SmartAgent Training

Bootcamp – SmartAgent Case Management & Customer Profiles

Version	Date	Author	Changes
2.51	06/10/2023	David Jusdson, Joe Cooper & Paul Egan	Case Management & Customer Profile

Introduction

The purpose of this guide is to provide you with an introduction to using the Case Management & Customer Profile Module of SmartAgent.

About SmartAgent Case Management & Customer Profile Module

SmartAgent Case Management & Customer Profile Module is a modular addition to the standard SmartAgent build that can help organisations track customers and any associated cases that require a degree of escalation or management, across multiple channels.

This additional modular feature will require a degree of configuration, so that necessary data fields can be setup with the required options. Data fields can be configured to be dropdown menu options, Fixed format fields or free text fields as required.

The module can support multiple channels and customer data can be automatically captured from customer inputs or other data sources utilised to present the latest information on case progression to any agent that contacts the customer.

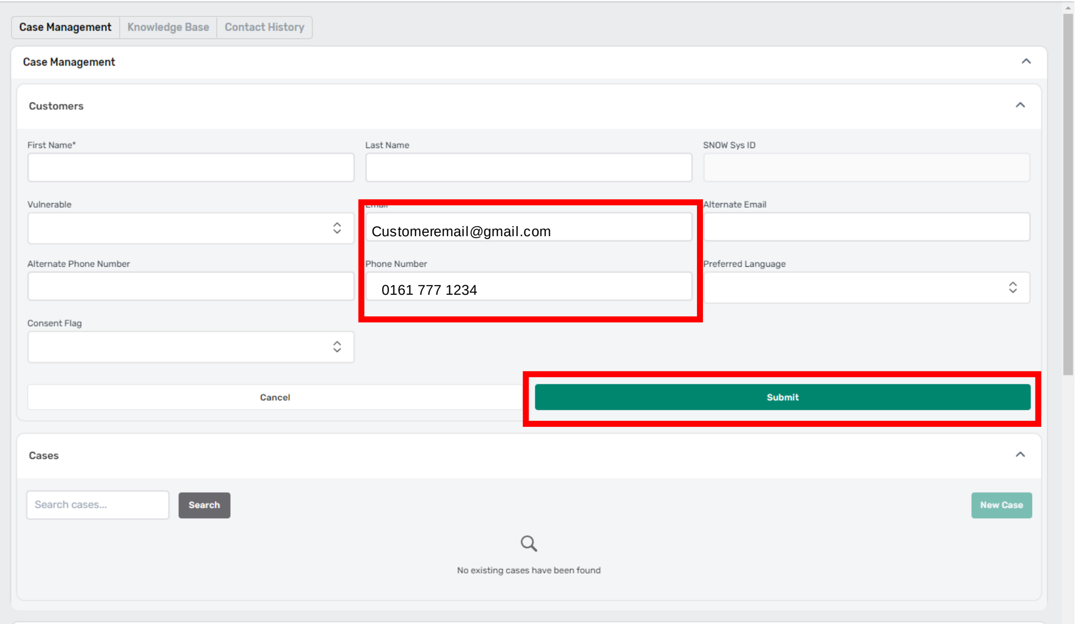
As a modular addition to the SmartAgent offering this will usually involve some degree of customisation to meet your requirements and needs. This guide outlines the general principles of how the system operates, but you will usually have your own custom fields and terminology that may require additional operational training, especially when integrated with other systems.

Agenda

Searching for a Customer Profile / Creating a new Customer Profile

This module can be configured so that it automatically recognises existing customers and presents the customer profile and any associated cases to the agent when they are presented to them as a new contact.

If the customer has not used the system before then details required for the Profile can be captured online or via voice and will be presented to the agent as a partially completed new customer form, with appropriate fields pre-populated for them to complete with the customer.



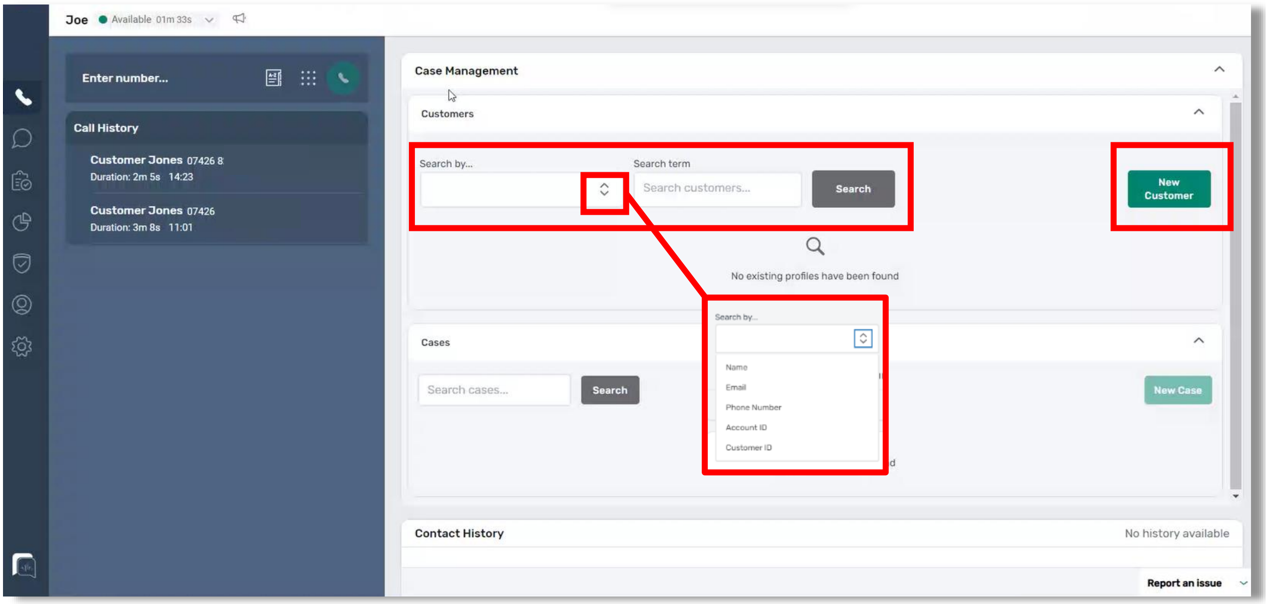
Alternatively, the system can be configured so that if the customers details are not on record that the Agent is presented with a blank new customer profile screen.

If a customer with an existing profile uses a new contact channel or has changed their existing contact details then they may come through to an Agent without their associated profile details.

To avoid creating duplicate customer profiles Agents should conduct a quick search for any existing customer profiles and then amend the profile with the customers new number or contact details

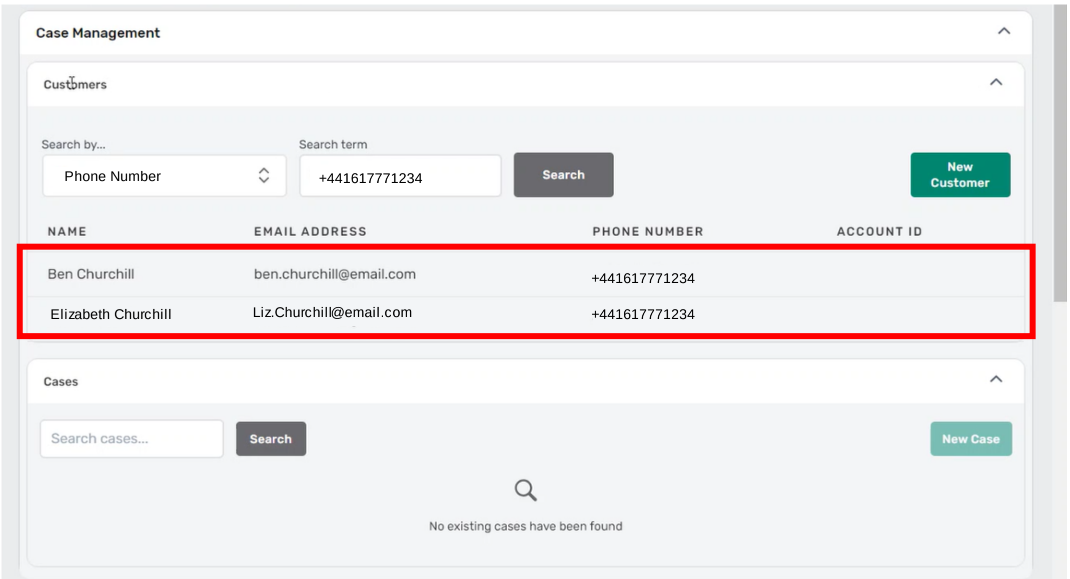
You can search for an existing customer profile using the “Search By” dropdown menu to select either
Name
Email
Phone Number
Account ID
Customer ID

And then input text in the search term box and select “search” button.



When using the search function you may get duplicate responses as shown below, as a person may have several different contact methods, or there may be very similar names in the system, you should ensure you aren't creating a duplicate profile, or incorrectly linking a customer with the incorrect profile information.

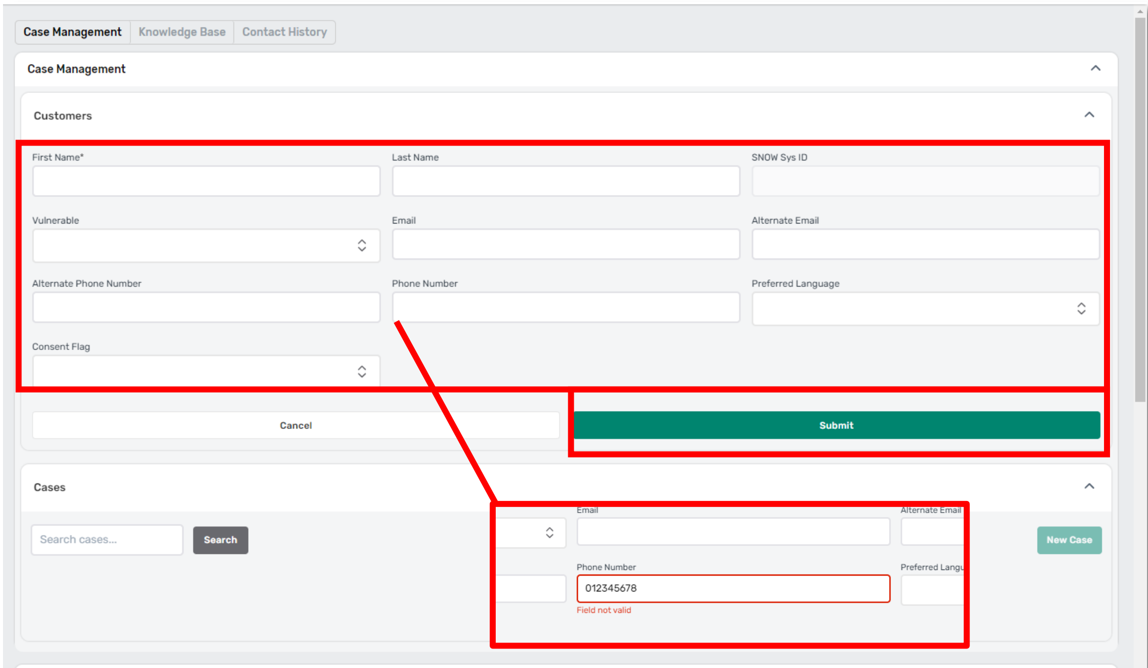
There may be occasions when a particular contact number is linked to multiple customer profiles, for example a landline number may have profiles for each householder.



If your system is setup to auto present a profile, if a customer contacts you using a telephone number or online address that is shared across multiple profiles, then you will be presented with a list of linked customer profiles. You should confirm which person you are speaking with and select the appropriate profile.

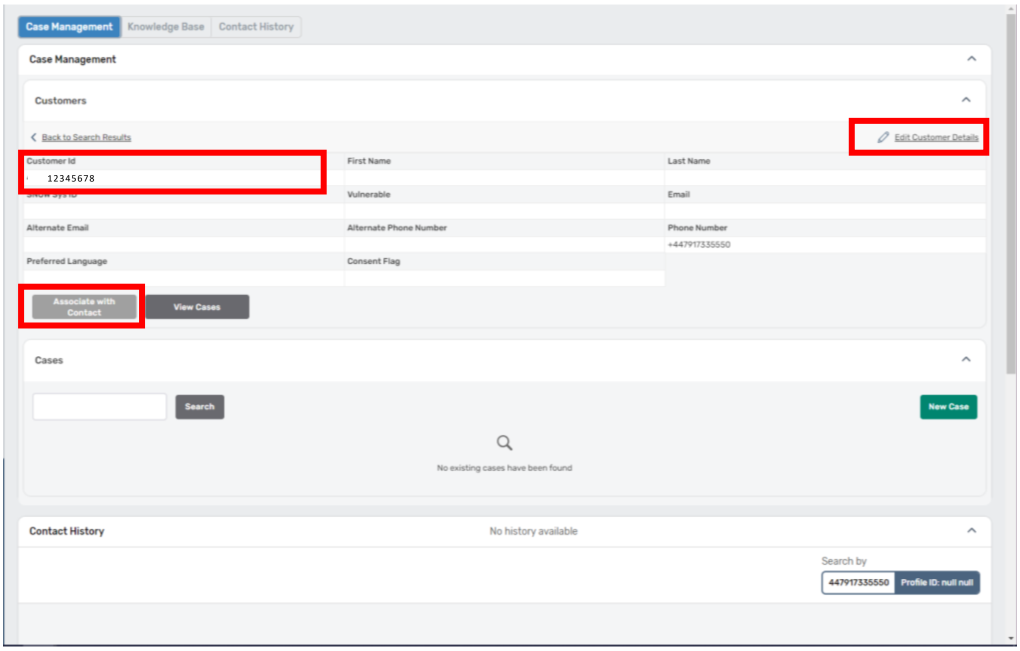
If you are sure you have a new customer on your contact, then select the New Customer button and begin to complete the details required for your Customer profiles.

Fields on this screen can be configured to input free text, such as the name field. You may also have the option to select from a dropdown list of set responses. Any Mandatory fields will be marked with an asterisk (*) and fields can also be set to require a particular format. If this format is not entered correctly, you will receive an onscreen error message that the format is invalid.



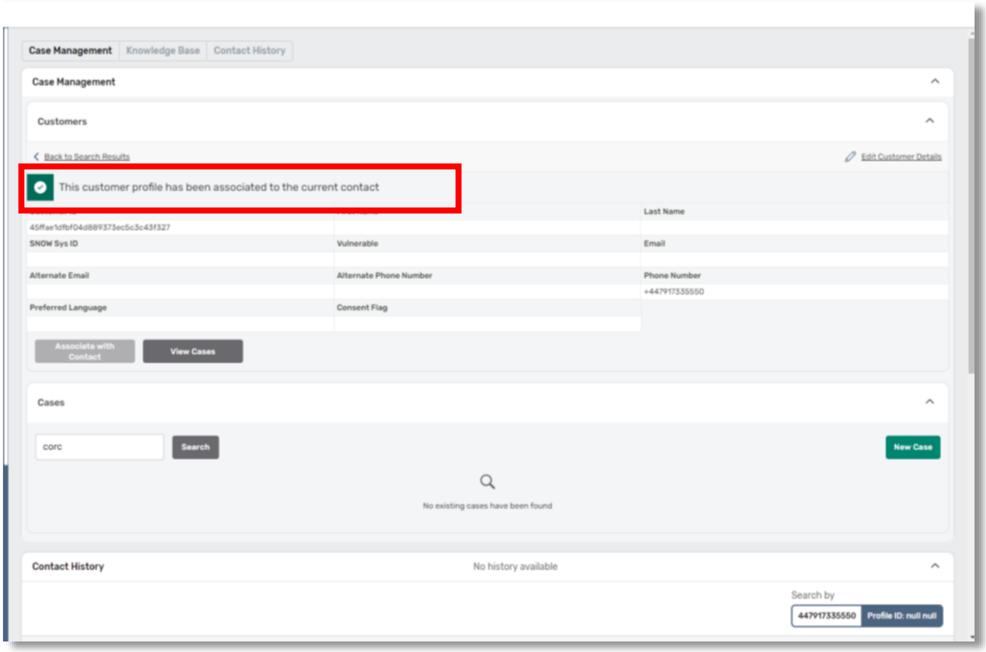
Once all the mandatory fields have been completed you can hit submit button.

This will generate a unique Customer ID code that will be presented on a summary screen.



You can use the "edit customer details" icon in the top right of the screen if you have input any details incorrectly.

If everything is correct you should then **select the "Associate with contact" button to link the new customer profile to your current contact.**



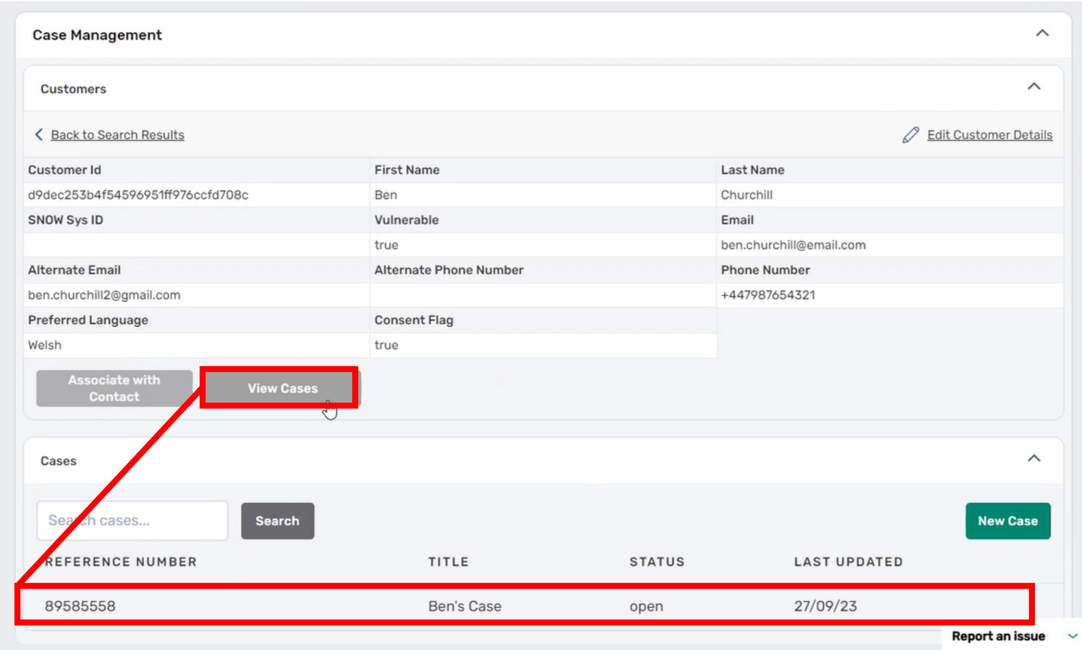
You will then get an onscreen confirmation that the customer profile has been associated and can create a case if required.

You can select the "associate with contact" button on future contacts if you want to log contact with a customer for monitoring purposes.

Creating a new case / Viewing & editing existing cases

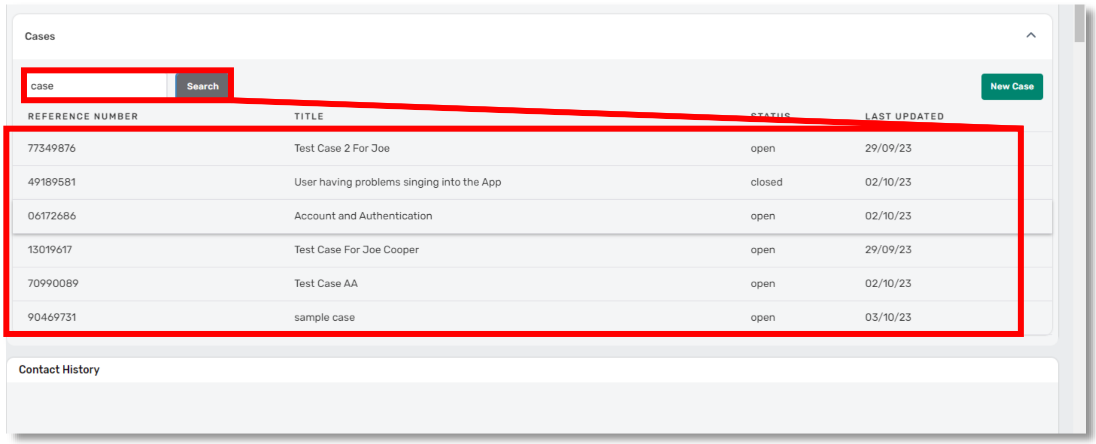
A case can be assigned to multiple customer profiles so that all customers affected by the case can be informed of any progression or changes. So you may want to check if a case has already been created and that profile has been linked to the case or, if there is an existing case, that the customer profile should be then be associated to that case.

You can search for cases in a couple of ways. You can find a customer profile and then select the "view cases" button.

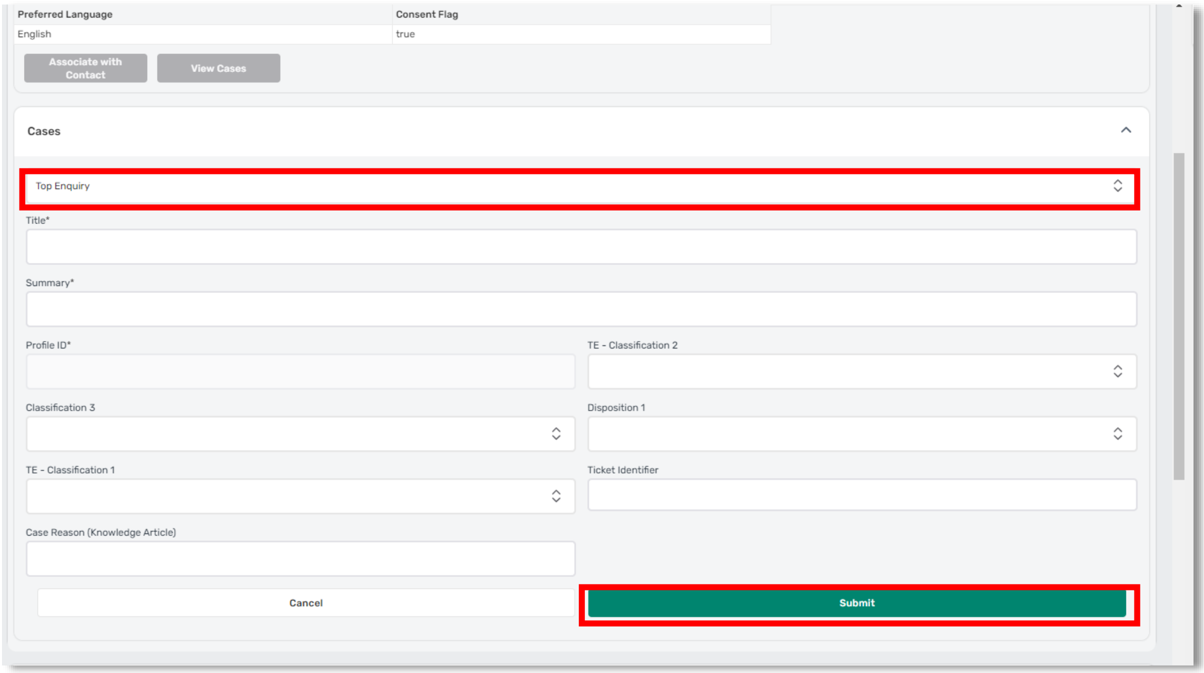


This will show any existing cases associated to that customer profile. If you still need to raise a new case then select the "New case" button to create a new case.

Alternatively, you can do a keyword search which will return any cases that contain that keyword. This may produce multiple responses, so you should try and use very specific search terms.



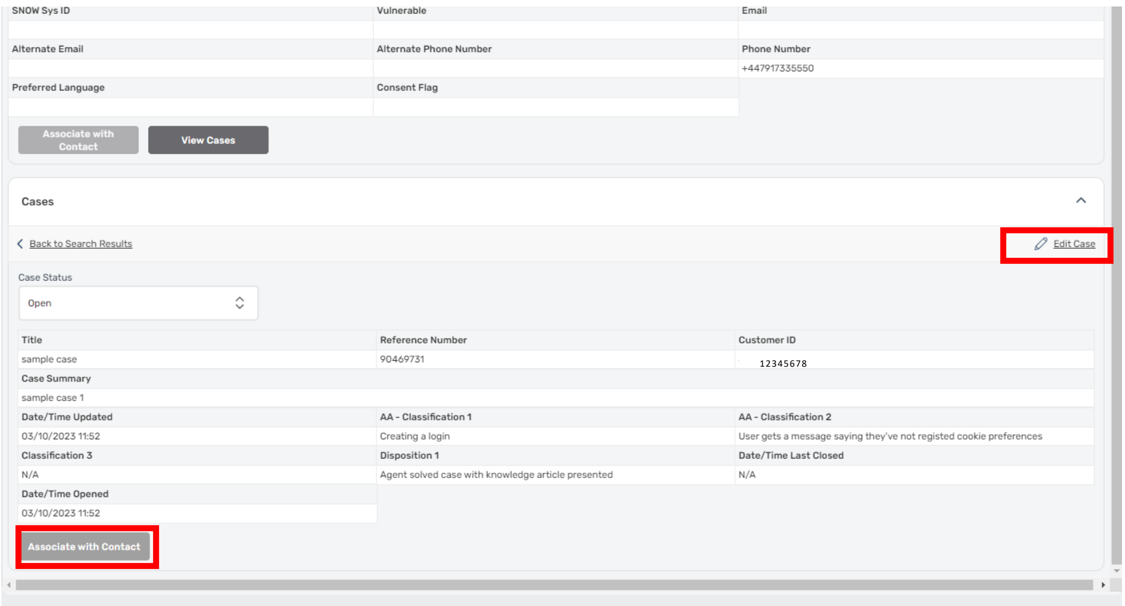
When you select the “New case” button you will be taken to the “New case” screen. **You will need to select a case template from the dropdown menu.**



These templates will have pre-configured specific data fields to complete, depending on the template chosen. Mandatory fields will be marked with an asterisk (*) and fields could be text input, a dropdown box or fixed format field.

If a field has specific formatting requirements and the correct format is not followed, an onscreen message will appear.

Once all mandatory fields have been completed you can select submit to create a case.

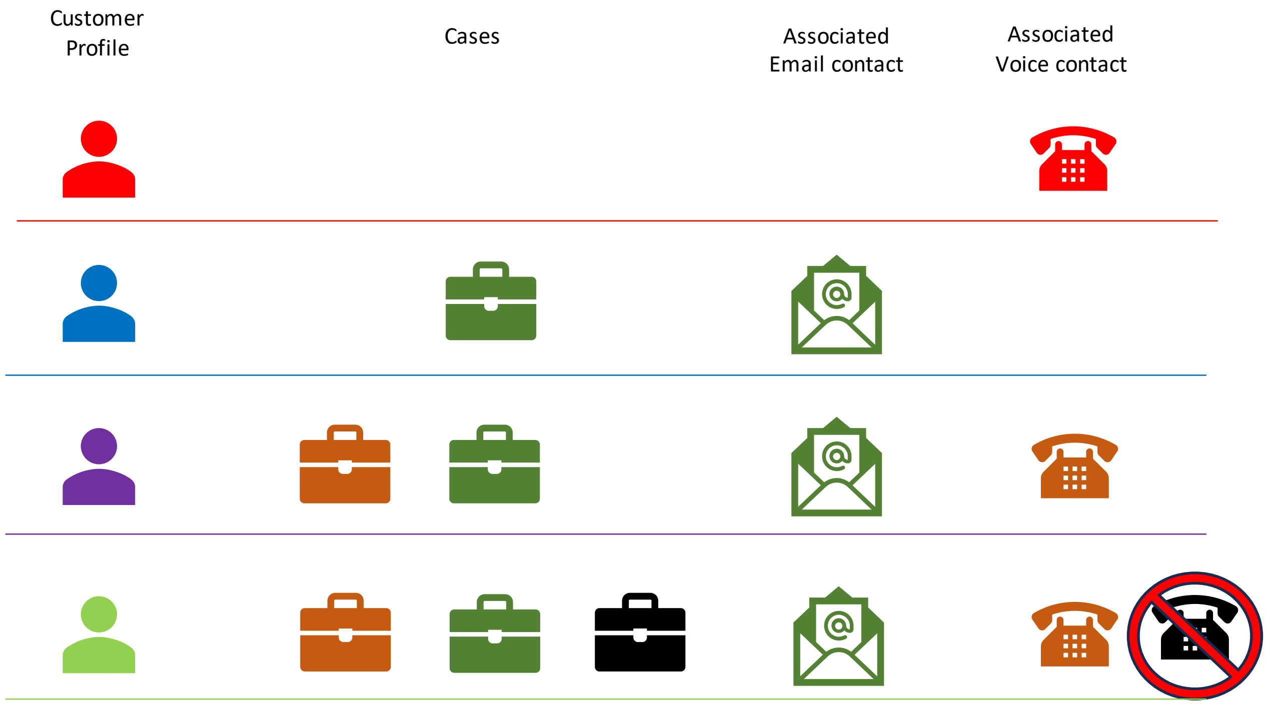


You will then be taken to the case summary screen where you have the option to edit the case or update any details.

You should then select the Associate with contact, to link this new case to your current contact.

You can select the "Associate with contact" button on subsequent contacts with the customer, if you want to log that you have discussed this case with them during the contact.

However, if you have discussed multiple cases with a customer in one call, for example, you will only be able to associate one particular case with that contact. So you may wish to record discussion of other cases in a text field, contact log notes or some other way.



So in this diagram we can see the first customer profile has no current cases and we speak to them via voice channel and associate that contact.

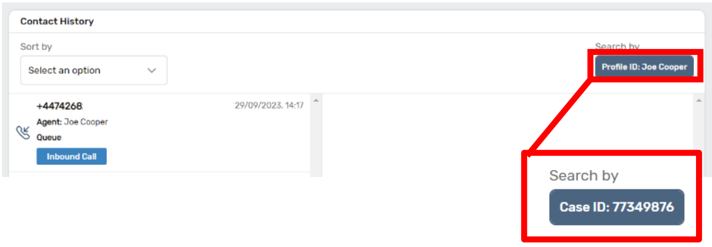
The second profile has an active case, that 2 other profiles are linked to. If we used SmartAgent to send a bulk email to update all customer profiles associated with this case, then each individual email contact could be associated with that case and appear in each person's profile.

The third person has 2 open cases. They have already received an update on one case via email. If they ring up to discuss the other case, we can associate that contact with the other case.

The fourth person has 3 open cases. They have received the email update but want to discuss their two remaining cases when they ring up using the voice contact. The agent will only be able to associate that contact with one of the remaining cases rather than both, so will need to make notes elsewhere to log this or perhaps send an additional email to confirm their discussion and associate this extra contact with the other case.

Contact History screen – Link to profiles and Cases

If you also have the Contact history module enabled you can see a customer profile and any associated cases on the contact History screen.



If you select the blue background area you will be taken straight to the profile details or case screen, as selected, if you need to associate your contact to the profile or case or make any amendments.

Notes