

smart CRM

XS InfoSol Inc.



Business Begins With Hello!

Introduction



Introduction

smart CRM

Thanks for calling message is not enough today. We assure your customers we have a process that not let go your customer complaints into black hole.

Smart CRM will automatically generates easy follow instructions to submit complaints and a way to monitor and follow up the same. The process intelligent enough to notify the effected persons. We not only help you in improvement of your support and maintaining low cost for support but also increasing your customer satisfaction and retention

Whether its on IVR/SMS or Email alerts our escalation system assures your customer gets required and appropriate support from your company.

Concept

The Smart CRM is a web based help desk system. The program allows efficient processing of customer inquiries. Each inquiry is referred by as a ticket. A ticket consists of one or more messages arranged in chronological order. A message is very close equivalent of email letter: it has author and date attributes, contains some text and may have file attachments. Each message represents a note posted by a customer or a server desk representative-an operator.

The software allows tracking of ticket status, such as whether it is new or solved, which operator owns the ticket, what department the ticket is assigned

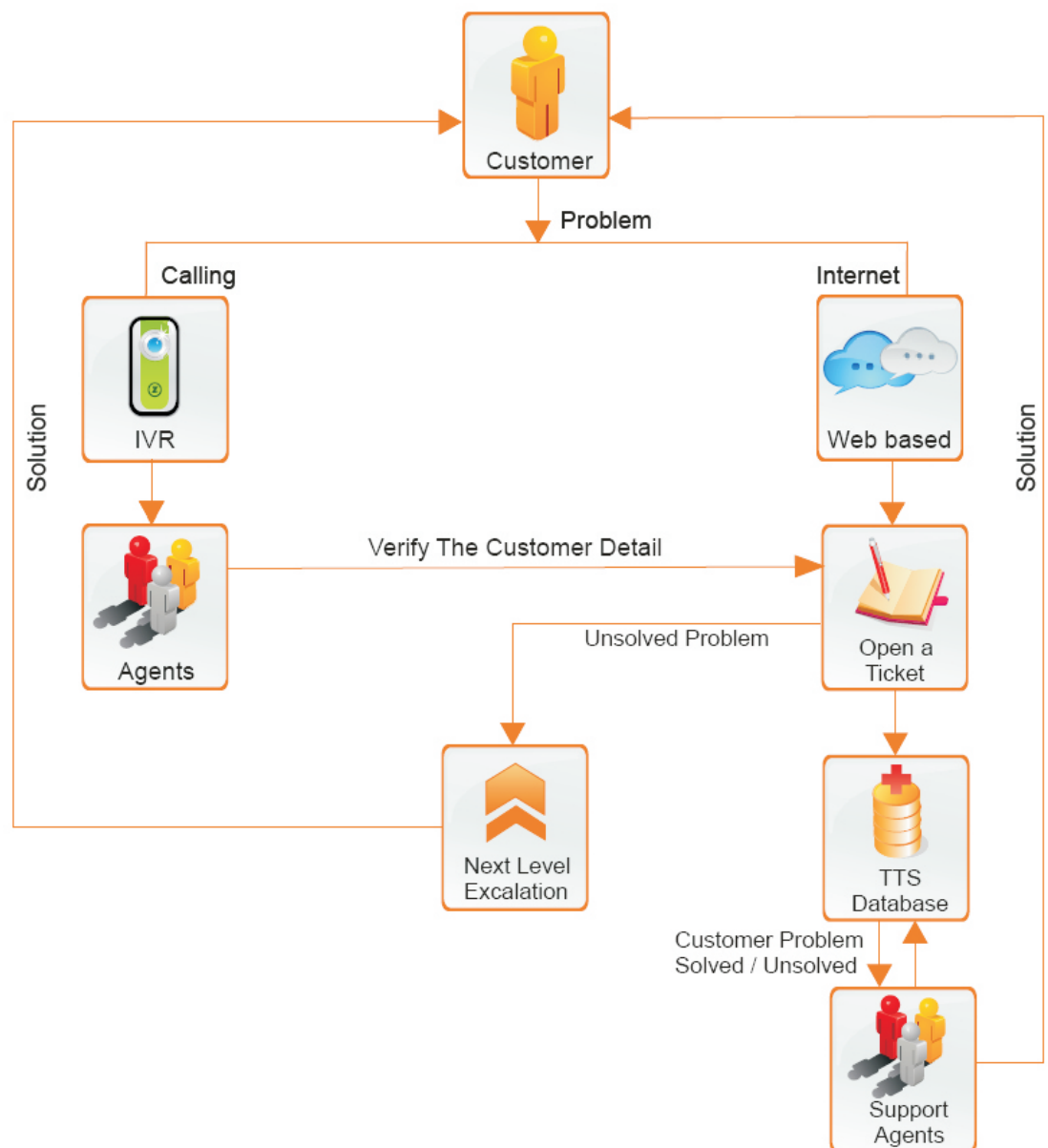


How It Works ?



How It Works ?

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Benefits of Smart CRM



Benefits

smart CRM

Faster response times

Smart CRM offers the best response management system in the industry at an extremely low cost. Smart Helpdesk automates the process of creating, organizing, tracking requests in to a seamless process. It automates the customer case tracking in the most efficient way.

Account and Contact Management

Smart CRM lets you establish and sustain your business relationships by maintaining valuable customer information. Integrating account management features with the Help Desk, it gives you an overall view of all your customer relationships. This central repository enables your teams to track account-level data, service level agreements, user contact information, and product ownership details.

Efficient and quick way of training support representative

Smart CRM ease of training staff and guiding them in following the designed workflow.



Benefits of Smart CRM



Benefits

smart CRM

Ensure QOS(Quality of services)

Smart CRM can help your IT support staff handle desk calls in a more organized manner. This can record all directed calls into the software database, which allows other IT staff to trace the nature of the problem. This makes it faster and easier to offer solutions.

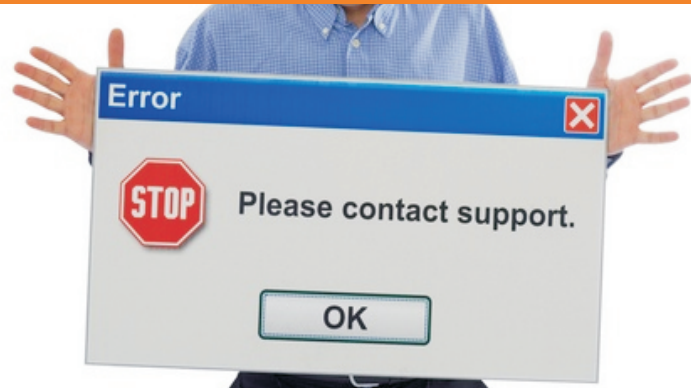
Using help desk programs also allow your support team to continue work without any pressure from customer responses. This can help them focus on their tasks and not worry about the status of their calls. With these programs, you can provide immediate response and timely results to guarantee customer satisfaction with quality.

Improved Customer Service / Satisfaction- Tickets Response

Your customers no longer have to wait for 9 - 5 p.m. or go on hold for ages on the phone. They can now get support by accessing web-Ticketing so you are providing true 24/7 support! They can help themselves through the extensive Knowledge Base, and Forum features of the Smart CRM software. They can also track progress of their support calls by accessing the CRM software on the web.



Benefits of Smart CRM



Benefits

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Increase customer retention

Knowing your customers, their frequently-asked questions, which customer service channels they prefer, their service history and their satisfaction level all this within one CRM software solution – gives your organization the competitive edge when it comes to personalized customer service, customer engagement and retention.

Self help Knowledge Base

Smart CRM helps your customers find answers to their problems instantly. There is no-waiting and is available 24X7. And since it is an automated service it brings down the load on your helpdesk.

Canned Responses

Most support departments will have commonly asked questions regarding their products and policies. Even though some parts of a customer response may be unique from case to case, other parts may be identical in nearly all cases. That's where canned responses come into play. Canned responses are perfect for:

- Frequently asked questions lists
- Answering common questions (like password resets or pricing information)
- Providing a list of useful resources.



Benefits of Smart CRM



Benefits

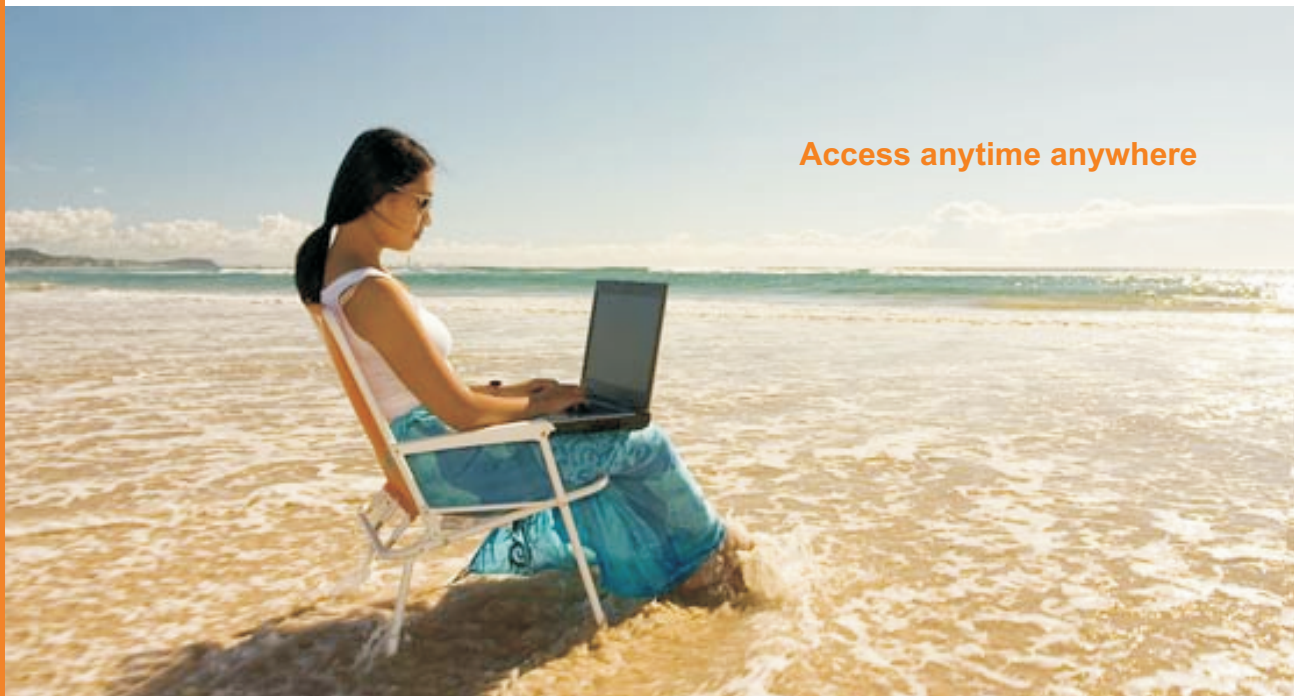
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Access anytime anywhere

Allow customers to submit even their most complex questions or issues online at their convenience , a world-class life cycle ticket management system for streamlined tracking, routing and resolution. Smart Help Desk empowers both your organization and your customers with round-the-clock professional online customer support from any where in the globe.

SLA

Service Level Management helps align crucial IT infrastructure and service support processes with the priorities of the Organisation. Service Level Management automates, monitors, and manages the entire range of services offered. In addition, visibility for commitments made between the company and the customers we support is enhanced.



Access anytime anywhere

Why Smart CRM ?



Why Smart CRM ?

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Knowledge Base Applications:

- Capture knowledge critical to supporting your customers
- Reduce call volumes
- Efficiently respond to repeat issues
- Quickly train new call center/support representatives

Customer Support Suite Applications:

- Web Customer Support Portal
- Intranet Employee Support Portal
- Call Center Documentation.

Customer Categorisation

- Product wise categorisation
- Revenue wise categorisation
- Gold, Silver, Platinum categories

Enhance Escalation

- Automatic escalation
- Manual escalation
- Transfer option
- Tagging option

Customer Support



Why Smart CRM ?



Why Smart CRM ?

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Enhance Escalation

- Automatic escalation
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MIS reporting

- Branch wise
- Department wise
- Prioritization
- Status wise
- Group wise
- Tagging option

IVR Integration

- On call ticket registration
- On call acknowledgment
- On call status check



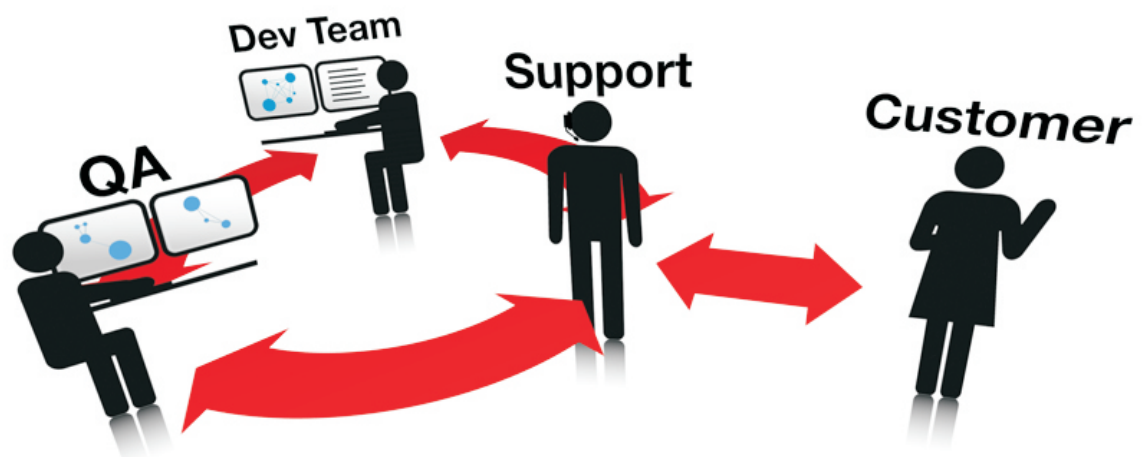
Features At A Glance



Features

smart CRM

- Manual and automatic ticket assigning to user or group
- Ticket scheduling
- Unlimited ticket categorisation
- Advance knowledge base application
- Automatic Email to Ticket Processing
- Web Services (API)
- SLA/Ticket Escalation
- Select Ticket Features
- Automatic Email Notifications
- Customer support suite
- Flexible user role management
- Flexible user rights management
- Automatic Email to ticket processing
- Automatic Email alerts
- Automatic SMS alerts



Features At A Glance



Features

smart CRM

- Multi attachment supports
- Time management
- Ticket Scheduling
- Web services (API)
- Duplicate ticket marking
- Ticket feedback option
- IVR Integration
- Reports export option
- Customized field reports
- Stats for ticket in-flow reports
- Customized Reports
- Agent Performance Reports
- Downtime Reports
- Category Wise Reports
- Received Call Logs Reports



Features



Features

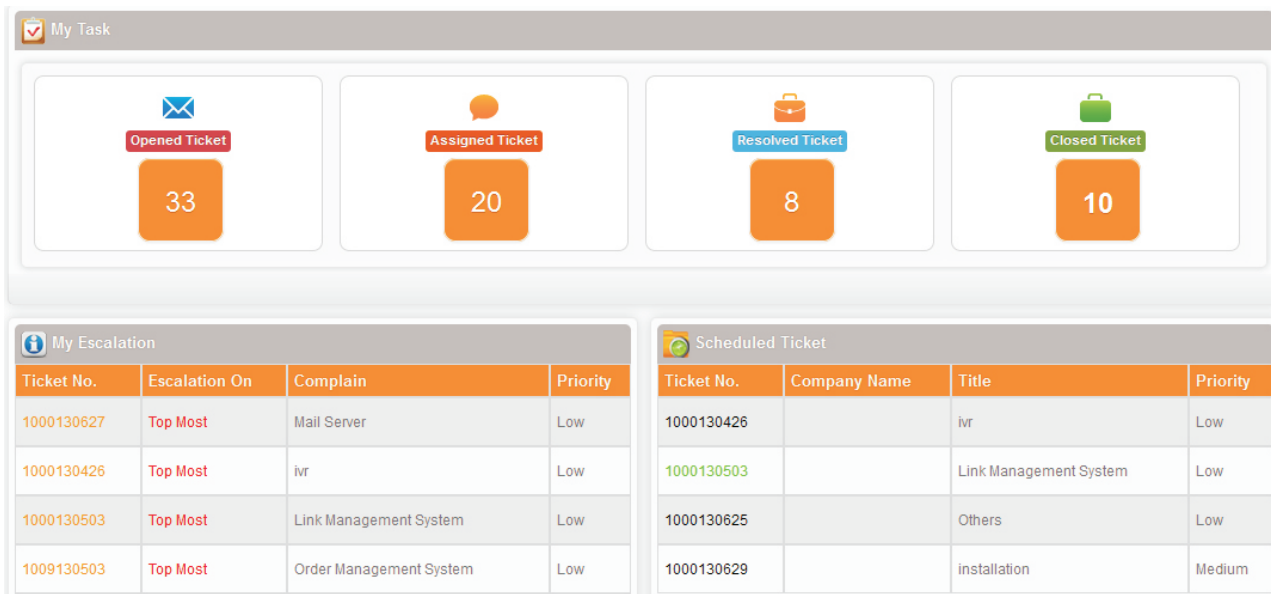
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Web Based, Configurable, Industry Standards

- Completely Web Based Online Customer Support Software Only a Web Browser is needed to administer & use the system
- Easily Accessible on your Corporate Intranet or Web Site
- Industry Standard Architecture (MY SQL Server)
- In-House & Hosted (ASP) Customer Support Software Editions available
- Utilizes Existing IT skills with minimal need for re-training

Powerful Admin Dashboard

- Admin Dashboard – fully customizable portal dashboard for at-a-glance viewing of lists and managing reports.



Features



Features

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Customer Support Request Submission/Management

- Submit Requests – allows customers to submit a request directly into the customer support Request/Ticket Queue (with email notifications)
- Manage Requests – allows customers to review request status, add notes and attachments and close requests

Flexible User Roles

- User Roles Management – allows customizable user roles so you can define what your users can and cannot do
- Multi-Department Request Management – allows customer support requests to be managed at the department level. Each department can create and manage their own requests.

Home → Support System → Create Ticket

Support Center

Customer Details

Search :

Customer Detail		Ticket Detail	
Service Id	1122	Total Ticket	46
Service Status	Enable	Open Ticket	20
Install Branch	Delhi	Assigned Ticket	13
Customer Code / GL	10359001 / 10359	Resolved Ticket	6
Customer Name	ARYA VEER DAL	Closed Ticket	6
Email Id	mukesh035@gmail.com		
Install Address	Vill+Po Anora, Distt: Mathura, PIN: 281301		
Service Name	Domain Registration		

Work Flow System



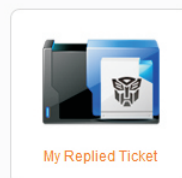
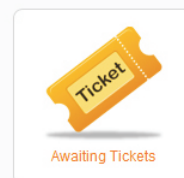
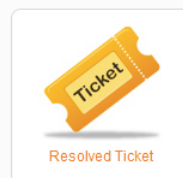
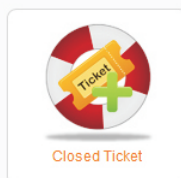
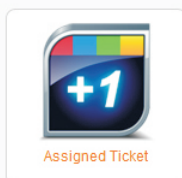
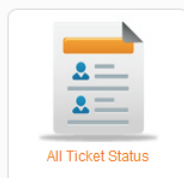
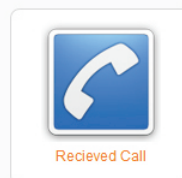
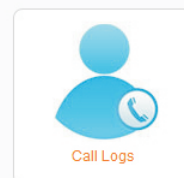
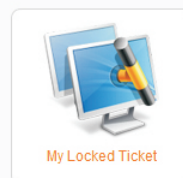
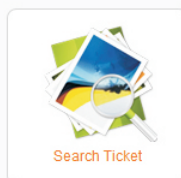
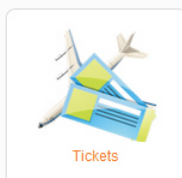
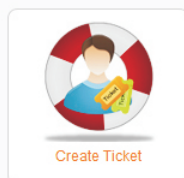
Features

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The Work Flow Module is available in specialized Help Desk versions. The versions may be purchased exclusively as needed.

Help Desk Workflow

- **Use & Benefit:** Many requests require multiple people in various departments to either approve the request (i.e. a change to a server configuration) and/or complete specific tasks related to the request. The Work Flow System provides a flexible method for automating AND keeping track of these tasks. Results are improvement in quality and control of information systems (Change Management), improved response time to requests involving multiple people, and reduction of time spent keeping track of multi-step requests.
- **Predefined & "On the Fly" Work flows:** Ability to create flexible work flows from a list of predefined tasks you setup or "on the fly" as Help Desk Tickets are being added.
- **Completion/Approval Paths:** Ability to define work flows with various completion/approval paths.
- **Rules Based Auto Assignment:** Ability to automatically assign predefined work flows to Help Desk Tickets based on flexible business rules (i.e. when a ticket is added to a particular category).



Work Flow System



Features

- Auto Email notifications: Email notifications are automatically sent to the appropriate person or group when tasks are completed or rejected.
- Work Flow Task "Queue": Empowers managers to view pending task status, assignment, predecessor relationship and deadlines (with color coded due dates for past due, current, future).

User Defined Fields

- Empowers Help Desk Managers with the ability to customize fields available in a ticket request form to their specific needs.
- Provides the ability to add fields and determine their position on the ticket form.
- Improves customer response times (support reps. have more information and are able to resolve issues faster).
- Improved reporting capabilities that result in better problem analysis.
- Ability to add fields to Tickets, Accounts and Contacts.

Home → Support System → All Ticket Status

Search By

Problem Category :

--Select--

Ticket Priority :

All Priority

Client Type :

Select

Status :

All Status

Escalation Level :

Select

From Date :

To Date :

Branch :

All

Search

Start

Previous (1 to 25 of 72)

Next

End

S.No	Ticket No.	Company Name	Contact Person	Contact No	Complain	Priority	Branch	Date Of Issue	Status
1	1001130803	COLLTEL INFOTECH Platinum	COLLTEL INFOTECH	Mukesh Kumar	Mail server problem	Low	Delhi	2013-08-03 13:53:42	Open
2	1000130803	TECHNICAL PLAYER SOLOUTION Platinum	TECHNICAL PLAYER SOLOUTION	Mukesh Sumrani	SmartGuard Bandwidth management problem	Low	New Delhi	2013-08-03 12:26:48	Open

Work Flow System



Features

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Custom/Business Rules

- Flexible Business Rules or auto assignment of tickets, auto notifications, etc.
- Multiple AND/OR Conditions & Actions – ability to configure rules based on various field dependencies and perform multiple actions (i.e. update status, reassign, email alerts, etc.)
- Rules Logging – ability to configure log events for each rule
- Ability to Route Inbound Emails to a Particular Support Queue (requires the optional Automatic Email to Ticket Module below) – automatically route incoming emails to different support teams or departmental “queues” based on the email address it was sent to (i.e. hr@... goes to the HR Queue, it@... goes to the IT Help Desk queue, etc.)

Automatic Email to Ticket Processing

- Monitors an email account and automatically adds/updates a ticket from the email message.
- Support for Multiple Email Accounts – POP, IMAP and Microsoft Exchange
- Work Flow Task Management– ability to complete Tasks via email
- Remote Mobile Technician Support – ability for support technicians to be able to update tickets via Email Smart Tags



Assign Category



Group Menu Rights



Assign Branch to User



Assign Button User



User Menu Rights



Assign Escalation Level



Assign Button Status



Assign Button To Group



Mail Master



E-mail Settings



SMS Configuration



SMS Alerts

Work Flow System



Features

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Web Services (API)

- Integrate software with 3rd party software applications- allows our software to be integrated with your existing software

SLA/Request Escalation

- SLA Management – Associate end users/customers into service level groups (account types)
- Business Rules – Create service level related business rules for each service level group
- Escalation – Auto escalate/re-assign tickets to another person or team
- Notifications – Auto email notifications (i.e. to a pager/mobile phone) to appropriate Help Desk personnel/management if a ticket is not responded to or closed within the defined time period.
- Logging/Reporting – Define service level log events as informational, warning or failure allowing report generation on failures and near failures. Generate charts of SLA performance



Add Escalation Level



Escalation Level



Manage Escalation

Work Flow System



Features

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Select Ticket Features

- Ticket Templates – create custom Ticket Templates, allowing you to create simple to complex ticket entry forms.
- Ticket Copy – ability to copy/save a ticket and its related information
- Memorized Tickets – ability to memorize repeatedly used tickets to speed ticket entry
- Recurring Scheduled Tickets – ability to schedule memorized tickets to automatically generate tickets for routine tasks

Automatic Email Notifications

- Confirmation Receipt To Customers/End Users/ – an email is sent back to the customer/end user that submitted the request to confirm its receipt.
- New Request Submissions – Customer support software users can be notified via email of new requests submitted by customers/end users.
- Re-routing of Requests – Customer Support staff are notified when a request is re-assigned to them. A link in the email takes them right to the request.
- SLA Failure – when the time to review a request has passed without action, notifications are sent to the appropriate management/supervisory personnel.



Work Flow System



Features

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Attachments

- Quick Attachments – easily add attachments (i.e. screen shots of error messages, etc.) to an online customer support software request.

Export Reports to PDF, Print View, or TSV

- Porting data is easy with Web Help Desk's report writer. Send your report data to TSV files, PDF, or a printer friendly view.

Support Multiple Companies, Locations, Departments, and Projects

- Not every client fits into specific parameters. Web Help Desk facilitates user segmentation into groups, companies, locations, and/or departments for appropriate service. Create efficiency and automation with Web Help Desk Action Rules to route, escalate and update tickets based on company, location, department, etc.

Robust, Easily Configurable Request Queue

- Flexible Request Queue – Easily enable/disable columns to display
- Priority Colors – Priorities are associated with a color making prioritization quick and easy.
- Request Filtering – each user can define their own preferred view of the requests by applying multiple filters
- Clean, Straightforward Layout – for ease of use



Work Flow System



Features

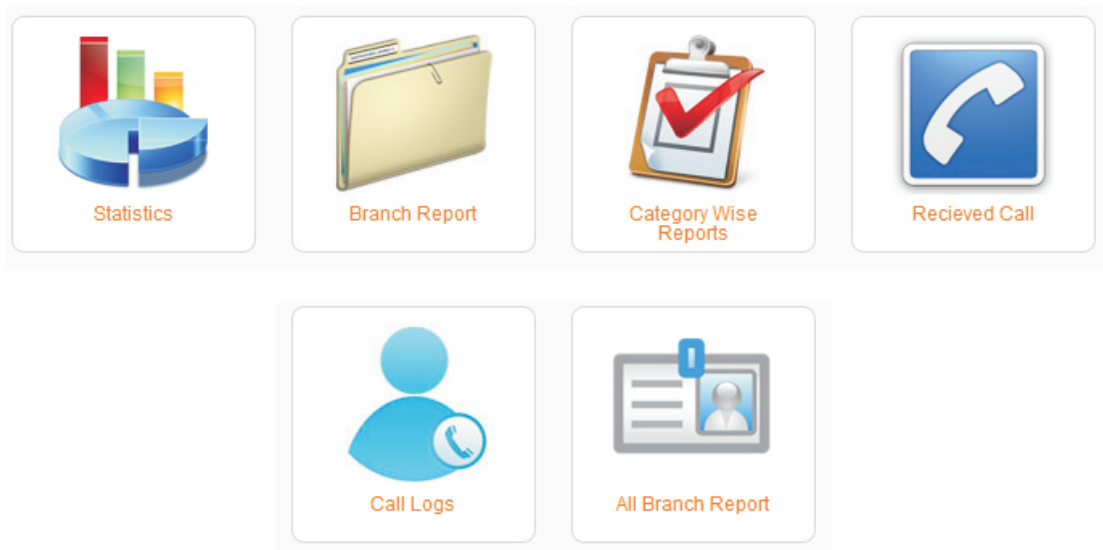
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Time Management

- Punch In/Punch Out Request Time Tracking – The online customer support software tracks cumulative time spent on a request.
- Ticket Due Date- Due date feature shows deadlines for ticket completion.
- Business Hours & Holidays – ability to define business hours to be used in ticket management

Reporting

- Metrics On Demand – ability to configure drill down charts and graphs
- Built-in Reports – numerous standard pre-built reports included
- Flexible Reporting capability – Our Customer Support Software identifies monthly/yearly trends by various metrics and facilitates root cause analysis (identifying problem areas)



Contact Us



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XS Infosol, The Invincible Technology :- Security Solutions - VoIP Solutions - IVR - Dialer - MailServer - Firewall - Bandwidth Management - Domain Registration - Web Hosting - Web Site Designing- Web Site Promotion.

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