AVAYA

Avaya™ Interaction Center
Release 6.1
CallCenterQ Administration

Preventing toll fraud

"Toll fraud" is the unauthorized use of your telecommunications system by an unauthorized party (for example, anyone who is not a corporate employee, agent, subcontractor, or person working on your company's behalf). Be aware that there may be a risk of toll fraud associated with your system and that, if toll fraud occurs, it can result in substantial additional charges for your telecommunications services.

Avaya fraud intervention

If you suspect that you are being victimized by toll fraud and you need technical assistance or support, call Technical Service Center Toll Fraud Intervention Hotline at +1-800-643-2353 for the United States and Canada. For additional support telephone numbers, see the Avaya Web site:

http://www.avaya.com

Select **Support**, then select **Escalation Lists**. This Web site includes telephone numbers for escalation within the United States. For escalation telephone numbers outside the United States, select **Global Escalation List**.

Providing telecommunications security

Telecommunications security (of voice, data, and video communications) is the prevention of any type of intrusion to (that is, either unauthorized or malicious access to or use of) your company's telecommunications equipment by some party.

Your company's "telecommunications equipment" includes both this Avaya product and any other voice/data/video equipment that could be accessed via this Avaya product (that is, "networked equipment").

An "outside party" is anyone who is not a corporate employee, agent, subcontractor, or person working on your company's behalf. Whereas, a "malicious party" is anyone (including someone who may be otherwise authorized) who accesses your telecommunications equipment with either malicious or mischievous intent.

Such intrusions may be either to/through synchronous (time-multiplexed and/or circuit-based) or asynchronous (character-, message-, or packet-based) equipment or interfaces for reasons of:

- Use (of capabilities special to the accessed equipment)
- Theft (such as, of intellectual property, financial assets, or toll-facility access)
- Eavesdropping (privacy invasions to humans)
- Mischief (troubling, but apparently innocuous, tampering)
- Harm (such as harmful tampering, data loss or alteration, regardless of motive or intent)

Be aware that there may be a risk of unauthorized intrusions associated with your system and/or its networked equipment. Also realize that, if such an intrusion should occur, it could result in a variety of losses to your company (including, but not limited to, human and data privacy, intellectual property, material assets, financial resources, labor costs, and legal costs).

Your responsibility for your company's telecommunications security

The final responsibility for securing both this system and its networked equipment rests with you, an Avaya customer's system administrator, your telecommunications peers, and your managers. Base the fulfillment of your responsibility on acquired knowledge and resources from a variety of sources, including, but not limited to:

- Installation documents
- System administration documents
- Security documents
- Hardware-/software-based security tools
- Shared information between you and your peers
- Telecommunications security experts

To prevent intrusions to your telecommunications equipment, you and your peers should carefully program and configure:

- Your Avaya-provided telecommunications systems and their interfaces
- Your Avaya-provided software applications, as well as their underlying hardware/software platforms and interfaces
- Any other equipment networked to your Avaya products.

Warranty

Avaya Inc. provides a limited warranty on this product. Refer to your sales agreement to establish the terms of the limited warranty. In addition, Avaya's standard warranty language, as well as information regarding support for this product, while under warranty, is available through the following Web site:

http://www.avaya.com/support

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Avaya support

Avaya provides a telephone number for you to use to report problems or to ask questions about your contact center. The support telephone number is 1-800-242-2121 in the United States. For additional support telephone numbers, see the Avaya Web site:

http://www.avaya.com

Select **Support**, then select **Escalation Lists**. This Web site includes telephone numbers for escalation within the United States. For escalation telephone numbers outside the United States, select **Global Escalation List**.

Avaya Training

Avaya provides training for Avaya Operational Analyst. For more information, contact Avaya University at:

Web site: http://www.avaya-learning.com/logon_form.asp

E-mail address: avaya.u.helpdesk@accenture.com

US telephone: 1-800-288-5327

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Comments

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Acknowledgment

This document was written by the CRM Information Development group.

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CallCenterQ Administration

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- [Educational Services](#) on page 11.

Typographical Conventions

This guide uses the following font conventions:

Font Type	Meaning
`command`	This font signifies commands, information that you enter into the computer, or information contained in a file on your computer.
`commandvariable`	This font indicates variables in a command string.
italics	This font is used to add emphasis to important words and for references to other chapter names and manual titles.
[link](#)	Blue underlined text in online documents indicates a hypertext jump to related information. To view the related material, click the blue underlined text.

Notes, Tips, and Cautions

> **Note:**
>
> A note calls attention to important information.

> ⚠ **Important:**
>
> An important note calls attention to a situation that has the potential to cause serious inconvenience or other similar repercussions.

> **Tip:**
>
> A tip offers additional how-to advice.

> ⚠ **CAUTION:**
>
> A caution points out actions that may lead to data loss or other serious problems.

Contacting Technical Support

If you are having trouble using Avaya software, you should:

1. Retry the action. Carefully follow the instructions in written or online documentation.

2. Check the documentation that came with your hardware for maintenance or hardware-related issues.

3. Note the sequence of events that led to the problem and the exact messages displayed. Have the Avaya documentation available.

4. If you continue to have a problem, contact Avaya Technical Support by:

   ● Logging in to the Avaya Technical Support Web site http://www.avaya.com/support/

   ● Calling or faxing one of the following numbers from 8:30 a.m. to 8:30 p.m. (Eastern Standard Time), Monday through Friday (excluding holidays):

     - Toll free in the U.S. and Canada: 1-888-TECH-SPT (1-888-832-4778)

     - Direct line for international and domestic calls: 1-512-425-2201

     - Direct line for faxes: 1-512-997-4330

- Sending email with your question or problem to crmsupport@avaya.com. You may be asked to email one or more files to Technical Support for analysis of your application and its environment.

   Note:

   If you have difficulty reaching Avaya Technical Support through the above URL or email address, please go to http://www.avaya.com for further information.

Product Documentation

Most Avaya product documentation is available in both printed and online form. However, some reference material is available only online, and certain information is available only in printed form. A PDF document with detailed information about all of the documentation for the Avaya Interaction Center is included in the `Doc` directory on the product CD-ROM. This PDF document is also included on the separate documentation CD-ROM.

Readme File

The Readme file is a PDF file included on the Avaya Interaction Center software CD-ROM. This file contains important information that was collected too late for inclusion in the printed documentation. The Readme file can include installation instructions, system requirements, information on new product features and enhancements, suggested work-arounds to known problems, and other information critical to successfully installing and using your Avaya software. Avaya may also deliver an Addendum to the Readme, which will be posted on the Avaya Technical Support Website. The Readme Addendum will contain similar information uncovered after the manufacture of the product CD-ROM. Review the Readme file and the Readme Addendum before you install your new Avaya software.

Electronic Documentation

The electronic documentation (in PDF or HTML format) for each Avaya Interaction Center product is installed automatically with the program. Electronic documentation for the entire Avaya product suite is included on the product CD-ROM and the documentation CD-ROM.

You can also view the documentation set online at http://www.avayadocs.com.

Printed Documentation

You can purchase printed copies of these manuals separately. For details, see Ordering information: Avaya Publications Center on the back of this manual's title page.

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● Over the telephone at 800-288-5327 (within the U.S.) +001 303-406-6089 (outside of the U.S.)

● Through email at Avaya.U.Helpdesk@accenture.com

Before You Begin

■ ■   ■   ■   ■   ■

Chapter 1: Overview

All call centers and salespeople maintain data. This data includes information about customers, products, fulfillment packages, and tasks that need to be done to keep customers satisfied. Managers often like to keep track of how many customers call in and what questions the customers ask. This growing volume of information quickly becomes unwieldy if it is not organized.

One of the best ways to organize information is by using a database. Using a database, you can search for a particular piece of data, or generate reports and look at groups of data points.

With a database, records are linked together so you can access John Smith's record, get his current address, find out what products he has ordered and determine if his return has been received by your service center.

A database is only as useful as the Graphical User Interface (GUI) that you use to access the data. If you cannot find the particular screen you need to use to type in your search phrase, or if you need to have special skills to simply get the command syntax correct, then the information becomes completely inaccessible.

CallCenterQ lets you find the information you need quickly. It keeps track of:

- The tasks that need to be done
- The dates when the customers need to be contacted again
- The types of calls that come into your call center
- The requests those calls generate

Application Overview

There are three applications in the CallCenterQ suite that cover the basic tasks your agents perform. You can customize all of the processes of these three applications for your specific needs and business processes.

- CallCenterQ (CCQ) is intended for agents who deal with customers, place orders, send out fulfillment orders, and handle returns. CCQ also provides a way to create and manage marketing campaigns.

- CallCenterQ for Consumer Relations (CCQ for CR) is intended for agents who handle customer complaints and possibly send out fulfillment packages, but who do not place orders or take returns.

- List Management lets you create and manage outbound calling lists that can be processed by the Avaya Agent application.

 > **Note:**
 >
 > List Management consists of the outbound calling-list management functions that are also part of CCQ. If you have employees who must create outbound calling lists, List Management gives them a simple way to create these lists.

CCQ lets you automate your sales and service call centers, while CallCenterQ for Consumer Relations (CCQ for CR) is designed for call center agents who handle questions and complaints from customers. Instead of taking orders or handling returns, these agents focus on finding out why the customer is upset and what needs to be done to solve the problem.

In both applications, you can set up:

- **Actions**, that send messages when an issue or task record changes its status.

- **Escalations**, that send messages if an issue or task record remains at a given status for a set length of time.

For more information, see Working with Actions and Escalations on page 73.

Request-Based vs. Contact-Based Call Processing

If you are using CCQ or CCQ for CR, you can choose from two different call processing options:

● Call processing centered around an individual customer request, complaint or comment

● Call processing centered around an individual customer contact (for example, a phone call, letter, fax, or e-mail)

Processing Type	Usage...
Request-based	Specific agents are assigned to certain types of requests, regardless of what other requests are made at the same time. For example, an airline customer calls in to report lost baggage, and at the same time complains about the poor quality of the in-flight food.One request is created for the lost baggage complaint and is routed to the Baggage Claim Agents. A second request is created for the poor quality food complaint and is routed to the In-Flight Service Agents.
Contact-based	A single agent handles the entire customer contact, regardless of what type of requests a customer makes. In the example above, the agent who takes the call works on both the baggage problem and the food quality problem.

Note:

The type of call processing your system uses is determined by system administrators when they generate the CCQ or CCQ for CR application. If you are not sure which application your system uses, look at the Agent focus. The basic call entry screen will feature either a Request group or a Contact group.

Overview

The two figures below show the two different agent focuses:

Agent focus for the request-based CCQ

The Request group is the center of this application. The contact, and any other requests made at the same time, are linked but not emphasized.

Agent focus for the contact-based CCQ for CR

The Contact group is the center of this application. The contact is the focal point and all requests are summarized in the Issues In-Form Browser (IFB). The details of each request are available but not emphasized.

CallCenterQ Functionality

CCQ includes:

Campaigns CQ - A series of marketing events that are designed to promote a product or line of products.

Customers and Organizations - Sales agents can keep track of their leads and opportunities, while call center agents can look up customer histories so they can more efficiently help each customer.

Employees and Workgroups - Information about sales agents, regions, call center agents, and workgroups can be saved in the database and used to assign leads and print queues. The information can also be used to determine who is responsible for different parts of a call.

Requests - Information that lets you keep track of the reasons customers contact the call center, and the tasks necessary to fulfill the requests. This is the core of the request-based CCQ system.

Contacts - Information that lets you keep track of when a customer contacts your company, by phone, e-mail, fax, or letter. This is the core of a contact-based CCQ system.

Fulfillment Packages - A list of all items that should be sent out as a unit so that nothing is forgotten. Fulfilment packages can be associated with marketing events, requests, or contacts.

Marketing Events - A specific event during a marketing campaign that can have its own budget, price catalog, script, or literature fulfillment package. Marketing events are also used to track outbound calling campaigns.

Order Entry/Quotes - Sales agents can generate quotes, and both sales and call center agents can take orders from customers.

Scripts - A series of questions or messages that an agent asks a customer.

Letter Generation/Paragraphs - Administrators can create entire letter templates or individual paragraphs that agents can use to create letters to send to customers.

Outbound Calling Lists - You can create lists of customers, then send the lists to the Avaya Agent application for processing. Avaya Agent checks all of the available lists, finds the one with the highest priority, and selects the next call from that list for any agent who is ready to make a call. (For details on Avaya Agent, see the *Avaya Agent Integrator's Guide* and the *Avaya Agent User's Guide.)*

Locator - This feature lets agents find the service center nearest to the customer based on the customer's area code, zip code, or state. If you have data about where your products are sold (either in-house or from a third-party), the Locator can also show agents the nearest store where a customer can buy a particular product.

Returns - Call center agents can arrange for customers to return a product for repairs or upgrade, exchange, refund, or replacement.

Defect Management - Agents can record product complaints from users, and these complaints can be assigned to development to be fixed. Once a defect has been fixed, it is automatically assigned to Quality Assurance to be confirmed, and then it is assigned to technical publications to be documented.

cross-selling - CallCenterQ lets you add cross-selling information. When an agent takes a call, the cross-sell information helps the agent sell other products to the customer as the call progresses. If the situation warrants, cross-sell prompts come up automatically so the agent does not have to remember the information. If a customer is not interested in hearing about cross-sales, the agent can cancel the prompts at any time and continue with the current task.

CallCenterQ for Consumer Relations Functionality

CCQ for CR includes:

Customers and Organizations - Agents can keep track of customer histories to more efficiently help each customer.

Employees and Workgroups - Information about call center agents and workgroups can be saved in the database and used to assign owners to each task. This ensures that all calls get handled as quickly as possible.

Requests - Information that lets you keep track of the reasons customers contact the call center, and the tasks necessary to fulfill the requests. This is the core of the request-based CCQ for CR system.

Contacts - Information that lets you keep track of when a customer contacts your company by phone, e-mail, fax, or letter. This is the core of a contact-based CCQ for CR system.

Fulfillment Packages - A list of all items that should be sent out as a unit so that nothing is forgotten. Fulfillment packages can be associated with marketing events, requests, or contacts.

Scripts - A series of questions or messages that an agent asks a customer.

Letter Generation/Paragraphs - Administrators can create entire letter templates or individual paragraphs that agents can use to create letters to send to customers.

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List Management Functionality

List management includes full-featured support for creating and managing outbound calling lists.

List Management enables you to:

- Add customers to a list

- Assign the agents and the workgroups who will call the customers on the list

- Check the status of each customer on a list

List management includes scaled-down versions of the following elements:

Campaigns - A series of marketing events that are designed to promote a product or line of products.

Customers - Agents can select the customers who should be included in the list and add new customers as needed.

Marketing Events - A specific event or events during a marketing campaign to which the list being created should be tied.

The CallCenterQ User Interface

With CallCenterQ, the data in your database is both organized and instantly accessible to any agent who needs the data. Because data also needs to be available *at the time* it is needed, the Graphical User Interface (GUI) is organized into separate focuses, which define work flows or particular activities. For example, agent tasks and administration tasks are in different focuses.

Each focus contains forms, which consist of a browser section and a data section. Each browser shows information that is a response to a database query. Each data section contains groups that show data from particular tables in the database.

You can access all of the application focuses from the Avaya Agent Start menu or from the Focus menu of any open application.

The following pages show a sample form from each of the CallCenterQ applications. For a description of the icons and menu options available, see the *Business Application Tools User Guide.*

Application Focus Examples

The following figure shows a sample CallCenterQ focus.
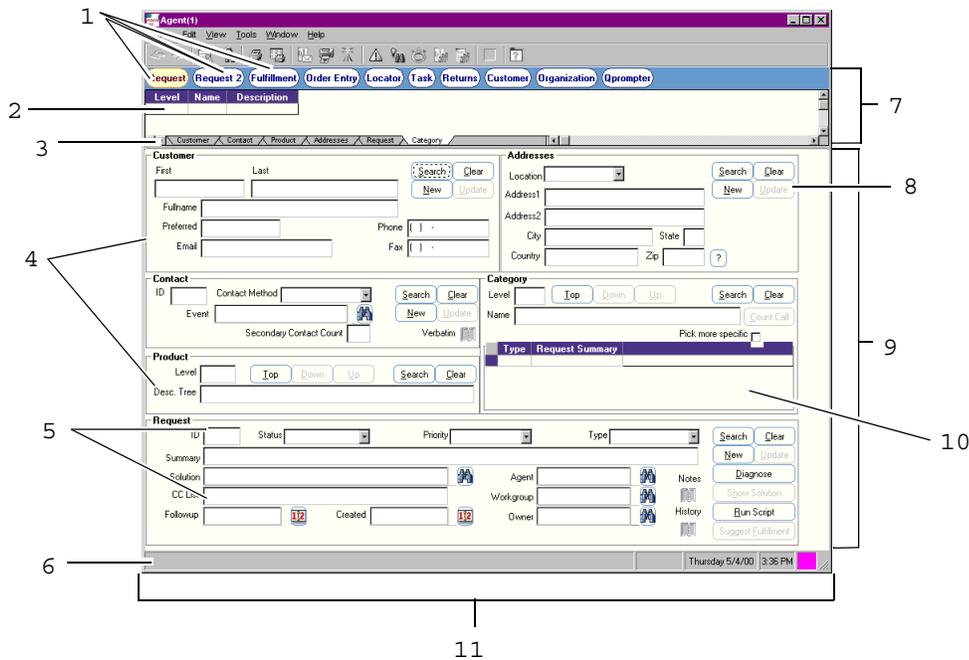
1. Buttons that access the other forms in the focus	**6. Status Bar**
	7. Browser Section
2. Browser	**8. Command Button**
3. Browser Tabs	**9. Data Section**
4. Groups	**10. IFB**
5. Fields	**11. Focus**

Your application developers can customize this GUI so that it is suited to your workflows and processes using the Avaya IC Database Designer. As the CallCenterQ administrator, your task is to take the system that your developers have put together and set up the data that the agents will actually be using.

Note:

This book documents the as-sold applications, and discusses basic administration tasks. However, if the system developers at your site have customized the applications, the screens shown in this document may not match those you see on your screen.

CCQ Request-Based Sample GUI

This is an example of the Agent focus for the request-based version of CallCenterQ. The initial form lets the agent get an immediate overview of the customer's order and request history.

CCQ for CR Contact-Based Sample GUI

This is an example of the Agent focus for the contact-based version of CallCenterQ for Consumer Relations. The initial form makes it easy for an agent to record a new contact from a customer, or to search for previous contacts.

1. **This group shows the customer.**
2. **This group shows the product**
3. **This group shows the contact information.**
4. **This group shows the category.**

List Management Sample GUI

This is an example of the List Management focus in List Management. The initial form lets you manage lists and add customers to the database.

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Chapter 2: Administration Tasks

To administer CallCenterQ (CCQ), set up small building blocks, such as fulfillment packages, scripts, and price catalogs, and then tie those blocks together into campaigns. These blocks are easily reusable. Once you have one campaign set up, use that as a basis for all other campaigns.

For CallCenterQ for Consumer Relations (CCQ for CR), you set up similar building blocks, but these blocks are tied to customer requests by agents, and are not organized into campaigns.

This section includes a chart that shows what functionality is available in each application, and what tasks need to be completed to use that functionality.

> **Note:**
> Ensure that Internet Explorer 5.0 or later is installed on your machine so the application can display HTML documents.

Setting Up Administration Tasks by Functionality

In each application, you can choose to set up different pieces of functionality based on the business processes your organization uses. For example, if your customers need to return defective or broken merchandise to service centers, you need to add the locations for those centers so agents can tell the customer about the locations. However, if your company doesn't use service centers, you can skip those tasks.

The following chart shows the functionality available in the three applications. Select the functionality you want to implement, ensure that the functionality is available in the applications you are setting up, and complete the list of tasks associated with each function. The following task list tells you which tasks are required, and where you can find more information.

If you want to... you need to.	Available in:
Assign employees to take calls and work with customers: ● Add employee records (required). (For details, see *IC Administration Volume 2: Agents, Customers, & Queues.*) ● Create workgroups (required). (For details, see *IC Administration Volume 2: Agents, Customers, & Queues.)*	All applications
Keep customer records: ● Add profile attributes and/or demographic groups. See Working with Customers on page 34.	All applications
Enter the daily hours that your agents work, so the application can track business hours correctly: ● Set up your work schedule calendar (required). See the *Avaya Business Applications Tools Reference.*	All applications
Mark a category as being nonviable, so agents cannot select it when creating a request or contact: ● Use the nonviable flag on the category record. See Nonviable Categories on page 40.	CCQ and CCQ for CR
Limit the categories agents can select based on the product they have chosen: ● Enter a record for each category and product (required).See Working with Categories and Templates on page 39 and Products on page 42. ● Add Restriction Levels to the application profile (required). See Setting Up the Application Profile on page 29. ● Link the products and categories on the Allowable Categories form (required). See Linking Products and Categories on page 59.	CCQ and CCQ for CR
Create fulfillment packages: ● Enter a fulfillment item record for each item and a package record for the package. Then link the items with the package (required). See Working with Fulfillment Packages on page 50. ● Enter default fulfillment information in the application profile (required). See Setting Up the Application Profile on page 29. ● Add fulfillment notifications. See Fulfillment Order Actions on page 77 and Fulfillment Escalations on page 81.	All applications
Suggest a fulfillment package based on the marketing event, product, and category the agent has chosen: ● Set up fulfillment packages as described above (required). ● Set up marketing events (required). See Managing Campaigns on page 63. ● Link a fulfillment package with each marketing event. See Linking Suggested Fulfillment Packages on page 60. ● Add Suggestion Levels to the application profile (required). See Setting Up the Application Profile on page 29. ● Link the suggested fulfillment package to the product, category, and/or product/category combination (required). See Linking Suggested Fulfillment Packages on page 60.	All applications

If you want to... you need to.	Available in:
Limit the fulfillment items from which an agent can choose. Limit by the marketing event, product, and category the agent has chosen: ● Set up fulfillment packages as described above (required). ● Set up marketing events (required). See Managing Campaigns on page 63. ● Link a fulfillment package with each marketing event. See Linking Suggested Fulfillment Packages on page 60. ● Create allowable item sets, and link them to the appropriate products and categories (required). See Creating Allowable Item Sets on page 56. ● Link the allowable sets to the marketing event to which the sets correspond (required). See Linking Allowable Item Sets on page 57.	All applications
Allow agents to send compensation vouchers to customers: ● Enter a voucher fulfillment item record (required). See Setting Up Vouchers on page 51. ● Attach a category (required). See Categories on page 39. ● Enter the fulfillment approval workgroup in the application profile (required). See Setting Up the Application Profile on page 29. ● Enter a per employee limit on the total fulfillment package value the employee can send out. (For details, see *IC Administration Volume 2: Agents, Customers, & Queues).*	CCQ and CCQ for CR
Manage mass mailing and outbound calling lists: ● Add the list management setup information to the application profile (required). See Setting Up the Application Profile on page 29. ● Set up the list (required). See Setting Up Customer Lists on page 35. ● Set up the target focus for the list. See Creating an Outbound Calling List on page 38.	All applications
In a request-based system, allow agents to enter customer requests and create associated task records to fulfill those requests: ● Enter product information (required). See Products on page 42. ● Add request categories (required in a request-based system). See Categories on page 39. ● Add Fulfillment packages. See Working with Fulfillment Packages on page 50. ● Add scripts. See Setting Up Agent Prompter Flows on page 61. ● If you are using the request-based version, you can add request templates. See Request Templates on page 41. ● If you are using CCQ, you can add task templates. See Task Templates on page 41. ● Add request notifications (for a request-based system). See Request Actions on page 75 and Request Escalations on page 82. ● If you are using CCQ, you can add task notifications. See Task Escalations on page 82. ● Add contact notifications (for a contact-based system). See Contact Actions on page 75 and Contact Escalations on page 81.	CCQ and CCQ for CR

If you want to... you need to.	Available in:
Set up a solutions database that agents can use to search for answers to customer problems: ● Use the Solution form in the Agent focus. See [Setting Up a Solutions Repository](#) on page 50. **Note:** If your solutions are stored in external documents, you can use QKnowledge to index those documents so that agents can search through them using the Avaya IC Solution Search facility. For details on setting up QKnowledge, see *IC Administration Volume 1: Servers & Domains.* For details on performing a solution search, see the *Business Application Tools User Guide.*	CCQ and CCQ for CR
Keep records on where service centers are located or where your company's products are sold: ● Add the locator setup information to the application profile (required). See [Setting Up the Application Profile](#) on page 29. ● Add product information (required). See [Products](#) on page 42. ● Add service center information. See [Service Centers](#) on page 63. ● Add information about what products are sold at specific locations so that agents can tell customers the store closest to their location. See [Product Locations](#) on page 63.	CCQ and CCQ for CR
Set up your system to handle customer returns: ● Set up a campaign and marketing event (required). See [Managing Campaigns](#) on page 63. ● Enter service center locations. See [Service Centers](#) on page 63. ● Set up Return notifications. See [Return Actions](#) on page 78.	CCQ
In a request-based system, enable defect reporting for your company's products: ● Add defect management information to the application profile (required). See [Setting Up the Application Profile](#) on page 29. ● Add product information (required). See [Adding Defect-Specific Information to Products](#) on page 47. ● Add defect notifications. See [Defect Actions](#) on page 79 and See [Defect Escalations](#) on page 82.	CCQ and CCQ for CR
In a request-based system, keep agents from selecting a particular product when they create a defect: ● Use the nonviable flag on the product record. See [Product Flags](#) on page 43.	CCQ and CCQ for CR

If you want to... you need to.	Available in:
Allow your agents to place customer orders: ● Set up a campaign and marketing event (required). See Managing Campaigns on page 63. ● Enter product information, ensuring the Use for Price Catalogs product flag is enabled. (required). See Products on page 42. ● Create a price catalog (required). See Price Catalogs on page 43. ● Set tax information (required). See Sales Tax on page 66. ● Set up the application profile (required). See Setting Up the Application Profile on page 29. ● Set shipping charges. See Shipping Charges on page 65. ● Create a script for an agent to use with a customer. See Setting Up Agent Prompter Flows on page 61. ● Set up a per-order discount. See Setting Up a Per-Order Discount on page 68. ● Set up order notifications. See Order Actions on page 76.	CCQ
Allow your agents to toggle between two different currencies: ● Enable the Currency Toggle Flag in the Application Profile (required). See Setting Up the Application Profile on page 29. ● Enter the currency records into the database (required). See Specifying Alternate Currencies on page 67.	CCQ
Set up cross-sell opportunities that could be displayed when an agent takes an order: ● Enter product information (required). See Products on page 42. ● Create a price catalog (required). See Price Catalogs on page 43. ● Set up the application profile (required). See Setting Up the Application Profile on page 29. ● Set up your cross-sell promotions (required). See Setting Up Cross-Sell Promotions on page 69.	CCQ

Setting Up the Application Profile

All three applications (CCQ, CCQ for CR, and List Management) have the same Application Profile. The Application Profile contains default information that enables the application to perform various processes. Not all of the values in the profile apply to every application, but the fact that applications share this information means you can set up a single profile and have it available for all your applications.

Here is a brief description of some of the fields in the application profile. You can provide all of this information on the Application Profile form in the Application Administration focus:

Field	Description	Used by...
Letter Generation Setup		
Batch Email Subject Line	This is the subject line that appears on the email or fax when a document is routed as an email or fax from the letter generator.	CCQ and CCQ for CR
Contact/Request Processing Flags		
Contact Active	This flag enables the application to verify that you have entered all the required information to implement this functionality.Check this box if the application should use the information in the Product Category Links section to limit fulfillment.	CCQ and CCQ for CR
Assignment mode	This flag identifies whether your system is contact based or request based.	CCQ and CCQ for CR
Auto Generated Contact Summary	The summary to use if Avaya IC automatically creates a contact.	CCQ and CCQ for CR
Duplicate Customer Check	If checked, Avaya IC will check to see if a customer already exists in the database when an agent creates a new customer record. **Note:** This feature only works if the customer names are in ASCII text.	CCQ and CCQ for CR
Product Category Links		
Restriction Levels	The product and category levels that are linked so that agents who have selected a product only see the associated categories. (For details, see Linking Products and Categories on page 59.)	CCQ and CCQ for CR
Suggestion Levels	The product and category levels that are used to pair a given level on the product tree with its associated level on the category tree when the system is suggesting fulfillment. (For details, see Linking Suggested Fulfillment Packages on page 60.)	CCQ and CCQ for CR
Fulfillment Setup		
Fulfillment Active	This lets the application verify that you have entered all the required information to implement this functionality. Check this box and fill out the rest of the fields in this section if your company deals with fulfillment.	CCQ and CCQ for CR

Field	Description	Used by...
Fulfillment Number Prefix	An optional prefix the application attaches to all fulfillment order numbers.	CCQ and CCQ for CR
Fulfillment Approval Workgroup	If the total value of a fulfillment order exceeds the agent's maximum limit, it needs to be approved by someone in an approval workgroup. Use this field to specify which workgroup serves the approval function. You can set up an action rule that notifies all group members when a fulfillment order is assigned to that group. (For details, see Fulfillment Order Actions on page 77.)	CCQ and CCQ for CR
Fulfillment Batch	This is the print batch to which any fulfillment cover letters will be sent for printing.	CCQ and CCQ for CR
Fulfillment Default Category	This is the category that will be used if the fulfillment order creates an automatic request record.	CCQ and CCQ for CR
Fulfillment Email Subject	This is the subject line that will appear in the message if part of the fulfillment order includes something that will be emailed or faxed.	CCQ and CCQ for CR
Fulfillment Pick List	The name of the report template the application should use to generate the fulfillment order pick list. For more information, see Creating the Fulfillment Pick List on page 58.	CCQ and CCQ for CR
Pick List Prefix	An optional prefix the application attaches to the pick list file name.	CCQ and CCQ for CR
Pick List Directory	The name of the directory in which the fulfillment pick list will be saved. The filename is based on fulfillment order number.	CCQ and CCQ for CR
List Management Setup		
List Active	Check this box if your company uses outbound calling lists.	All applications
List Management URL	This is the location of the Avaya Agent HTML page.	All applications
Auto Place Call	If checked, when an agent is using Avaya Agent to place calls, the system will automatically dial the next number as soon as the agent clicks Next Call.	All applications

Field	Description	Used by...
Order Setup		
Order Active	Check this box if your agents can take customer orders. This lets the application verify that you have entered all the required information to implement this functionality.	CCQ
Shipping Cost Method	Identifies the way shipping costs will be calculated: by weight, product, or amount. For more information, see Shipping Charges on page 65.	CCQ
Promotion Catalog	The price catalog that is used for cross-sell promotions. For more information, see Setting Up Cross-Sell Promotions on page 69.	CCQ
Order Number Prefix	An optional prefix the application will attach to order numbers.	CCQ
Tax Method	Indicates if taxes are charged, whether the taxes are calculated by the state in the billing address or by information stored in the tax category or state record.	CCQ
Currency Toggle Flag	Check this box if your agents can toggle between two different currencies. For more information, see Specifying Alternate Currencies on page 67.	CCQ
Tax All Items	If enabled, all items in an order are taxed based on the state of the billing address. For more information, see Sales Tax on page 66. Note: This method works only if Tax Method is set to Rate Set by State mode.	CCQ
Locator Setup		
Locator Active	Check this box if you want your agents to be able to find products by location. This lets the application verify that you have entered all the required information to implement this functionality.	CCQ and CCQ for CR
Show Locations Qty	When the agent searches for locations on the Locator form, this is the maximum number of locations that will be returned by the search.	CCQ and CCQ for CR

Field	Description	Used by...
Locator UPC Search Max	When the agent searches for products by location on the Locator form, the application finds all the UPC codes from that point downwards in the product tree. This number is the maximum number of UPC codes that can be returned for the application to continue processing. If the search returns more than this number, the application displays a message telling the agent to select a lower level product and run the search again.	CCQ and CCQ for CR
Load Locator Product Info	To load locator data from a third party source, click this button and follow the prompts.	CCQ and CCQ for CR
Defect Management Setup		
Assign to Owner Flag	If this flag is enabled, defects will be assigned to the owner of the product (if available). Otherwise, defects will be assigned to the workgroup assigned to the product.	CCQ and CCQ for CR
Document Workgroup	If the resolver and confirmer agree that a defect is fixed and has a documentation impact, it is automatically assigned to this workgroup.	CCQ and CCQ for CR
Management Workgroup	If the resolver and confirmer agree that a defect is a management issue, it is automatically assigned to this workgroup.	CCQ and CCQ for CR

Viewing Employees and Workgroups

The Employee and Workgroup forms in the Application Administration or the Notification Administration focus let you view the employee records to see who is assigned to which workgroups. For details about creating or changing employees and workgroups, see *IC Administration Volume 2: Agents, Customers, & Queues.*

Working with Customers

Customer records are kept in all of the Business Applications. In CallCenterQ, your customers call in wanting to place an order, return merchandise, find out where products are sold, or get compensation, literature, or service information. In CallCenterQ for Consumer Relations, your customers call in to make a request, or to get literature, compensation, or product-location information.

You can either set up your customers ahead of time or have your agents enter individual records, either when your customers call in for the first time or when your sales agents get sales leads. However, before you can turn this duty over to a call center or sales agent, you should set up the profile attributes or demographic groups you want those agents to track.

A profile attribute is a specific fact about customers that you can use to provide better service or to identify a good fit for your company products. For example, you might want to record customer hobbies, names of spouses, birthdays, or favorite colors.

A demographic group is similar to a profile attribute, but it covers a range of characteristics that tend to group similar individuals or companies. Once you divide your customers into demographic groups, you can target your marketing campaigns much more effectively. For example, you can divide your customers into early adopters, observers, or laggards in their approach to new technology. If you are selling a state-of-the-art product, you will probably have much better success with your early adopters, so you would want to focus your first campaign on them.

You can also use this information to analyze what type of customers are asking for services, and, in general, to communicate with your company. This information can help you tailor your customer support processes and fulfillment packages to meet the demands of your customers and make your agents more efficient.

When you set up attributes or demographic groups, have just one person define the attributes or groups. This will avoid several people independently creating attributes or groups that are so similar that agents cannot select between them. For example, you do not want to add a profile attribute called income and then add another one called salary unless it is clear these are different attributes.

To enter profile information, use the Profile Admin form in the Customer/List Administration focus. To enter customer records, use the Customer Profile form.

Note:

In CallCenterQ, demographic groups can also be used to trigger cross-sell promotions. For more information, see

The following flowchart shows how to set up these attributes and your customer database:

```
                    ( Setting up Customers )
                              |
                              v
 ┌──────────────────┐      ◇───────────◇                      ◇────────────────◇            ┌──────────────────┐
 │ Add the attribute by │  ◇  Are all profile  ◇              ◇ Do you have a comma ◇──Yes──▶│ Add them using the │
 │ clicking New in the the │◀─No─◇ attributes you want ◇       ◇ delimited list of customers? ◇   │ right-click menu item │
 │ Profile Attribute group on │  ◇ to track in the db? ◇        ◇────────────────◇            │ Import Customers on │
 │ the Profile Admin form │      ◇───────────◇                        │                      │ the Customer Profile │
 └──────────────────┘              │                                 No                      │       form         │
          │                        Yes                                │                      └──────────────────┘
          v                        │                                  v                              │
 ┌──────────────────┐              │                         ┌──────────────────┐                    │
 │ Specify whether the │           │                         │ Add a record for each │                │
 │ attribute applies to a │        │                         │ customer by clicking New in │             │
 │ customer, organization, or │    │                         │ the Customer group on the │              │
 │       both       │            │                         │ Customer Profile form │                 │
 └──────────────────┘            v                         └──────────────────┘                  │
          │              ◇───────────◇                              │                             │
          │              ◇ Are all the  ◇                           v                             │
          │   ┌─No──◇ demographic groups ◇                ┌──────────────────┐                    │
          │   │        ◇  in the db?  ◇                   │ Link profile attributes │◀─────────────┘
          │   v        ◇───────────◇                      │  to the customer  │
 ┌──────────────────┐      │                             └──────────────────┘
 │ Add the group by clicking │ Yes                                 │
 │ New in the the Demographic │                                    v
 │ Group group on the │                                   (    Done    )
 │ Profile Admin form │
 └──────────────────┘
          │
          v
 ┌──────────────────┐
 │ Specify whether the group │
 │ applies to a customer, │
 │ organization, or both │
 └──────────────────┘
```

Setting Up Customer Lists

A list is a group of customers that you want to mark as being related in some way. When you set up a list, you can use the customers already defined in your database, or import pre-defined customer lists into your database as individual customer records. (When you do, the application automatically eliminates the duplicate records.)

Lists are often used to create a mass mailing or to set up information for an outbound calling campaign. For a mass mailing, you create a list and then use the Letter Generator to produce the letters. For outbound calling, you create the list and then use the Avaya Agent application that integrates CallCenterQ with a Softphone.

You can set up your customer lists in the CCQ and CCQ for CR Customer/List Administration focuses, or in the List Management application.

Mass Mailing Lists

When you use the Avaya IC Letter Generator, you can use database variables that are filled in at runtime. You can also constrain the number of letters created by entering search criteria in the GUI (the Letter Generator takes those constraints into account when it determines how many letters it needs to generate).

A list can be considered to be a pre-set list of constraints that lets you generate a complete mass mailing. After you've set up the letter template, you can determine who to send it to by using a new or existing list.

The following information describes setting up the Mass Mailing list and using it with the Letter Generator. For information on setting up the letter template, see the *Business Application Tools User Guide*.

The following flowchart shows you how to set up a Mass Mailing list.
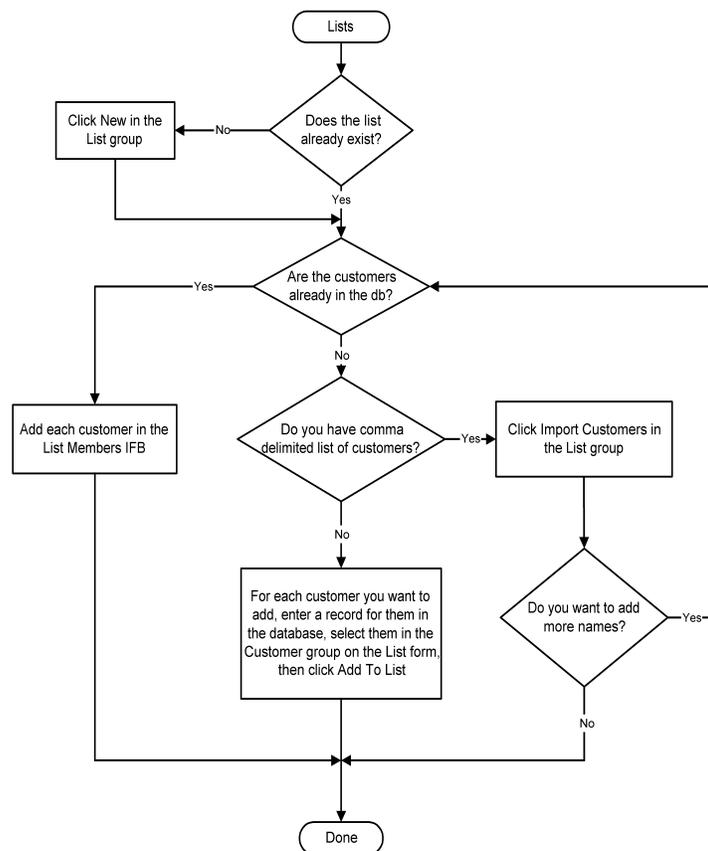
When you have the list, follow these steps to create the letters for the mailing:

1. Select Clear Focus from the Edit menu to remove all unwanted constraints.

2. On the List form, right-click in the List group and select Local.

> **⚠ CAUTION:**
> You must use a local search and not just click the Search button. If you only click the search button, the Letter Generator will create only one letter for the first customer in the List Members IFB.

3. Select the appropriate list from the browser.

4. Open the Letter Generator by selecting Letter Generator from the Tools menu. For details about using the Letter Generator, see the *Business Application Tools User Guide*.

Outbound Calling Lists

Outbound calling lists are processed by Avaya Agent, an application that integrates CallCenterQ with a softphone. Avaya Agent cycles through all the customers in the list and shows agents the name of the associated campaign, marketing event, and list name. Avaya Agent also provides some customer information. You can set up the list so that when a call is placed, Avaya Agent automatically opens the associated CallCenterQ focus and backfills the customer record so the agent has all the information the agent needs without having to search the database.

A sample of the outbound list HTML-based interface appears below:

Before you use Avaya Agent:

1. The Avaya Agent HTML interface is called `listmanagement.htm`, and it is in the `...\IC61\design\QConsole\listmanagement` directory. If you want to make any changes based on your organization, edit this file and save your changes.

2. Put the `listmanagement.htm` page on a web server that all your agents can access.

3. Go to the Application Profile form.

4. Select the application profile that will be used by your agents and enter the URL of `listmanagement.htm` in the List Management URL field.

5. To test Avaya Agent, start the application and look at the Outbound List form. A blank form with all the proper field labels should be displayed. (For details about setting up Avaya Agent, see *Avaya Agent Integration.)*

Creating an Outbound Calling List

To create a new list:

1. If you want to backfill a customer record into a focus, go to the List Target form and specify the focus, browser, and relation set to use when the customer database is searched and the list is populated. (You will need to get the *exact* names from the developer who created them.) The tables listed in the relation set are the only ones the application will search when it populates the list.

   Note:

   You can set a list target only in CCQ, not in the List Management application.

2. On the List form, click New and enter information about the list. Besides the Target described above, some of the things you can specify are:

   ● Flow Set and Flow Name. The set and name of the Prompter flow that should run when the agent clicks Next Call.

   ● List Status. The status of the list. You can set the status to Inactive, Active, or Completed. Only active lists will be sent to Avaya Agent. When Avaya Agent calls all customers on the list and the customers either answer the call or exceed the callback limit, Avaya Agent sets the list's status to Completed.

   ● Priority. Low, Medium, High, or Critical. Whenever an agent requests the next call, Avaya Agent looks for the highest priority list and selects a call from that list. If all lists are of the same or lower priority than the current list, Avaya Agent selects the next call in the current list.

   ● Callback Limit. The maximum number of times that Avaya Agent tries calling the Customer from this list. If Avaya Agent exceeds this limit, Avaya Agent sets the status to "Unreachable" and does not try to call that customer again.

   ● Next Call Delay. How long Avaya Agent should wait before it calls the Customer again, if the agent sets the Result to Busy, Answering Machine, or No Answer.

   ● Assigned Agents and Assigned Workgroups. The agents who will take the calls. You can specify either individual agents, entire workgroups, or both. The agents must have a status of Active before the agents can take calls.

   ● List Members. The customers who will be called. Make sure their status is set to Callable so the customers will be included in the list. After that, Avaya Agent sets the customer status and Next Contact information as appropriate.

Checking the Status of a List

To check the status of all list members, go to the List form and click Show Status. The application displays a dialog box that shows how many list members are in each of the six possible statuses.

Working with Categories and Templates

In CCQ and CCQ for CR, categories are a hierarchical way of organizing the calls your agents receive. Categories can also be associated with products, and the category and product combination can be used by the application as a guide for suggesting relevant fulfillment packages. (For details, see Linking Products, Categories, and Fulfillment Packages on page 58.)

Categories

Categories make your data more uniform because agents choose from a pre-defined set of options instead of typing in free-form text. Once you have standardized categories, you can use them as an assignment tool for any tasks that are created, and as a reporting tool so you can tell how many issues of a particular type your agents are handling. When you generate a report, you can sort by category, to get summary totals, and to perform other statistical operations.

Categories are hierarchical and can have an unlimited depth. For example, a top-level category could be `product performance`, which could contain two second level categories, `cleaning` and `bleaching`. Furthermore, cleaning could be broken down into two third level categories, `cleans well` and `cleans poorly`. This structure would be pictured as:

```
                    product performance
              _____/_____
             /                              \
          cleaning                       bleaching
        ___/\___
       /        \
  cleans well   cleans poorly
```
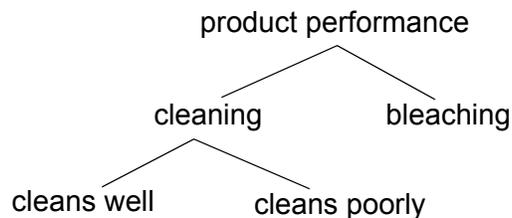
When you set up your categories, make sure the categories are unique so that agents can quickly tell which category applies. For example, `product performance/cleaning` and `product performance/removes dirt` are so similar as to be confusing.

To create categories, use the Category group on the Category form. For each category, enter a name and description. When you enter the category name, you specify the levels

using forward slashes. For example, to add the third-level category `cleans well,` you would enter the category name:

product performance/cleaning/cleans well

> **Note:**
>> If any of the levels in the category name tree are not already in the database, the application automatically creates records for them when you add the new category name.

Optionally, you can enter a workgroup, which will be automatically assigned to a request of the given category. You can also associate a fulfillment package with a category so agents can open an issue, select the category, and immediately find the right fulfillment package to send the caller.

Attaching Prompter Flows to Categories

You can link a Prompter flow with a category so that when agents select the category as part of a request, the agent can run the flow by clicking the Run Script button.

If this script should run in the Avaya Agent instead of in the Prompter form in the application, enable the Run In Avaya Agent checkbox on the category record. (For details, see <u>Setting Up Agent Prompter Flows</u> on page 61.)

Nonviable Categories

In some cases, you may not want agents to select a particular category because it is too general for your reports or fulfillment package suggestions. For example, if an agent selects "product performance" as the category, there is no way to tell whether the customer is talking about cleaning or bleaching, and the fulfillment items for those two things might be very different.

To keep an agent from selecting a particular category, enable the Nonviable Category check box. If the agent selects a nonviable category, the application will not update the contact or request until the agent changes the category to a viable one.

Basing a New Category on an Existing One

When you create categories, you want the beginning levels to be exactly the same or the application will not know the beginning levels are levels of the same category tree. The easiest way to do this is to create upper level categories and then use one of these upper level categories as the starting point for your new category.

For example, if you have created `product_performance/cleaning/cleans well,` you can create a matching third-level category `cleans poorly` by:

1. Selecting the `product_performance/cleaning/cleans well` category in the browser so the record backfills into the Category group.

2. Clicking New in the Category group.

   The application creates a new Category record and copies the information from the previously-selected category into it.

3. Replacing `cleans well` in the Category name with `cleans poorly`.

4. Changing any other information as appropriate.

5. Clicking Update.

Request and Task Templates for Request-Based Applications

If you are using the request-based version of CCQ or CCQ for CR, request and task templates give your agents a fast and easy way to handle common calls. You can enter the default information ahead of time so agents can have the application create request and task records automatically.

Request Templates

When you create a request template, you can enter the summary, type, status, and description ahead of time. Agents only need to search for the appropriate template and click a button to have the application open a new request record with the appropriate information. Request templates are attached to categories, so you also get the benefit of any default information (like the workgroup) stored in the category record. Once CCQ has created the issue record, the agent can change any of the default information as appropriate.

To create request templates, use the Request Template group on the Category form in the Request Administration focus. Do not forget to enter the category name the template is linked to in the Category field, or the agent will not be able to access the template.

Task Templates

Requests often require a series of tasks to be performed before the request can be closed, for example, when a refund is needed and a check has to be cut and mailed. You can attach one or more task templates to a request template. When agents select the template, they also get the tasks.

As with requests, the task templates contain default information that CCQ automatically enters into the task record when the agent elects to use the templates. This default information can be changed by the agent at any time.

To create task templates, use the Task Template group on the Category form in the Request Administration focus. Do not forget to enter the request template name in the Request Template field the task is linked to, or the agents will not be able to use the templates.

Managing Products and Price Catalogs

In all three applications, you can enter information about the products that your company sells. In CallCenterQ, you can also create price catalogs that list the cost of each product and, optionally, its shipping charge.

Products can also be associated with categories, and the category and product combination can be used by the application as a guide for suggesting relevant fulfillment packages. (For details, see Linking Products, Categories, and Fulfillment Packages on page 58.)

Products

In CallCenterQ, you can add information about the products your company sells by entering a record for each product on the Price Catalog form.

In CallCenterQ and CCQ for CR, once you create the product records, you can import third-party information that relates the product UPC code to the stores in which the product is sold. Agents can then find the store closest to the customer by searching on the customer's zip code.

Like categories, products are arranged in a tree structure. For example:

```
                        laundry

              Sudso              Bleacho

        lemon fresh      unscented
```
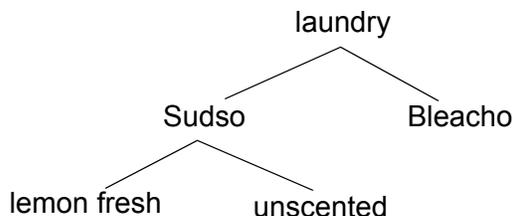
Entering Product Records

To enter products, use the Product form in the Request Administration focus or the Price Catalog form in the Order Administration focus. For each product, enter a name and optional description tree. If this product will *not* be associated with a category, the description tree simply adds some information about the product. If this product can be associated with a category, the Description Tree field specifies the product's place in the hierarchy. Use forward slashes to separate the levels, and enter all parent nodes above the product you are entering.

For example, to add the third-level category `lemon fresh`, you would enter the following:

Name: lemon fresh
Description Tree: laundry/Sudso

The application then makes the third level `lemon fresh` leaf under `Laundry` and `Sudso`.

> **Note:**
>> If any of the levels in the description tree are not already in the database, the application automatically creates records for them when you add the new product name. It does *not*, however, associate an official level with the product unless you enable the Use in Contacts/Requests flag, because level numbers are only important if you want to link the product with a category. If you do not enable this flag, the Level field stays at 0 (zero) when you save the new product.

Product Flags

There are three checkboxes on the product record that control how a product can be used:

- Use in Contacts/Requests. If this checkbox is enabled, the product can be associated with a category. (For details, see Linking Products and Categories on page 59.)

- Use in Price Catalogs. If this checkbox is enabled, the product can be added to a price catalog and can be selected by agents taking orders.

- Nonviable Product. If this checkbox is enabled, the product *cannot* be selected when an agent creates a defect record against this product. For details, see Adding Defect-Specific Information to Products on page 47.

  > **Note:**
  >> This field is only available on the Product form in the Request Administration focus.

Basing a New Product on an Existing One

When you create a product, all of the product's beginning levels need to be exactly the same, or the application will not know the levels are from the same product tree. The best way is to create the upper level products first. Then use one of the upper levels as the starting point for your new product.

Price Catalogs

In CallCenterQ, price catalogs list the products that are available during a particular marketing event and specify how much the products cost. Once you have one catalog, you can use it as the basis for new catalogs. The application can automatically change all the prices for the new catalog by a given percentage.

Note:

Only products at the very bottom of the product hierarchy with Order flags that have been set can be added to the price catalog. (These products can be added only if their Order Flags are set).

For example, if one of your product branches is `Laundry/Sudso/lemon fresh`, only the `lemon fresh` product can be added to the catalog, not the `Laundry` or the `Sudso` products.

The following flowchart shows you how to create a price catalog:
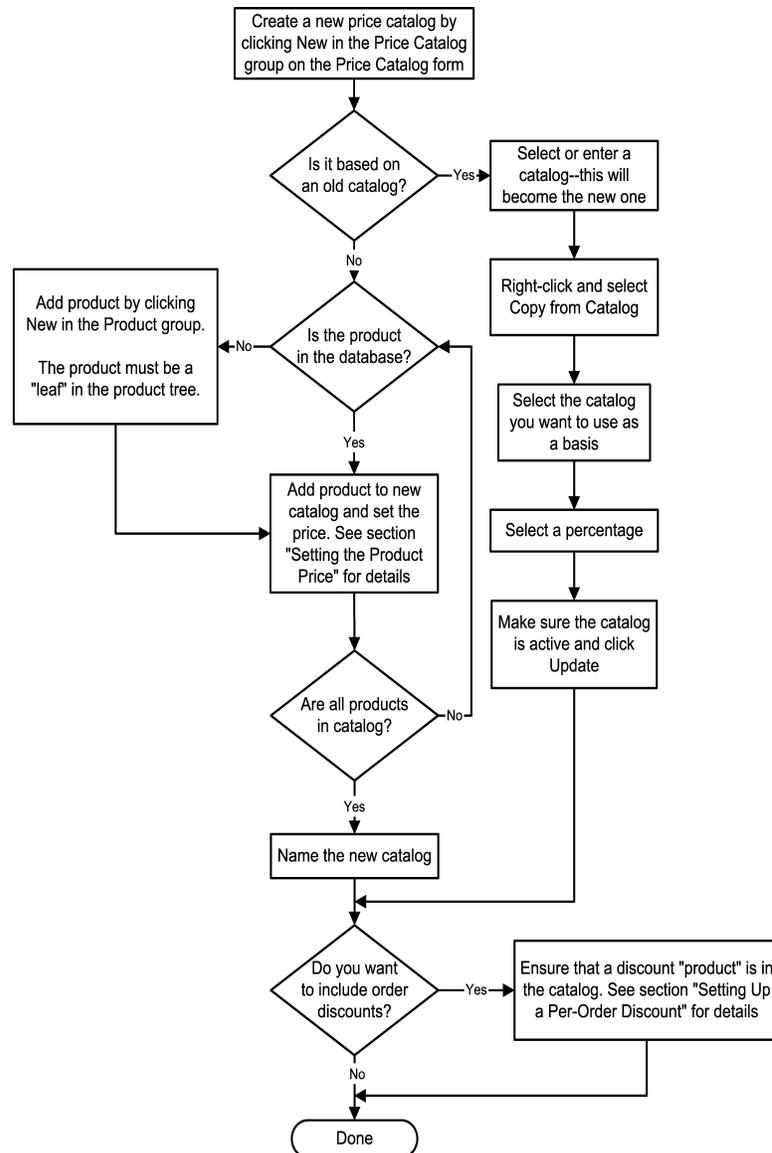
Setting the Product Price

The price catalog entry contains the following fields:

Field	Description
Part No.	The product's part number.
Name	The product's name.
Quantity for Price	The minimum number of products required to get the price listed in the Unit Price field. **Note:** All products must have an entry with "1" (one) specified in the Quantity for Price field.
Unit Price	The price *per unit* if the customer's order falls into the quantity range in the Quantity for Price field.
Shipping Charge	The shipping charge *per unit* if the customer's order falls into this quantity range.

When an agent enters an order, the application compares the number of units ordered to the entries in the Quantity for Price field, and takes the best possible price.

For example, here's a price catalog with three entries for Everfresh gum:

Part No.	Name	Quantity for Price	Unit Price	Shipping Charge
001	Everfresh Gum 10 pack	1	5.00	.10
002	Everfresh Gum 10 pack	10	4.00	.05
003	Everfresh Gum 10 pack	20	3.50	.03

If a customer ordered 1 (one) 10 pack, the customer would pay a total of $5.10 ($5.00 base plus $0.10 shipping). If the customer ordered 12 (twelve) 10 packs, the customer would pay a total of $48.60 (12 * $4.00 base plus 12 * $0.05 shipping). If the customer ordered 50 (fifty) 10 packs, the customer would pay $176.50 (50 * $3.50 base plus 50 * $0.03 shipping).

Working with Product Defects

Defect Management is used to track product problems or enhancement requests. There are three key roles involved in defect management:

Reporter - The person who adds new defects to the database.

Resolver - The person who fixes the reported defects or determines the defects are not actually defects. This person might also decide the defect is a documentation issue (as opposed to a development issue) or a management issue, if the defect needs to be escalated to someone higher in the management chain.

> **Note:**
>
> An employee cannot be a resolver for a defect unless the employee is designated as an "owner" in the database. For more information, see *IC Administration Volume 1: Servers & Domains.*

Confirmer - The person who checks the solution and agrees or disagrees with the resolver's conclusions. If the confirmer agrees, the defect is closed (or reassigned to documentation as an accepted fix). If the confirmer disagrees, the defect is returned to the resolver for further investigation.

When an agent adds a new defect, the application automatically assigns that agent as the reporter. It assigns the resolver and confirmer based on the business logic that is set up for your system, using settings in the Application Profile and in the associated Product record.

To set up Defect Management:

- Use the Production Versions/Platform form in the Request Administration focus to specify different platforms and product versions against which defects can be reported. For details, see Adding Defect-Specific Information to Products on page 47.

- Use the Application Profile form in the Application Administration focus to specify global defect management parameters. For details, see See Setting Up the Application Profile on page 29.

- Optionally, you can use the Product form in the Request Administration focus to link development, documentation, QA, and product management owners with a product. For details, see Adding Defect-Specific Information to Products on page 47.

- Optionally, you can use the Defect Notification form in the Notification Administration focus to set up action and escalation rules. See Defect Actions on page 79 and Defect Escalations on page 82.

Tip:

> When you set up your defect management system, think about how the agents will actually use it. Then you can decide which optional settings to use to make the process flow more smoothly. For the out-of-the-box agent task flow, see Agent Tasks on page 101.

Adding Defect-Specific Information to Products

Before you can track defect information, you may want to use the Request Administration focus to add additional information to your company's product records.

Linking Owners with Products

Several fields are available on the Product form that help automate the defect management process or provide useful information for employees:

Dev. Owner (Development Owner) - If the Assign to Owner Flag is enabled in the Application Profile when a defect is logged against the product, the defect is automatically assigned to the owner listed in this field. (Otherwise it is assigned to the workgroup, as described below.) For more information on the application profile flag, see Defect Management Setup on page 33.

Doc. Owner (Document Owner) - The employee who is the documentation owner for the product. This field is informational only, as the out-of-the-box application assigns defects to the documentation workgroup specified in the Application Profile, not to specific documentation owners. (For more information on specifying this workgroup, See Setting Up the Application Profile on page 29.)

QA Owner (Quality Assurance Owner) - The employee who is the quality assurance owner for the product. If the Assign to Owner flag is set in the Application Profile and the product has a QA owner, than this person is automatically assigned as the confirmer for all product defects in the out-of-the-box application.

Product Mgmt Owner - The employee who is the product management owner for the product. This field is not used by the out-of-the-box application to assign defects.

Workgroup - The workgroup that is assigned to deal with defects for this product. When a defect is reported, the system checks the Assign to Owner Flag in the Application Profile. If that flag is not checked, or if the Dev. Owner field in the Product record is blank, the application assigns the defect to the workgroup specified in this field.

Nonviable Product flag - If this flag is enabled, agents cannot enter a defect against this product.

Specifying Product Platforms and Versions

The Product Version/Platform form allows you to specify:

● The platforms against which defects can be reported, resolved, or confirmed in the Defect Platform group. In general, the defect should be resolved and confirmed on the same platform against which it was reported, but the out-of-the-box application does not verify that this is true.

● If your products have multiple versions or builds, you can specify them in the Product Version group. To make a particular version and build available for defect reporting, enable the Active check box. If this box is not enabled, the version and build will not appear when an employee performs a search in the Rep. Version (Reported Version), Res. Version (Resolved Version), or Conf. Version (Confirmed Version) fields.

Managing Defects

Once defects have been entered into your system, you can track and update them using the Defect Management focus. The Defect group on the Defect form is divided as follows:

● The fields at the top of the form show information about the defect itself, including its summary, priority, current status, and business impact.

● The bottom half of the form is divided into three columns. The first column shows who reported the defect, what platform it was reported against, and when the defect was created. The second column shows who resolved it, and when it was resolved. The third column shows the confirmer, and when the defect was confirmed.

In addition, there is one flag and several long text fields that allow you to specify additional information about the defect:

Readme flag - When enabled, this flag indicates the information about this defect needs to be included in the product Readme. At the end of the cycle, the person in charge of creating the Readme needs to run a report against the database looking for all defects fixed in the current version that had the Readme field enabled.

Readme Text - If the defect needs to be included in the Readme, developers can add appropriate information into this field. This ensures work-arounds and other important information do not get separated from the related defect.

Description - This long text field can include the steps to reproduce the defect, additional comments by the customer or reporter, or any other information that can help developers solve the problem. If developers need more information about some aspect of the defect, they can put their questions in this field and then pass the defect to someone who can answer those questions. This field then becomes a record of those questions and answers.

Resolution - This long text field provides details about the resolution.

Confirmation - If confirmers disagree that the problem is resolved, they can add their comments or questions in this field. Again, this keeps a log of confirmer input with the defect so that it can be referred to later.

Linking Duplicate Defects

Before an employee enters a new defect, the employee should search the database to make sure the problem is not already in the system (and has not already been resolved). However, unless the employee does an extensive search, there will be times when defects overlap.

When you find defect overlaps, make sure you link all of the overlapping defects. When the main defect is updated, all of the linked defects are updated as well.

To link defects:

1. Go to the Duplicate Defect form in the Defect Management Focus.

2. In the Defect group, fill in one of the defects that you want to link.

3. In the Target Defect group, fill in the defect that you want to link with the first defect.

   Tip:

   If either of the selected defects is already linked to another defect, the application displays that information in the Primary Defect group. You can continue to link your defect with the already linked defect.

4. In the Defect group, click Make Duplicate.

If you make a mistake, you can sever the link between defects by following steps 1 through 3 above, and then by clicking Unlink in the Defect group.

Viewing All Linked Defects

The Primary Defect group lets you see all of the defects that are marked as duplicates of one another. When you select a defect in this group, the Duplicate Defects IFB lists the selected defect along with all of the defects that are marked as duplicates of that defect.

   Note:

   When you are dealing with defects that are duplicates of other duplicate defects, the application selects the primary defect based on the first link that is made. For example, if you specify defect #40 in the Defect group and defect #23 in the Target Defect group, defect #23 becomes the primary defect. If you later specify that defect #57 is a duplicate of defect #40, the application automatically makes defect #23 the primary defect for #57, as well as for defect #40.

Setting Up a Solutions Repository

When problems are solved, it makes sense to save those solutions so that they can be easily referenced the next time a different customer calls to report the same problem.

This solutions repository can be stored:

● As records in the database that agents can search using the Solution form in the Agent focus.

● Separately from the database in a collection of documents that you index with the QKnowledge tool. Agents can search through the entire collection to find the information they need via full text searching. (For details on using QKnowledge, see *IC Administration Volume 2: Agents, Customers, & Queues.* For details on using full text searching, see the *Business Application Tools User Guide*.)

If an agent finds a solution for the customer's problem in either solution repository, the agent can link that solution to the Request or Issue record so the solution given to the customer is saved with the record. In that way agents in the future will know exactly what information was communicated to the customer in the past.

Working with Fulfillment Packages

A fulfillment package lets you send several pieces of information to the customer without concern for missing information. Each package can contain a unique cover letter along with the brochures, flyers, products, and other items that go together to form a single fulfillment order. You can use variables to personalize the cover letter for a particular person. These fulfilment order items can be both physical pieces and electronic files that are emailed or faxed to the customer.

For example, your company could create a marketing campaign that includes several brochures, a white paper, a price list, and a demo CD-ROM. When the customer asks for the package, you want to be able to select it as a unit, so that no single item is forgotten.

Fulfillment packages can also be linked to specific products and categories, as well as to product/category combinations. When the agent requests a fulfillment suggestion, the application looks at those links to determine which package to automatically enter into the fulfillment order form. (For details, see Linking Suggested Fulfillment Packages on page 60.)

However, these packages can be changed before the packages are sent to the customer. When an agent adds a fulfillment package to an order, the agent can add or delete items to or from the package, or the agent can change the quantity on any of the items in the

package before the order is officially placed. Packages provide a good starting point for the agent so the agent knows what the customer wants.

You can also group the fulfillment packages and items into allowable item sets. When the agent searches for fulfillment items on the Fulfillment form, the application uses the allowable set links to determine which items to display in the agent's browser. By limiting the display to only those items and packages in the associated allowable sets, the application automatically discards fulfillment items and letter templates that do not apply to the current customer order. (For details, see Creating Allowable Item Sets on page 56.)

Setting Up the Fulfillment Items

Before you create a package, use the Fulfillment Stock form in the Request Administration focus to add a Fulfillment Item record for each physical or electronic piece in your inventory. The library record contains the name and description of the item so that agents know what is being sent, the delivery method, and either the location of an electronic file or the inventory and re-order information for a physical item. (For more information on how the system handles physical items, see Inventory Tracking on page 52.)

You can also enter a monetary value for each stock item in the Value field. When an agent places an order, the application determines the total value, and it then checks the Fulfillment Limit specified on the agent's employee record. If the total value exceeds this specified amount, the application prompts the agent to lower the value of the order or send it to the Fulfillment Approval workgroup for processing. (For more information on the total value limit and workgroups, see Viewing Employees and Workgroups on page 33. For more information on setting the approval workgroup, See Setting Up the Application Profile on page 29.)

Adding Forms to Your Fulfillment Library

If you have created forms in the Report Writer that need to go into the package, you can create a fulfilment record for them as well. Create a new Item record and enter the template name in the Form Template field. When the agent selects the form item, the application prints it as specified in the Form specification. (For details about creating forms, see the *Business Application Tools User Guide.)*

Setting Up Vouchers

Vouchers are a special type of form template. To designate an item as a voucher, make sure the Voucher Flag checkbox on the Fulfillment Item record is enabled.

Once this checkbox is enabled, you can:

● Set the voucher's upper limit in the Voucher Max Value field.

● Link the voucher to a form template created in the letter generator. Agents can enter the amount of the voucher, and the application can send it to a printer that is loaded with

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blank voucher forms. The customer's customized voucher is then automatically printed and can be picked up and mailed.

When you create the voucher form, you can print the monetary amount the agent enters by referencing the `voucheramount` field in the `litlineitem` table. (For details about creating forms, see the *Business Application Tools User Guide*.)

> ⚠️ **CAUTION:**
>
> DO NOT include this voucher form in a template pack because the value of the voucher comes from the literature order line item and not from the type of database field the letter generator normally accesses. If you try to generate a voucher through a template pack, the results will be unpredictable.

If you want to use vouchers, you also need to set up one or more categories that have the Compensation Flag checkbox enabled. Agents need to use one of those categories for the fulfillment order before they can select a voucher. (For more information, see Categories on page 39.)

Agents can select only one voucher item per fulfillment order. The application requires the agent to enter a monetary total for the voucher.

If you are using a request-based system, there is only one category linked to the request, so that category has to be the one with the voucher flag checked. However, if you are using a contact-based system, you can have a different category linked to each issue.

In a contact-based system, the application will add a voucher if:

- Any one of the categories linked to any one of the issues has the voucher flag checked.

- The agent clicks Suggest Fulfillment and any of those categories have the voucher flag checked.

> **Note:**
>
> If the voucher is part of a package, that package must be linked to a category with the voucher flag checked. If it is not, the application adds all the other package items to the fulfillment order, but will not add the voucher.

Inventory Tracking

When you set the Delivery Method on a stock item to Mail, the application keeps track of how many of those items are available. When you create the item, you enter the starting inventory, the re-order level and size, and the item's owner.

From that point, the application keeps track of the current number available and committed for that item. Available inventory is the total number you have on hand, including any inventory that has been ordered but not yet processed. The application decreases the available inventory number for the item whenever a fulfillment order containing that item is

processed. Committed inventory is the number (quantity) of an item that has been ordered, but not yet processed. The application increases the committed inventory number when a fulfillment order containing that item is created, and decreases the committed inventory number when the order is processed.

When the available inventory drops below the re-order level, the application notifies the owner of that item that it is time to re-order, and tells that person what the re-order size should be.

The Available and Committed inventory numbers let the application verify that a fulfillment order can actually be processed. When the agent requests a physical item and enters a quantity, the application ensures that there are enough items in the available inventory to accommodate the request.

If the quantity requested does exceed the available inventory, the application displays a message telling the agent that the item is out of stock. If the Date Available field is not blank, the application knows that the item has been re-ordered and the application displays a message telling the agent when the stock is expected to arrive.

If the agent leaves the out-of-stock item in the order, and updates the order, the application repeats the message telling the agent the item is out of stock and gives the agent the option of automatically dropping it from the order. If the agent declines the option, the application leaves the out-of-stock item in the order.

In order to make use of this functionality, whenever an item is re-ordered, the owner should update the stock library record with the quantity ordered (in the Quantity Reordered field) and the date the item is expected to arrive (in the Date Available field).

When the stock actually arrives, the owner should:

1. Select the stock item record.

2. Right-click and select Stock Received from the popup menu.

3. Enter the number received in the dialog box.

4. Click OK.

The application then increases the Available inventory by that amount and clears out any information in the Quantity Reordered and Date Available fields.

Creating Packages Example

Let's say that your company makes Sudso detergent and Bleacho bleach. Your fulfillment library consists of the following items:

- Various coupons for Sudso and Bleacho
- A brochure describing all your products
- A brochure showing results obtained from testing your products against the leading brands
- A study proving cleaner clothes improve self-esteem

● Testimonials about the effectiveness Sudso and Bleacho
● Ingredient lists for each product
● Samples of all your products, in both powdered and liquid form
● A voucher for a free product
● A voucher for a rebate
● A letter thanking the customer for writing
● A letter apologizing to the customer for problems encountered with your products
● Various studies showing how well the products work
● Various problem-and-resolution or question-and-answer guides

After you enter an item record for each fulfillment piece and create the letters and vouchers using the Report Writer, you can group those items into packages. As mentioned above, you can link a package to a specific product or category, so you should keep this in mind when you are setting up your packages. You should ask yourself:

● What items make a natural grouping and should always go out as a set?

● When the agent clicks Suggested Fulfillment for a product/category combination, or for a single product or category, what would the agent most likely want to send?

> **Note:**
>
> Remember that only *one* package will be selected when Suggested Fulfillment is clicked, so each package should be complete. If the agent selects additional packages, duplicate items are automatically eliminated.

In this example, let us assume there are two product branches, Sudso and Bleacho. Each branch is further broken down into type (liquid or powder), and then into scent and then into size. One of the category branches is Product Performance, which is broken into cleaning, bleaching, and fading.

Given this structure, here are some of the packages you might want to make:

Package Name	Contains...
General laundry	● Brochure describing all laundry products ● Testimonials about how effective Sudso and Bleacho are ● Brochure describing tests done with all products against the leading brands ● Studies proving cleaner clothes improve self-esteem ● A thank you letter
Sudso package	● Brochure describing Sudso's ingredients ● A coupon for Sudso, any type ● Brochure describing tests done with all products against the leading brands ● A thank you letter
Bleacho package	● Brochure describing Beacho's ingredients ● A coupon for Bleacho, any type ● Brochure describing tests done with all products against the leading brands ● A thank you letter

Package Name	Contains...
Liquid Sudso package	• Coupon for liquid Sudso, any size • Sample of liquid Sudso • Brochure describing Sudso's ingredients • A thank you letter
Powder Sudso package	• Coupon for Sudso powder, any size • Sample of powdered Sudso • Brochure describing Sudso's ingredients • A thank you letter
Liquid Bleacho package	• Coupon for liquid Bleacho, any size • Sample of liquid Bleacho • Brochure describing Bleacho's ingredients • A thank you letter
Powder Bleacho package	• Coupon for Bleacho powder, any size • Sample of powdered Bleacho • Brochure describing Bleacho's ingredients • A thank you letter
Performance package	• Testimonials about how effective Sudso and Bleacho are • Brochure describing tests done with all products against the leading brands • A thank you letter
Cleaning package	• Studies showing how well the products clean • Suggestions for treating various types of stains • A thank you letter
Bleaching package	• Studies showing how well the products bleach • Suggestions for using bleach properly • A list of the fabrics that can be bleached • A thank you letter
Fading package	• Studies showing how well the products maintain colors • Suggestions for keeping colors bright • A thank you letter
Complaints	• Voucher for a free product, any type, any size • Letter of apology

For details on linking packages with their associated products and categories, see

Creating Allowable Item Sets

Besides grouping fulfillment stock items into packages, you can also group packages (and single items) into allowable item sets. Each product and category can have one associated allowable set, and it can contain as many fulfillment packages and items as you need. (If you include several packages in a set, the application automatically condenses any duplicate items.)

When the agent clicks Search in the Fulfillment form, the application looks at the selected marketing event and retrieves any linked fulfillment package. Then it looks at the product and retrieves all the items in the allowable sets linked to it, and to any product above it in the tree. The application then does the same with the category, and displays the resulting list of fulfillment items in the browser, ignoring any other items that might be in the fulfillment library.

> **Note:**
>
> Because the application includes all the applicable sets, each one can build on the one above it instead of being complete in itself as packages should be. However, only sets linked to a product or category are included in a fulfillment search, so you may need to create a set that holds just a single package. Suggested Fulfillment item links are ignored during this search process.

You can also link a letter template to an allowable set. When you do so, the application displays only the linked letters when the agent clicks Search in the Letter field.

For example, let us take the packages created above in Creating Packages Example on page 53. Here are some of the allowable sets you might build out of those packages and items:

Set Name	Set Contains
Laundry Set	● General Laundry Package ● "Thank you for contacting us" form letter
Sudso Set	● Sudso Package ● Sample of powdered Sudso ● Sample of liquid Sudso
Liquid Sudso Set	● Coupon for liquid Sudso
Powdered Sudso Set	● Coupon for powdered Sudso
Bleacho Set	● Bleacho Package ● Sample of powdered Bleacho ● Sample of liquid Bleacho

Set Name	Set Contains
Performance Set	● Performance Package
Cleaning Set	● Cleaning package ● Bleaching package ● Fading package

The links between sets and the Sudso product branch look like this:
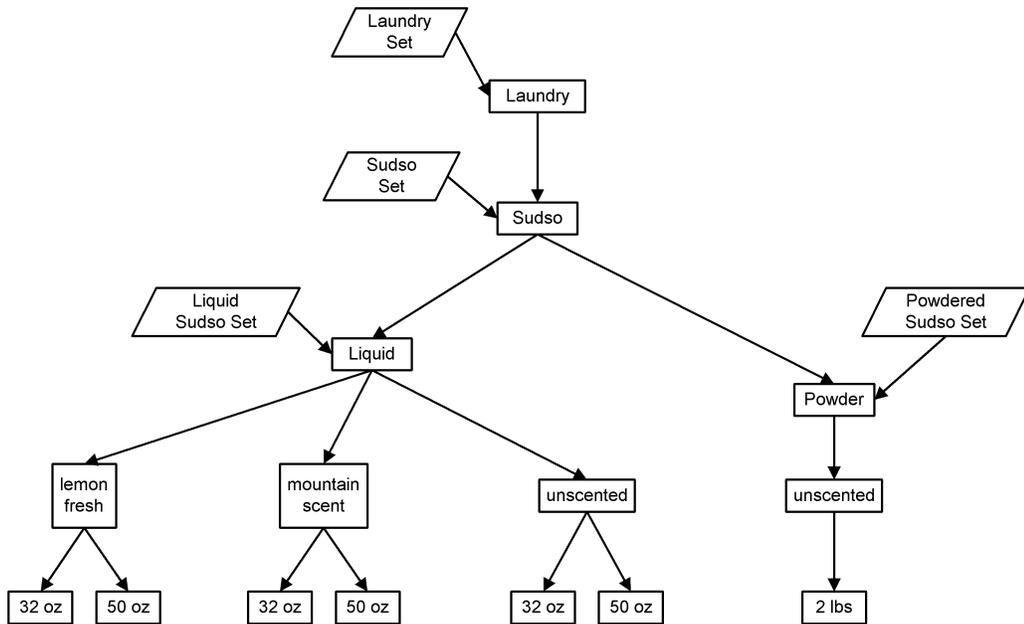
In the figure above, if the agent selects liquid Sudso and searches in the Fulfillment form, the agent sees all the items and packages in the Liquid Sudso set, the Sudso set, and the Laundry set. In this case, that translates into the General Laundry package and the Sudso package, plus the coupon for liquid Sudso and the two samples of the product, one powdered and one liquid.

Linking Allowable Item Sets

To set up the links, create the allowable sets you want to use. Go to the Product or Category form in the Request Administration focus, select the appropriate product or category, and enter the name of the set in the Allowable Set for Fulfillment field.

Creating the Fulfillment Pick List

When the application generates a fulfillment order pick list, it uses the report template named in Fulfillment Pick List field in the Application Profile to generate that list and send it to the named Pick List Directory. (If no template is linked into this field, the application does not create a pick list.)

Avaya IC includes an Ad-Hoc report specification file for each application called `ccq_<appname>_fulfillpicklist.qwr` that you can modify as necessary. These files are installed in your `...\IC61\design\CallCenterQ\reports` directory.

To use this report:

1. Open the Report Writer.

2. Load the pick list template that matches your application.

3. Make any modifications necessary.

4. Save the report specification to the database. Make sure you mark it as Public so it can be accessed by all users.

5. Link the database report to the application profile by selecting its name in the Fulfillment Pick List field on the Application Profile.

For more information on using the Report Writer, see the *Business Application Tools User Guide*.

Linking Products, Categories, and Fulfillment Packages

If you have a large number of products and categories, you may want to link them so certain products are associated with certain categories. Then, instead of having to search through the complete list of products and then work through the complete list of categories, agents need to enter only a product. When agents click Search in the Category group, the application displays only the categories associated with that product.

Product and category combinations can also be linked to fulfillment packages. An agent can request suggested fulfillment, and the application can automatically open a new order that contains the best fulfillment package for that situation.

Although these links take careful thought and pre-planning to set up, once the links are in place your agents can work far more quickly and with far fewer mistakes because you have already removed the extraneous information from the category, product, and fulfillment package lists.

Linking Products and Categories

When linking products and categories, set up two types of links:

- A general link that matches a level of the category tree with a corresponding level on the product tree. This link is established as part of the Application Profile in the Restriction Levels fields, and it limits the products and categories displayed when you search in the Allowable Categories form in the Request Administration focus. (For details on setting these fields, see Setting Up the Application Profile on page 29.)

- One-to-one links that match the specific categories on the general category level with specific products on the associated product level. These links are established on the Allowable Categories form, and these links limit the agent's search results when the agent selects a product and searches for a matching category.

For example, your product and category trees might look like this:

Product Tree

```
                              Laundry
                 ┌──────────────────────────┐
               Sudso                      Bleacho
          ┌───────────┐              ┌──────────────┐
       Liquid      Powder         Liquid         Powder
     ┌────┼────┐     │         ┌─────┼─────┐        │
 lemon  mountain unscented  unscented spring forest unscented unscented
 fresh   scent              rain    scent
  ┌─┐    ┌─┐    ┌─┐    │      ┌─┐    ┌─┐    ┌─┐    ┌─┐    │
32oz 50oz 32oz 50oz 32oz 50oz 2 lbs 32oz 50oz 32oz 50oz 32oz 50oz 2 lbs
```

Category Tree

```
                        Product Performance
            ┌──────────────────┼──────────────────┐
          Cleaning           Bleaching          Fragrance
   ┌────┬────┬────┬────┬────┐    ┌────┐      ┌────┐
Cleans Cleans Sudses Sudses Discolors Fades Discolors Fades Dislikes Likes
 well  poorly  well  poorly  fabric  colors  fabric  colors
```

In this system, it would make sense to link Product level 2 with Category level 2. Once you have the general levels linked, you would specifically link `Sudso` with the relevant level 2 categories Cleaning and Fragrance. Those two then become the only categories the agent will see when the agent clicks Search.

To create these links:

1. On the Application Profile form, set the Restriction Levels to 2 for both Product and Category.

2. On the Allowable Categories form:

   a. Click Search in the Restricting Product group.

   b. Select the product Sudso and click Change.

   c. Click Search in the Category group.

   Note:

   > The products and categories displayed when you click Search are limited to the levels specified in the Application Profile. To make sure you have linked the correct levels, set the application profile restrictions to make sure your searches produce the expected results before you use this form.

   d. Select the category Cleaning.

   e. Click the link icon in either group.

   f. Click Change on both records.

   g. Repeat the above steps for the Fragrance category.

Linking Suggested Fulfillment Packages

Just as you link products and categories to make searching easier, you can also link product/category combinations with suggested fulfillment packages and individual items. Once the agent has selected the product and category, the agent can use the Suggest Fulfillment button on the Contact or Request form. The application finds the best suggested fulfillment and automatically creates a new order containing that fulfillment package (or the application appends it to an existing order).

The application searches in the following places, stopping as soon as it finds a match:

● The product and category intersection specified in the Application Profile, if the agent has selected a product and category at or below the specified levels.

● The suggested fulfillment item associated with the product, or with any product from the current level back up to the top of the product tree.

● The suggested fulfillment item associated with the category, or with any category from the current level back up to the top of the category tree.

If it cannot find any associated fulfillment packages, the agent's search returns nothing. The application still creates a new order (unless one is already open), but the agent needs to do a search on the Fulfillment form to see the list of all relevant fulfillment items specified in the allowable fulfillment sets.

Linking with Product/Category Combinations

First determine what level of product and category you want to link for fulfillment packages. After your levels are determined, set up your links.

In our example, we linked products and categories at level 2, but for fulfillment, we can go deeper on the product tree and link the type of product (liquid or powder) with the category. That would mean using level 3 on the product tree and level 2 on the category tree.

To set up this linkage:

1. On the Application Profile form, set the Suggestion Levels to 3 for Product and 2 for Category.

2. On the Suggested Fulfillment form:

   a. Right-click and select Local Search from the pop-up menu in the Product group.

   b. Select the product Sudso.

   c. Right-click and select Local Search from the pop-up menu in the Category group.

   Note:

   The products and categories displayed when you click Search are limited to the levels specified in the Application Profile. To make sure you have linked the correct levels, set the application profile restrictions to make sure your searches produce the expected results before you use this form.

   d. Select the Category Cleaning.

   e. In the Product/Category Link group, click New.

   f. Enter the name of a Suggested Fulfillment package and click Update.

   g. Repeat steps e and f for each package you want associated with that product and category combination.

Linking with Specific Products or Categories

To set up this link, create the fulfillment item or package you want to use. Go to the Product or Category form in the Request Administration focus and select the appropriate product or category. Enter the name of the item in the Suggested Item for Fulfillment field.

Setting Up Agent Prompter Flows

In all three applications, you can create agent flows (or scripts) that collect data from customers, provide a uniform call process, or suggest cross-sell opportunities. Agents can

launch a script using the Run Script button when entering a request or contact, or when handling a return.

Use the Workflow Designer to create Prompter scripts that can run in either the application or Avaya Agent.

Using Prompter Scripts

You can attach a Prompter script to a product/category combination, a category, or a marketing event. When the agent clicks the Run Script button, the application runs the first script it finds that matches the criteria the agent has selected, starting with the product/category combination and ending with the marketing event.

The Prompter script can either run in the application (if your system designer has included the Prompter form) or in Avaya Agent. You specify where the script will run when you create the link.

Linking Prompter Scripts

To link a script to a category:

1. On the Category form in the Request Administration focus, select the category you want to link to a script.

2. Enter the flow set name and the flow name in the appropriate fields.

3. If the script should run in Avaya Agent instead of the application, ensure that the Run In Avaya Agent field is enabled.

To link a script to a category/product combination:

1. On the Suggested Fulfillment form in the Request Administration focus, select the product and category you want to link to a script.

2. In the Product/Category Link group, enter the flow set name and the flow name in the appropriate fields.

3. If the script should run in Avaya Agent instead of the application, ensure that the Run In Avaya Agent field is enabled.

To link a script to a marketing event:

1. On the Campaign form in the Order Administration focus, select the marketing event you want to link to a script.

2. Enter the flow set name and the flow name in the appropriate fields.

3. If the script should run in Avaya Agent instead of the application, ensure that the Run In Avaya Agent field is enabled.

Legacy Scripts

If you have scripts that were developed using the old scripting engine, the scripts will still run in the applications as long as you are not using Avaya Agent.

> ⚠ **CAUTION:**
>
> Running a legacy script will cause Avaya Agent to freeze. Legacy scripts run only in the Business applications.

Managing Service Centers and Product Locations

Service Centers - In CallCenterQ and CCQ for CR, you can enter information about your company's service centers on the Locator Admin form. Once you have entered your service center addresses, agents can enter the customer's address and the application will find the closest service center to that customer.

Product Locations - In all three applications, after you've entered your product records with the associated UPC code, you can import third party information listing where products (listed by UPC code) are sold. Agents can then use the customer's address to find the closest store to the customer that carries the product in question. To import this information, click Load Locator Product Info on the Application Profile form in the Application Administration focus.

Managing Campaigns

In both CallCenterQ and CCQ for CR, you organize campaigns, which consist of one or more marketing events such as special advertising drives, mass mailings, and trade shows. In both applications, a marketing event contains a price catalog, a default script, and a fulfillment package. Once you have created these building blocks, you can use them in any number of marketing events and campaigns:

- A fulfillment package lets you coordinate sending several pieces of information to the customer without worrying that anything will be missed. (For details, see Working with Fulfillment Packages on page 50.)
- Suggested fulfillment and allowable sets let you restrict the fulfillment packages agents can choose, based on the product, category, and marketing event that they have

selected. (For details, see [Linking Suggested Fulfillment Packages](#) on page 60 and [Creating Allowable Item Sets](#) on page 56.)

- A price catalog gives you a clearly-defined set of prices for each product you sell, optionally adjusted by quantity if your company gives a discount when the customer buys the product in quantities. (For details, see [Price Catalogs](#) on page 43.)

- A script organizes a series of questions and prompts that you want the agents to read to a customer. (For details, see [Setting Up Agent Prompter Flows](#) on page 61.)

in the Order Administration focusyou need to The following flowchart shows you how to create a campaign using the CallCenterQ Order Administration focus:
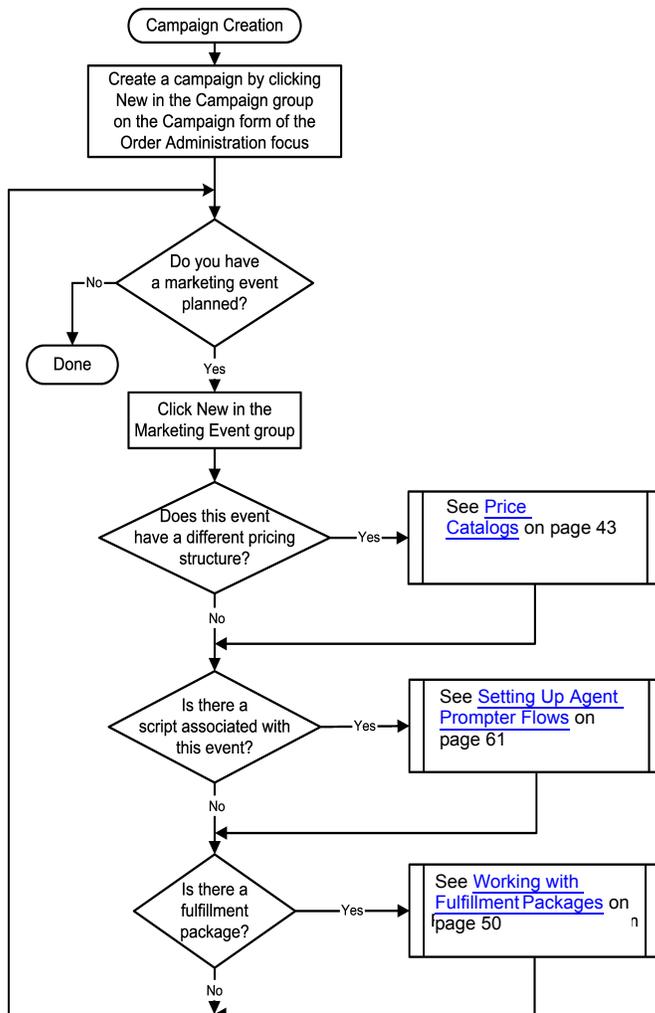
Managing Customer Orders

Before your call center agents can take orders, you must set up shipping charges and tax information and define how you want to calculate shipping charges.

To begin setting up customer orders, go to the Application Profile form. There you can set:

- The way shipping charges will be calculated
- The promotion catalog if you have cross-sell promotions
- The prefix that will be added to all order numbers
- The way taxes are computed (by billing address or by product)
- Whether agents can switch between two different currencies.

Shipping Charges

Shipping charges can be calculated by the subtotalled cost of the order, total weight, or per product. Once you set the calculation method in the Application Profile, use the Order Admin form in the Order Administration focus to add the details.

The calculation methods for shipping charges are:

- Subtotalled cost of the order (pre-tax). To use this method:
    - Define the start of each price range and its associated cost in the Shipping Charge group on the Order Admin form.
- Total weight. To use this method:
    - Define the start of each weight range and its associated cost in the Shipping Charge group on the Order Admin form.
    - Ensure that the weight of each product is in the database. Go to the Product group on the Price Catalog form, select (or enter) each product, and check its weight.
- Per product. To use this method:
    - Leave the Charge and Start Range fields in the Shipping Charge group on the Order Admin form blank.
    - Ensure that the shipping charge for each product is in the database. Go to the Price Catalog form, select the price catalog with which you are working, and check the shipping charge for each product in the catalog.

Sales Tax

You can calculate taxes based on:

- The state in the customer's billing address
- The tax category under which each product falls

Setting Taxes by Billing Address

The easiest way to set up taxes by billing address is to set the Tax Method to Rates set by State and check Tax All Items on the Application Profile form. Whether or not there is a tax category linking the product to the state, all products are taxed based on the state in the customer's billing address.

On the Order Admin form in the Order Administration focus, use the State Tax group to enter a record for each state and its associated tax rate, expressed as a decimal number. (For example, if California has an 8 1/2% tax, you would enter a record with the State as CA and the Tax Rate as .085)

> **Note:**
>
> If a sales tax record does not exist for the particular state in the billing address, CallCenterQ does not add sales tax to the order.

However, if you sell some products that are not taxable in some states (for example, food), create tax categories and link them with the appropriate states. Furthermore, link each product with its associated tax category in the Product group on the Price Catalog form.

When the agent adds a product to an order, the application calculates the tax as shown in the following flowchart:

```
                    ┌──────────────┐
                   ( Agent adds     )
                   ( product to order)
                    └──────┬───────┘
                           │
                           ▼
                      ╱Is Tax All Items╲      ┌──────────────┐
                     ╱    selected?     ╲──Yes─▶( Use the tax rate )
                      ╲                 ╱       ( for the state    )
                       ╲               ╱        └──────────────┘
                           │ No
                           ▼
              ╱Is there a tax╲            ╱Is the tax    ╲          ┌──────────────────┐
             ╱ category linked to╲──Yes──▶╱ category linked to╲──Yes─▶( Use the tax rate set in)
              ╲ the product?   ╱          ╲ the state?     ╱         ( the state record      )
               ╲             ╱             ╲            ╱            └──────────────────┘
                   │ No                        │ No
                   ▼                           │
                   ◀───────────────────────────┘
             ┌──────────────────┐
            ( Do not tax the product)
             └──────────────────┘
```
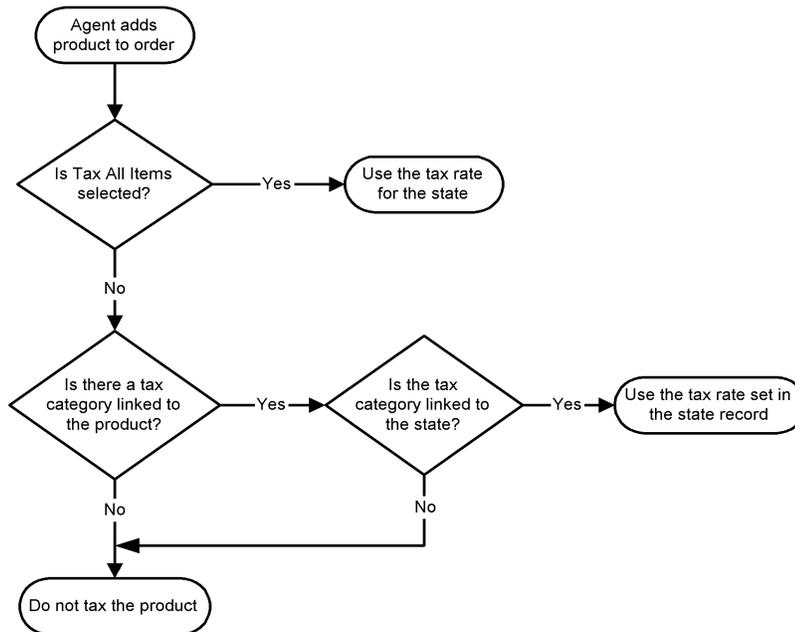
Setting Taxes by Product Category

If you want to calculate taxes totally on the product without regard to where it is being shipped, set the Tax Method to Rates set by Product on the Application Profile form. Then, on the Order Admin form, create a tax category for each rate you need, and link it to the product.

If a tax category is not linked with a product, and that product is included in an order, the application does not charge tax for that product.

> **Note:**
>
> You cannot use Tax All Items when you are calculating taxes by product. This option works only when taxes are based on the billing address.

Specifying Alternate Currencies

When dealing with foreign currencies, you can set up two different currencies that agents can toggle between when they are taking an order. When an order is created, the application uses the current exchange rate. If you subsequently change the exchange rate, the application does not recalculate any of the current orders. To use the new exchange rate, you must create a new order.

If you want your agents to be able to toggle between two different currencies:

1. On the Application Profile form in the Order Administration focus, in the Order Setup section, enable the Currency Toggle Flag.

   When you enable this flag, the Toggle Currency button becomes available on the agent's Order Entry form.

2. In the Currency Exchange group on the Order Admin form of the Order Administration focus, enter a record for the secondary currency, including its symbol and the exchange rate between it and the main currency.

Verifying that the Toggle Works Correctly

Once the application with the toggle has been generated and the administration items set, you can verify that the toggle is working by going to the Order Entry form. Once you create an order (or select a previous order and click Change), click the Toggle Currency button to have the application recalculate the cost of the order based on the given exchange rate.

Setting Up a Per-Order Discount

There are three types of order discounts:

- Item catalog discounts. If your company is having a sale on one or more products, you can create a special price catalog and have all agents use that catalog when a customer places an order. The system then automatically gives the agents the discounted prices.

- Line item discounts. When the agent takes the order, the agent can enter a discount for that product in the Line Items IFB. This is a one-time discount that applies only to that product for this order.

- Order discounts. If you add an order discount item to a price catalog, agents can select this item to have a percentage discount applied to the entire order. To do so:

  1. Create a new product on the Price Catalog form in the Order Administration focus.

  2. Give it a name and model number that clearly indicates it is a discount and not one of your regular products.

  3. Enable the Order Discount Flag checkbox.

  4. Click Update.

  5. Add the item to any price catalogs that it can be used with.

The agent creates an order and selects this discount "product," then the agent fills in the amount of the discount and the application applies the discount to the subtotalled (pre-tax) order amount. In this case, CallCenterQ ignores the quantity field.

Setting Up Cross-Sell Promotions

In CallCenterQ, you can add cross-sell information so that, when agents are taking orders, agents can find other products in which the customer may be interested.

Use the XSell/Promotion form in the Order Administration focus to create cross-selling and promotional opportunities that CallCenterQ automatically displays for agents at different points within the call.

There are four types of promotions that you can create:

● General promotions are shown to everyone.

● Product promotions are shown to everyone who selects the associated products.

● Group promotions are shown to everyone who is part of the associated demographic groups. (For more information see Working with Customers on page 34.)

● Personal promotions are shown to one or more specific customers.

Each of these promotions can appear at one or more of the three phases within the order. The three phases are:

● Order Entry phase. Cross-sells are automatically triggered when the agent clicks the Cross Sell button on the Order Entry form.

● Order Line Item phase. Cross-sells are automatically triggered when a row in the Line Items browser has been completed.

● Request phase. Cross-sells are automatically triggered when the agent clicks Update on the Request or Contact form.

The eligible promotions by phase are shown in the following table:

Eligible Promotions by Order Phase	Product	Personal	Group	General
Order Entry	N/A	Yes	Yes	Yes
Order Line Item	Yes	n/a	n/a	n/a
Request	Yes (Applies if the system is request-based and the trigger product is selected in the product group)	Yes	Yes	Yes

If you have an HTML page that describes a particular promotion or product, you can enter the URL in the promotion record. CallCenterQ displays the link when it shows the promotion, and the agent can click on the link to view the additional information.

Note:

Only products with Use in Price Catalog flags enabled can be cross-sold. (For details, see Product Flags on page 43.)

Specifying the Repeat Interval

The Repeat Interval limits the number of times a particular cross-sell promotion is shown to a specific customer.

You can select from the following repeat intervals:

- One Time, if you want the promotion to come up just once for each customer.

- Once a Day, if you want the promotion to come up once per calendar day for each customer.

- Once a Week, if you only want the promotion to come up once per calendar week for each customer.

Specifying Prices and Selecting Promotions

When you set up cross-sell opportunities, the application uses a special promotional catalog to determine the prices for the products. Create the price catalog you want to use and enter it in the Promotion Catalog field on the Application Profile form. (For more information, see Price Catalogs on page 43.)

When the application determines which cross-sell opportunities to display to the agent, the application takes the following factors into account:

- The Weight Floor (number) for the order phase. For a promotion to display during this phase, its Appearance Weight must exceed the Weight Floor number.

- The Offer Limit (number) for the order phase. This is the maximum number of promotions that the application displays during this phase.

- The promotion Start and End Dates. If the current date does not fall within this range, the promotion will not be offered.

When the agent takes an order, the application determines which, if any, cross-sell promotions to show once the agent launches the cross-sell process. A simplified version of this process is shown in the flowcharts below. The flowchart on the left describes launching the cross-sell process. If an agent launches a cross-sell event, the flowchart on the right shows the system process for selecting a cross-sell promotion.

Cross Sell Opportunities (left flowchart)

Cross Sell Opportunities

↓

Agent clicks Cross Sell button

↓

Is there an Order Entry phase set up? — Yes → See "Select Cross Sell Promotions"

↓ No

Agent enters a product in the Line Items IFB

↓

Is there an associated Order Line Item promotion? — Yes → See "Select Cross Sell Promotions"

↓ No

Agent enters a request

↓

Is there an associated Order Line Item promotion? — Yes → See "Select Cross Sell Promotions"

↓ No

Done

Select Cross Sell Promotions (right flowchart)

Select Cross Sell Promotions

↓

Select the next promotion

↓

Check Repeat Interval--should promotion be shown? — Yes → Add to promotion list

↓ No

Is there another promotion? — Yes (loops back to Select the next promotion)

↓ No

Sort all applicable promotions by Appearance Weight

↓

Do any promotions exceed the Weight Floor? — No → End

↓ Yes

Set n = 1

↓

Is n <= Offer Limit AND Weight Floor <= Appearance Weight? — Yes → Display promotion → Set n = n + 1 (loops back)

↓ No

End

Cross-Sell Administration Task Flow

The following flowchart shows you how to set up cross-selling information:

```
                    ╭─────────────────────╮
                    │  Cross Selling Admin │
                    ╰─────────────────────╯
                              │
                              ▼
            ┌─────────────────────────────────┐
            │ On the XSell/Promotion tab,      │
            │ click New in the Cross Sell      │
            │ Admin group and select the       │
            │ appropriate order phase          │
            └─────────────────────────────────┘
                              │
                              ▼
            ┌─────────────────────────────────┐
            │ Set the Weight Floor and         │
            │ Offer Limit for this phase       │
            └─────────────────────────────────┘
                              │
                              ▼
                          ◇─────────◇          ┌──────────────────┐
                         Are the promotions  No │ See Creating a   │
                         already in place?  ──► │ Promotion on     │
                          ◇─────────◇          │ page 73          │
                              │                 └──────────────────┘
                             Yes
                              │
                              ▼
                    ╭─────────────────────╮
                    │       Done           │
                    ╰─────────────────────╯
```
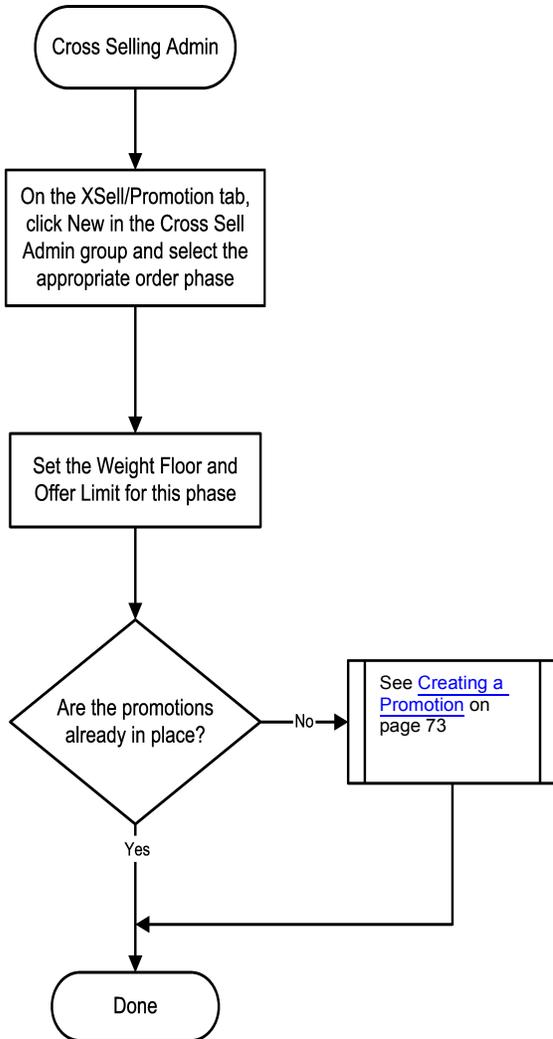
Creating a Promotion

The following flowchart shows you how to create a promotion:.

```
┌──────────────────────┐
│  Create a promotion  │
└──────────────────────┘

┌──────────────────────────────────┐
│ Set the Appearance Weight. For this │
│ promotion to be visible during the  │
│ selected phase, this weight must be  │
│ both greater than the Weight Floor   │
│ and high enough to put it in the top │
│ n promotions, where n corresponds to │
│ the associated Offer Limit.          │
└──────────────────────────────────┘

        Is the associated
        'suggested' product      ──No──►  Add the product by clicking
        in the database?                   New in the Product group
              │                            on the Price Catalog form.
             Yes

        Is the suggested
        product included        ──No──►  Add suggested product to
        in the promotion catalog?         the price catalog listed on
              │                           the Profile Admin form.
             Yes

        Define the trigger
        condition for this
        promotion.

        Set the Repeat Interval to
        specify how many times the
        promotion will be shown to
        each customer.

        Is there another
        promotion to add?   ──Yes──
              │
             No

          ( Done )
```

Working with Actions and Escalations

Actions are messages the three applications send automatically when the status of certain types of records changes. If the record's status does not change, the application never sends an action message.

Escalations are notifications that CallCenterQ and CCQ for CR send if the status of a record does *not* change in a given time frame. For example, if the application creates a request record and assigns the request record to a workgroup, you can set an escalation rule that sends a message if an owner does not accept the request within a certain number of hours.

> **Note:**
>
> You must create workgroups if you want to use escalation rules. The application sends Escalations to the workgroup associated with a request or contact.

Actions and escalations require:

- that any agent receiving an action or escalation must have the Support role enabled in their agent profile record. For details, see *IC Administration Volume 2: Agents, Customers, & Queues*.

- that the Notification server be running. For more information, see *IC Administration Volume 1: Servers & Domains*.

General Guidelines for Creating Actions

When you create Actions for any application, keep the following things in mind:

- If the recipient is a workgroup, the Send field must be blank. The application uses the contact method specified for the workgroup.

- If the notification method is email, set up Microsoft Exchange, the Notification server, and valid user profiles. For more information, see *IC Administration Volume 1: Servers & Domains.*

CallCenterQ Actions

When there is a change in status for a particular type of request, you may want CallCenterQ to send out an alert, email, fax, or page. When such a change occurs, CallCenterQ checks for any Actions set up for that combination of request type and status setting. If the application finds Actions, CallCenterQ sends out the specified message to the list of recipients.

You can set up the following actions:

- Request Actions on page 75 (in a request-based system)
- Contact Actions on page 75 (in a contact-based system)
- Order Actions on page 76
- Fulfillment Order Actions on page 77
- Task Actions on page 79 (in a request-based system)
- Defect Actions on page 79

For example, when an order's status becomes Cancel Pending or Cancelled, you might want to send a message to a sales manager. The sales manager can look into the problem

to find out why the order is being cancelled and to check for potential recovery actions to save the sale.

The following sections show the combination of record status, delivery method, and recipients that you can specify in an action rule.

Request Actions

Enter Request actions on the Request Notification form. Request actions trigger when the record status changes to one or more of the following:

- 1-New
- 2-Assigned
- 3-Owned
- 4-Closed
- 5-Cancelled

When such a change occurs, the action rule sends one or more of the following types of notifications:

- Alert (not valid if the recipient is Customer)
- Email
- Fax
- Pager

These notifications can go to one or more of the following types of recipients:

- Customer
- Agent
- Workgroup
- Owner

Example 1: when a Service Request is assigned to a workgroup, send a page and an alert to all members of the workgroup.

- Status: 2 Assigned
- Send: Alert
- Recipient: Workgroup

Example 2: When an employee is assigned a request, send an alert to the employee:

- Status: 3 Owned
- Send: Alert
- Recipient: Owner

Contact Actions

Enter Contact actions on the Contact Notification form. Contact actions trigger when the record status changes to one or more of the following:

- 1-New
- 2-Assigned
- 3-Owned
- 4-Closed

- 5-Cancelled

When such a change occurs, the action rule sends one or more of the following types of notification:

- Alert (not valid if the recipient is Customer)
- Email
- Fax
- Pager

These notifications can go to one or more of the following types of recipients:

- Customer
- Agent
- Workgroup
- Owner

Example 1: When a contact is assigned to a workgroup, send a page to all members of the workgroup:

- Status: 2 Assigned
- Send: Page
- Recipient: Workgroup

Example 2:When an employee is assigned a contact, send an alert to the employee.

- Status: 3 Owned
- Send: Alert
- Recipient: Owner

Order Actions

Enter Order actions on the Order Notification form. Order actions trigger when the record status changes to one or more of the following statuses:

- 1-New
- 2-Assigned
- 3-Owned
- 4-Shipped
- 5-Cancelled

When such a change occurs, the action rule sends one or more of the following types of notification:

- Alert (not valid if the recipient is customer)
- Email
- Fax
- Pager

These notifications can go to one or more of the following recipients:

- Customer
- Agent
- Workgroup
- Owner

Example 1: When an order ships to a customer, send an email to the customer.

- Status: 4 Shipped
- Send: Email
- Recipient: Customer

Example 2: When an order is assigned to a workgroup, send an alert to all members of the workgroup:

- Status: 2 Assigned
- Send: Alert
- Recipient: Workgroup

Example 3: When an order is shipped or cancelled, send a fax to the originating agent:

- Status: 4 Shipped, 5 Cancelled
- Send: Fax
- Recipient: Agent

Fulfillment Order Actions

Enter fulfillment order actions on the Fulfillment Notification form. Fulfilment order actions trigger when the record status changes to any of the following statuses:

- 1-New
- 2-Assigned
- 3-Owned
- 4-Processed
- 5-Approval Required
- 6-Cancelled

When such a change occurs, the action rule can send one or more of the following types of notification:

- Alert (not valid if the recipient is Recipient)
- Email
- Fax
- Pager

These notifications can go to one or more of the following recipients:

- Recipient
- Agent
- Workgroup
- Owner
- Approval Workgroup

Example 1: When a fulfillment order is shipped, send a fax to the fulfillment order requestor:

- Status: 4 Processed
- Send: Fax
- Recipient: Recipient

Example 2: When a fulfillment order is assigned to a workgroup, send an alert to workgroup:

- Status: 2 Assigned
- Send: Alert
- Recipient: Workgroup

Example 3: When a fulfillment order is cancelled, send an email to the workgroup:

- Status: 6 Cancelled
- Send: Email
- Recipient: Workgroup

Return Actions

Enter Return order actions on the Order Notification form. Return order actions trigger when the record status changes to any of the following statuses:

- 1-New
- 2-Assigned
- 3-Owned
- 4-Closed
- 5-Cancelled

When such a change occurs, the action rule can send one or more of the following types of notification:

- Alert (not valid if the recipient is customer)
- Email
- Fax
- Pager

These notifications can go to one or more of the following recipients:

- Customer
- Agent
- Workgroup
- Owner

Example 1: When a return is assigned to a workgroup, send an alert to the workgroup:

- Status: 2 Assigned
- Send: Alert
- Recipient: Workgroup

Example 2: When a return is cancelled, send an email to an agent:

- Status: 5 Cancelled
- Send: Email
- Recipient: Agent

Example 3: If a return is closed, send a fax to the customer:

- Status: 4 Closed
- Send: Fax
- Recipient: Customer

Task Actions

Enter Task actions on the Task Notification form. Task actions trigger when the record status changes to any of the following statuses:

- 1-New
- 2-Assigned
- 3-Owned
- 4-Closed
- 5-Cancelled

When such a change occurs, the action rule can send one or more of the following types of notification:

- Alert (not valid if the recipient is customer)
- Email
- Fax
- Pager

These notifications can go to one or more of the following recipients:

- Customer
- Agent
- Workgroup
- Owner

Example 1: When a task is assigned to it, a workgroup send an alert to the workgroup:

- Status: 2 Assigned
- Send: Alert
- Recipient: Workgroup

Example 2: When a task is cancelled, send an email to an agent:

- Status: 5 Cancelled
- Send: Email
- Recipient: Agent

Defect Actions

Enter Defect actions on the Defect Notification form. Defect actions trigger when the record status changes to any of the following statuses:

- 1-Reported
- 2-Assigned
- 3-Under Review
- 4-Pending Confirm
- 5-Pending Defer
- 6-Mgmt Issue
- 7-Doc Issue
- 8-Deferred
- 9-Closed

When such a change occurs, the action rule can send one or more of the following types of notification:

- Alert
- Email
- Fax
- Pager

These notifications can go to one or more of the following recipients:

- Reporter
- Workgroup
- Resolver
- Confirmer-Based

Example 1: When a defect is assigned to workgroup, send an alert to the workgroup.

- Status: 2 Assigned
- Send: Alert
- Recipient: Workgroup

Example 2: When the resolver believes the defect is fixed, send an email to a confirmer:

- Status: 4 Pending Confirm
- Send: Email
- Recipient: Confirmer

Escalations

Escalations ensure that requests or contacts, fulfillment orders, and tasks are addressed by monitoring how long a record remains at a given status. CCQ sends an alert if the length of time exceeds the duration specified in the escalation rule. For example, if a task is assigned to a workgroup but does not get an owner in the time specified, CCQ raises an escalation event and sends an alert to the specified workgroup. If the rule is set to repeat, CallCenterQ waits for the same amount of time again and, if the request has not changed status, sends another alert to the same workgroup.

You are also able to schedule two escalation rules, depending on how long the request stays at a given status, thus causing different workgroups to get notified. For example, if the request is in an Assigned status in a workgroup but does not change to an Owned status within 4 hours, you can cause an escalation rule to trigger an alert to tier 1 of that workgroup. CCQ notifies that workgroup the request is in the queue. If the request is still in an Assigned status after 8 hours, you can cause an escalation rule to trigger an alert to tier 2 of the workgroup. A manager can decide whether the request (issue or task) requires special handling.

To create escalations:

- For all applications, use the Fulfillment Notification form

- For CCQ and CCQ for CR, use the Request (or Contact) Notification, Defect Notification, and Task Notification forms

You can create the following escalations:

- <u>Contact Escalations</u> on page 81
- <u>Fulfillment Escalations</u> on page 81
- <u>Request Escalations</u> on page 82
- <u>Task Escalations</u> on page 82
- <u>Defect Escalations</u> on page 82

Validating Escalations

Before the application sends the escalation message, the application checks the priority of the record in question still matches the severity field in the `qw_events` table. If the record does not have a priority field, this validation is not done.

There are several reasons why an escalation becomes invalid and therefore does not generate a message:

- The originating record is deleted.
- The priority of the originating record changed.
- The status of the originating record changed to Closed.
- A newer escalation record exists and superseded this escalation.

Contact Escalations

Contact escalations trigger when, in the specified amount of time, the record status does *not* reach one or more of the following statuses:

- Assigned (from New)
- Owned (from New, Assigned, or Reassigned)
- Closed (from Owned or Cancelled)

These notifications can go to one or more of the following workgroups:

- Primary Workgroup
- Escalation Workgroup

Fulfillment Escalations

Fulfillment escalations trigger when, in the specified amount of time, the record status does *not* reach one or more of the following statuses:

- Assigned (from New)
- Owned (from New, Assigned, or Reassigned)
- Processed (from Owned)

These notifications can go to one or more of the following workgroups:

- Primary Workgroup
- Escalation Workgroup

Request Escalations

Request escalations trigger when, in the specified amount of time, the record status does *not* reach one or more of the following statuses:

- Assigned (from New)
- Owned (from New, Assigned, or Reassigned)
- Closed (from Owned)

These notifications can go to one or more of the following workgroups:

- Primary Workgroup
- Escalation Workgroup

Task Escalations

Task escalations trigger when, in the specified amount of time, the record status does *not* reach one or more of the following statuses:

- Assigned (from New)
- Owned (from New, Assigned, or Reassigned)
- Completed (from Owned)

These notifications can go to one or more of the following workgroups:

- Primary Workgroup
- Escalation Workgroup

Defect Escalations

Defect escalations trigger when, in the specified amount of time, the record status does *not* reach one or more of the following statuses:

- Assigned (from Reported)
- Under Review (from Reported or Assigned)
- Resolved (from Assigned or Under Review)
- Confirmed (from Pending Confirm)
- Closed (from Pending Confirm, Management Issue, Doc Issue)

These notifications can go to one or more of the following workgroups:

- Primary Workgroup
- Escalation Workgroup

Escalation Examples

Example: If a high, critical, or special priority task is not Owned after 4 hours, send an escalation to the primary workgroup:

● Type: Not Owned
● Priority: 3 High
● Delay: 4
● Delay units: Hours
● Tier: 1
● Subject: Task record does not have an owner after 4 hours.
● Notify Target: Primary WorkGroup

Example 2: If a critical or special priority request is not closed after 30 minutes, send an Escalation to the escalation workgroup:

● Type: Not Closed
● Priority: 4 Critical
● Delay: 30
● Delay units: Minutes
● Tier: 1
● Subject: Critical request not closed after 30 minutes.
● Notify Target: Escalation Workgroup

Administration Tasks

Chapter 3: Business Logic Flows and Status Diagrams

When agents perform tasks such as creating a new record, shipping a fulfillment package, or running a script, CCQ runs multiple processes in the background to ensure proper notifications are sent out, inventories are properly adjusted, and script results are properly stored.

This chapter presents some of the more complicated business logic flows that occur within CCQ when an event takes place. The business logic presented in this chapter is based on the system the default behavior. Check with your system administrator to make sure the system administrator has not change the IC Scripts that drive these processes.

This chapter also shows status diagrams that explain the lifecycles of orders, fulfillment orders, quotes, service requests, and returns.

General Business Logic Flows

The following logic processes pertain to CCQ only or to all of the business applications as indicated here:

- Order Entry (just CCQ)
- Fulfillment (all applications)
- Scripts (all applications)

Order Entry

When the agent enters a product and a quantity in the Order Entry in-form browser, CCQ executes the following logic to determine how much the item costs, including base price, sales tax, and shipping:

Adding a Product and Quantity to an Order

Add product and quantity to Order line item

Does SalesQ profile record exist? — No → Message: "App Profile Record is not set up"

Yes ↓

Does billing address exist for this order? — No → Message: "Please enter a billing address" → Set current qty to 0 (zero) → Exit

Yes ↓

Is this state in the tax rate table? — No → Tax rate = 0 (zero)

Yes ↓

Set tax rate equal to the tax rate in the table

How many records in the product table match this product? — more than 1 → Message: "Product Key is not unique" → Exit

1 →

Is there a marketing event for this order? — No → Set current qty to 0 (zero) → Exit

Yes ↓

Is there a price catalog for this event? — No → Get the default catalog from the profile

Yes ↓

Is this a cross-sell item? — Yes → Get the promotion catalog from the profile

No ↓

Do we have a catalog for pricing? — No → Message: "Cannot find default catalogs" → Set current qty to 0 (zero) → Exit

Yes ↓

Get the appropriate price based on qty and qty for price, copy shipping charge → Add (line item price times line item qty times line item discount) to subtotal add line total times tax rate to tax subtotal → A

A

Is Profile record set to "tax all items"? —Yes→ Mark this item as taxable

No ↓

Is this product linked to a tax category? —Yes→ Add line total times tax rate to tax subtotal

No ↓

Is shipping cost method = product? —Yes→ Add product shipping charge to shipping subtotal

No ↓

Is shipping cost method = total order amount? —Yes→ Get appropriate charge based on order subtotal, add it to shipping subtotal

No ↓

Get appropriate charge based on this line item's weight, add it to shipping subtotal

Is this a regular screen-entry line item? —No→ Are there more cross-sell items to add to the order?

Yes ↓

Has customer selected any product cross-sell items? —Yes→ B

No ↓

Is there an overall order discount? —Yes→ Apply overall order discount to total

No ↓

End

Are there more cross-sell items to add to the order? —Yes→ B / No→

Fulfillment

When the agent clicks Insert Item, all fulfillment applications go through the following business logic to make sure all items are available and to send a message if shipping this package will bring any item below its re-order level.

```
                                    ┌─────┐
                                    │  A  │
                                    └─────┘
                                       ▲
                                      Yes
                                       │
   ┌─────┐         ╱╲                  │         ╱╲
   │  B  │───────▶╱    ╲               │        ╱    ╲
   └─────┘       ╱  Is there╲          │       ╱ Does recipient╲      No    ╭──────────────────╮
                ╲ another    ╱────No──────────▶╲ foreign field  ╱──────────▶│ Error; Need      │
                 ╲package    ╱                  ╲  exist?      ╱             │ recipient        │
                  ╲item?    ╱                    ╲           ╱               ╰──────────────────╯
                   ╲      ╱                       ╲        ╱
                    ╲   ╱                          ╲    ╱
                     ╲╱                             ╲ ╱
                      ▲                            Yes
                     No                            │
                      │                            ▼
              ┌───────┘                     ╱╲
              │                            ╱    ╲               ╱╲
   ┌─────┐    │        ╱╲                 ╱ Does  ╲    Yes    ╱    ╲    Yes   ┌──────────────┐
   │  C  │────┘       ╱    ╲             ╱ Address ╲────────▶╱ Is there╲────▶│ Generate the │
   └─────┘          ╱  Is    ╲          ╲for recipient╱      ╲a letter  ╱     │ letter       │
                   ╱Available-╲   Yes   ╲  exist?  ╱          ╲attached? ╱     └──────────────┘
                  ╲committed   ╱──────▶ ┌────────────┐╲       ╲        ╱              │
                   ╲<=Reorder ╱        │ Notify Owner│  ╲      ╲    ╱                 │
                    ╲ level  ╱         │ to reorder  │    ╲     ╲╱                    │
                     ╲    ╱            │ this item   │      No                        │
                      ╲╱               └────────────┘       │                        │
                                            No              ▼                        │
                                            │      ╭──────────────────╮              │
                                            ▼      │ Error; Need       │             │
                                     ╭──────────╮  │ address           │    ┌────────┘
                                     │ Error;   │  ╰──────────────────╯    │
                                                    ╯                ┌──────────────┐
                                                                     │ Set status=  │
                                                                     │ "New"        │
                                                                     └──────────────┘
                                                                            │
                                                                            ▼
                                                                      ╭──────────╮
                                                                      │ Continue │
                                                                      ╰──────────╯
```

Scripts

When an agent runs a legacy script designed with the old Script Admin tool, all applications follow this logical procedure:

Running Scripts (Logic Flow)--Call Center Campaign and Campaign Management Focuses
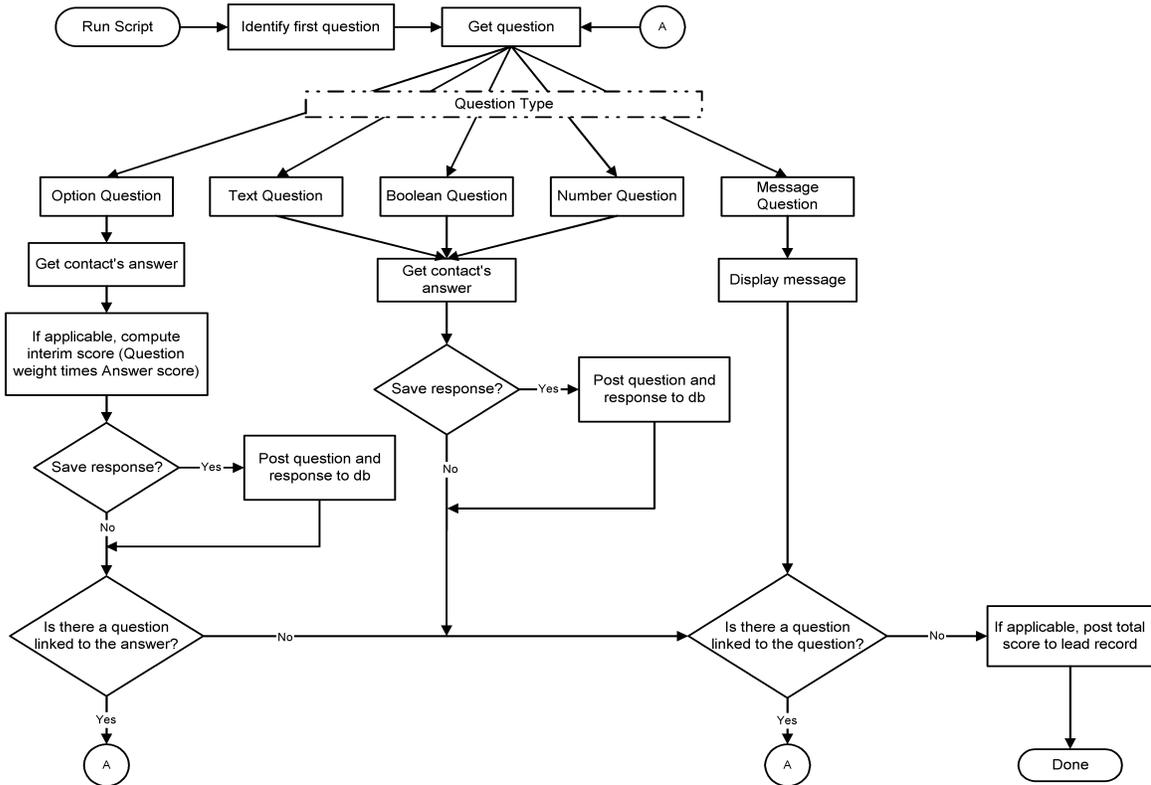
Note:

The logic for Prompter scripts is determined by how they are built in the Workflow Designer.

CallCenterQ-Specific Business Logic Flows

The following processes are specific to CallCenterQ:

● Locator

● Cross-Sell

Locator

When a call center agent searches for the nearest location, CCQ and CCQ for CR follow this process:

A

Do the first
3 digits of the zip
match? —Yes→ Put all matching 3 digit zipcode records in random order and display up to the number found in Show x Locations setting in the Application Profile.

No

Does the
area code
match? —Yes→ Put all matching area code records in random order and display up to the number found in Show x Locations setting in the Application Profile. → Done

No

Does the
state match? —Yes→ Put all matching state records in random order and display up to the number found in Show x Locations setting in the Application Profile.

No

Msg: "No
locations found."

Done

Cross-Sell

When you set up cross-sell items in CallCenterQ, the system checks at each stage of the order for available cross-sell items and checks if these items should display.

Business Logic Flows and Status Diagrams

A → For a promotion from the final promotion list, get all prices for suggested product from the promotion catalog

At least one price found?
- No → Show message box with zero prices--create 0 qty line item → Exit
- Yes → Pop up message box showing all prices found → Select the price and click a button

Select the price and click a button:
- More Info → Does HTML page exist?
  - No → Message: "No detail available."
  - Yes → Show sug. product HTML page
- Cancel → Exit
- Accept → Is order entry group filled?
- Reject → Make a "not successful" entry into crosssale table

Message: "No detail available." → Is there another promotion?
- Yes → (back to For a promotion...)
- No → Exit

Is order entry group filled?
- No → Create a new order number
- Yes → Ask "Do you want to create a new order?"
  - Yes → Create a new order number
  - No → Add promotion to current order

Create a new order number → is user on order entry form?
- Yes → (to Update X-sale table)
- No → Message: Order entry form has following older number: Get cross sell items → Update X-sale table with "Update Successful"

Add promotion to current order → Update X-sale table with "Update Successful"

Make a "not successful" entry into crosssale table → Is there another entry in the final promotion list?
- No → Exit
- Yes → (back to For a promotion...)

Update X-sale table with "Update Successful" → Is there another entry in the final promotion list?

Status Diagrams

You can view the lifecycle of:

- Orders
- Fulfillment Orders
- Requests and Tasks
- Defects
- Returns

Orders

This diagram shows the status of an order record as it changes from New to Cancelled or Shipped.

Order Status Diagram
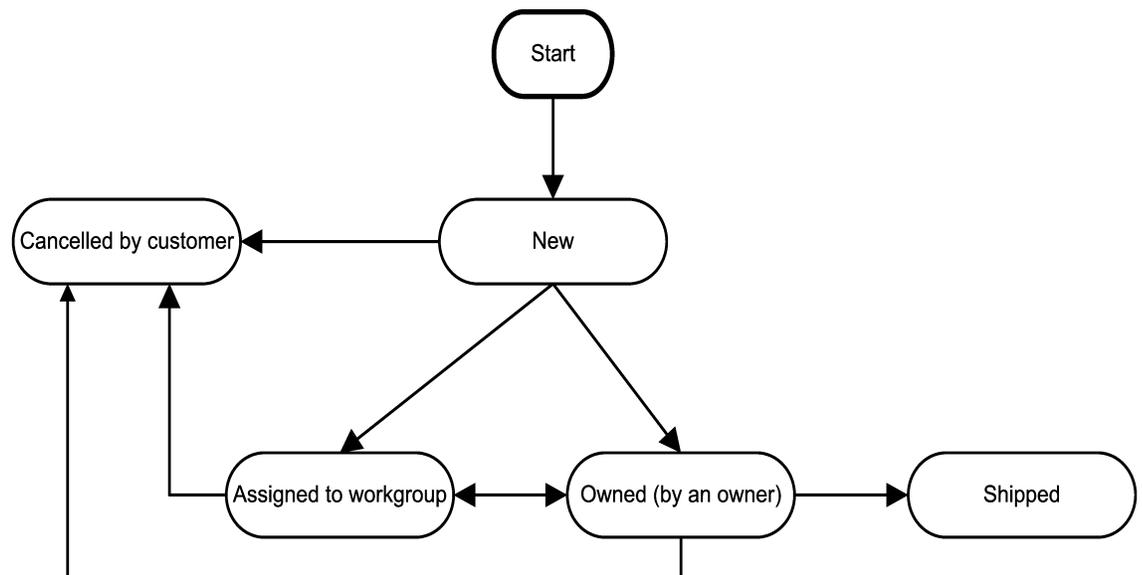
Fulfillment Orders

This diagram shows the status of a fulfillment order record as it changes from New to Cancelled or Shipped.

Fulfillment Order Status Diagram
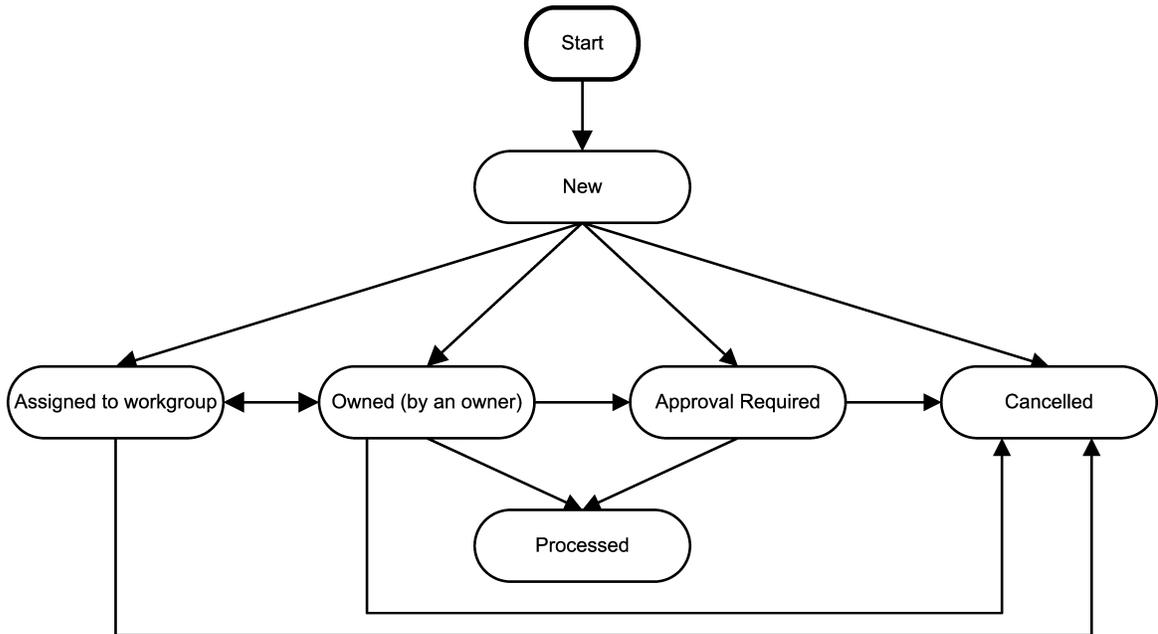
Requests and Tasks

This diagram shows the status of a request or task record as it changes from New to Closed.

Request / Task Status Diagram

```
                          ┌─────────┐
                          │  Start  │
                          └────┬────┘
                               │
                               ▼
        ┌──────────────────────────────────┐
        │               New                │
        └──────────────────────────────────┘
        │                    │              │
        │               ┌─────────┐         │
        │               │Cancelled│         │
        │               └─────────┘         │
        ▼                                    ▼
┌──────────────────┐            ┌──────────────────┐
│Assigned to       │◄──────────►│Owned by an owner │
│workgroup         │            │                  │
└──────────────────┘            └──────────────────┘
        │                                    │
        └────────────► ┌─────────┐ ◄─────────┘
                       │ Closed  │
                       └─────────┘
```
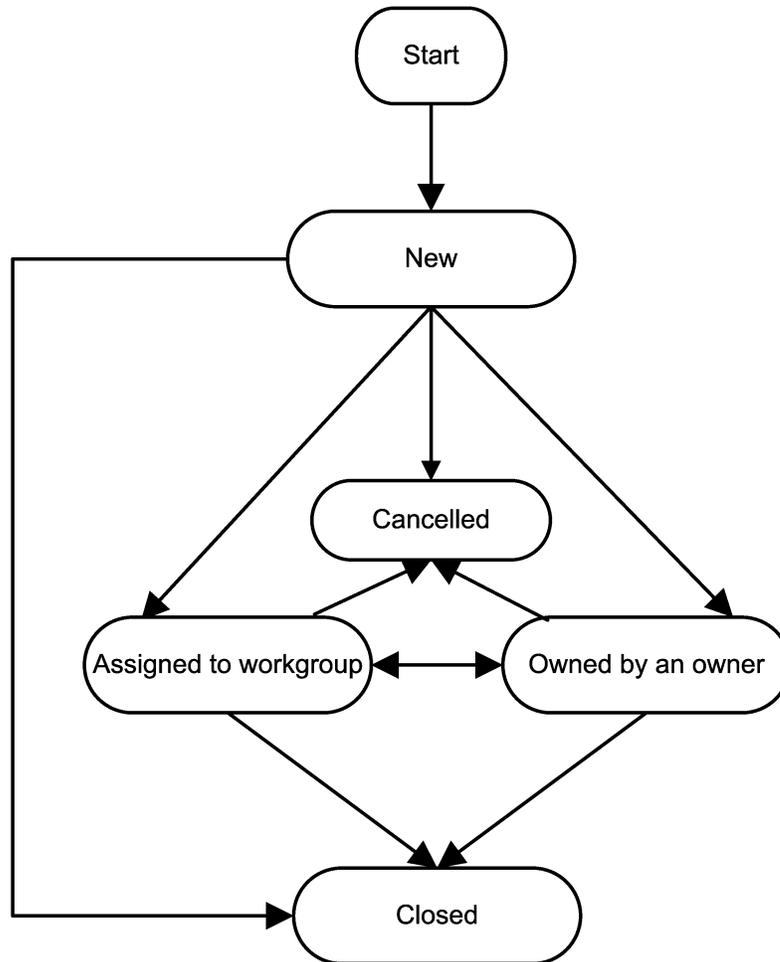
Defects

This diagram shows the status of a defect record as it changes from Reported or Assigned to Closed.

Defect Status Diagram

```
                    ┌─────────┐
                    │  Start  │
                    └─────────┘
                         │
                         ▼
                    ┌──────────┐
                    │ Reported │
                    └──────────┘
                         │
                         ▼
                    ┌──────────┐
          ┌────────▶│ Assigned │◀────────────┐
          │         └──────────┘              │
          │              │                    │
          │              ▼                    │
          │      ┌──────────────┐     ┌──────────┐
          │      │ Under Review │     │ Deferred │
          │      └──────────────┘     └──────────┘
          │              │                    ▲
          │        ┌─────┴─────┐              │
          │        ▼           ▼       ┌──────────────┐
          │  ┌──────────────┐  │       │ Pending Defer│
          │◀─│Pending Confirm│         └──────────────┘
          │  └──────────────┘
          │     │      │
          │     ▼      ▼
    ┌──────────┐    ┌──────────┐
    │Mgmt Issue│    │Doc. Issue│───────┘
    └──────────┘    └──────────┘
          │      │      │
          ▼      ▼      ▼
          ┌──────────┐
          │  Closed  │
          └──────────┘
```
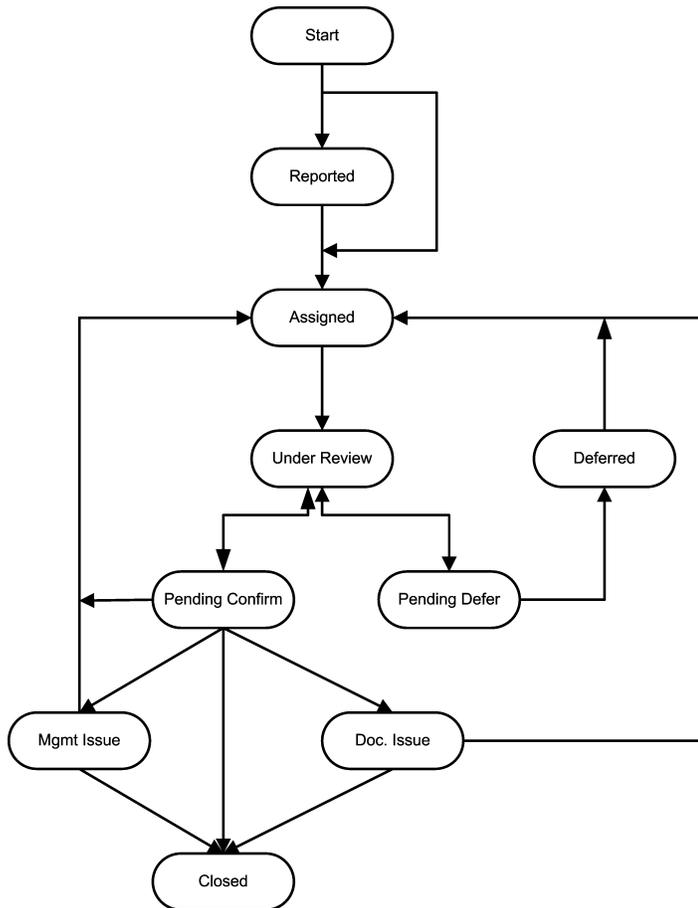
Returns

There are four types of returns: replacements, repairs, exchanges, and upgrades. This diagram shows the status of a return record as it changes from New to Closed.

Return Status Diagram
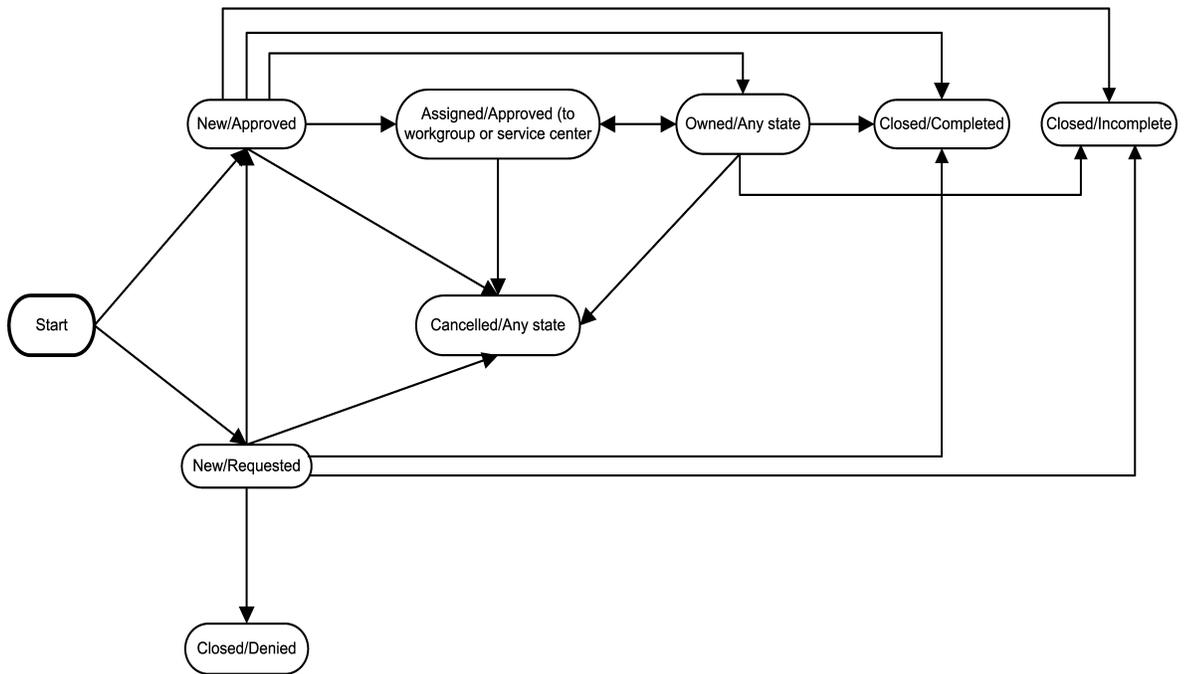
Business Logic Flows and Status Diagrams

Chapter 4: Agent Tasks

It is often easier to design your system when you know how it is going to be used. This chapter provides some agent task flows to help you envision how your agents will deal with the campaigns and other CallCenterQ environment information that you have created.

Note:
These task flows are based only on the default GUIs. You should check with your system administrator to make sure the administrator has not changed the organizational structure of the GUI that drives these task flows.

Request-Based CallCenterQ Agent Task Flow

When an agent takes a call, the agent has to identify the customer, bring up the customer's record in the database or create a record for the customer, and then decide what the customer wants to do.

Generally, a call follows the process in the flowchart below:

Taking a Call

Is the customer in the db?

No → Add them by clicking New in the Customer group

Yes → Select them

Find out what the customer wants to do

Place an order → Go to the Order Entry tab → See Placing an Order on page 107.

Find out where a product is sold → See Locating a Product on page 114.

Request information or report a problem → See Making a Request on page 108.

Get literature or request compensation → See Sending Fulfillment on page 111.

Return a product → Go to the Returns tab → See Returning a Product on page 112.

Check on the status of a request → Create a contact record by clicking New in the Contact group → Click Search in the Request group and select the request → To see the details of any tasks, double click the selection box at the start of the IFB row and go to the Task tab

Does the customer want anything else?

Yes →

No → Done

Contact-Based CallCenterQ Agent Task Flow

When an agent takes a call, the agent has to identify the customer, bring up the customer's record in the database or create a record for the customer, and then decide what the customer wants to do.

Generally, a call follows the process in the flowchart below:

Taking a Call

Is the customer in the db?

No

Add them by clicking New in the Customer group

Yes

Select them

Find out what the customer wants to do

Place an order

Find out where a product is sold

Request information or report an issue

Get literature or request compensation

Return a product

Check on the status of an order

Go to the Order Entry form

Click Suggest Fulfillment

Go to the Returns form

Go to Order Entry form

See Placing an Order on page 107.

See Locating a Product on page 114.

See Reporting an Issue on page 113.

See Sending Fulfillment on page 111.

See Returning a Product on page 112.

Select the appropriate order and tell the customer its status

Does the customer want anything else?

Yes

No

Done

Request-Based CCQ for CR Agent Task Flow

When an agent takes a call, the agent has to identify the customer, bring up the customer's record in the database or create a record for the customer, and then decide what the customer wants to do. Generally, a call follows the process below.

```
                          ( Taking a Call )
                                 |
                                 v
                          / Is the customer \
           No ───────────<    in the db?     >
           |                \                /
           v                      | Yes
  +-------------------+           v
  | Add them by       |    +----------------+
  | clicking New in   |    | Select them in |
  | the Customer group|    | the browser    |
  +-------------------+    +----------------+
           |                      |
           +----------+-----------+
                      v
         +-----------------------------------+
         | Find out what the customer wants  |
         | to do                             |
         +-----------------------------------+
```

Request information or report a problem	Find out where a product is sold	Get literature or compensation	Check on the status of a request
See **Making a Request** on page 108.	See **Locating a Product** on page 114.	See **Sending Fulfillment** on page 111.	Create a contact record by clicking New in the Contact group

Check on the status of a request →
Create a contact record by clicking New in the Contact group →
Click Search in the Request group and select the request →
To see the details of any tasks, double click the selection box at the start of the IFB row and go to the Task form

Does the customer want anything else?
Yes — (back to Find out what the customer wants to do)
No →
(Done)

Contact-Based CCQ for CR Task Flow

When an agent takes a call, the agent has to identify the customer, bring up the customer's record in the database or create a record for the customer, and then decide what the customer wants to do.

Generally, a call follows the process below.

```
                        ┌─────────────────┐
                        │  Taking a Call  │
                        └─────────────────┘
                                 │
                                 ▼
                          ◇ Is the customer ◇
        No ───────────────◇   in the db?   ◇
        │                        ◇
        ▼                       Yes
┌──────────────────────┐        │
│ Add them by clicking │        ▼
│ New in the Customer  │   ┌────────────┐
│        group         │   │ Select them│
└──────────────────────┘   └────────────┘
        │                        │
        └────────────────────────┤
                                 ▼
                   ┌──────────────────────────────────┐
                   │ Find out what the customer wants  │
                   │             to do                 │
                   └──────────────────────────────────┘
```

Taking a Call

Is the customer in the db? — No → Add them by clicking New in the Customer group

Yes → Select them

Find out what the customer wants to do

- Request information or report an issue → See Reporting an Issue on page 113.
- Find out where a product is sold → See Locating a Product on page 114.
- Get literature or request compensation → Click Suggest Fulfillment → See Sending Fulfillment on page 111.
- Check on the status of a contact → Select the appropriate contact and tell the customer its status → Go to the Contact 2 form and add a secondary contact so it's known that they called again

Does the customer want anything else? — Yes → Find out what the customer wants to do

No → Done

Common Agent Tasks

The common agent tasks are:

- Logging in to the CallCenterQ Business Application
- Placing an Order
- Making a Request
- Reporting a Product Defect
- Sending Fulfillment
- Returning a Product
- Reporting an Issue
- Locating a Product.

These task flows are discussed in the following sections.

Logging in to the CallCenterQ Business Application

When an agent logs into CallCenterQ, they are required to specify a username and password. All agents have an important responsibility to help keep the system secure.by observing the following rules:

- Choose a password that is easy to remember but impossible for anyone else to guess.
- Make sure that your password meets your site requirements with regards to length and type of characters (either alphabetic, numeric, or a mixture of both). If you need more information about the password rules at your site, contact your system administrator.
- Never write down your password.
- Never share your password with anyone.
- Contact your administrator immediately if you suspect any security problems, such as a computer virus, unusually slow response times, or other abnormal system behavior.

Placing an Order

This flowchart shows you how an agent places an order (for Request or Contact based versions of CCQ only).

```
        ( Placing an order )
                |
        Go to the Order
          Entry form
                |
      If not already done,
    select a marketing event
                |
        Click New in the
          Order group
                |
    Get the customer's shipping
     and billing addresses
                |
        < Is there a script >  --Yes-->  Click Run Script and go
            available?                    through it with the customer
                |
                No
                |
      Add the products the
       customer wants into
     the Line Items browser
                |
      < Are there cross-sell >  --Yes-->  Click Cross Sell and go
        opportunities here?               through items adding
                |                         anything they want to
                No                        the order
```

```
        < Do you want to >     --Yes-->  Select the special Discount
       apply a discount to the           Product set up by your
            entire order?                CallCenterQ Administrator
                |                                |
                No                      Enter the amount of the
                |                       discount in the % Discount field
                |                        of the Line Items browser
                |
        < Do you want to >     --Yes-->  Select the product
       apply a discount to a single              |
            product?                    Enter the amount of the
                |                       discount in the % Discount field
                No                       of the Line Items browser
                |
       Get the customer's
       payment information
      and check their credit
                |
         Click Update to
        process the order
                |
            ( Done )
```

Making a Request

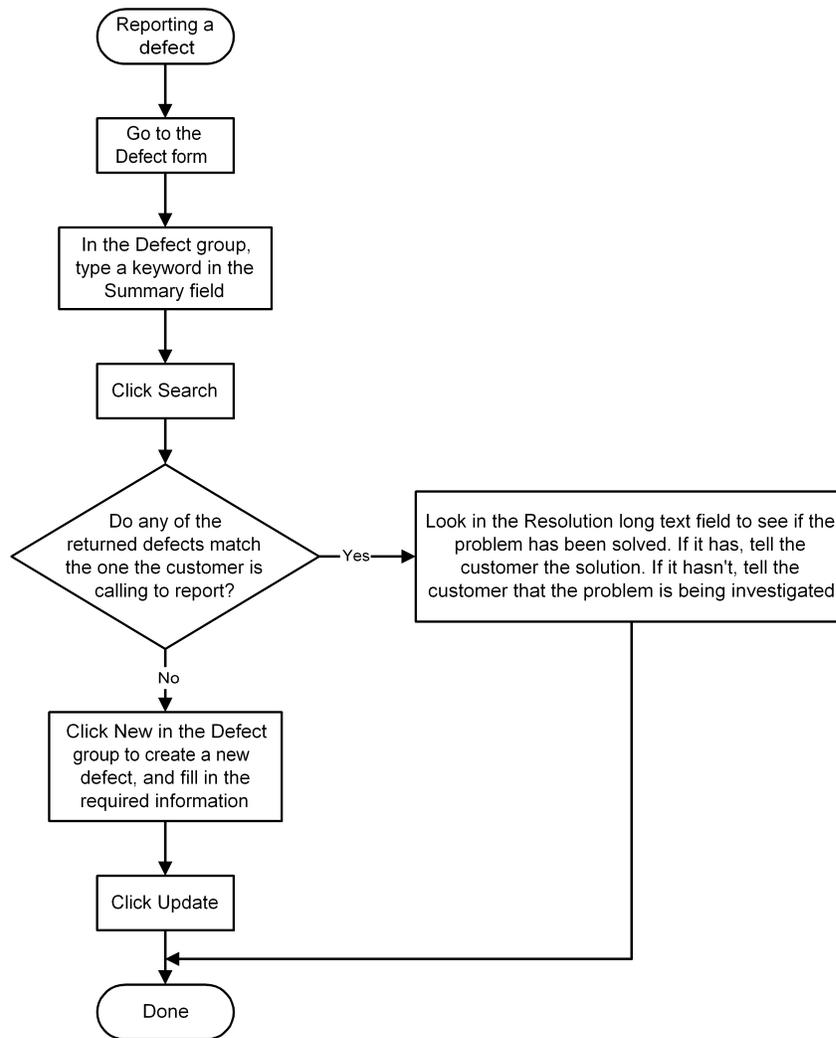This flowchart shows you how an agent enters a new request (for request-based versions of CCQ and CCQ for CR only).

```
┌─────────────────────────┐
( Getting information or    )
( reporting a problem       )
└─────────────────────────┘
            │
            ▼
┌─────────────────────────┐
│ Click New in the        │
│ Contact group and set   │
│ the Contact Method      │
└─────────────────────────┘
            │
            ▼
┌─────────────────────────┐
│ If this request is about a │
│ product, select the product │
└─────────────────────────┘
            │
            ▼
┌─────────────────────────┐
│ Select the category      │
└─────────────────────────┘
            │
            ▼
     ◇ Is there a Request      ──Yes──▶ ┌──────────────────────┐
       Summary associated with          │ Double click the      │
       the selected category? ◇         │ selection button at the│
            │                           │ beginning of the row  │
            No                          └──────────────────────┘
            │                                     │
            ▼                                     ▼
┌─────────────────────────┐         ┌──────────────────────┐
│ Click New in the Request │        │ If Task Plans are available, │
│ group and enter a summary │       │ you can use them by clicking │
│ of the request          │         │ Yes at the prompt when you │
└─────────────────────────┘         │ update the Request    │
                                    └──────────────────────┘
```
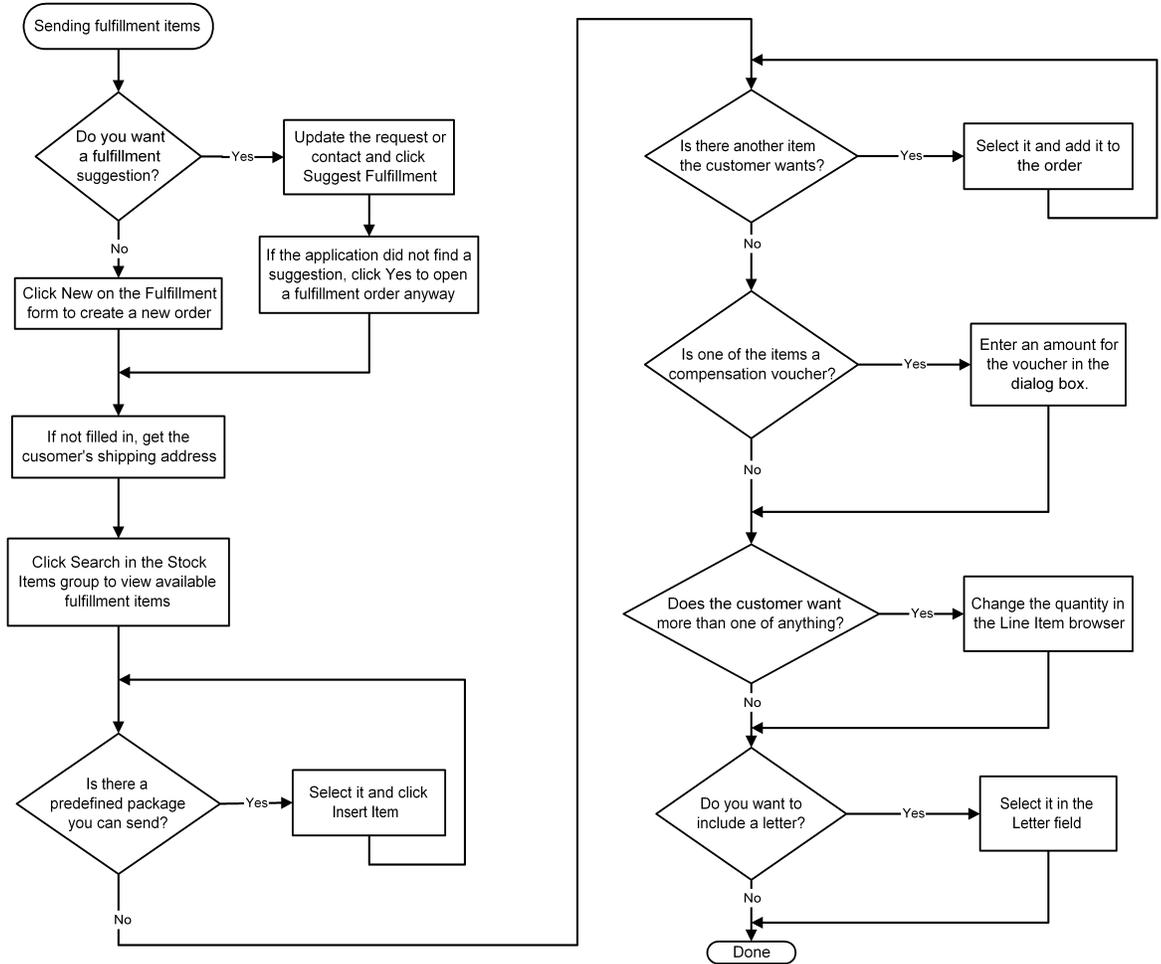
```
     ◇ Do you want to       ──Yes──▶ ┌──────────────────────┐
       try and diagnose the          │ Click Diagnose, and if │
       problem? ◇                    │ you find an answer, tell │
            │                        │ the customer about it │
            No                       └──────────────────────┘
            │
            ▼
     ◇ Is there a           ──Yes──▶ ┌──────────────────────┐
       script associated with        │ Click Run Script and │
       the request? ◇                │ follow the instructions │
            │                        └──────────────────────┘
            No
            │
            ▼
     ◇ Could there already   ──Yes──▶ ┌──────────────────────┐
       be a solution to the           │ Go to the Solution form and │
       customer's problem? ◇          │ search for a solution in the │
            │                         │ Solutions Database. If you find │
            No                        │ one, tell the customer about it. │
            │                         └──────────────────────┘
            ▼
     ◇ Is the customer       ──Yes──▶ ┌──────────────────────┐
       calling to report a            │ See Reporting a       │
       product defect? ◇              │ Product              │
            │                         │ Defect on            │
            No                        │ page 110.            │
            │                         └──────────────────────┘
            ▼
          ╱ A ╲
```

A

Are more than one customer or employee involved in this request? — Yes ▶ Go to Request 2 form

No

Add parties and employees as necessary in the Party and Involved Employees IFBs

Are there tasks that need to be done to close this request? — Yes ▶ Enter them on the Task form

No

Do you want to send a fulfillment package? — Yes ▶ See Sending Fulfillment on page 111.

No

Done

Reporting a Product Defect

This flowchart shows an agent how to report a product defect (for request-based versions of CCQ and CCQ for CR).

```
                    ┌─────────────┐
                   (  Reporting a  )
                    (   defect    )
                     └──────┬──────┘
                            │
                            ▼
                    ┌───────────────┐
                    │   Go to the   │
                    │  Defect form  │
                    └───────┬───────┘
                            │
                            ▼
                 ┌────────────────────┐
                 │ In the Defect group,│
                 │ type a keyword in the│
                 │   Summary field    │
                 └─────────┬──────────┘
                           │
                           ▼
                  ┌─────────────────┐
                  │  Click Search   │
                  └────────┬────────┘
```

Do any of the returned defects match the one the customer is calling to report?

Yes → Look in the Resolution long text field to see if the problem has been solved. If it has, tell the customer the solution. If it hasn't, tell the customer that the problem is being investigated.

No →

Click New in the Defect group to create a new defect, and fill in the required information

Click Update

Done

Sending Fulfillment

This flowchart shows an agent how to assemble a fulfillment package for all applications.)

```
┌─────────────────────────┐
│ Sending fulfillment items│
└─────────────────────────┘
```

Do you want a fulfillment suggestion?
— Yes → Update the request or contact and click Suggest Fulfillment
→ If the application did not find a suggestion, click Yes to open a fulfillment order anyway

No ↓

Click New on the Fulfillment form to create a new order

If not filled in, get the cusomer's shipping address

Click Search in the Stock Items group to view available fulfillment items

Is there a predefined package you can send?
— Yes → Select it and click Insert Item

No

Is there another item the customer wants?
— Yes → Select it and add it to the order

No ↓

Is one of the items a compensation voucher?
— Yes → Enter an amount for the voucher in the dialog box.

No ↓

Does the customer want more than one of anything?
— Yes → Change the quantity in the Line Item browser

No ↓

Do you want to include a letter?
— Yes → Select it in the Letter field

No ↓

```
┌────────┐
│  Done  │
└────────┘
```

Returning a Product

This flowchart shows an agent how to handle a product return (for request-based or contact-based versions of CCQ only).

```
        ( Returning a product )
                   │
                   ▼
        ┌──────────────────┐
        │ Click New on the │
        │   Returns form   │
        └──────────────────┘
                   │
                   ▼
            ╱ Is there a ╲──────Yes──────▶ ┌──────────────────┐
            ╲ script available? ╱          │ Click Run Script │
                   │                        └──────────────────┘
                  No
                   ▼
          ╱ Are the items ╲
          ╱ being returned from a ╲──Yes──▶ ┌──────────────────────┐
          ╲ previous order? ╱                │ Select the order in the │
                   │                          │ Previous Order Group    │
                  No                          └──────────────────────┘
                   │                                     │
                   │                                     ▼
                   │            ┌──────────────────────────────────────┐
                   │            │ Select the items from that order that │
                   │            │ the customer wants to return by       │
                   │            │ double clicking the selection box at  │
                   │            │ the beginning of each line in the IFB │
                   │            └──────────────────────────────────────┘
                   ▼
          ╱ Will the return go ╲          ┌──────────────────────┐
          ╲ to a service center? ╱──Yes──▶│ Select one in the     │
                   │                        │ Service Center field or │
                  No                        │ use the Locator form to │
                   │                        │ find the nearest center │
                   ▼                        └──────────────────────┘
        ┌──────────────────────┐
        │ Tell the customer where to │
        │ send the returned product(s) │
        └──────────────────────┘
                   │
                   ▼
              ( Done )
```

Reporting an Issue

This flowchart shows an agent how to report one or more issues (for contact-based versions of CCQ and CCQ for CR only).

```
  ( Getting information or )
  ( lodging a complaint    )
            │
            ▼
  ┌──────────────────────┐
  │ If this issue is about a │
  │ product, select the product │
  └──────────────────────┘
            │
            ▼
  ┌──────────────────────┐
  │ Select the category  │
  └──────────────────────┘
            │
            ▼
      ◇ Is there an Issue              ┌──────────────────────┐
      Template associated with ──Yes──▶│ Click Add Issue to use │
      the selected category? ◇         │ the template           │
            │                          └──────────────────────┘
            No                                      │
            ▼                                        │
  ┌──────────────────────┐                          │
  │ Click New in the Contact │◀───────────────────────┘
  │ group and enter a summary │
  │ of the contact           │
  └──────────────────────┘
            │
            │
```

```
      ◇ Do you want to                 ┌──────────────────────┐
      try and diagnose the ───Yes────▶│ Click Diagnose, and if │
      problem? ◇                       │ you find an answer, tell │
            │                          │ the customer about it   │
            No                         └──────────────────────┘
            ▼
      ◇ Do you want to check           ┌──────────────────────────┐
      your company's internal ─Yes────▶│ Go to the Solution form and │
      solution database? ◇             │ search for a solution in the │
            │                          │ Solutions Database. If you find │
            No                         │ one, tell the customer about it. │
            ▼                          └──────────────────────────┘
      ◇ Is there a                     ┌──────────────────────┐
      script associated with ─Yes────▶│ Click Run Script and  │
      the contact? ◇                   │ follow the instructions │
            │                          └──────────────────────┘
            No
            ▼
      ( Done )
```

Locating a Product

This flowchart shows an agent how to locate where a product is sold for all versions of CCQ and CCQ for CR.

Locating a product

Go to the
Locator form

Make sure that the
customer's correct address
is selected, as the Locator
uses that address to find
the nearest product

Select the product the
customer wants to find

Click Find Nearest
Location

Follow any prompts that
appear during the search

Did it find a
location that the
customer likes?

Yes → Select it and tell the
customer where it is

No

Tell the customer the
best match you can find

Click Location Found so
the location gets saved
for reporting purposes

Done

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