

CustomerSoft's ESP Product Features

A Closer Look - ESP contains the following features, modules and software integrations:

Multiple Views

Each department can have its own view of customer data, as well as complete control over how data is displayed and edited. With on-the-fly customization capabilities, users find it simple to add customized fields that track unique information important to each group. The result is one shared database that ensures data integrity and provides customer support, sales, marketing, quality assurance and other departments with the information they need to grow and maintain their client base. And best of all, there is no need for a full-time database administrator.

ESP Dashboard

DashBoard is a graphical management-reporting tool. It provides real-time operational information for each department utilizing ESP, allowing managers to significantly enhance productivity and to more effectively manage both their staff and customers. DashBoard provides a continually updated graphical view of departmental activity, including individual workloads, key customer metrics, and key product issues and solutions.

Reports

ESP provides you over 200 predefined reports. You select the type of report and any filter conditions. These reports can also be viewed graphically six different ways. ESP also interfaces with popular report writers such as Infomaker and Crystal Report Writer, giving you unlimited reporting capabilities.

Contract/Service Level Agreement Management

Enables your support, sales, and quality assurance team to use several methods to track and manage the varying levels of service you have contracted to provide your customers. Allows you to set up billing on a per incident, per minute, or on an annual basis and automatically generate invoices.

Automated Workflow Management

Allows the user to define business rules to automate various ESP processes such as sending confirmation emails to clients, printing surveys of routing incidents, etc. Automated workflow allows the user to define which actions ESP should initiate and when. AWM enhances contact with your clients and keeps your employees and managers informed via automated email or incident assignment/escalation.

Automated workflow can even generate new tickets or run tasks outside of ESP or for advanced users run SQL statements generated by the database administrator to perform tasks on tables not normally associated with ESP.

API Integration

ESP's API integration tools enable real-time data replication between ESP and third-party systems. Information from third-party systems is imported into ESP's integration table. ESP then automatically creates and/or updates records from the data. No need for a full-time database

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Defect Tracking

Users are able to track the progress of product defect resolution without ever leaving the ESP system. Information entered into the system by Quality Assurance, Engineering or Development can be referenced by Customer Support, Sales and other ESP users by simply switching support modes. Customers will benefit from quick answers to inquiries regarding specific fixes, estimated timeframes and new solutions.

Bulk E-mail

Available for use throughout the ESP system to facilitate the communication of CRM information across the enterprise. Lists of recipients may be generated by call type, company, type, caller type or a SQL query. E-mail can then be sent to all callers associated with the items in the list.

Easy Customization - Strong Security

Allows you to customize screens and format ESP to reflect different organizational needs. Customization may be performed while other users are in the system. Allows you to set user-defined security down to the field level to administer access to different screens.

Problem /Solution Database

Employ several different search methods to provide extensive lists of solutions –by product, version, or problem type. Powerful search engine enables your support reps to answer your customer's questions on the first call. There are no "Decision Trees" to write or maintain and no "Key Words" to define. You can search the problem or the solution. A built-in Web browser allows you to search the Internet without leaving ESP.

Inventory Management

Enables you to keep track of your customers' systems and their components by manufacturer, model number, and serial number. Equipment may be assigned to a company or a specific

Auto-Escalation

Allows users to be notified if an incident has been escalated to them. Runs on the same server as the ESP database, eliminating the need for a dedicated server or additional hardware. Sends e-mail to the user letting them know an incident has been assigned to them. Escalations can be based on the situation, individual or organization.

Technical Notes

Technical notes are often used to manage information such as documentation, common instructions and procedures. Technical notes may also be linked with one another, allowing the user to

OLE Objects

Allows industry-wide standard for attaching files or applications of one type within a file or application of another type. Allows a file to be attached to a caller record, company record, incident or problem solution abstract.

Web/Email Interface

Allows users to search your problem/solution database via the Internet. Allows you to maintain only one knowledge base. Users can search for solutions and receive responses automatically. They can also log a new incident and check on the status of existing incidents. Technicians can open, close and modify incidents. This will allow you to operate 24x7 and have a "virtual" office for remote technicians.

ESP Messenger

Allows your customers to submit their support requests via e-mail. Messenger automatically enters the support request into the ESP database, performs a search against your ESP problem/solution database, and automatically sends your customers the top two solutions – enabling you to provide your customers 24x7 support. A record of the transaction is automatically created and assigned to the appropriate representative.