottingham
0115 911 2233

Contact
Fred Bloggs
E-Mail: fred@bloggs.co.uk

Project
Not linked to a project

Reported Issue
How are new templates added to QuoteManager.

Notes

Conclusion

Owner Unassigned
E-Mail: JEFF
Call Type: Support Call
Category: QuoteManager
Status: Open
Priority: High
Serial Number:
 Public Searchable

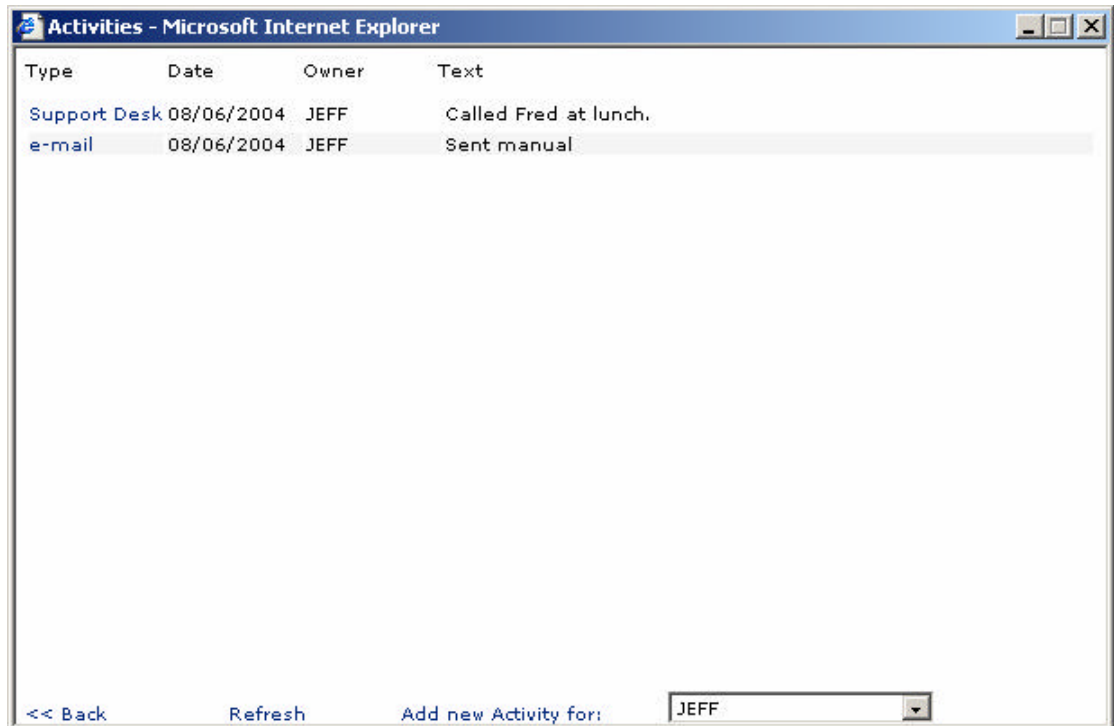
Activities Save Close

The Owner of the Call is the person within the home company who is responsible for dealing with the reported issue. The Call can be marked as Unassigned, this would be appropriate if the call was logged by the Customer via the Self Service module, or by administrative staff unable to handle calls. The other methods of categorising calls are by Type, Category, Status and Priority. The content of the Status and Priority lists are dependant on the Type, enabling different values of Status and Priority for each Type. If the Call is marked as Public Searchable it is added to the Knowledge Base for access from the Self Service module. The Serial Number field is used to allocate the Call to a specific piece of equipment; this is of particular interest if the Redcastle Machine module is in use.

Call details can be emailed to the customer contact, the Owner or both via the mail hyperlinks, this action can be automated using the Escalation programme described later in this document.

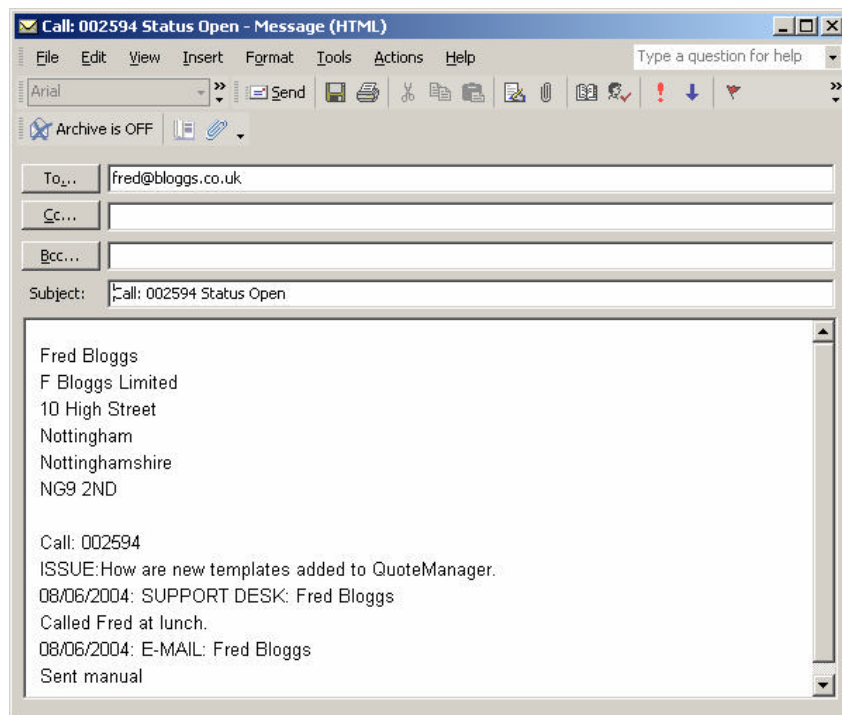
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In addition to the Reported Issue, Conclusion and Internal Notes, CRM5 Activities can be added and associated to the Call.



As these are standard CRM5 Activities they show in the Company list, Associate task list and can be linked to documents and emails.

They are also reflected into the call detail email, generated by the application;



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CustomerCare.net adds an extra tab in the CRM5 Company view, the text on this tab is user defined. By default within this tab is a list of the Open calls for the current CRM5 Company. The list can be sorted by any of the columns and the Call ID hyperlink initiates the call detail form.

The screenshot shows the SuperOffice CRM 5 interface for the company 'F Bloggs Limited'. The main content area is divided into two sections: 'Company' details and 'Our Contacts'. The 'Company' section includes address, telephone, and website information. The 'Our Contacts' section lists 'Jeff Procter' as the contact, with details like category, code, number, VAT no., business, and support. Below this is a table of calls with columns for Call ID, Description, Owner, Status, Contact, Category, and Registered. The table contains two rows of data. At the bottom, there is a toolbar with icons for Appointment, Task, Phone Call, Sale, Note, Email, and Write.

Call ID	Description	Owner	Status	Contact	Category	Registered
002974	How are new templates added to QuoteManager...	JEFF	Open	Fred Bloggs	QuoteManager	08/06/2004
002603	Will QuoteManager handle pictures	JEFF	Registered	Fred Bloggs	QuoteManager	08/06/2004

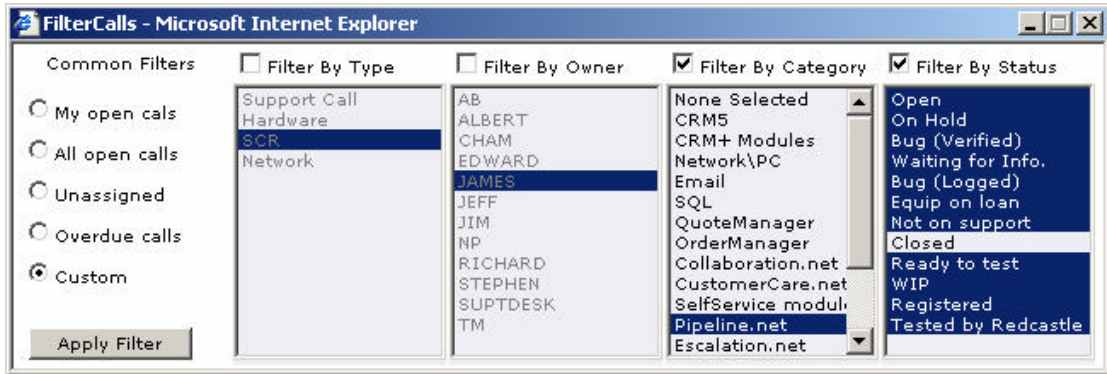
Calls can also be viewed via the call filter; this is situated on a new tab in the CRM5 browser area, again the Call ID hyperlink initiates the call detail form.

The screenshot shows the SuperOffice CRM 5 interface in the 'Call Filter' view. The main content area is a table listing calls with columns for Call ID, Description, Owner, Status, Company, Category, and Registered. The table contains eight rows of data. At the bottom, there is a toolbar with icons for Appointment, Task, Phone Call, Sale, Note, Email, and Write.

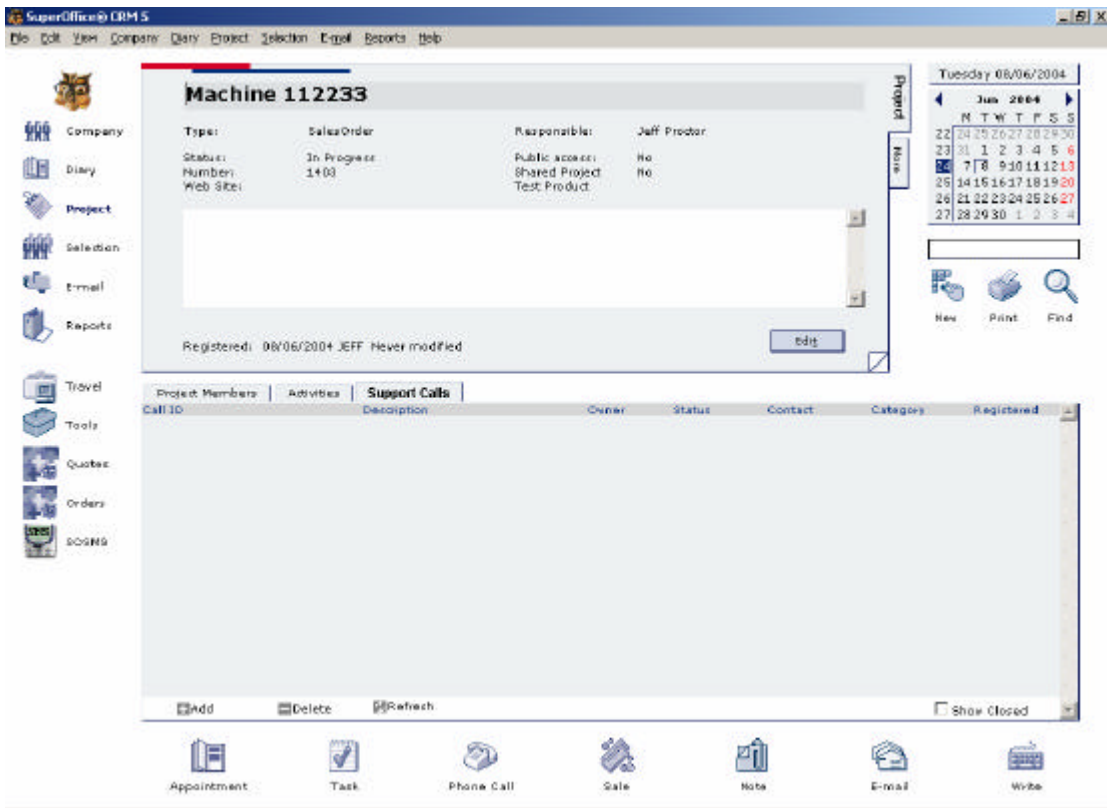
Call ID	Description	Owner	Status	Company	Category	Registered
002599	Pipeline not displaying some sales that have re...	EDWARD	Ready to test	Redcastle CRM Limited	Pipeline.net	08/06/2004
002595	Add login screen. Pipeline is for xcal license...	EDWARD	WIP	Redcastle CRM Limited	Pipeline.net	08/06/2004
002582	Remember filter settings at user level. James G...	EDWARD	WIP	Redcastle CRM Limited	Pipeline.net	08/06/2004
002581	Still not happy with the column widths and align...	EDWARD	Ready to test	Redcastle CRM Limited	Pipeline.net	08/06/2004
002980	Display Values to no decimal places to save space.	EDWARD	Ready to test	Redcastle CRM Limited	Pipeline.net	08/06/2004
002979	Sort on the columns as in CustomerCare.net	EDWARD	WIP	Redcastle CRM Limited	Pipeline.net	08/06/2004
002976	If a Sales has no Activity associated with R...	EDWARD	WIP	Redcastle CRM Limited	Pipeline.net	08/06/2004
002476	Thicken up lines on graphs and remove data on \$...	EDWARD	Open	Redcastle CRM Limited	Pipeline.net	26/05/2004
002480	If Filter is set to show all probabilities add...	EDWARD	Open	Redcastle CRM Limited	Pipeline.net	26/05/2004

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This view allows Calls to be filtered;



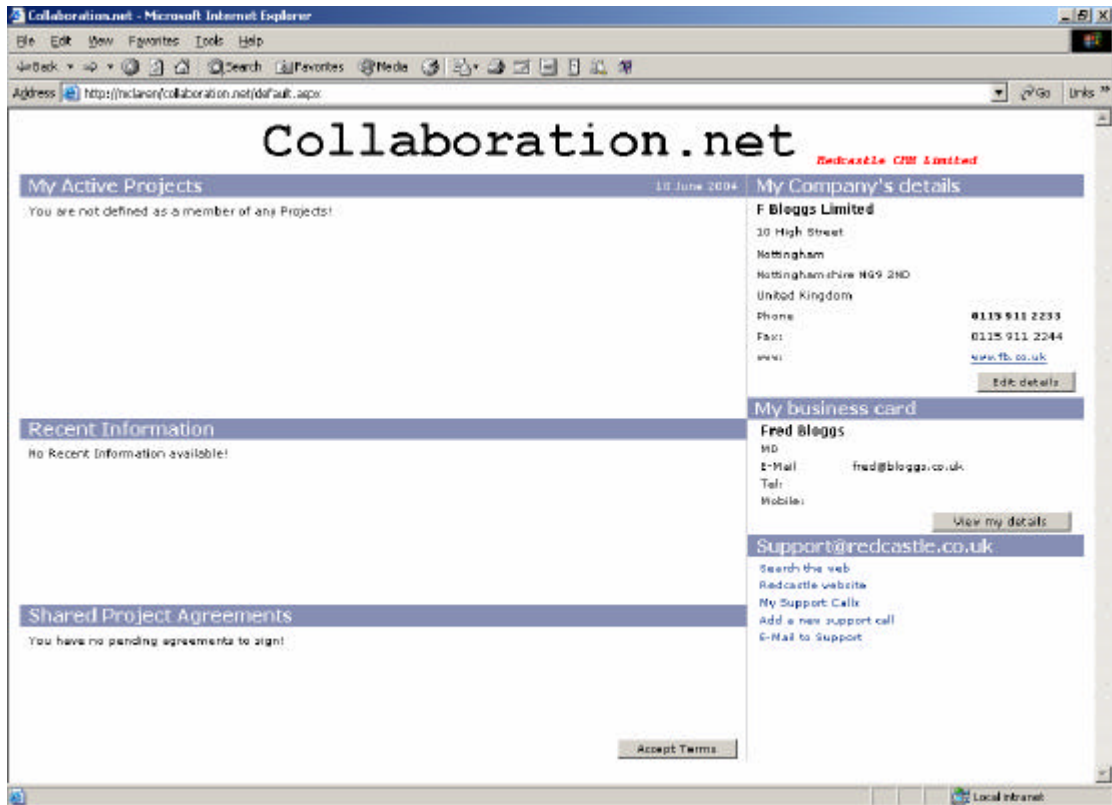
If Calls are registered against a particular piece of equipment, the user may have designated a CRM5 Project to hold information relevant to the equipment. Support Calls can be flagged to this project and accessed from within the CRM5 Project view.



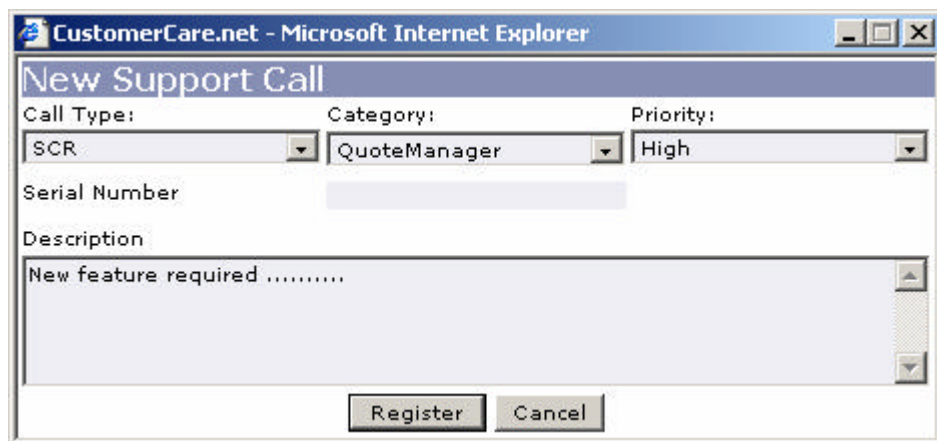
Customer Self Service

Due to the collaborative nature of Netserver technology we can enable customers, when granted permission, to view and add support calls over the internet.

This facility can be accessed via Collaboration.net



Here the Customer can view all their calls, down to activity level. They can also add a new call, which will be added to the unassigned call list and automatically send an email to a predetermined group informing them of the call.



In addition to viewing and adding calls the customer can update the Priority and Status.

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CustomerCare.net [Self Service] - Microsoft Internet Explorer

Address: http://mclanor/collaboration.net/Support/CustomerCare.htm

CustomerCare.net

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F Bloggs Limited Show Closed Calls

Support Calls

Call ID	Call Text	Registered	Status	Owner
002594	How are new templates added to QuoteManager.	08/06/2004	Open	JEFF
002605	Will QuoteManager handle pictures	08/06/2004	Registered	JEFF
002641	New feature required	10/06/2004	Open	

Call Details

Call: 002594
Call Type: Support Call
Call Priority: High

Contact: Fred Bloggs
Call Category: QuoteManager
No Serial Number Recorded

JEFF
Status: Open

Reported Issue

How are new templates added to QuoteManager.

Registered by: JEFF 08/06/2004 15:00:33

Supervisory Activities

Call Type	Date	Owner	Description
Support Desk	08/06/2004	JEFF	Called Fred at lunch.
e-mail	08/06/2004	JEFF	Sent manual

Conclusion

Done

Local intranet