



Doing More with Less in Technical Support

Presented by

Don Samoil, Sr. CRM Consultant



Agenda

- ❖ **Soffront Overview**
 - ❖ **Company**
 - ❖ **CRM Suite**
- ❖ **Customer Support Solution**
- ❖ **Key features**
- ❖ **Summary**
- ❖ **Questions and Answers**



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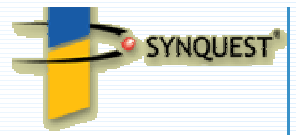


Soffront Overview - Company

- Soffront was founded in 1992
- Record of consistent growth and profitability
- Solution that has evolved over 10 years
- Over 500 CRM installations worldwide



Soffront Overview..Customers

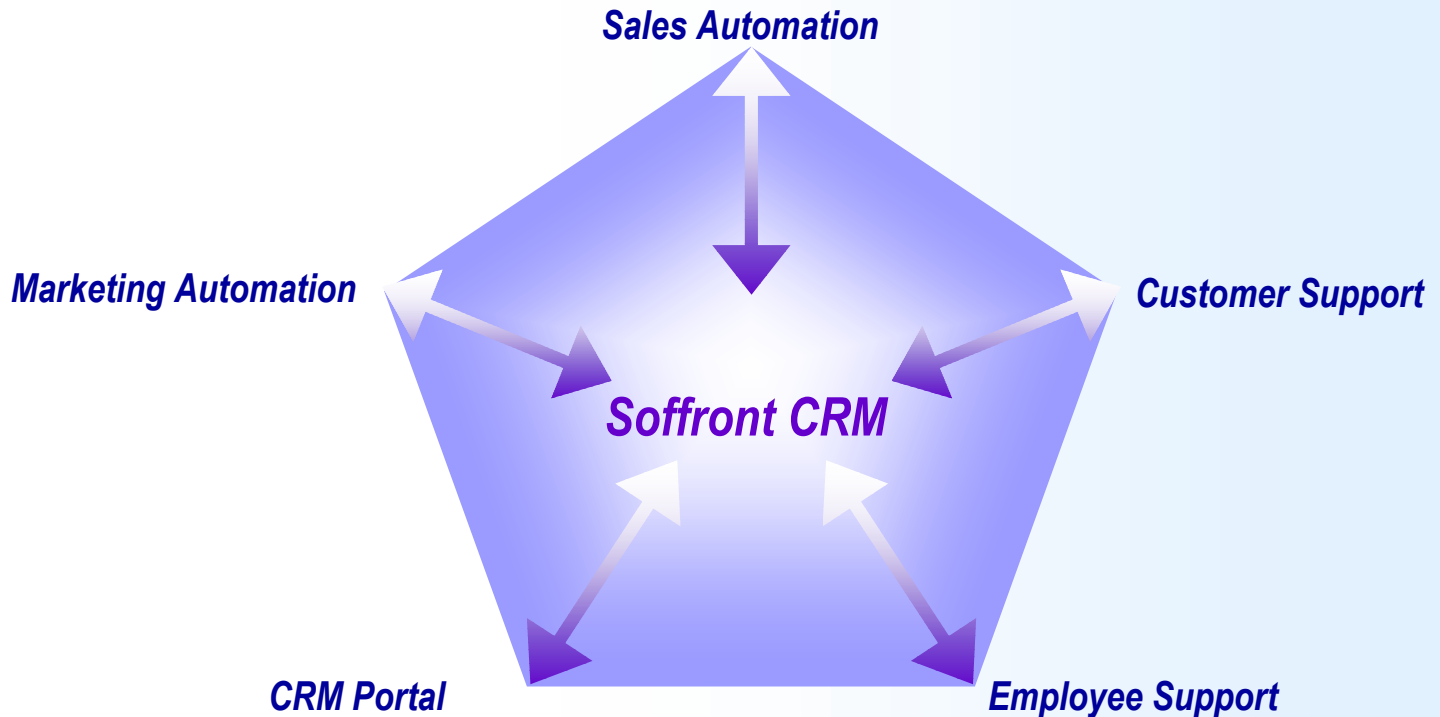


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Soffront Overview.. CRM Suite



Soffront Customer Support Solution

1. Knowledge Management

- Natural language self-service
- Build and share knowledge as you work a ticket

2. Web Tickets

- Web-based ticket submission and status check
- Automatic ticket assignment

3. Email Response for Support

- Create and assign tickets automatically
- Auto respond with knowledge base results

4. Multi-Channel Contact Center

- Multi-Channel service – Telephone, Web Chat, VOIP and Email
- Support agents send/receive phone calls using the computer

5. Customer Helpdesk

- Track tickets from submission to resolution.
- Automatic notifications
- Automate surveys to measure satisfaction
- Generate reports to measure CSR productivity.

6. Mobile Support

- Read-Write access from a laptop, a PDA or a WAP enabled mobile phone.

9. Customization Tools

- Add new fields and tables. Redesign the user interface. No coding required.
- Configure the workflow to match your business process.
- Change Soffront CRM with your changing business.

7. Business Rules

- Take automatic actions based on configurable business rules.
- Monitor 24 X 7.
- For example, escalate a 'critical' ticket to management, if not resolved in 24 hours.

8. Defect Tracking

- Track defects and enhancements
- Integrated Version Control
- Test Case management



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When a call comes in

Identifying the caller and contract

TRACKWEB 8 Susan Smith / SFCRM8000
Calendar | Inbox | Search | Setup | Tools | Help | Logout

Accounts | Activities | Contacts | Products | Tickets | Employees | Tasks

New | Critical Tickets | Query By Example | Query Manager | Report Manager | Customize Menu

Customize this Dashboard

Quick Search

Tickets.Contacts
Email
golden@abc.com

My Assigned Tickets

TicketID	Product	Priority	Synopsis
13	Product2	2-High	Keyboard is not working
22	Product4	3-Medium	Display problem
5	Product4	3-Medium	Display problem

Escalated Tickets

TicketID	QAPerson	Status	DueDate
	George Castro	Resolved	28 Apr 2003
	Jane Jones	Open	21 Apr 2003

Tickets by Product

Product	Tickets
Product1	3
Product2	8
Product4	6

Help Desk Summary

	Assignedlevel1	Assignedlevel2	Closed	Escalated	SubTotal
Bill Johnson	0	0	0	0	0
Bob Reynolds	0	0	0	0	0
Pat Miller	0	0	0	0	0
Susan Smith	0	0	0	0	0
SubTotal (4)	0	0	0	0	0

Calendar

April 2003

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

11:00AM [Follow up](#)
3:00PM [Meeting](#)

- <http://www.cnn.com>
- <http://www soffront.com>
- <http://www.google.com>
- <http://www.msn.com>
- <http://www.yahoo.com>



Verify the Contact and Contract

Soffront TRACKWeb - Microsoft Internet Explorer

File Edit View Favorites Tools Help Send Links »

SoFront TRACKWEB® 8 Susan Smith / SFCRM000
Calendar | Inbox | Search | Setup | Tools | Help | Logout

Accounts Activities **Contacts** Products Tickets Employees Tasks

New | Critical Tickets | Query By Example | Query Manager | Report Manager | Customize Menu

Actions --Select-- Contact ID: 4 Hide ?

Contact ID : 4 Type : Status : **Authorized**

Salutation : **Ms.** First Name : **Patricia** Last Name : **Golden**

Job Title : **CFO** Role : **Decision Maker** Dept :

Company : **ABC Corp.** Phone : **212-123-5555**

Address1 : **123 Main St** Fax : **212-123-4456**

Address2 : Mobile :

City : **Fremont** State : **CA** Email : golden@abc.com

Zip Code : **94539** Country : **USA** News Letter :

Contract Notes Activities Emails Tickets Accounts

	<u>ContractID</u>	<u>Status</u>	<u>Total hours</u>	<u>Used</u>	<u>Remaining</u>
Edit	2	Available	100	0	100



Enter the new ticket

The screenshot displays the SoFront TRACKWeb application in a Microsoft Internet Explorer browser. The interface is split into two main panes. The left pane shows a sidebar with a 'New' button circled in red and highlighted by a yellow arrow. The right pane shows a ticket entry form with the following fields:

Ticket ID	Creator: Susan Smith	Status: Open
Category: Request	Opened: 19 Jun 2003 14:57:03	Closed:
Severity: 3-Workaround	Product: Product4	Version: 4.4
Priority: 3-Medium	Synopsis: Display problem	


Below the form is a 'Notes' section with a text area containing the text: "Seems to be a hardware refresh rate issue. Needs further investigation".


At the bottom of the interface, a navigation bar includes buttons for 'Contract', 'Notes', 'Activities', 'Emails', 'Tickets', and 'Accounts'. The 'New' button is highlighted in red.



Assign the ticket

Soffront TRACKWeb - Microsoft Internet Explorer




File Edit View Favorites Tools Help  Links >>

 **TRACKWEB® 8** Susan Smith / SFCRM8000

Calendar | Inbox | Search | Setup | Tools | Help | Logout

Accounts | **Activities** | **Contacts** | **Products** | **Tickets** | **Employees** | **Tasks**

New | Critical Tickets | Query By Example | Query Manager | Report Manager | Customize Menu

Ticket ID Status

Queue ... Assigned To ...



Synopsis


[Notes](#) [Spell check](#)



Tracking the time spent

Soffront TRACKWeb - Microsoft Internet Explorer




File Edit View Favorites Tools Help  Links 

 **TRACKWEB® 8** Susan Smith / SFCRM000

Calendar | Inbox | Search | Setup | Tools | Help | Logout

Accounts | **Activities** | **Contacts** | **Products** | **Tickets** | **Employees** | **Tasks**

New | Critical Tickets | Query By Example | Query Manager | Report Manager | Customize Menu

Time Id User

Type ID

Time spent

[Work description](#) [Spell check](#)



Tying it back to the support contract

The screenshot shows the SoFront TRACKWEB 8 interface in a Microsoft Internet Explorer browser. The page displays details for a ticket with ID 22, including its creator (Susan Smith), status (Assigned level1), category (Request), severity (3-Workaround), priority (3-Medium), and synopsis (Display problem). A red circle highlights the 'Total time spend : 45 Minutes' field. Below the ticket details is a navigation bar with tabs for Notes, Activities, Time Track, Contacts, Contract, Defects, Solutions, Account, and Workflow. The 'Contract' tab is active, showing a table with columns for ContractID, Status, Total hours, Used, and Remaining. A red circle highlights the 'Used' and 'Remaining' columns in the table.

Ticket ID: 22 Creator: Susan Smith Status: Assigned level1
Category: Request Opened: 19 Jun 2003 14:57:03 Closed:
Severity: 3-Workaround Product: Product4 Version: 4.4
Priority: 3-Medium Queue: Hardware level1 Assigned To: Susan Smith
Synopsis: Display problem
Total time spend : 45 Minutes

ContractID	Status	Total hours	Used	Remaining
2	Available	100	0.75	99.25



All information at one place

The screenshot displays the SoFront TRACKWEB 8 web application interface. At the top, there is a navigation bar with tabs for Accounts, Activities, Contacts, Products, Tickets, Employees, and Tasks. Below this, a breadcrumb trail reads: New | Critical Tickets | Query By Example | Query Manager | Report Manager | Customize Menu. An Actions menu is visible with a dropdown arrow and a button icon circled in red and labeled '3'. The main content area shows ticket details for Ticket ID: 5, Category: Issue, Severity: 3-Workaround, Priority: 3-Medium, and Synopsis: Display problem. Other fields include Creator: Tim, Status: Assignedlevel1, Opened: 20 Apr 2003 13:16:01, Product: Product4, Version: 4.4, Queue: Hardware level1, and Assigned To: Susan Smith. A vertical red line on the left side of the details area is labeled '1'. At the bottom, a Notes section is circled in red and labeled '2', containing a note from 06 Jan 2003 14:36:37 by admin- stating: Seems to be a hardware refresh rate problem. Needs investigation.



Support process

The screenshot displays the TRACKWEB 8 web application interface. At the top, there is a navigation bar with tabs for Accounts, Activities, Contacts, Products, Tickets, Employees, and Tasks. Below this, a breadcrumb trail reads: New | Critical Tickets | Query By Example | Query Manager | Report Manager | Customize Menu. The main content area features an 'Actions' menu with a dropdown showing options like '--Select--', Edit, Resolve, Search KB, and 2nd level. The ticket details are as follows:

Tic	Resolve	Creator :	Tim	Status :	<u>Assignedlevel1</u>
Cat	Search KB	Opened :	20 Apr 2003 13:16:01	Closed :	
	2nd level	Severity :	3-Workaround	Product :	Product4
				Version :	4.4
		Priority :	3-Medium	Queue :	Hardware level1
				Assigned To :	Susan Smith
Synopsis : Display problem					
Total time spend : 30 Minutes					

At the bottom, there is a 'Notes' section with a tabbed interface (Notes, Activities, Time Track, Contacts, Contract, Defects, Solutions, Account). A note is visible: '06 Jan 2003 14:36:37 -admin- Seems to be a hardware refresh rate problem. Needs investigation.'



Automatic surveys

Measure customer satisfaction on ticket closure

The screenshot displays an email client interface with a message titled "Ticket No: 9589 has been closed - Message (Plain Text)". The message content includes the sender (support@soffron), recipient (satishek@soffron), and subject (Ticket No: 9589). The body of the email reads: "Dear satishek, Please h... link and fill in TicketID :9589 Synopsis :Valida Thank you, <https://soffron>".

Overlaid on the email is a browser window titled "Your feedback please - Microsoft Internet Explorer". The browser displays the SoFront Software logo and a survey form. The form header states: "Your ticket has been closed. Let us know if you are satisfied. Please answer this questionnaire to help us serve you better the next time." The form includes dropdown menus for "Ticket Resolution" (set to "Very Good") and "Customer Service" (set to "Good"). Below this, it asks "Please answer the following:" with three questions, each with a "Yes" dropdown: "Was the support engineer able to understand / troubleshoot your problem quickly?", "Is your problem fixed or question answered?", and "Was the support engineer courteous?". A fourth question asks, "Based on your satisfaction with the resolution of this ticket, would you recommend Soffron solutions to others?" with a "Yes" dropdown. A "Comments" section contains the text "Kudos!". A "Submit" button is located at the bottom of the form.



Monitor your SLAs

Escalation rules to track SLAs

Create Escalation Rule

Name:

on: Status on Off

Rule Condition

If the Record status has not been changed for this long (Closed records are ignored)

Minutes: Hours: Day: Week:

Additional condition (Optional)

Whom to notify

Send email to these addresses(Comma separated email addresses)

Send email to these groups

Send email to these users

Administration
Quality Assurance
Sales
Development
HelpDesk

Peter mills
QA Manager Mark
Susan Smith
Tim
Tim Daniels

What to update

Update field With value

Apply this rule every

Save Close



Access the knowledgebase while working

The screenshot displays the SoFront TRACKWEB 8 web application interface. At the top, there is a navigation bar with the SoFront logo and the text 'TRACKWEB 8'. To the right of the logo, there are links for 'Calendar', 'Inbox', and 'Search', with the 'Search' link circled in red. Below the navigation bar is a menu with tabs for 'Accounts', 'Activities', 'Contacts', 'Products', 'Tickets', 'Employees', and 'Tasks'. Underneath the menu, there are links for 'New', 'Critical Tickets', 'Query By Example', 'Query Manager', 'Report Manager', and 'Customize Menu'. The main content area shows a ticket details form with the following fields: 'Actions' (a dropdown menu with 'Search KB' selected), 'Tic Resolve' (a text input field), 'Creator: Tim', 'Status: Assignedlevel1', 'Cat 2nd level', 'Opened: 20 Apr 2003 13:16:01', 'Closed: [empty]', 'Severity: 3-Workaround', 'Product: Product4', 'Version: 4.4', 'Priority: 3-Medium', 'Queue: Hardware level1', and 'Assigned To: Susan Smith'. Below these fields is a 'Synopsis: Display problem' field and a 'Total time spend: 30 Minutes' field. At the bottom of the interface, there is a 'Notes' section with tabs for 'Activities', 'Time Track', 'Contacts', 'Contract', 'Defects', 'Solutions', and 'Account'. The 'Notes' section shows a note dated '06 Jan 2003 14:36:37 -admin-' with the text 'Seems to be a hardware refresh rate problem. Needs investigation.'



Build knowledge as you work

The screenshot displays the SoFront TRACKWEB 8 web application. The interface includes a navigation menu with tabs for Accounts, Activities, Contacts, Products, Tickets, Employees, and Tasks. The 'Tickets' tab is active, showing a detailed view of a ticket with the following information:

- Ticket ID: 5
- Creator: Tim
- Status: Assignedlevel1
- Category: Issue
- Opened: 20 Apr 2003 13:16:01
- Closed:
- Severity: 3-Workaround
- Product: Product4
- Version: 4.4
- Priority: 3-Medium
- Queue: Hardware level1
- Assigned To: Susan Smith
- Synopsis: Display problem
- Total time spend: 30 Minutes

Below the ticket details, there is a table with columns for Status, Synopsis, and Solution. The table contains one entry:

Status	Synopsis	Solution
New	display problem	Check as to whether all the cables are connected properly and the power is switshed on. If that is not



24/7 Web support and self-service

The screenshot displays the SofFront Software user interface. The main content area is titled 'My Tickets' and contains a table with the following data:

TicketID	Status	Synopsis	
1	Closed	Display problem	--
2	Open	Screen colors are not consistent	--
28	Open	script error	--

Below the table is a 'KB Search' section with dropdown menus for 'Interest' (All Interest), 'Category' (All Categories), and 'Topic' (All Topics). A search box is labeled 'Please enter a keyword:' and a 'SEARCH' button is present.

On the left, the 'Update Profile' section shows user details for Ron Jackson, CFO at BCD Corp. An 'Update' button is at the bottom.

On the right, the 'Quick Links' section lists www.google.com and www.cnn.com. The 'Downloads' section lists links for Soffront Financials, Soffront Health Care, Soffront Configuration, and Trackweb Settings.

A red circle highlights a small icon in the top-left corner of the 'My Tickets' table. A red arrow points from this icon to the 'Submit a New Ticket' form in the bottom-right corner.

Submit a New Ticket

Synopsis:

Type: Severity:

Product: Version:

Description:

Attachments:



Queries and Reports

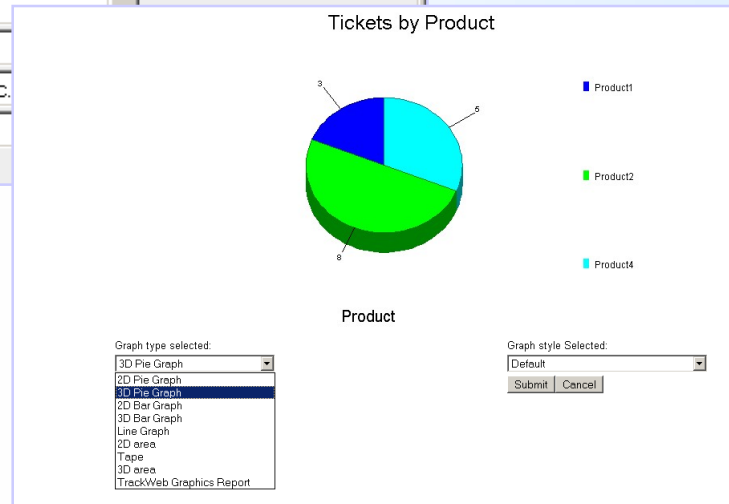
Wildcard Search

Contact ID	<input type="text"/>	Type	<input type="text"/>
Status	<input type="text"/>	Salutation	<input type="text"/>
First Name	<input type="text"/>	Last Name	<input type="text"/>
Job Title	<input type="text"/>	Role	<input type="text"/>
Dept	<input type="text"/>	Company	<input type="text"/>
Address1	<input type="text"/>	Address2	<input type="text"/>
City	<input type="text"/>	State	<input type="text"/>
Zip Code	<input type="text"/>	Country	<input type="text"/>
Phone	<input type="text" value="212-123-5555"/>	Fax	<input type="text"/>
Mobile	<input type="text"/>	Email	<input type="text" value="golden@abc"/>
Notes	<input type="text"/>	News Letter	<input type="text"/>

Customer Support Representative Report - Microsoft Internet Explorer

Customer Support Representative Report (for January 2003 - April 2003)

Agent	Resolved			Total	%	Tickets closed	
	in 1 day	in 1-3 days	in > 3 days			Avg. per day	
Susan Smith	2	0	2	4	36.3636363636364	0	0
Bob Reynolds	1	2	0	3	27.2727272727273	0	0
Carol Bennett	0	1	0	1	0.000000000000000	0	0
Dave Jones	0	0	1	1	0.000000000000000	0	0
John Johanson	1	0	0	1	0.000000000000000	0	0
Bill Johnson	0	1	0	1	0.000000000000000	0	0



Personalized dashboard

The screenshot displays the SoFront TRACKWEB 8 interface. At the top, the user is identified as Susan Smith / SFCRM000. The main navigation bar includes Accounts, Activities, Contacts, Employees, Products, Tickets, and Tasks. A secondary bar offers options like View, Critical Tickets, Query By Example, Query Manager, Report Manager, and Customize Menu. A red circle highlights the "Customize this Dashboard" link.

Quick Search

Tickets

Ticket ID

Recent Records

- Team follow up
- Follow up with Full Sun
- Full Sun, Inc
- Defect ID:23
- Defect ID:33
- Ticket ID:5
- Ticket ID:2
- Account ID:4

KB Search

Please enter a keyword:

GO

My Favorite Links

- <http://www.cnn.com>
- <http://www.softfront.com>
- <http://www.google.com>
- <http://www.msn.com>
- <http://www.yahoo.com>

My Assigned Tickets

TicketID	Product	Priority	Synopsis
13	Product2	2-High	Keyboard is not working
2	Product2	3-Medium	Screen colors are not consistent
5	Product4	3-Medium	Display problem

My Escalated Tickets

DefectID	QAPerson	Status	DueDate
23	George Castro	Resolved	28 Apr 2003
33	Jane Jones	Open	21 Apr 2003

Tickets by Product

Product	Ticket Count
Product1	3
Product2	5
Product4	3

Calendar

April 2003

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

11:00AM [Follow up, Scheduled](#)

3:00PM [Meeting, Scheduled](#)

Help Desk Summary

	Assignedlevel1	Assignedlevel2	Closed	Escalated	Sub Total
Bill Johnson	1	0	1	0	2
Bob Reynolds	1	0	3	0	4
Pat Miller	1	1	0	1	3
Susan Smith	3	0	4	2	9
SubTotal (4)	6	1	8	3	18



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Summary

Soffront CRM Features that help you do more with less

- ✓ Verify contact and contract information
- ✓ Enter new ticket and assign to an agent
- ✓ Keep track of time and support contract parameters that matter
- ✓ Maintain all ticket information in one place



Summary..

Soffront CRM Features that help you do more with less

- ✓ Follow the support process and stay on top of SLAs
- ✓ Measure customer satisfaction with automatic surveys
- ✓ Build knowledge as you work
- ✓ Provide 24/7 support from the Web and enable self-service
- ✓ Stay on top with key metrics and a personalized dashboard



Closing thoughts

Ensim Corporation does more with less using Soffront CRM

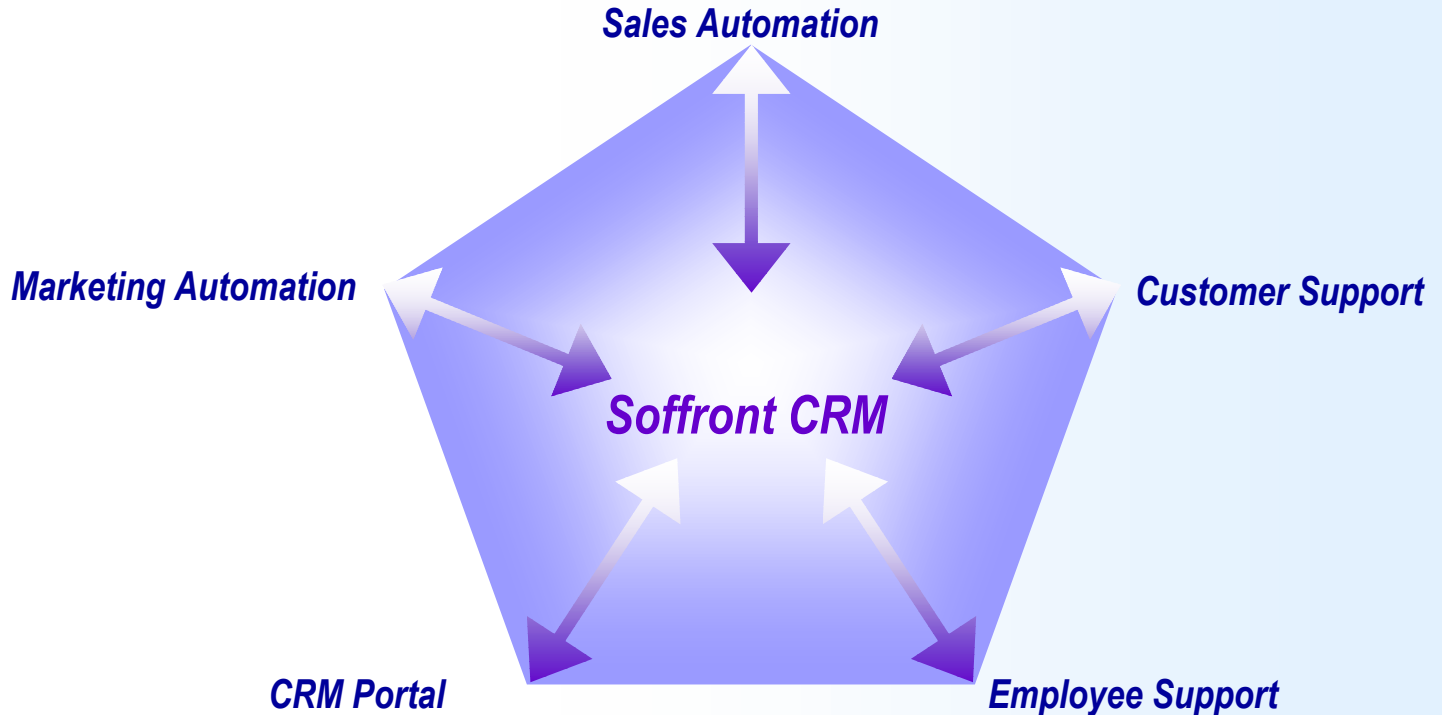
- ✓ **Tripled operational volume and still improved customer service**
- ✓ **No additional resources needed to handle dramatic growth**

“Even with significant growth, we were able to actually increase customer satisfaction without having to hire additional support staff. We can directly attribute this to the implementation of Soffront Knowledge Base and self help tools.”

**-Director, Professional Services and Support
Ensim Corporation**



Closing thoughts



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Questions and Answers



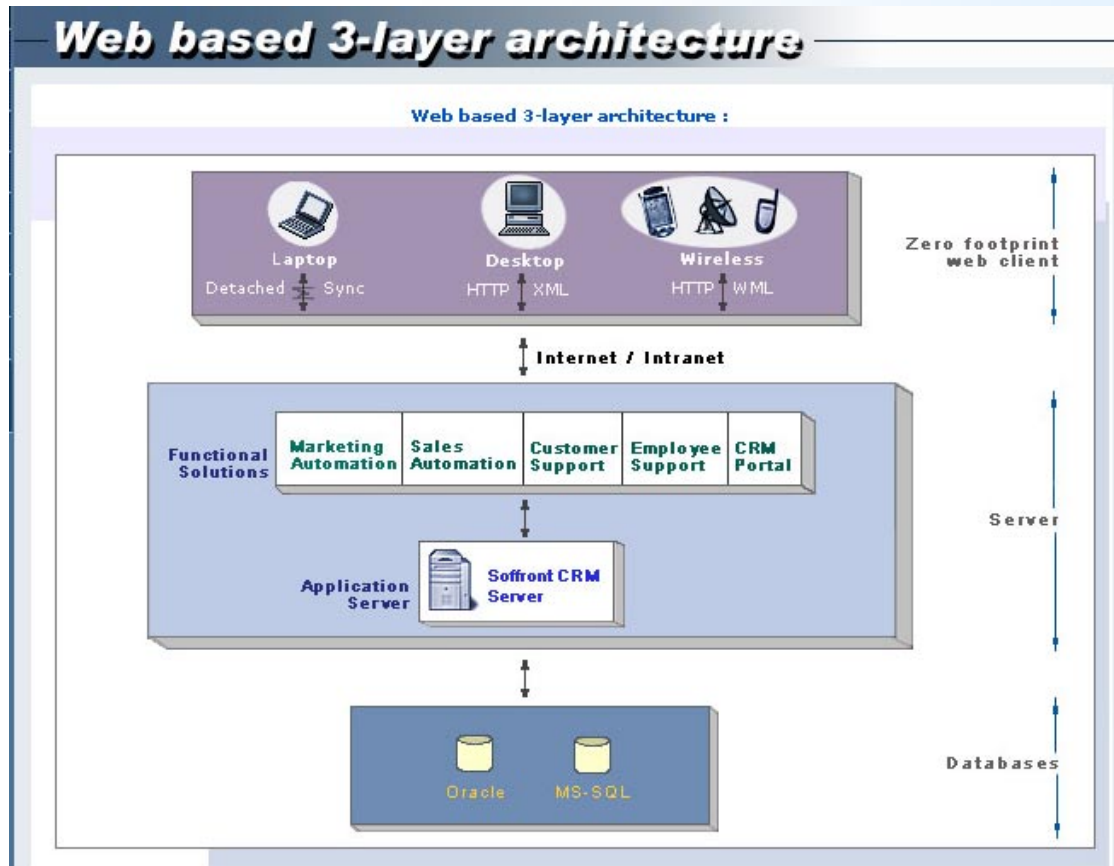
For more information or to request a copy of these slides, please contact:

**Satish Kumar,
Product Marketing Manager,
satishk@soffront.com
510.413.9000 X 105**



Technology Architecture

Web based 3-layer architecture



Configuration and Customization

1. End user driven
 - ❖ Personalization features like dashboard layout, start-up object, sub-menu, fields to view etc.

2. Admin driven
 1. Create new tables
 2. Define the relationship between tables
 3. Design new forms
 4. Add / modify fields
 5. Configure the workflow
 6. Create new gadgets for the dashboard
 7. Create users and user groups



Configuration and Customization

Admin option – Define the relationship between tables

Ticket ID: 5 Creator: Tim Status: Assignedlevel1
Category: Issue Opened: 20 Apr 2003 13:16:01 Closed:
Severity: 3-Workaround Product: Product4 Version: 4.4
Priority: 3-Medium Queue: Hardware level1 Assigned To: Susan Smith
Synopsis: Display problem
Total time spend: 30 Minutes

Notes | Activities | Time Track | Contacts | Contract | Defects | Solutions | Account

[Edit](#) 06 Jan 2003 14:36:37 -admin-
Seems to be a hardware refresh rate problem. Needs investigation.

2

Users see this interface

TRACKWEB 8

admin / SFCRM3000

Calendar | Inbox | Setup | Tools | Help | Logout

Accounts | Activities | Contacts | Opportunities | Campaigns | Campaign Stage | Campaign Message | Products | Sales | Tickets | Help Desk Tickets

New | Quick Search | Query By Example | Query Manager | Report Manager | Recent Records | All Accounts | My Accounts | New Accounts | Customize Menu

Setup

Sub Objects

ID	Parent	Child	Child Label	View Form	Condition	Group	Flags
89	Ticket	Note	Notes	Note			Add, Edit
90	Ticket	TREVENT	Activities	TREVENT			Add, Edit
91	Ticket	TimeTrak	Time Track	TimeTrak			Add, Edit
92	Ticket	Contact	Contacts	Contact		1, 17, 14	Add, Edit, Search
93	Ticket	SLAMgmt	Contract	SLAMgmt		1, 17, 14, 9	
94	Ticket	Defect	Defects	Defect		1, 17, 14	Add, Edit, Search
95	Ticket	Solution	Solutions	Solution		1, 14, 17	Add, Edit, Search
96	Ticket	Account	Account	Account		1, 14, 17	Search

1

Admin customizes here



Configuration and Customization

Customization – Adding/modifying a field

Form Layout - Ticket - Microsoft Internet Explorer

Field Definition Dialog

Fill in the field attributes. If you want to add additional items to the List field add 'Value List' button. Click the Formula button to specify the formula and where condition of the calculated or required fields.

Name: NoName Type: Text Size: 64 Position: 17

Label: NoName Default Value:

Description:

Field Option

- Required Field
- Non Editable
- Index Field
- E-Mail Field
- Notify Field
- Calculated Field
- Buddy Button
- URL Field
- Display Only
- Telephone Number

Value List...
Option...
Font...
Formula...
OK
Cancel
Help



Configuration and Customization

Form Layout - Ticket - Microsoft Internet Explorer

Ticket ID: Creator: Status:

Category: Opened: Closed:

Severity: Product: Version:

Priority: Queue: Assigned To:

Synopsis:

Notes:

1

Admin option –
Drag / drop form
designer in your
browser

So front TRACKWEB®

Accounts Activities Contacts Products Employees Tasks

New | Critical Tickets | Query By Example | Query Menu | Customize Menu

Ticket ID: Creator: Status:

Category: Opened: Closed:

Severity: Product: Version:

Priority: Synopsis:

Notes [Spell check](#)

2



Configuration and Customization






Admin option – Defining the workflow

The screenshot displays the SoFront TRACKWEB 8 administration interface. The top navigation bar includes menu items such as Accounts, Activities, Contacts, Opportunities, Campaigns, Campaign Stage, Campaign Message, Products, Sales Reps, Tickets, and Help Desk Tickets. The user is logged in as 'admin / SFCRM3000'. The main content area is titled 'Setup' and shows a 'Workflow' configuration table. The table has columns for ID, Objects, Actions, Action Form, Next State, Next Actions, and Group. The 'Actions' column is highlighted with a red box.

ID	Objects	Actions	Action Form	Next State	Next Actions	Group
37	Ticket	Submit	Ticket:Submit	Open	Assign, Edit, Search KB	1, 14
38	Ticket	Assign	Ticket:Assign	Assignedlevel1	Edit, Resolve, Search KB, 2nd level	1, 17, 14
39	Ticket	2nd level	Ticket:Assign	Assignedlevel2	Edit, Escalate, Resolve, Search KB	1, 14
40	Ticket	Escalate	Ticket:Escalate	Escalated	Search KB, Edit	1, 14
41	Ticket	Resolve	Ticket:Resolve	Closed	Edit, Search KB	1, 14
42	Ticket	Search KB				1, 14
43	Ticket	Edit	Ticket:Submit			1, 14
44	Ticket	View	Ticket:View			1, 14, 5, 3



The Soffront difference

1		Over 10 years of expertise in the mid-size CRM domain
2		Unmatched adaptability – “Built to Adapt”
3		Rapid deployment – up and running in days!
4		Fully web based solution
5		Broad, yet, integrated suite of CRM applications

