THINGS TO DO IN DEMO

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3. Check your Employee record
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7. Create Solutions
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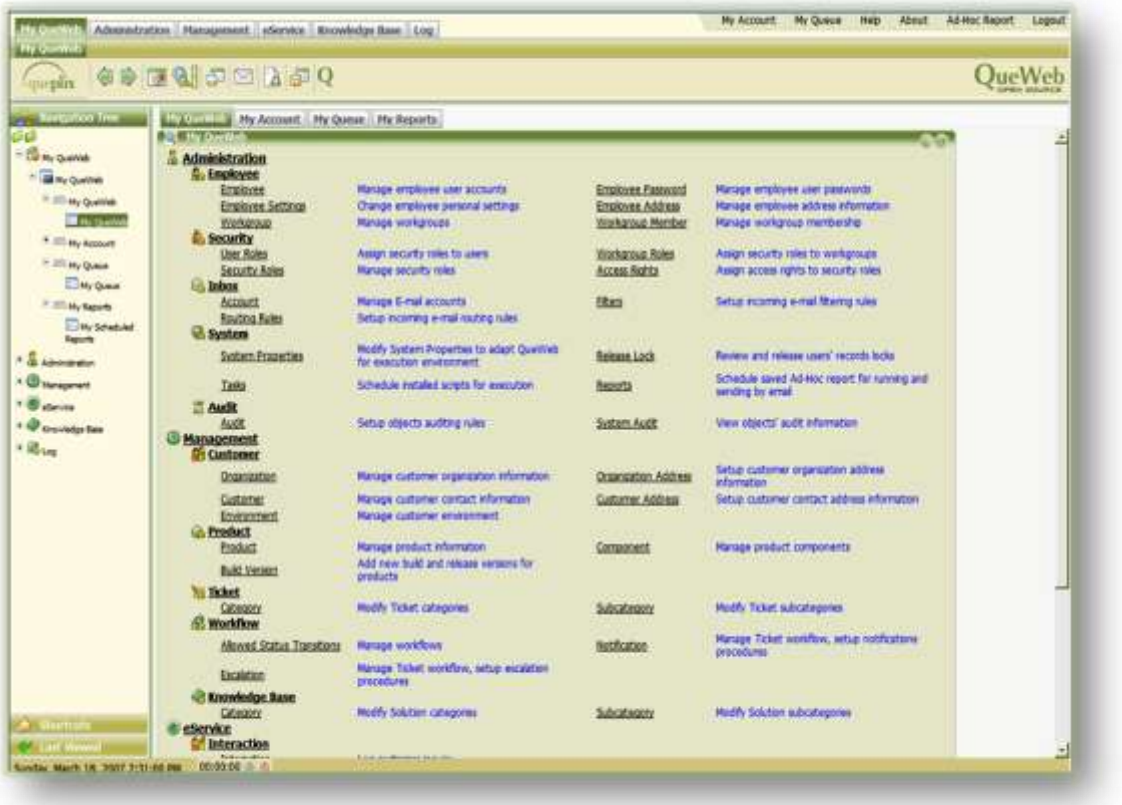
9. Understand Email Queue Routing Rules

GUI OVERVIEW WHEN YOU FIRST LOGIN

When you login you will be placed in the My QueWeb, which is an application navigation map:



From here you can navigate to any areas to which you have access. Areas of the system which are not allowed to you based on your permissions will be hidden. For the demo purposes you will be a member of the Demo Admin workgroup with limited Administration privileges (you will have unlimited access to all areas of the system and read-only access level to Admin Focus).

UNDERSTANDING QUEWEB HIERARCHY: FOCUSES/SUBFOCUSES/TABS/FORMS CONCEPT

All screens in QueWeb are divided into the following hierarchy:

Let's consider the top object: a Focus. QueWeb Application is in fact a collection of various Focuses. Each Focus represents a complete set of business processes corresponding to a unique business Role. In other words, any user can fully complete his or her most common tasks within a specific Focus

QueWeb Customer Care Open Source edition contains the following focuses:

- My QueWeb
- Administration
- Management
- eService
- Solutions
- Log

For example My QueWeb is a special Focus which is used to combine all user-relevant information and is a good starting point for your daily tasks. It provides quick navigation ability to specific tasks available to your Role and displays all possible activities you can perform within all Focuses you have access to. My QueWeb also provides access to your personal account options as well as My Queue.

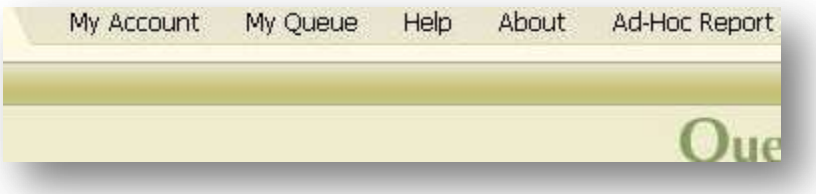
A Focus can contain SubFocuses, which in turn consist of multiple Tabs, Forms and field objects, controls and data elements.

To Navigate between Focuses and SubFocuses you can use QueWeb Main toolbar on the top of the window:

Or Navigation Tree on the left:

CHECK YOUR EMPLOYEE RECORD

You can see your default settings by clicking on the second Tab called My Account in the My QueWeb Focus or by clicking on My Account link in the top right portion of the Main Toolbar.

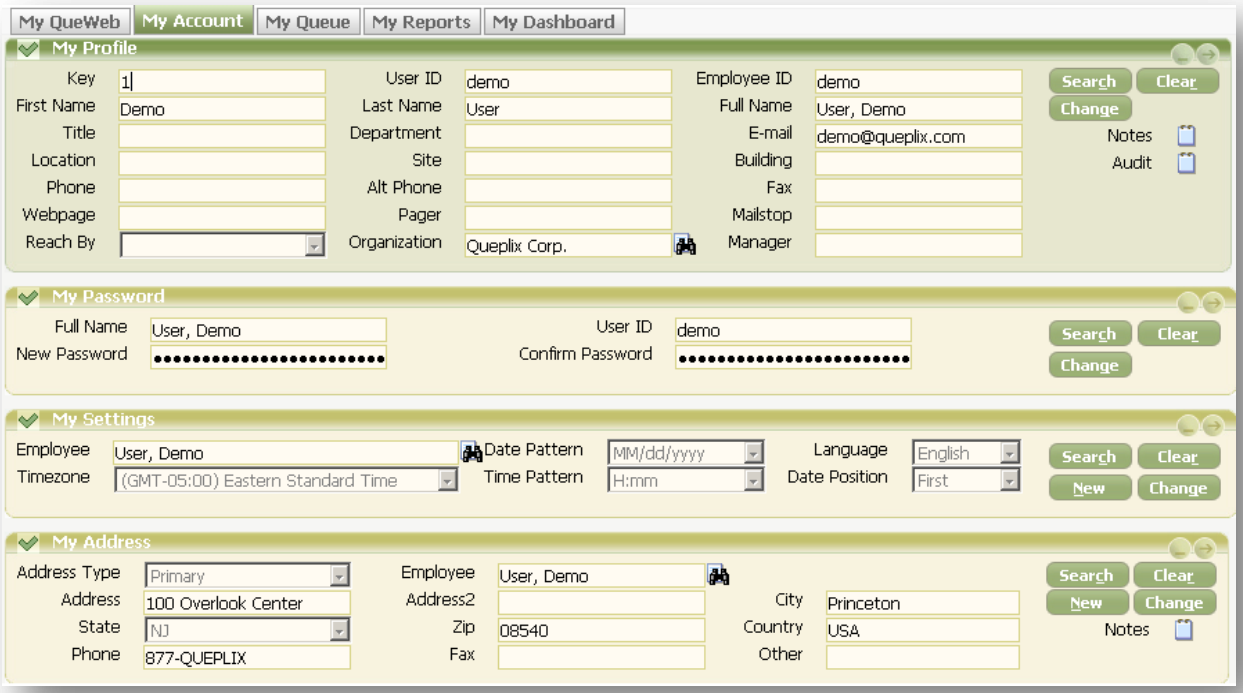


My Account Tab is used to maintain your personal information: Your name, User and Employee ID, address and phone numbers. Also here you can reset your password and locale settings.

There are four Forms in this Tab:

- My Profile
- My Password
- My Settings
- My Address

Once your information is displayed in all four Forms, you can click CHANGE button in individual Forms and correct any information in this Form. Click SAVE to update your changes. To use new settings you will need to re-login to the application.



CREATE A CUSTOMER RECORD

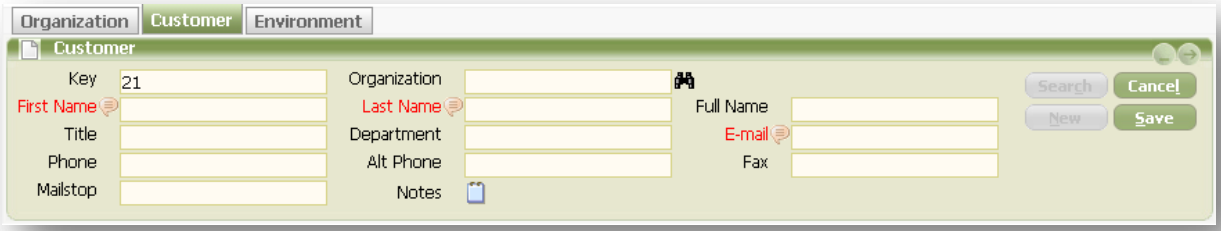
Your can create a new customer record in two different places based on the business role you represent in the Customer Care Center

1. Management focus -> Customer subfocus -> Customer tab -> Customer form

Or

2. eService focus -> Interaction subfocus -> Interaction tab -> Customer form which is same as on eService focus -> Ticket subfocus -> Ticket tab -> Customer form. These twp places are identical copies to be closer to Contact Center Agent working with Customers on different screens.

To create a new record click the NEW button in the Customer form. The **Key** field is unique Customer identifier. Automatically generated with a sequential number from the last generated Customer id + 1. The field is grayed out and cannot be altered during the change option. Enter new record information (all other fields are available for input) and click SAVE. The required fields are marked in red color and as soon as they receive expected input they change color to black. The system will alert you if you are trying to save a record while missing input for required fields. More information about customer can be provided in **Notes**.



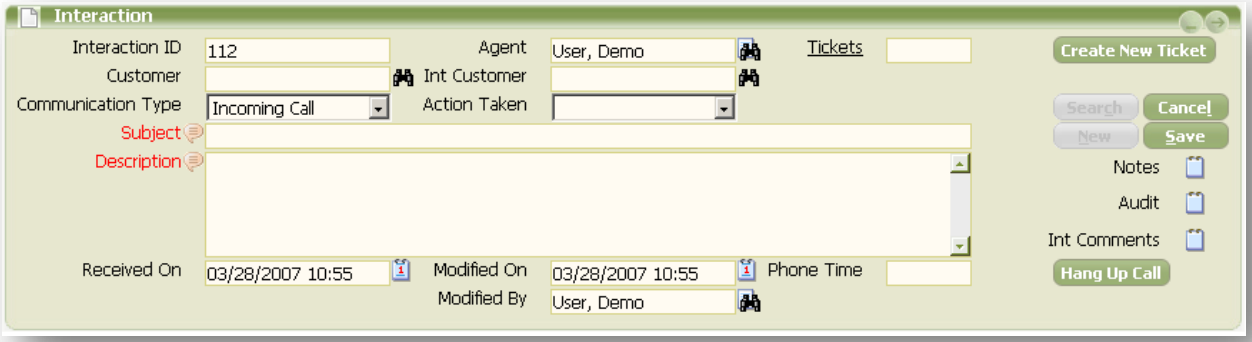
CREATE INTERACTIONS

Interactions are designed to quickly record the communication regardless of its channel: email, phone, etc. By capturing all Interactions in the Customer Care system, you endure a complete history of the Customer communications, as well as you can measure the subjective aspects of Customer Care: frequency of Interactions, experience patterns, buying habits, Customer Care quality rates, amount of feedback regarding certain product or service you offer.

Your can create a new interaction record on

eService focus -> Interaction subfocus -> Interaction tab -> Interaction form

To create a new record click the NEW button in the Interaction form. Some fields will fill in automatically and cannot be changed by a user.



They are **Interaction ID, Received On**, **Modified On** and **Modified By**. The **Interaction ID** field is unique Interaction identifier. Automatically generated with a sequential number from the last generated Interaction id + 1. The field is grayed out and cannot be altered during the change option. Received On

and Modified On are date fields, showing information on when interaction was started and last modified. **Modified By** field shows the user name that modified the Interaction record the last time. All changes in the interaction you can see in the **Audit** notepad. Communication Type field is set automatically, but you can change it to Outgoing Call, Incoming or Outgoing Emails, Fax or Walk Up. All other fields are ready for you input. Enter new record information and click SAVE. The required fields are marked in red color and as soon as they receive expected input they change color to black. The system will alert you if you are trying to save a record while missing input for required fields.

CREATE TICKETS

External Customer or an Internal Customer (Employee) initiates an interaction with a call center Agent via email, phone, etc. Agent identifies an inquiry as a request for enhancement, request for information or as a bug submittal and creates a Ticket.

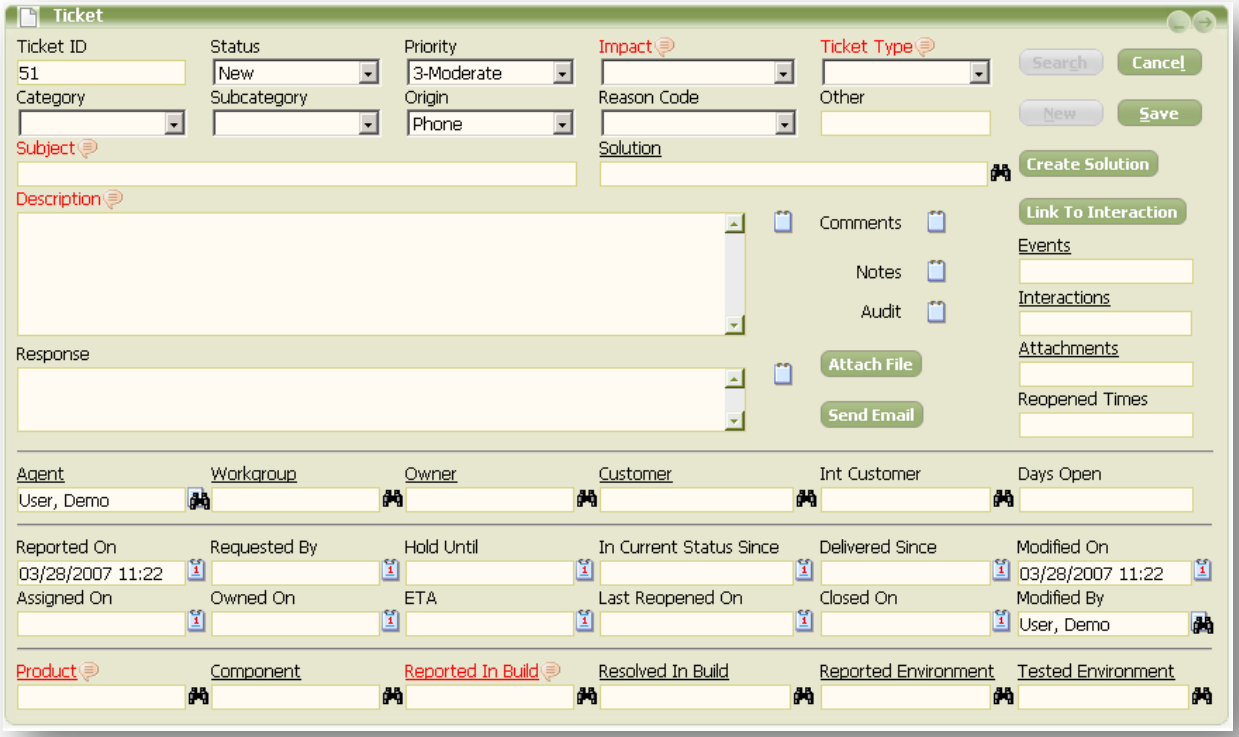
You can create a new ticket in two different ways:

1. on eService focus -> Ticket SubFocus -> Ticket tab -> Ticket form

Or

2. From Interaction form by clicking the CREATE NEW TICKET button. It will start new Ticket creation process for you and will switch to the same Ticket form as the first option

If you chose the first option to create a new Ticket on the Ticket tab you need to press the NEW button there. When you create a new ticket from Interaction form the Ticket form appears in the New mode automatically for you; it will also bring some information from Interaction record into the Ticket.



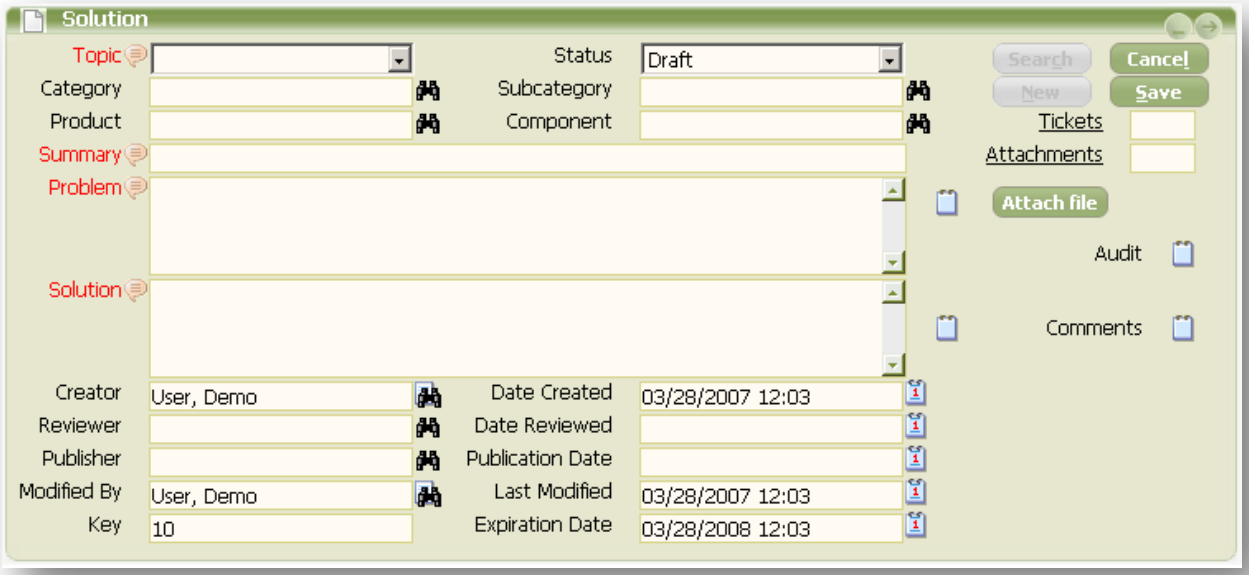
For new Tickets some fields on the Form will be auto populated with default values by the system. Some fields are required and have to be filled in by a User before Ticket information can be saved. List of required fields may vary based on the Ticket status.

The newly created Ticket can be saved with status field set to New only. Once you type in all the Ticket information click Save button.

CREATE SOLUTIONS

While working with the Ticket in edit mode, you can type in the problem text into the Solution Reference field on the Ticket Form and click the binoculars button. This will produce a quick search inside the similar problems already recorded in KB. If none can be found, you can click on the Solution field label and transfer to the Solution Form inside the Knowledge Base Focus. This where you can create a new Solution record and optionally link it to the Ticket. Besides clicking the Solution link on the Ticket you can navigate to Knowledge Base focus -> Solution

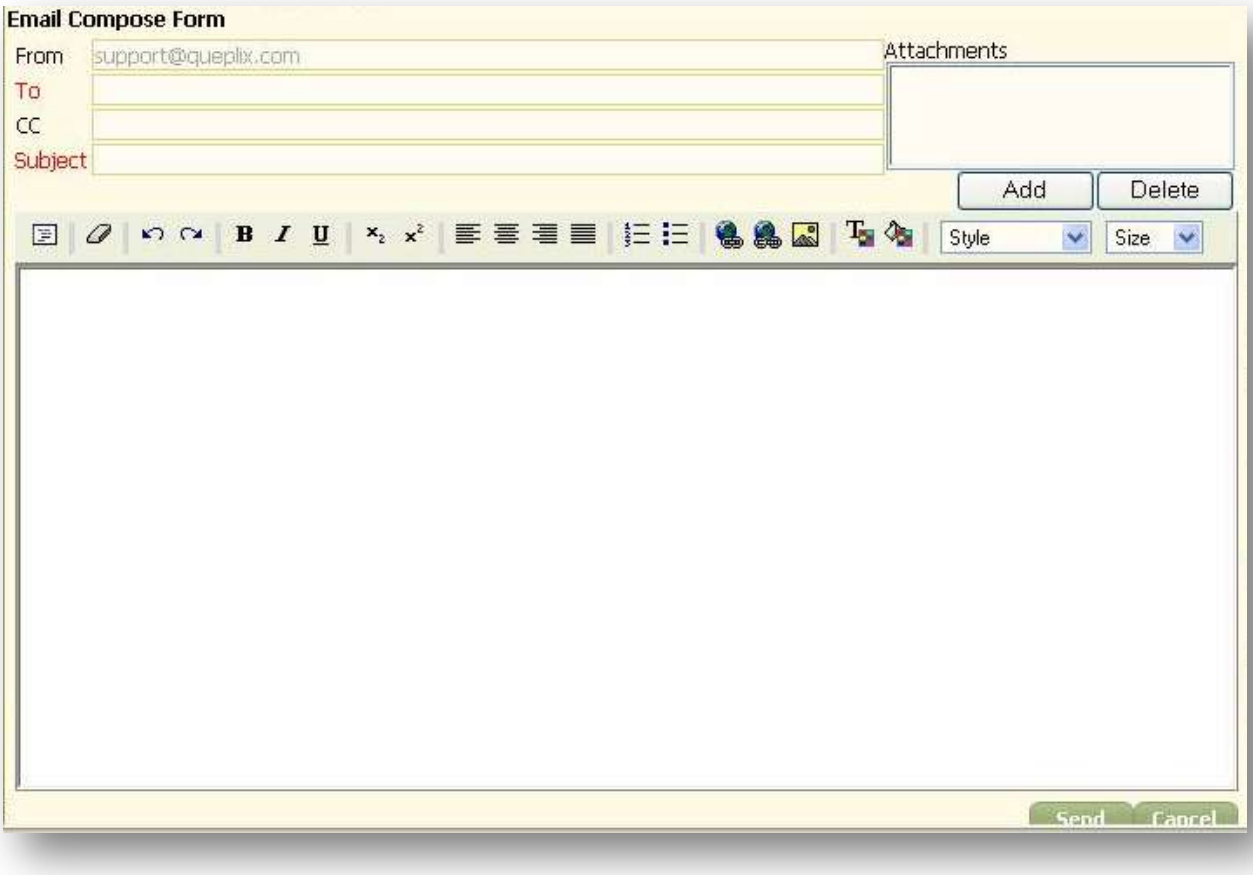
To create a new solution record- click the NEW button on the Solution form.



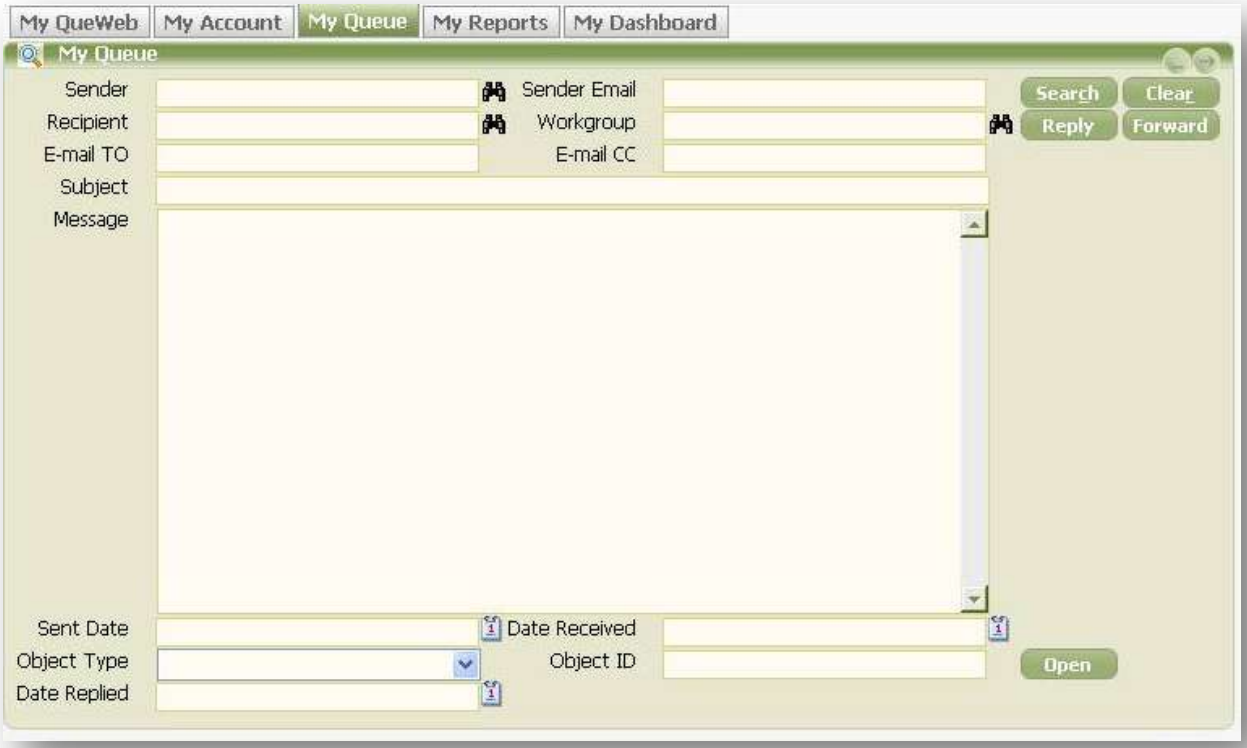
Some fields will be filled in automatically by the system and cannot be changed by a user. They are **Key**, **Creator**, **Modified By**, **Date Created**, **Last Modified** and **Expiration Date**. Date Created, Last Modified and Expiration Date are date fields, which show timestamp when solution was created, when it was last modified and when solution expires. Creator field will display you full name as a Solution creator. The required fields are marked in red color and as soon as they receive expected input they change color to black. The system will alert you if you are trying to save a record while missing input for required fields. Enter new record information and click SAVE.

SEND EMAIL TO TEST INBOX QUEUE AND CHECK HOW SYSTEM CREATES INTERACTION AND TICKET

QueWeb demo monitors testinbox@queplix.com mailbox once a minute and processes all incoming email messages like it would in the production system. You can use your favorite email application to send a test message to testinbox@queplix.com address. Or if you don't have email client at the moment you can use QueWeb built in email feature to send out emails. For that you need to click E-Mail button on the toolbar and the following window will come up:



Once you sent the email to testinbox@queplix.com email address you will soon see it in the My Queue screen (to navigate to My Queue simply click its title in the right top window corner).



While your email was processed by QueWeb application based on Email Queue Routing Rules (see next section for details) recognized that this is a real Customer enquiry and didn't the following actions:

- Tried to look up the existing customer by email. If no customer was found it created a new customer record for you
- Created a new Interaction object of type Incoming Email and linked it to the Customer record.
- Created a new Ticket object linked to newly created Customer and Interactions.

You can review all these objects by selecting the message in My Queue grid into the form and clicking the Open button.

UNDERSTAND EMAIL QUEUE ROUTING RULES

When incoming email was processed by QueWeb the so called Email Queue Routing Rules were applied. You can observe the preconfigured rules on the Administration focus -> Email Queue SubFocus -> Routing Rules tab.

Depending on the Routing Rule information, an incoming Email could automatically create a Ticket or Interaction: if a Routing Rule distributes the email to an Agent or a Workgroup in your company, then the Ticket is automatically created and linked to the email. If the system did not find any Routing Rules based on the criteria specified, then the system will create an Interaction record only and link it to the email. In this case you can choose to create a Ticket from the Interaction upon reviewing it.