

Instant access to information

- ▶ Leverage existing information held in your database
- ▶ Answer integration, no double keying of companies
- ▶ Manage your communications
- ▶ Keep your promises
- ▶ Be pro-active
- ▶ Integrated with Outlook 2000 and above
- ▶ Fully integrated with Supply Chain modules bringing sales and service together
- ▶ Efficient, consistent management of Contacts leads to improvements in service levels for Customers, Vendors, Companies and so on
- ▶ Improve Customer retention

Answer Contact Centre is the base module within the Answer CRM suite and offers a new look and feel carefully designed to facilitate speed and ease of use. It provides your service teams instant access to the information they require and the tools necessary to respond to any query or question.

In its simplest implementation, it can provide a fresh front end to the Customer and Vendor service and support teams in your organisation. Once they have identified who they wish to deal with, a Contact, a Customer, a Vendor and so on, all information relating to the Contact/Company (Customer or Vendor) is available and appropriate methods of communicating with that company are provided.

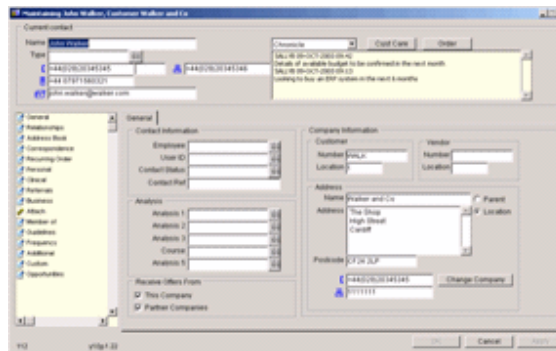
The current Contact being dealt with is retained “in context” and all the appropriate Answer “Back-Office” functionality can be reviewed to provide the information necessary.

As you get more familiar with the functionality, the Contact Centre application provides you the ability to proactively deal with your Contacts.

Ensure that if you promise to contact them on a certain matter, then this promise is visible to your organisation, and ensures that the promise is kept.

Get to know your contacts better. Understand where they fit in their organisation and what decisions they can take.

Integrate with MS Outlook to send and record e-mails from the Contact Centre and schedule appointments.



What is a contact?

A Contact in the Answer Contact Centre is anyone who has, or might have, a relationship with your company.

A contact might represent an existing Customer or Vendor. Dealing with such contacts enables you to leverage the integration into the Answer Enterprise application, providing you with instant information relating to the current status of the Customer/Vendor in question.

Contacts do not have to represent Customers or Vendors—in fact they do not have to be associated with a company at all. You might want to record any dealings with your bank, landlord or even queries from end consumers.

The Contact might be from a Prospective Customer or Vendor and you can capture information relating to the opportunity which presents itself. Further integration into the Answer application allows such Prospects to be provided with Sales Quotations or you can send a Request For Quotation to a prospective Vendor.

Contacts might also be people within your own organisation who are not Contact Centre users.

You can configure what items of data must be collected against a contact. This can help your organisation gain an understanding of where the contact sits in their structure and perhaps what decisions they can take.

For instance, you may define that Home or Business Address is mandatory using the configuration options.

Contacts can have user defined relationships assigned and/or enforced. These relationships can vary by Contact Type. A relationship is a link to another Contact, Customer or Company.

When defining Activities/Action Types then these can be assigned to a Relationship or a User or a Group of Users. Contacts can be linked to a Customer based on a Relationship.

When using Recurring Standard Orders who pays for individual items is determined by Contact relationships.

Contacts can be defined as 'Private' or Company, which invokes the appropriate processing. Contact data maintenance also includes the necessary double option for promotional and email offers.

Once you start working with a Contact that contact and associated company remain available to you without further searching until you decide to remove it from your work list.

How do I identify a contact?

You can identify contacts in many different ways. Users are provided with different paths through the identification process depending on what sort of information the contact is providing. It might be their e-mail address, the first few characters of their name, or the company they represent.

Advanced searching with full wildcard, similar sound matching and combinations of different data fields are available. For example looking for Fred Smith would suggest using Fred Smythe if a 'fuzzy' search set of criteria had been used.

The contact may not exist, there are many paths which then enable you to create the contact and associate him/her with a company if appropriate and capture all required/necessary data.

Once you have selected the contact you can immediately see all the open activities against this contact. You might be waiting for a call from the contact

on a certain subject, or realise that the contact was due to be called about a different matter. This helps improve your efficiency and the perception of a quality service in the contacts' eyes.

Contacts you are working with are retained as you select them, hence contacts you deal with on a regular basis are always visible on screen without having to be searched and retrieved.

Once a Contact's details are captured, if they wish to place a Sales Order then a single check will create them as a full Answer Customer or use 'one off' customer information to position the user in sales ready for entry of the sales lines required.

How do I identify a company?

Contacts might be associated with a company. They might be associated with an existing Customer or Vendor.

You can identify a company by Name, Address, Post Code, Telephone Number, or their existing Customer or Vendor code as used throughout the Sales and Purchasing modules.

Responsibility for maintaining the company identification for Customers and Vendors remains within the remit of the Sales and Purchasing teams. Any change of company characteristics such as Name, Address, Post Code, Telephone Number etc. are immediately reflected in the Contact Centre.

Any change of Company Telephone Number is immediately reflected through all Contacts associated with that company unless they have had a specific number attached.

You do not have to do double key any such data changes and there will be no confusion between data held in the Sales/Purchasing modules with that in the Contact Centre.

Activities

Everything done in the Contact Centre revolves around activities.

If a Contact calls in and leaves a message, that is recorded as an activity. If a Contact calls in and wants to be called back then that is a scheduled activity which is assigned to an appropriate member of your team.

If you call a Contact then that is a Completed activity. If you call a contact and they weren't available, that's an activity. If you asked them to call you back, that's an activity.

And so it goes on...

Most activities can be seen by all users of the Contact Centre regardless of the activity owner. Under certain configuration options you can assign activities to others or take ownership of activities currently assigned elsewhere.

You can print a calendar style schedule of your open activities.

Use the power of Outlook to request Appointments with your Contact. Invite others that might be required to attend and let Outlook determine if they are available on the requested date.

Use standard e-mail templates to create well-formed e-mails in Outlook ready to be sent to the Contact. Such e-mails can be reviewed by all users when reviewing your activities to find out exactly what has been said.

Mark activities as Sensitive to prevent unauthorized users from seeing them.

Activities can also be thought of as calls and offer:

Call Logging

- ▶ Incoming calls (e.g. complaint handling)
- ▶ Outgoing calls (e.g. marketing activities)
- ▶ Multiple Call Types
- ▶ System-generated Call Numbers
- ▶ System-maintained Call Statuses
- ▶ User-defined Call Reasons and Priorities
- ▶ Extra Date by Call Reason
- ▶ Issue, Comment and Reply Text
- ▶ Call ownership by person or department
- ▶ Optional auto-addition of new Contact
- ▶ Optional auto-addition of Action or Set of Actions
- ▶ Cross-reference calls to:
 - Answer objects/documents such as sales order, GRN, product, lot or credit note etc.
 - User-defined objects/documents
- ▶ Target and actual fix dates
- ▶ Accumulated Call costs and time spent

When managing any Actions resulting from a Call/Activity Contact Centre offers:

Action Tracking

- ▶ Multiple Actions per call
- ▶ Standard and/or ad hoc Actions
- ▶ User-defined Action statuses
- ▶ Action ownership by person, department or contact
- ▶ Planned and actual start and end dates/times
- ▶ User-defined Priorities
- ▶ Optional or Mandatory
- ▶ Action sequencing enforcement
- ▶ Accumulated Action costs and time spent
- ▶ Actions Due Enquiry

Activity Recording

- ▶ Multiple Activities per Action
- ▶ Pre-defined or ad hoc Activities
- ▶ All Activities time stamped
- ▶ Free-format text description
- ▶ Optional entry of time spent
- ▶ Optional entry of cost incurred

Capture data

Capture a wealth of additional data relating to Contacts and Companies. This data set builds upon that already being maintained in the Sales and Purchasing modules for existing Customers and Vendors.

Each data field is provided with the ability to select from a list of available entries. You can configure these items to enforce that entries must be made from these lists or you can allow your users to add entries as and when appropriate. Each list carries a set of configuration options and can be secured at the required levels to prevent inadvertent misuse/adjustment.

If you cannot see a data field that corresponds to a piece of information you want to record then you can take advantage of the ability to create your own data items for both Contacts and Companies. These can be positioned wherever you like and have an appropriate label and associated list of valid values.

Contact Management

- ▶ Multiple Contacts per Company/Customer, Address
- ▶ Internal Contacts
- ▶ Contact-specific details including:
 - Job title
 - Telephone no. and mobile no.
 - e-mail address
 - Text and extra data
- ▶ Contact search/enquiry facilities
- ▶ Contact suspension

Telephone numbers and email addresses

Telephone numbers are formatted accordingly to ensure consistent presentation of data. The number will include the country code although for ease of entry this is derived from the Country in which the company is based. A full set of ISO standard Countries and Dialing codes is included with the dataset provided with the Contact Centre.

Contacts associated with a company can either “inherit” the company telephone number or can have their own specific one entered.

For ease of entry the e-mail address of contacts can be configured as to whether they must be entered or not. The Contact Centre attempts to speed up entry by making a suggestion as to the domain of the e-mail address based on the company characteristics.

Telephone numbers and e-mail addresses are key to ensuring you are dealing with the correct contact and have not inadvertently selected the wrong one. The Contact Centre helps ensure consistency to help prevent mistakes.

Answer Enterprise integration and new developments

Answer Contact Centre provides a single point of entry for you to start working with a Customer or Vendor.

Once working with a Customer or Vendor, a set of Answer Back-Office functions are always available to you. This will be continually built upon by with ongoing Answer releases and currently you can enquire and report upon

objects related to the current company. For example you can review all open Sales Orders and optionally reprint any of the output documents, without having to continually search through objects belonging to other customers.

With appropriate security levels you can also maintain data pertinent to the current company. You can review prices and provide quotes to Customers.

The integration from Answer Enterprise back into the Contact Centre is continually being developed and this will further enhance your ability to pro-actively deal with your contacts. The application will direct your staff on certain conditions, for example when a credit limit has been breached, a delivery is going to be short or late or perhaps some received stock was not of the required quality.

User defined activity template

Optimal Activity Template definitions can be set up, which can have an unlimited number of Activities attached.

These Activities can be defined as occurring a number of days on, before, or after a given date, current date, sales order related dates (delivery, due, ship) based on a frequency (all, first, last and so on) and more.

Activity Templates can then be attached to the defined relationships for automatic generation of activities.

Recurring/standing order facilities

A Contact, either standalone or associated with a Company, can optionally have one or more Recurring/Standing Orders (RSO) associated with them.

An RSO is a collection of products that will form the basis of regular/timed sales orders.

The RSO can be defined, maintained, authorised, designed to be active for a period of time, stock checked prior to next shipment and much more.

An RSO can be used for the reorder/repeat supply of Janitorial Supplies, Repeat Prescriptions, and so on.

An RSO can provide the facility to prompt and auto-generate Customer Returns. Service Items can be highlighted for Collection based on user defined time parameters.

An RSO can automatically generate e-mails with or without user intervention

An RSO can also be defined as having multiple billing points on a part line by line basis with the appropriate invoice generation and splitting.

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