



TechExcel CustomerWise

Support for the entire customer lifecycle



Delivering superior customer service is a key ingredient to maintaining your customer relationships. TechExcel CustomerWise helps you optimize your organization's support process by providing your team with everything you need to exceed your customer's service expectations. Through sophisticated process automation, knowledge base management, and the availability of customer self-service through the Customer Web Portal, your support team can resolve issues more efficiently and improve your bottom line. Refine your support process to increase efficiency and productivity and significantly decrease overall support costs by reducing the time to resolve incidents. Best of all, TechExcel CustomerWise can be deployed under budget in days or weeks.

Benefit from a holistically-managed support process



Support Managers:

Use TechExcel CustomerWise to manage the support team's workload and track performance metrics, to monitor high priority incidents, and to identify critical problem trends.



Support Engineers:

Use TechExcel CustomerWise to manage the incident resolution process, to build and search the knowledge base, and to have Web conversations with customers.



Development Teams:

Use TechExcel CustomerWise to monitor new product releases for incident trends, and to identify problem areas and specific defects to focus on for future releases.



Sales Account Managers:

Use TechExcel CustomerWise to monitor the status of their customers' incidents, to stay informed when customers submit new incidents, and to search the knowledge base.



Customers:

Use TechExcel CustomerWise to enter new incidents and view the status of existing ones, to search the knowledge base, and to have online Web conversations with the support team.



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Sophisticated Workflow

TechExcel CustomerWise tracks every ownership and progress status change for every incident. Workflow rules are defined to include state-to-state transitions; field-level security control and applicable support team member owners for each state, while role-based access defines who can move a support incident from current state to next state. You can also specify which fields are mandatory for each state or state transition. A support incident in TechExcel CustomerWise is represented by a parent incident along with multiple subtasks - or events. Each event can now be updated with multiple progress statuses and ownership tracking.

Based on definable business rules, new incidents are automatically routed to the most appropriate support team member based on their skills and current workload. Team members are notified when they have overdue or stagnant incidents and incidents can be automatically escalated and re-assigned to other team members. With a complete set of triggers and conditions, incident owners and other related parties are always in the loop for the entire support lifecycle.

Easy customization

TechExcel CustomerWise supports extensive customization using an easy and intuitive point-and-click interface. The easily configured workflow rules can be changed to control business processes based on your organization's mission. Personalize field labels and drop-down menu choices, as well as the detailed workflow rules.

Fields can be created with parent/child relationships to enable a different set of options in one field based on the option selected in another.



Incident tracking and resolution

New incidents are easily submitted by the support team or employees. The assigned support engineer resolves the issue, can search the knowledge base, have a Web conversation with the employee, or escalate the incident to higher-level support staff – all from one easy-to-use interface. Role-based access enables support team members to view comprehensive incident lists filtered and sorted by the incident status, assigned employee, current owner, or virtually any other criteria to better understand incidents. Finally, support managers are able to easily reassign incidents to other team members or groups to balance the workload and maximize overall team effectiveness.



Workflow-enabled Email management

Let's face it; email is one of today's main support channels. Many users prefer sending quick messages to ask questions and get support rather than wait on the phone for a live individual. But, even though it is easy to use, email communication has many shortcomings: it is very difficult to track and it is almost impossible to link related messages and enforce workflow rules. TechExcel ServiceWise Workflow-enabled Email Management has successfully solved these problems. When employees can send email messages to TechExcel ServiceWise, incident events are automatically created and then routed to the most appropriate team members. These "email events" are processed by the support team according to workflow rules that you can define. Subsequent message exchanges are automatically associated with the original email and displayed in a tree format for easy viewing and organization.

Knowledge management

Resolved incidents, self-service support topics, HTML links, and file attachments can be easily categorized and indexed in the ServiceWise knowledge base. Full text and keyword searches of the knowledge base quickly return documents ranked by relevancy. Resolved incidents can be published as new knowledge items to help resolve similar problems in the future and then that relevant knowledge items can be attached to any incident and forwarded to the user.

Asset management

The better your customer view, the more likely you can exceed their expectations. By including AssetWise in your support solution, your team has a truly complete customer view. As part of the TechExcel Service Suite, AssetWise can be accessed by team members of to provide a single version of asset truth for sales, service, help desk, IT, and other teams. AssetWise aids enterprises in the process of monitoring, controlling and accounting for assets throughout their lifecycle. A single and centralized location enables businesses to monitor all assets important to their mission including company IT assets, managing asset inventories, and tracking customer-owned assets. All asset changes, including maintenance information, trouble ticket data, status inventory, utilization metrics and usage, are recorded in the central repository and linked to other Service and Support tasks.



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Lifecycle Model Support with an open workflow architecture - tracking the history of incidents from creation to closure

Extensive knowledge builder - publish knowledge topics for customer self-service incident resolution
Customer contact manager

Fully customizable user interface

Incident tracking processes include escalation, copying, and linking

New Incidents can be automatically routed to the most appropriate support engineer based on their technical skills and current workload.

Support engineers can be notified automatically when they have overdue or stagnant incidents. Incidents can be automatically escalated and re-assigned to other team members based on the defined automatic routing criteria.

Full-text and keyword searching of knowledge base(s) for faster issue resolution

Fully dynamic and customizable reports and graphics
Automatic e-mail notification with user specified triggers

Easy-to-use Administrator for project setup and configuration

TechExcel CustomerWise Web - supports advanced features of its client/server version with an intuitive and LAN-like user interface

CustomerWise Add-on Modules

Further extend your TechExcel CustomerWise investment with these powerful add-on modules:

DevTrack Integration - Optimize the important relationship between customer support and development without sacrificing the autonomy of either organization. It's ideal solution to manage the whole lifecycle of an issue from its reporting by the customer to its resolution by the support and development teams.

FormWise - Create fully customized online forms and integrate them directly with your workflow processes. The integration of workflow and form processing enables streamlined data gathering, tracking, and form storage. Forms can even be routed automatically to the appropriate individuals for completion, approval, and processing, improving your team's efficiency.

DownloadPlus - Download Plus improves sales lead generation, lead qualification, and software delivery. DownloadPlus enables businesses to enhance their web presence by integrating web activities with their customer records to improve sales and customer service.

LinkPlus - An application programming interface (API) enabling automatic real-time data synchronization between TechExcel Service Suite software and third party or legacy applications. TechExcel LinkPlus can be web-services based or as COM module implemented as Active X controls. Integrating data with third party or existing applications allows businesses to maximize current investments while increasing data visibility for internal team members.

Wireless Web - Real-time project information through secure portals and full and interactive access to all of your sales, support, and marketing processes. Support engineers, field service technicians, sales people, and customers can access TechExcel CustomerWise functions from anywhere at any time using supported mobile devices.

Service Agreement Manager - Complete service level agreement management capabilities to your service delivery team. This comprehensive service level agreement solution allows you to easily configure and administer service plans for your customers.

CTI Data Connector - Integration between TechExcel Service Suite and your existing phone system infrastructure.

KnowledgeWise External Knowledge Links - links TechExcel CustomerWise to third-party knowledge management tools



For more information, please visit us at:
<http://www.techexcel.com>



TechExcel ServiceWise is part of TechExcel Service Suite, giving organizations the total visibility and actionable intelligence you demand for all service desk, asset management and customer support business processes. TechExcel Service Suite enables organizations to begin their quest for holistic service and support management at any point in their evolution. Start with one product - or two - or even the whole suite. No matter where you begin, your organization will always benefit from configurable workflow, centralized data repositories and a knowledge-based view of your support initiatives. Contact us today at 1-800-439-7782 ext 5 or email to sales@techexcel.com and jump start your service and help desk today.

System Requirements

Client

- Windows 95/98 or Windows NT 4.0 or above
- Pentium PC with 32MB memory and 100MB disk space

Server

- Pentium PC with 256MB memory and 500MB disk space
- Windows NT Server 4.0 or above (recommended), or Windows NT Workstation
- Microsoft Internet Information Server 4.0 or higher

Supported Databases

- Microsoft SQL Server
- Oracle
- MySQL
- Microsoft Access
- Other ODBC compliant databases



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