Avaya™ Interaction Center

Release 6.1

CustomerQ Administration

585-248-505
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Notice

While reasonable efforts were made to ensure that the information in this document was complete and accurate at the time of printing, Avaya Inc. can assume no liability for any errors. Changes and corrections to the information in this document may be incorporated in future releases.

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

Outside US telephone: +1-303-406-6089

Comments

To comment on this document, send e-mail to crminfodev@avaya.com.

Acknowledgment

This document was written by the CRM Information Development group.

Avaya™ Interaction Center
Release 6.1
CustomerQ Administration

Contents

Before You Begin

This section includes the following topics:

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/qq
   - 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

Chapter 1: Overview

CustomerQ is the Business Application designed to work with external support desks. It lets agents and developers:

- Manage external customer information
- Validate a customer's contract when he or she requests support
- Report defects against your company's products
- Enter solutions and test cases for reported defects
- Authorize returns and allowances
- Track service center information
- Enter customer warranties

This section contains the following topics:

- The CustomerQ GUI on page 13
- Logging in to the CustomerQ Business Application on page 15

The CustomerQ GUI

The GUI lets the user view and manipulate data stored in the database. It consists of focuses, which define workflows or particular sets of activities. A focus contains forms, each of which contains a browser section and a data section. Each browser shows information from one or more fields in the associated table in response to a database query. Each data section contains groups, which show data from tables in the database.

CustomerQ contains the following focuses:

- Administration. For details, see Using the Administration focus on page 17.
- Customer Management. For details, see Using the Customer Management focus on page 57.
- Call Entry. For details, see Using the Call Entry focus on page 32.
- Call Management. For details, see Using the Call Management focus on page 35.
- Defect Management. For details, see Using the Defect Management focus on page 63.

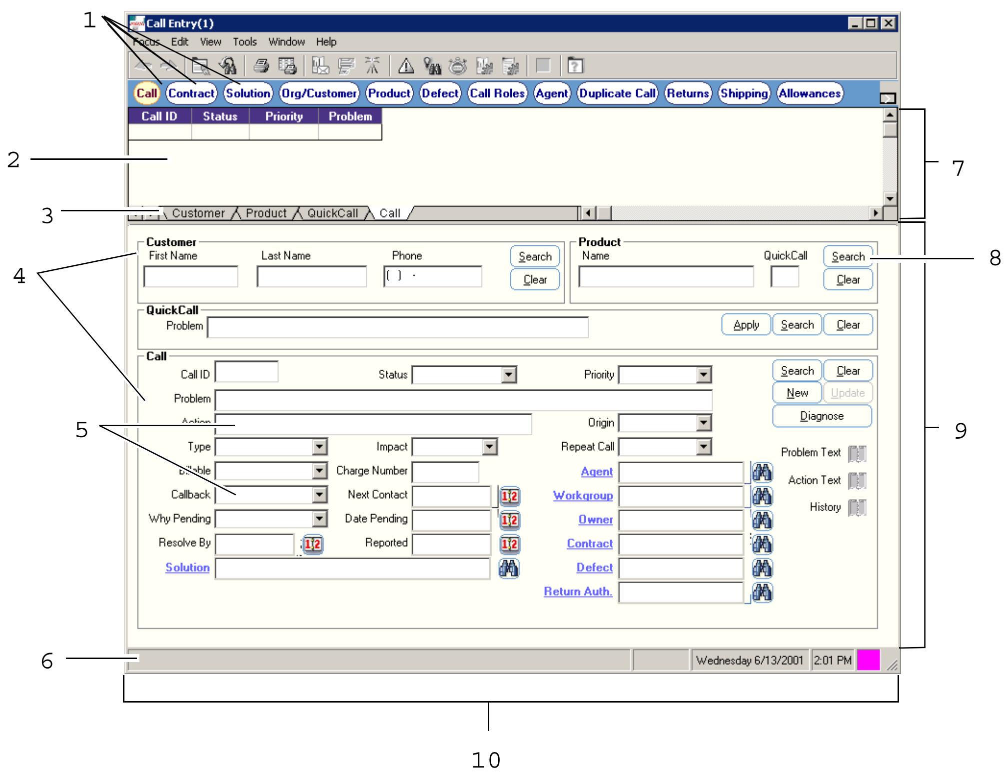
- Returns and Shipping. For details, see Using the Returns and Shipping focus on page 73.
- Warranty Entry. For details, see Using the Warranty Entry focus on page 77.

Note:

Ensure that Internet Explorer 5.0 or later is installed on your machine so that the Business Application can display HTML documents.

Sample focus

A sample focus from the CustomerQ GUI is shown below.



1. **Buttons that access the other forms in the focus**
2. **Browser**
3. **Browser Tabs**
4. **Groups**
5. **Fields**
6. **Status Bar**
7. **Browser Section**
8. **Command Button**
9. **Data Section**
10. **Focus**

Logging in to the CustomerQ Business Application

When you log into CustomerQ, you 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 behavior of the system.

Chapter 2: Using the Administration focus

You use the Administration focus to:

- Define products, components, and regions
- Set escalation levels
- Add or change employee WebQ authorization

To open the Administration focus, choose Administration from the Focus menu in any open CustomerQ focus, or launch the application and select Administration from the list of focuses.

Note:

The Administration focus is restricted to certain users. If it is not available, talk to your Avaya IC System Administrator.

This section contains the following topics:

Right-click menu items

Most groups in this focus have a corresponding right-click menu that contains commonly-used commands.

Common right-click menu items

The following right-click menu items appear in multiple groups:

Menu Item	Description
Delete	Remove the record currently displayed in the group from the database
Local Search	Search the database table associated with the group ignoring the information in any other group in the focus (perform an unconstrained search)

Managing products and components

The Product/Component form lets you keep track of your company's products and their components. You can use the Product form for:

- Adding a new product on page 18
- Finding and changing existing products on page 19
- Linking products, components, and workgroups on page 19

Adding a new product

To add a new product:

1. On the Product/Component form, click New.

   The application highlights the field labels of any required fields.

2. Type the product information in the fields in the Product group.

   Note:

   If your company offers a warranty on this product, then you must include a model number in order to link the warranty to the product. For more information see Entering warranties on page 77.

3. When you are finished, click Update.

Finding and changing existing products

You can use the Product/Component form to find and change existing products.

To find a product:

1. On the Product form, enter any information you want to use to constrain the search.
2. Click Search. The application displays any products that match the specified criteria in the browser.

To change an existing product:

1. On the Product/Component form, select the product you want to change from the browser.
2. Click Change.
3. Make your changes and click Update.

Linking products, components, and workgroups

A product can be associated or linked to a workgroup. When a product is linked to a workgroup, all calls about the product are assigned to the workgroup by default.

A component can be associated with a product and/or a workgroup.

When a component is linked to a workgroup, all calls about the component are assigned to the workgroup by default. If the component is linked to a product, and not assigned to a workgroup, all calls concerning the component are assigned to the product workgroup.

Working with regions

Regions let you organize your sales and field agents into two-person teams. Once you have set up a team, you can link it with an organization (company) so that any call from that organization is assigned to the same team.

Note:

Sales and field representatives must already be in the employee database before you can link them to a region. For details, see *IC Administration Volume 2: Agents, Customers, & Queues.*

You can use the Region form for:

- Setting up a new region on page 20

Setting up a new region

To set up a new region:

1. In the Sales Rep group, click Search and select the sales representative from the browser.
2. In the Field Rep group, click Search and select the field representative from the browser.
3. In the Region group, click New.

   The application fills the selected agents into the foreign fields in the Region group, and lets you enter a name and description for the region.
4. Enter the information about the new region in the appropriate fields.
5. When you’re finished, click Update.

Linking an organization with a region

If you want to link an organization with this region:

1. Click Search in the Organization group and select the organization from the browser.
2. Click Change.
3. Click the Search icon to the right of the Region field and select the Region from the pop-up browser.
4. Click Update.

Finding and changing existing regions

You can use the Region form to search for all regions in the database, or you can constrain your search to regions that have other criteria in common, like a particular sales or field rep. To view a limited list of sales or field reps that:

- Work for a particular region, enter the region’s name in the Name field (to select the region from a list, click Search in the Region group and click in the region in the browser)

- Have some other criteria in common, enter or select those criteria in the fields in the Region group

When you have finished specifying the information you want to use to limit the list of regions, go to the Region group and click Search. The application displays a list of all regions that meet the selected criteria in the browser.

If you want to find regions that aren't limited to the specified organization, clear the Region group and select Search.

Changing the information for a region

To change an existing region:

1. In the Region group in the Region form, type the first few letters of the region in the Name field and click Search.
2. Select the region you want to change from the browser.
3. Click Change.
4. Make your changes and click Update.

Working with call actions and escalations

CustomerQ lets you create action notifications and escalations for call and defect records.

Actions are sent when a record changes its status. You can use them to alert developers when they've been assigned a defect, or to let reporters know that a defect they entered has been resolved.

Escalations are sent when a record does *not* change its status in a given time. For example, if your company's policy states that all calls must be assigned to an owner within two hours, you can set up an escalation notice if a call sits in the "Pending" queue for any longer than that.

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*.

Call actions

Actions are notification events associated with the change in state of a call record. These actions are often a part of the workflow for dealing with a customer request. For example, you may want to send an email receipt to the customer when his or her call is entered into the database.

An action rule has the general form:

- When the call status changes to Status, send Subject and Message to the Recipient using Method.
- The Subject field can contain information from the call record. To include the contents of a record field in the message, include the field name enclosed in angle brackets: <field name>. To include an angle bracket in a message, enter two characters ("<<").
- You can include the contents of the complete call record by checking the Include Record box in the action form. A block of text, contained in the Message long text field, may be appended to the message. This text could include a standard message, contact numbers, instructions, or any additional text to accompany the notification.

When a call record is updated, the action table is searched to locate records that match the call's status. For each of these, the requested notification is made. There are several different behaviors depending on the recipient and the method requested:

- If the recipient is Workgroup, the notification method for that workgroup will be used, and any value in the action method field will be ignored. This takes advantage of the fact that the event server resolves workgroups into individual owners, based on the workgroup notification method.
- Only Email and Fax methods are valid for external customers.
- Only the Email method is valid for the CC List, which must contain valid email addresses.
- For Email and Fax methods, the subject field is used as the subject line, and the message field makes up the message body.
- For Alerts, only the subject is sent.

While this description refers to Call records, this process also applies to Change Requests, Tasks and Defects. In each case, the same table structure and business rules apply. Note that the Action table and interface replaces any explicit IC Script code that previously handled notifications. As a result, no notifications will be done by default, until action records are added to the Action table.

Adding a new call action

To add a new call action:

1. In the Call Action/Escalation form, Action group, click New.
2. Type the name of the rule you are adding.
3. Select the target table for this action:
   - call
   - change request
   - task
4. Select the Record Status.
5. Select the notification method.
6. Select the recipient.
7. If you want to include the call record information, check the Include Record Info checkbox.
8. Add a subject line which is included in Alert, Email, Fax and alpha Pager notifications.
9. Add additional information by clicking the Message Text icon.
10. When you are finished, click Update.

Finding existing call actions

You can use the Call Action/Escalation form to search for all call actions in the database, or you can constrain your search by entering information in the Call Action fields before clicking Search. The application displays a list of all actions that meet the selected criteria in the browser.

To find all actions, click Clear to remove any information from the fields in this group, then click Search.

Changing call actions

To change an existing action:

1. In the Action group on the Call Action/Escalation form, type the first few letters of the escalation and click Search.
2. Select the action you want to change from the browser.
3. Click Change.
4. Make your changes and click Update.

Call escalations

The Call Escalation group on the Call Action/Escalation form lets you create and store escalations and corresponding actions by table. The escalation parameters determine what will happen when a record meets certain criteria like:

- Specific record priority
- Determined period of time passes and the call is not:
  - assigned
  - owned
  - closed

When a record meets your escalation criteria, the escalation is initiated (or "fired").

The Escalation group lets you create and store escalations for:

- Calls
- Change requests
- Tasks

When records are entered that match these criteria, the appropriate action rule is invoked.

Change request escalations

When setting escalations for Change Request:

- Not Assigned will not fire if a workgroup is associated with a change request. The workgroup is a required field, so this escalation will never fire.
- Not Owned will not fire after an Owner is linked to the change request record.
- Not Closed will not fire after the change request record's status is set to `completed`.

Task escalations

When setting escalations for Tasks:

- Not Assigned will not fire if a workgroup is associated with a task. The workgroup is a required field, so this escalation will never fire.
- Not Owned will not fire after a Resolver is linked to the task record.
- Not Closed will not fire after the task record's status is set to `completed`.

Adding a new call escalation

To add a new call escalation:

1. In the Call Action/Escalation form, click New in the Escalation group.
2. Type the escalation information in the group's fields.
3. Specify the workgroup to which this escalation notification applies.
4. When you are finished, click Update.

Finding existing call escalations

You can use the Call Action/Escalation form to search for all escalations in the database, or you can constrain your search by entering information in the Call Escalation fields before clicking Search. The application displays a list of all escalations that meet the selected criteria in the browser.

To find all escalations, click Clear to remove any information from the fields in this group, then click Search.

Changing call escalations

To change an existing escalation:

1. In the Call Action/Escalation form, type the first few letters of the escalation and click Search.
2. Select the escalation you want to change from the browser.
3. Click Change.
4. Make your changes and click Update.

Working with defect actions and escalations

The Defect Action group on the Defect Action/Escalation form lets you create actions that occur anytime a defect record changes its status. For example, you can create an action that automatically sends a confirmation email when a defect has been resolved.

The Defect Escalation group on the Defect Action/Escalation form lets you create escalation rules that fire when a defect record does *not* change its status in a given time.

Adding a new defect action

To add a new defect action:

1. In the Action group of the Defect Action/Escalation form, click New.
2. Type the name of the rule you are adding.
3. Select the Record Status.
4. Select the notification method.
5. Select the recipient.
6. Choose to include the call record information by checking the Include Record Info checkbox (or conversely, not checking it does not send the call record information with the message).
7. Add a subject line which is included in Alert, Email, Fax and alpha Pager notifications.
8. Add additional information by clicking the Message icon.
9. When you are finished, click Update.

Finding and changing existing defect actions

You can use the Defect Action/Escalation form to search for all defect actions in the database, or you can constrain your search by entering information in the Defect Action fields before clicking Search. The application displays a list of all defect actions that meet the selected criteria in the browser.

To find all defect actions, click Clear to remove any information from the fields in this group, then click Search.

Changing defect actions

To change an existing action:

1. In the Defect Action/Escalation form, Action group, type the first few letters of the escalation and click Search.
2. Select the action you want to change from the browser.
3. Click Change.
4. Make your changes and click Update.

Adding a new defect escalation

To add a new defect escalation:

1. In the Defect Action/Escalation form, click New.
2. Type the escalation information in the fields in the Defect Escalation group.
3. Specify the workgroup to which this escalation notification applies.
4. When you are finished, click Update.

Finding and changing existing defect escalations

You can use the Defect Action/Escalation form to search for all defect escalations in the database, or you can constrain your search by entering information in the Defect Escalation fields before clicking Search. The application displays a list of all defect escalations that meet the selected criteria in the browser.

To find all defect escalations, click Clear to remove any information from the fields in this group, then click Search.

Changing defect escalations

To change an existing escalation:

1. In the Defect Action/Escalation form, type the first few letters of the escalation and click Search.
2. Select the escalation you want to change from the browser.
3. Click Change.
4. Make your changes and click Update.

Setting up WebQ authorization for employees

WebQ lets internal and external support agents and customers access CustomerQ database tables using a web browser. Support agents and customers have different levels of access; a support agent can initiate an unconstrained search across all tables, while a customer is limited to searching only tables which contain their calls. Additionally, customers may only update their own calls, create new calls, or initiate a solution search.

Note:

If you want to designate an employee as a Support Agent, the Support Role checkbox must be enabled for that employee in the IC Manager. For details, see *IC Administration Volume 2: Agents, Customers, & Queues.*

Employees designated as customers may only examine their own calls, search for solutions, or create new calls. Each customer must have a support agent explicitly assigned to them before they are granted access to the database. That support agent is also responsible for any escalations from the customers to which they are assigned.

When a user logs into WebQ, The application determines whether he or she has support agent or customer privileges by matching the login id with the user type in the database. If the login id is not found, WebQ will not accept the login.

Adding a new WebQ user

To add a new WebQ user:

1. In the WebQ Authorization group, click New.
2. Type the name the user should log in with.
3. Add the employee's password.
4. Select the User Type:
   - Customer
   - Support Agent
5. Select the employee who logs in with this name.
6. If the employee is a Customer, select a support agent.
7. Click Update when you are finished.

Finding and changing existing WebQ users

You can use the WebQ Authorization form to search for all WebQ users in the database, or you can limit your search to user types.

When you have finished specifying the information you want to use to limit the list of WebQ users, click Search. The application displays a list of all WebQ users that meet the selected criteria in the browser.

If you want to find all WebQ users, click Clear, then click Search.

Changing existing WebQ users

To change an existing WebQ user:

1. In the WebQ Authorization form, type the first few letters of the username and click Search.
2. Select the username you want to change from the browser.
3. Click Change.
4. Make your changes and click Update.

Chapter 3: Using the CustomerQ Call focuses

There are two focuses in CustomerQ that are devoted to handling external customer calls:

- Call Entry, which is designed for the agent who is logging the call
- Call Management, which is designed for the support representative who is working on closing the call

All tasks that can be performed in the Call Entry focus can also be performed in the Call Management focus. The Call Management focus has several additional forms not included in the Call Entry focus; these additional forms allow a greater level of detail in reviewing call details and resolving problems.

The following sections discuss the workflow for both focuses and the tasks that can be accomplished with them. Unless otherwise stated, a given task can be performed in either focus.

This section contains the following topics:

Using the Call Entry focus

This focus is designed to help you log calls from external customers, and it lets you:

- Enter new calls. For details, see Adding a new call with the Call Entry focus on page 38.
- Find existing calls, customers, or products. For details, see Finding and changing existing calls on page 40, Finding existing customers on page 43, and Finding and changing existing products on page 46.
- Search for solutions to a customer's problem. For details, see Searching for solutions on page 51.
- Print reports showing one or more calls, products, or customers. For details, see Printing and exporting information on page 54.

Workflow

The workflow for this focus is:

Step	Description
1	Find the customer in the database. If this is the first contact from this customer, add the customer to the database.
2	Find the name of the product the caller is using.
3	Make sure the customer is calling about a new problem and not checking on one that has already been entered.
4	In the Call group, click New.
5	If your company requires users to have a contract for technical support, check the customer's contract. If the contract is not valid, refer the caller to the contract group.
6	Type a short description of the problem in the Problem field and see if there is an existing solution in the solutions database.
7	If there is a solution, tell the customer what it is and link the solution to the call.
8	If you cannot find a solution, assign the call to a workgroup and tell the caller that you have logged the problem, that your company is working on a solution, and that the caller will be notified when the problem has been solved.
9	If the call is a duplicate of an existing call, link it to the original call.

Call Entry focus right-click menu items

Each group in this focus has a corresponding right-click menu that contains commonly-used commands. In addition, several other groups include additional commands.

Common right-click menu items

The following right-click menu items appear in multiple groups:

Menu Item	Description
Delete	Remove the record currently displayed in the group from the database
Local Search	Search the database table associated with the group ignoring the information in any other group in the focus (perform an unconstrained search)
Search by Customer and Product	Search for any instances where the selected customer returned the selected product
Similar	Search for customers whose last names are similar to the one entered in the Last Name field
Toggle Availability	If the Agent or Owner is available to take calls, makes them unavailable or vice versa.

Allowances group (Allowances form) right-click menu items

The Product group on the Call form includes the following additional right-click menu item:

Menu Item	Description
Release Allowance	Mark the allowance as "authorized" so that the customer is given whatever cash or concession is listed on the allowance record

Call group (Call form) right-click menu items

The Call group on the Call form includes the following additional right-click menu items:

Menu Item	Description
Check Contract	Check the contract associated with the currently-selected call and displays any special handling requirements in a message box.
Check Warranty	Check that the associated warranty exists and has not expired.

Menu Item	Description
Open Calls	Search for all calls where the status is New, Assigned, Reassigned, Owned, or Pending. **Note:** If a customer is currently selected, only open calls for that customer will be returned. If a product is selected, only open calls for that product will be returned.
Open Calls by Org	Search for all calls whose status is New, Assigned, Reassigned, Owned, or Pending. **Note:** If a customer is currently selected, then the search is constrained to open calls for people from that customer's organization.
My Calls (Agent)	Search for all calls requiring an action where the Agent's database ID matches that of the currently logged-in user. **Note:** this search does not find any calls where the status is Closed, Parked, Duplicate, Defect, or Change Request.
Bookmark	Add a bookmark for this call.
Show Document	If a document name appears in the Solution field, display the document in the Solution Search dialog box.
Link Document	If a document has been marked in the Solution Search dialog box, link that document with the current call.
Make Duplicate	Designate the currently-selected call as a duplicate of another call.
Search Duplicate	Search for all calls that are marked as duplicates of the currently-selected call.

Customer group (Org/Customer form) right-click menu items

The Customer group on the Org/Customer form includes the following additional right-click menu item:

Menu Item	Description
Make Primary Contact	Make the currently-selected customer the primary contact for the associated organization

Product group (Call form) right-click menu items

The Product group on the Call form includes the following additional right-click menu item:

Menu Item	Description
Search by Organization	Search for all products associated with the currently-selected customer's organization

Product group (Returns form) right-click menu items

The Product group on the Call form includes the following additional right-click menu item:

Menu Item	Description
Products with Contracts	Search for all products that the selected customer has a contract for

Using the Call Management focus

This focus is designed to help you manage calls from external customers, and it lets you:

- View and change call information. For details, see Finding and changing existing calls on page 40.
- Assign calls to a workgroup and an owner within that workgroup. For details, see Linking a workgroup and owner to a call on page 39.
- Search for solutions to a customer's problem. For details, see Searching for solutions on page 51.
- Enter defect records for a product. For details, see Adding a product defect on page 40.
- View contract information for a customer or organization. For details, see Checking a customer's contract on page 41.
- Print reports showing one or more calls, products, or customers. For details, see Printing and exporting information on page 54.

Workflow

The workflow for this focus is:

Step	Description
1	Review the calls waiting in the queue for your workgroup.
2	Select a call to work on.
3	If a call is a duplicate of an existing call, link it to the original call.
4	Solve the problem or enter a defect report.
5	Close the call and notify the customer about the call's status.

Call Management focus right-click menu items

Each group in this focus has a corresponding right-click menu that contains commonly-used commands. In addition, the right-click menu in the Call group on the Call form and the Customer group on the Org/Customer form includes additional commands.

Common right-click menu items

The following right-click menu items appear in multiple groups:

Menu Item	Description
Delete	Remove the record currently displayed in the group from the database
Local Search	Search the database table associated with the group ignoring the information in any other group in the focus (perform an unconstrained search)
Toggle Availability	If the Agent or Owner is available to take calls, make them unavailable or vice versa.

Call group (Call form) right-click menu items

The Call group on the Call form includes the following additional right-click menu items:

Menu Item	Description
My Queues	Search for all calls assigned to any workgroups that the currently-logged in user is a member of that are not assigned to an owner.
My Calls (Owner)	Search for all calls where the Owner's database ID matches that of the currently logged-in user.
Accept Call	Assign the currently-logged in user as the owner of the currently-selected call.
Open Calls	Search for all calls where the status is New, Assigned, Reassigned, Owned, or Pending. **Note:** If a customer is currently selected, only open calls for that customer will be returned. If a product is selected, only open calls for that product will be returned.
Open Calls by Org	Search for all calls whose status is New, Assigned, Reassigned, Owned, or Pending. **Note:** If a customer is currently selected, then the search is constrained to open calls for people from that customer's organization.
Bookmark	Add a bookmark for this call.
Diagnose	Search for a solution based on the text in the Problem field.

Menu Item	Description
Show Document	If a document name appears in the Solution field, display the document in the Solution Search dialog box.
Link Document	If a document has been marked in the Solution Search dialog box, link that document with the current call.
Make Duplicate	Designate the currently-selected call as a duplicate of another call.
Search Duplicate	Search for all calls that are marked as duplicates of the currently-selected call.

Customer group (Org/Customer form) right-click menu items

The Customer group on the Org/Customer form includes the following additional right-click menu item:

Menu Item	Description
Similar	Search for customers whose last names are similar to the one entered in the Last Name field

Working with calls

Tasks involving calls include:

- Adding a new call with the Call Entry focus on page 38
- Adding a new call with the Call Management focus on page 39
- Linking a workgroup and owner to a call on page 39
- Adding a product defect on page 40
- Finding and changing existing calls on page 40
- Checking a customer’s contract on page 41
- Using bookmarks to mark an existing call on page 41
- Closing a call on page 42
- Viewing a call’s event history on page 42

Adding a new call with the Call Entry focus

To add a new call in the Call Entry focus:

1. In the Customer group on the Call form, type the first few characters of the customer's last name in the Last Name field and click Search. If you are not sure how to spell their last name, type in your best guess, right-click in the group, and select Similar from the pop-up menu.

   Note:

   If you click Search and only one record matches the specified criteria, The application automatically fills in the appropriate field and does not display a pop-up browser.

   If the customer's name appears in the pop-up browser, click on it. If it does not, find out whether the customer has called before. If the customer has called previously, check the spelling of the name with the caller and repeat the search. If this is a new contact, or you are unable to find the customer in the database, add the customer to the database. (For more information, see Adding a new customer on page 43.)

2. In the Product group, type the first few characters of the name of the product that the customer is calling about and click Search. Click on the product name in the browser.

3. If there are any QuickCall templates associated with the product, the application displays the number of templates in the QuickCall field in the Product group. To view the available QuickCalls, click on the QuickCall browser tab or click Search in the QuickCall group. (For more information, see Using QuickCall templates on page 46.)

   If you find an appropriate QuickCall template, select it and click Apply in the QuickCall group. If there are no templates available or none are appropriate to this call, click New in the Call group.

   Note:

   When you click Apply or New, The application highlights the labels of any required fields.

4. Type a description of the problem in the Problem field. To determine if this problem has already been solved, click Diagnose. (For more information, see Searching for solutions on page 51.) If the problem has not been solved, enter the rest of the information about the call in the Call group fields.

5. If the customer is eligible for a replacement product, or wants to return the old one, go to the Returns form and fill out the requested information. (For details, see Working with returns, replacements, and repairs on page 49.) When you have finished entering the information in the Return form, go back to the Call form.

6. When you have completed entering the record, click Update. If you have not selected a customer or product, or filled in a required field, the application displays an error message and does not update the call.

Adding a new call with the Call Management focus

To add a new call in the Call Management Focus:

1. If this call is similar to a previous call, then the previous call can be used as a template. Select the previous call and click New. The application creates a new call and copies the information from the selected one. (For information about selecting a call, see Finding and changing existing calls on page 40.)

   Otherwise, select Clear Focus from the Edit menu to remove any information from the forms in the focus and then click New.
2. Click the search icon to the right of the Customer field and select the name of the customer from the pop-up browser.
3. Click the search icon to the right of the Product field and select the name of the product from the pop-up browser.
4. Type a description of the problem in the Problem field. To determine if this problem has already been solved, right-click and select Diagnose from the pop-up menu. (For details, see Searching for solutions on page 51.)

   If the problem has not been solved, enter the rest of the information about the call.
5. If the customer is eligible for a replacement product, or wants to return the old one, go to the Returns form and fill out the requested information. For details, see Working with returns, replacements, and repairs on page 49. When you have finished entering the information in the Return form, go back to the Call form.
6. When you are finished, click Update. If you have not selected a customer or product, or filled in a required field, the application displays an error message and does not update the call.

Linking a workgroup and owner to a call

To link a workgroup and owner to a call:

1. On the Call form, select the call you want to link to and click Change.
2. Click the Search icon to the right of the Workgroup field and select a workgroup, or go to the Call Roles form and select a workgroup, then return to the Call form.
3. Click the Search icon to the right of the Owner field and select a workgroup, or go to the Call Roles form and select an owner, then return to the Call form.
4. On the Call form, click Update.

Adding a product defect

To add a defect for a product:

1. Go to the Defect form and click New.

   The application highlights the labels of any required fields.

2. Enter the information about the defect.
3. Click Update.

Finding and changing existing calls

You must limit the list of calls you want to retrieve by entering at least one search constraint in the Call, Customer, or Product group. To view a limited list of calls that:

- Have some call criteria in common, such as call status or priority, enter those criteria in the fields in the Call group.
- Were made by a particular customer, enter the customer name in the Customer group fields. For details, see Finding existing customers on page 43.
- Were made about a particular product, enter the product name in the Name field of the Product group. For details, see Finding and changing existing products on page 46.

When you have finished specifying the information you want to use to limit the list of calls, go to the Call group and click Search. The application displays a list of all calls that meet the selected criteria in the browser.

If you want to find calls that are not limited to the specified product or customer, click Clear then click Search, or right-click in the Call group and select Local Search from the pop-up menu.

Special searches

The right-click menu in the Call group provides several special, out-of-the-box searches.

In both focuses, you can find:

- Open calls by selecting Open Calls.
- Open calls by organization by selecting an organization on the Org/Customer form, and then right-clicking in the Call group on the Call form and selecting Open Calls By Org. This search finds the open calls for all customers associated with the selected company, and automatically screens out duplicate calls.

In the Call Entry focus you can find calls that have your Logon ID in the Agent field by selecting My Calls (Agent).

In the Call Management focus, you can find:

- Calls that have your Logon ID in the Owner field by selecting My Calls (Owner)
- All of the unowned calls in all of the queues to which you are assigned by selecting My Queues

Changing an existing call

To change an existing call:

1. Select the call you want to change from the browser.
2. Click Change.
3. Make your changes and click Update.

Checking a customer's contract

After you have entered the customer and product in their respective groups on the Call form, you can check to see if a contract exists for that customer and product. To do so, right-click in the Call group and select Check Contract from the pop-up menu. The application displays a message box telling you if the customer has a contract, and if so, what kind of support they are entitled to. To see more details about the contract, click on the Contract form.

Once you have determined the customer's contract status, you should follow the support rules and procedures established by your company. The application automatically decrements either the time spent on the call (if the contract is time-based) or the number of calls made (if the contract is number-of-problems based).

Using bookmarks to mark an existing call

Bookmarks let you retrieve specific calls quickly. To add a bookmark to a call, select it from the browser, right-click in the Call group, and choose Bookmark from the pop-up menu. When you add a bookmark to a call, the application adds that bookmark to the alerts in the Alert window.

To see your bookmarked calls, select Show Alerts from the View menu to open the Alert window. Any calls you have bookmarked appear as messages sent by your user ID with the message text `Bookmark - call #`, where `#` is the call number. To select one of these calls, double-click on its bookmark in the Alert window, or type the complete call number in the Call ID field of the Call group and click Search.

Closing a call

When you have solved the problem associated with a call or determined that the problem is a product defect, you can close the call. To do so:

1. If the problem is a product defect, go to the Defect form and enter the defect. (For more information, see Adding a new defect on page 66.)
2. On the Call form, select the call you want to close.
3. Click Change.
4. If the problem has a solution that is stored in:
   - An external document, bring that solution up in the Solution Search dialog box, then go back to the Call form, right-click and select Link Document.
   - The solutions database, enter the Solution in the Solution field on the Call form, or go to the Solution form and select the solution. The application automatically backfills that solution into the Solution field on the Call form.

   For more information, see Searching for solutions on page 51.
5. In the Status field drop-down box, select Closed.
6. Click Update.

Viewing a call's event history

In the Call Management focus, you can view the events in a call's history. To do so:

1. Go to the Call form and select the call.
2. Go to the Call Event form.
3. To view events that match specific criteria, enter those criteria in the Call Event group fields.
4. Click Search.
5. To view the details of any event, click on that event in the browser.

   Note:

   The events that the application records are specified in the Database Designer.

Working with customers

You can use the Org/Customer form for:

- Adding a new customer on page 43
- Finding existing customers on page 43
- Changing the information for a customer on page 44
- Adding organizations on page 44

Adding a new customer

To add a new customer:

1. If you know that the organization the customer works for has a parent organization, type the first few characters of the parent organization in the Name field in the Parent Org group and click Search. If the parent organization is displayed in the browser, click on it. If not, add the organization to the database. (For details, see Adding organizations on page 44.)
2. In the Organization group, type the first few characters of the organization the customer works for in the Name field and click Search. If the customer's organization is displayed in the browser, click on it. If it is not displayed, click New and enter the information in the Organization group fields. When you are finished, click Update.

   Note:

   When you click New, the application highlights the labels of any required fields.

   Leave the organization's information displayed in the Organization group so that the new customer will be linked to that organization.
3. In the Customer group, click New. Type the information about the customer in the Customer group fields and click Update.

Finding existing customers

You can use the Org/Customer form to search for all customers in the database, or you can limit your search to customers from a particular organization or who have other criteria in common.

To view a limited list of customers that:

- Work for a particular organization, enter the organization's name in the Organization group fields (to select the organization from a list, click Search in the Organization group and click on the organization in the browser)
- Have some other criteria in common, such as title or department, enter those criteria in the fields in the Customer group

When you have finished specifying the information you want to use to limit the list of customers, click Search in the Customer group. The application displays a list of all customers that meet the selected criteria in the browser.

If you want to find customers that are not limited to the specified organization, either clear the Organization group or right-click in the Customer group and select Local Search from the pop-up menu. The list of customers displayed will still be limited by any information you have entered in the Customer group fields.

Note:

When you use Similar, the first letter of the search phrase must be correct.

If you enter a name in the Customer group fields but that customer is not found, you can search for names that sound the same but are spelled differently by right-clicking in the Customer group and selecting Similar from the pop-up menu. For example, if you type "Mane" and select Similar, The application matches names such as "Main," "Maynz," and "Mains."

Changing the information for a customer

To change an existing customer:

1. Select the customer you want to change from the browser. (For more information, see Finding existing customers on page 43.)
2. Click Change.
3. Make your changes and click Update.

Adding organizations

The Organization group is used to keep track of companies that call with questions about the products and services you provide. The information includes:

- Primary contact personnel
- Billing information
- Mailing addresses

- Primary and secondary phone numbers
- Fax numbers
- Email addresses
- Descriptions of the organization
- Parent organization (where applicable)

This form is cross-referenced in the Region and Employee forms.

When adding or modifying organization information, the changes must be committed or updated to the database table before they take effect. The status of the update is noted in the lower left-hand corner of the focus' status bar.

Adding a parent organization

The Parent Org group uses information from the Organization group to create a parent organization. A parent organization must first exist as an organization before it can be designated a parent organization.

Adding a new organization

To add a new organization, you should:

1. Find out if the organization has a parent organization. If it does, in the Parent Org group on the Org/Customer form, type the first few letters of the organization's name in the Name field and click Search. If the name of the parent organization appears in the browser, click on it. (Then continue with step 8.)
2. In the Organization group, click New.
3. Enter the information about the parent organization in the Organization group fields.
4. Click Update.
5. Click Clear.
6. In the Parent Org group, click Search.
7. Click on the name of the parent organization in the browser.
8. In the Organization group, click New.
9. Enter the information about the organization in the Organization group fields.

   Tip:

   If an organization appears in the Parent Org group, the application automatically links the two.
10. Click Update.

Working with products

You can use the Product form for:

- Adding a new product
- Finding and changing existing products

Adding a new product

To add a new product:

1. On the Product form, click New.

   The application highlights the field labels of any required fields.
2. Type the product information in the fields in the Product group.

   Note:

   If your company offers a warranty on this product, then you must include a model number in order to link the warranty to the product. For more information see Entering warranties on page 77.
3. When you are finished, click Update.

Finding and changing existing products

To find a product:

1. On the Product form, enter any information you want to use to constrain the search.
2. Click Search. The application displays any products that match the specified criteria in the browser.

To change a product:

1. On the Product form, select the product you want to change from the browser.
2. Click Change.
3. Make your changes and click Update.

Using QuickCall templates

A QuickCall template contains default call record information that you link with a product. When an agent takes a call about the product, he or she can apply the QuickCall template and have the application automatically enter the default information into the new call record.

A QuickCall template can be associated with multiple products, and a product can have multiple QuickCall templates associated with it. Once the agent selects a product, the application displays the number of QuickCall templates available. The agent can then display those templates and select the appropriate one without leaving the Call form.

Associating QuickCall templates with products

To associate a QuickCall template with a product:

1. On the Product form, select the product with which you want to associate the new QuickCall template (for more information, see Finding and changing existing products on page 46).
2. If you want to:
   - Create a new QuickCall template, click New in the QuickCall group and enter the default information for the template in the QuickCall group fields
   - Use an existing QuickCall template, click Search in the QuickCall group, select the template from the browser, and click Change in the QuickCall group
3. To link the template and the product, click the link icon after the Product button in the QuickCall group.
4. Click Update in the QuickCall group.

Applying QuickCall templates

Some products may have associated QuickCall information that lets you apply default information to a call immediately.

To use QuickCall information:

1. Select a product. If the number in the QuickCall field in the Product group is greater than zero (0), then QuickCall templates exist for that product.
2. To view all the templates associated with the product, click on the QuickCall browser tab or click Search in the QuickCall group.
3. To use a template, select it and click Apply in the QuickCall group. The application opens a new call and transfers any information in the associated QuickCall template to the fields in the Call group.
4. Add any additional information to the call (or change the default information) and click Update.

Working with warranties

The Warranty Entry focus is designed for warranty data entry, while the Warranty and Warranty Inquiry forms within the other CustomerQ focuses are designed to check a customer's warranty. These forms show more information about the customer and the product then the Warranty Entry focus, but you can add warranties in any focus.

Note:

If you do want to enter a warranty from this form, the customer and the product must already be in the database. For more information, see Adding a new customer on page 43 and Adding a new product on page 46. The product must also have an associated model number as well.

Checking a customer's warranty

To check a customer's warranty:

1. On the Call form, select the customer and the product whose warranty you want to check.
2. Right-click in the Call group and select Check Warranty from the pop-up menu.

   The application automatically checks the status of the warranty and displays a message box with the warranty's status.

Changing warranty information

To change information about a warranty, or the products, organizations, and customers associated with a warranty:

1. Click Clear to remove any information from the Warranty group.
2. Click Search in the Warranty group.
3. Choose the warranty for which the changes need to be made.
4. Make the changes and click Update in the Warranty group.

Deleting a warranty

To delete an existing warranty:

1. Choose the warranty to delete.
2. Right-click and select Delete.
3. Click Yes.

Working with returns, replacements, and repairs

This section describes how to perform the tasks associated with the handling returns, replacements, allowances, and repairs, which can be performed using the Returns, Shipping, Allowances, Warranty, and Service Center forms. These forms let you:

- Check a warranty to make sure it is valid before you process a return. For details, see Checking a customer's warranty on page 48.
- Authorize the return. For details, see Authorizing a new return on page 49.
- Enter shipping and service information, as necessary. For details, see Entering shipping and service center information on page 50.
- Authorize an allowance, if applicable. For details, see Working with allowances on page 51.

Note:

Once a call had been entered, you can update it using the Returns and Shipping focus. For details, see Finding and changing existing returns on page 74.

Authorizing a new return

If the current customer is eligible for a replacement, or can return the product for a repair:

1. On the Call form, select the customer and open a new call record. For details, see Adding a new call with the Call Entry focus on page 38 or Adding a new call with the Call Management focus on page 39.
2. Go to the Returns form.
3. If no product has been selected, in the Product group, type the first few characters of the product's name and click Search. Click on the product's name in the browser.
4. If you company requires the customer have a valid warranty before returning a product, click Search in the Warranty group and make sure that the serial number matches the customer's product and that the warranty has not expired.
5. If the customer is eligible to return the product, click New in the Return Authorization group.

   Note:

   When you click Apply or New, The application highlights the labels of any required fields.
6. Enter the appropriate return information in the Return Authorization group fields.

7. If a workgroup should be notified of any abnormalities with the return process (as specified by your Avaya IC Administrator), make sure you enter a workgroup in the Notification Group field.
8. If you can authorize a return immediately, click Generate Number to have the application assign an authorization number to the return.
9. If you are shipping a replacement part to the customer, click Shipping in the Return Authorization group and fill out the shipping information. (For details, see Entering shipping and service center information on page 50.)
10. If the customer needs an allowance, click Allowance in the Return Authorization group and fill out the shipping information. (For details, see Working with allowances on page 51.)
11. When you're finished, click Update. If you haven't selected a customer or product, or filled in a required field, the application displays a message and does not update the record.

Entering shipping and service center information

If the customer needs a replacement part, or will be sending in an item for repair and will need to have it returned, use the Shipping or Shipping Update form to enter the address where the customer's product should be sent, and, if applicable, the service center that will be repairing the product. To do so:

1. With a return record open, click Shipping in the Return Authorization group.
2. If the product is going to be repaired, click the search icon following the Service Center field and select a Service Center from the pop-up browser.

   The application fills in the default shipping address information.
3. Click New in the Shipping Addresses group.
4. If the customer is getting a replacement product, enter the customer's shipping address in the Replacement Shipped fields in the Shipping Addresses group.
5. If the repaired product is supposed to be shipped to a different address, enter that address in the Send Repaired Product fields.
6. If necessary, change the information in the Return Authorization group.
7. Click Update.

Working with allowances

If the customer is eligible for an allowance (such as a credit or trade-in), you can enter that information on the Allowances form. To do so:

1. With a return record open, click Allowance in the Return Authorization group.
2. Click New in the Allowances group.
3. Enter the appropriate information in the Allowances group fields.
4. Click Update.

Releasing an allowance

After the product has been repaired, you need to indicate that the allowance check is ready to be cut. To do so:

1. Select the appropriate return record and click Allowance in the Return Authorization group.
2. Make sure that the concession amounts are accurate.
3. Click the Release Allowance button.
4. Click Update.

Searching for solutions

You can try to solve a problem by searching the solution database automatically or manually, or by searching through libraries of documents that have been defined by your Avaya IC Administrator.

You can use the Solutions form for:

- Searching based on the problem description on page 52
- Searching the solutions database
- Linking a solution to a call on page 52
- Adding a solution on page 53

Searching based on the problem description

To search for a solution based on the information in the Problem field:

1. Select the call you want to solve and click Change.
2. On the Call form, type a brief description of the problem in the Problem field.
3. Click Diagnose. The application displays the Solution Search dialog box, which shows all the documents that contain the search terms you entered. For details about using this dialog box, see the *Business Application Tools User Guide*.

Searching the solutions database

To search for a solution in the solution database:

1. On the Solution form, enter any information you want to use to constrain the search and click Search.
2. If you find a solution in the browser that solves the problem, click on it, then return to the Call form. If the current call is in Update mode, the application puts the solution you selected in the Solution field. To save the link, click Update.
3. Once you find a solution, you can link it to a call and then close the call.

Linking a solution to a call

To link a document to a call:

1. Select the call you want to link the document to and click Change.
2. Click Diagnose.
3. In the browser in the Quintus Enterprise Suite Solution Search dialog box, click on the name of the document you want to link to the call.
4. Click Mark.
5. On the Call form, right-click in the Call group and select Link Document from the pop-up menu.

To link a solution from the solutions database to a call:

1. Select the call you want to link the solution to and click Change.
2. On the Solutions form, select the solution you want to link.
3. On the Call form, click Update.

Adding a solution

If you have a solution for a call that could be used by other people to solve other calls, you should enter it in the solutions database. To do so:

1. On the Solution form, click New.

   Note:
   When you click New, The application highlights the labels of any required fields.

2. Type the solution information in the fields in the Solution group.
3. When you are finished, click Update.

Working with duplicate calls

If you determine that a call is a duplicate of an earlier call, you can link the two calls together. The application keeps track of which calls are duplicates and which are originals, and it makes sure that one call does not become a duplicate of another call that is:

- Itself a duplicate
- An original for other duplicate calls

For example, suppose call number 7 is a duplicate of call number 3. You're working on call number 15, and you determine that it's a duplicate of call number 7. When you go to link calls 15 and 7, The application determines that call 7 is already a duplicate of call 3 and automatically adjusts the link so that call 15 becomes a duplicate of call 3, not a duplicate of call 7.

Furthermore, if you tried to make call number 3 a duplicate of call number 1, The application would determine that call 3 is the original call for 15 and 7, and, therefore, would display an error message and not make call 3 a duplicate of call 1.

Linking duplicate calls

To link a duplicate call to its original:

1. Make a note of the original call's Call ID or select the original call, highlight the Call ID number, and use Control+C to copy it to the clipboard.
2. On the Call form, select the call you want to mark as the duplicate of the original call.
3. Right-click in the Call group and choose Make Duplicate from the right-click menu.

4. Enter the Call ID number of the original call in the Duplicate Call dialog box (or use Control+V if you copied it to the clipboard in Step 1) and click OK.

Unlinking duplicate calls

To unlink a call that has been designated as a duplicate:

1. In the Duplicate Call group on the Duplicate Call form, click Search and select the call you want to unlink.
2. Click Change.
3. In the Call field, delete the Call ID number of the original call.
4. Select a new status from the Status drop-down list box.
5. Click Update.

Changing the original call

To change the original call linked to a duplicate call:

1. In the Duplicate Call group on the Duplicate Call form, click Search and select the call whose original call you want to change.
2. Click Change.
3. In the Call field, change the Call ID number of the original call to the new Call ID number.
4. Click Update.

Printing and exporting information

CustomerQ allows you to:

- Run a pre-defined report or create an ad-hoc report that shows selected fields in the current focus
- Print the currently-selected call
- Export the information in a browser to Excel

Running a report

To run a report using the Report Writer, choose Tools > Report Writer. For details, see the *Business Application Tools User Guide.*

Printing the current call

To print the currently-selected call, choose File > Print Form.

Printing a browser

To print all the information displayed in a browser, choose File > Print Browser.

Creating a spreadsheet from the browser

To export the information in a browser to Excel, choose Export Browser from the File menu.

Viewing agent information

The Agent form lets you view basic information about the currently-logged-on user. For details about creating or changing agents, see *IC Administration Volume 2: Agents, Customers, & Queues.*

Chapter 4: Using the Customer Management focus

The Customer Management focus lets you manage changes and updates or search within the CustomerQ application. The changes you make here are global to the CustomerQ database. For example, Regions that are added here can be linked to the employee database through the Sales Rep and Field Rep groups.

Note:

This focus was designed to manage already existing customers that were entered by call center agents on an as-needed basis. For details about adding customers or organizations, see Working with customers on page 43.

This section contains the following topics:

Right-click menu items

Each group in this focus has a corresponding right-click menu that contains commonly-used commands. In addition, the right-click menu in the Customer group on the Org/Customer form includes additional commands.

Common right-click menu items

The following right-click menu items appear in multiple groups:

Menu Item	Description
Delete	Remove the record currently displayed in the group from the database
Local Search	Search the database table associated with the group, ignoring the information in any other group in the focus (perform an unconstrained search)

Customer group (Org/Customer form) right-click menu items

The Customer group on the Org/Customer form includes the following additional right-click menu items:

Menu Item	Description
Similar	Search for customers whose last names are similar to the one entered in the Last Name field
Make Primary Contact	Make the currently-selected customer the primary contact for the associated organization.

Working with contracts

The Contract form shows the level of service a customer or organization is entitled to receive when they call for help.

You can use the Contract form in the Customer focus for:

- Adding a new contract on page 59
- Finding and changing existing contracts on page 59

Note:

If you want to associate a contract with an organization or a product, you must enter that information into the database first. For more information, see Adding organizations on page 44 or Adding a new product on page 46.

Adding a new contract

To add a new contract:

1. In the Organization group of the Contract form, type the first few characters of the organization's name in the Name field and click Search. If the customer's organization is displayed in the browser, click on it.

   If this is a new contract, establish the Organization first by changing to the Org/Customer form and entering the new organization's name in the Organization group.
2. Leave the organization's information displayed in the Organization group so that the new contract will be linked to that organization.
3. In the Product group on the Contract form, you can also search for the Product associated with the new contract.
4. In the Contract group, click New. Type the information about the contract in the Contract group fields and click Update.

There are several types of contracts:

- Unlimited, toll call
- BOP (block of problems or limited to number of calls)
- BOT (block of time)

BOP and BOT contracts have a warning level you can set to remind you when the customer is reaching their support limit.

Finding and changing existing contracts

You can use the Contract form to search for all contracts in the database, or you can constrain your search to products that have other criteria in common.

To view a limited list of contracts that:

- Are for a particular organization, enter the organization's name in the Organization group fields
- Are for a particular product, enter the product's name in the Product group fields
- Have some other criteria in common, such as contract type, enter those criteria in the Contract group fields

When you have finished specifying the information you want to use to limit the list of contracts, go to the Contracts group and click Search. The application displays a list of all contracts that meet the selected criteria in the browser.

If you want to find contracts that are not limited to the specified organization, all contracts, or all contracts associated with products:

1. Clear the Organization group and select Search from the Contracts group.
2. Click the All Contracts button.
3. Click the Contracts with Products button.

Changing an existing contract

To change an existing contract:

1. In the Organization group on the Contract form, type the first few letters of the organization and click Search, or right click and choose Local Search for a list of all Organizations.
2. Select the organization you want to change from the browser.
3. Click Change.
4. Make your changes and click Update.

Viewing region information

Regions let you organize your sales and field agents into two-person teams. Once you've set up a team, you can link it with an organization so that you know who you need to send when a call comes in from a company.

The Region form in the Customer Management focus is mainly informational. Generally, regions should be managed using the Administration focus. For details, see Working with regions on page 19.

Setting up WebQ authorizations for customers

To enable a customer to access CustomerQ database tables through the web, you need to give them WebQ authorization. That customer can then view the status of any calls they have made to your support center, search your solutions database, or access any other functions that your system administrator has made externally available.

When entering a new user, a Support Agent must be assigned to that user. The Support Agent assigned to the user handles all requests and escalations from that user.

You can use the WebQ Authorization form in the Customer Management focus for:

- Adding a new WebQ user on page 61
- Finding and changing existing WebQ users on page 61

Adding a new WebQ user

To add a new WebQ user:

1. In the WebQ Authorization group, click New.
2. Type the name with which the external customer logs in.
3. Select the User Type:
   - Customer (restricts access to only their own calls)
   - Support Agent (allows them to see all calls)
4. Add the external customer's password.
5. Choose the external customer.
6. Choose the Agent responsible for future calls from this external customer.
7. Click Update when you are finished.

Finding and changing existing WebQ users

You can use the WebQ Authorization form to search for all WebQ users in the database, or you can limit your search to user types.

When you have finished specifying the information you want to use to limit the list of WebQ users, click Search. The application displays a list of all WebQ users that meet the selected criteria in the browser.

If you want to find all WebQ users, click Clear, then click Search.

To change an existing WebQ user:

1. On the WebQ Authorization form, type the first few letters of the username and click Search.
2. Select the username you want to change from the browser.
3. Click Change.
4. Make your changes and click Update.

Chapter 5: Using the Defect Management focus

The Defect Management focus helps you manage any defects logged against your products and keep track of who is in charge of them as they get reported, fixed, and confirmed.

This section contains the following topics:

Roles in defect management

There are three key roles involved in defect management:

- A reporter, who adds new defects to the database
- A resolver, who fixes the reported defects and attaches the appropriate test cases to the defect

  Note:

  An employee cannot be a resolver for a defect unless they are designated as an "owner" in the database. For more information, see *IC Administration Volume 2: Agents, Customers, & Queues.*

- A confirmer, who makes sure that the fix really works by running the associated tests and possibly adding others

When you add a new defect, you can assign a person to each of the above roles. The application notifies each person when a new defect is assigned using the method set up in that person's user profile.

Workflow

The workflow for this focus is:

Step	Description
1	Review the calls waiting in the queue for your workgroup.
2	Select a call to work on.
3	If the defect is a duplicate of an existing defect, link it to the original defect.
4	If you have any test cases, link them to the defect record.
5	If the defect has a common solution, enter it in the solutions database.
6	Have the confirmer agree that the defect is successfully resolved or should be deferred.

Right-click menu items

Each group in this focus has a corresponding right-click menu that contains commonly-used commands. In addition, the right-click menu in the Defect group on the Defect form includes additional commands.

Common right-click menu items

The following right-click menu items appear in multiple groups:

Menu Item	Description
Delete	Remove the record currently displayed in the group from the database

Menu Item	Description
Local Search	Search the database table associated with the group, ignoring the information in any other group in the focus (perform an unconstrained search)
Global Search	Search the database table associated with the group using the information in any other groups in the focus as constraints for the search

Defect group right-click menu items

The Defect group on the Defect form includes the following additional right-click menu items:

Menu Item	Description
My Queues	Search for all defects assigned to any workgroups that the currently-logged in user is a member of that are not assigned to an owner
My Defects	Search for all defects where the Owner's database ID matches that of the currently logged-in user
Make Duplicate	Designate the currently-selected defect as a duplicate of another defect
Search Duplicate	Search for all defects that are marked as duplicates of the currently-selected defect

Working with defects

You can use the Defect form for:

- Adding a new defect on page 66
- Finding and changing existing defects on page 66
- Accepting a defect on page 67
- Working with duplicate defects on page 67
- Linking a test case to a defect on page 67
- Closing a defect on page 68

Adding a new defect

To add a new defect:

1. On the Defect form, click New.

   Note:

   When you click New, the application highlights the labels of any required fields.

2. Type the information about the defect in the fields in the Defect group.
3. To specify the people responsible for managing a defect, enter the name of the person who:
   - Reported the defect in the Reporter field
   - Will fix the defect in the Resolver field
   - Will confirm that the fix actually works in the Confirmer field
4. Enter the number of the build in which the defect was found in the Report Build field.
5. Click Update.

Finding and changing existing defects

To find existing defects:

1. On the Defect form, enter any information you want to use to constrain your search.
2. Click Search.

Finding specific defects

There are several pre-defined searches available with CustomerQ. To see a list of all defects that are:

- Assigned to any workgroups you belong to, right-click and choose My Queues
- Associated with your user ID, right-click and choose My Defects

Changing existing defects

To change an existing defect:

1. Select the defect you want to change from the browser.
2. Click Change.
3. Make your changes.

4. Click Update.

Accepting a defect

If you plan to work on a defect, you should become the defect's resolver. To do so:

1. Select the defect you want to work on from the browser.
2. Click Change.
3. Put your name in the Resolver field, and set the Res Status to Under Review.
4. Click Update.

Linking a test case to a defect

To link a test case to a defect:

1. On the Defect form, select the defect.
2. Click the Test Case button to go to the Test Case form.
3. Click Search and select the appropriate test case from the browser.

   If the test case you want to use isn't displayed in the browser, add it by clicking New, typing the appropriate information in the fields, and clicking Update.
4. Once both the defect and test case are selected:
   a. click Change on either the Defect or Test Case form
   b. click the unlinked icon to close the link
   c. click Update.

Working with duplicate defects

If you determine that a defect is a duplicate of an earlier defect, you can link the two defects together. The application keeps track of which defects are duplicates and which are originals, and it makes sure that one defect does not become a duplicate of another defect that is:

- Itself a duplicate
- An original for other duplicate defects

For example, suppose defect number 7 is a duplicate of defect number 3. You're working on defect number 15, and you determine that it's a duplicate of defect number 7. When you go to link defects 15 and 7, The application determines that defect 7 is already a duplicate of defect 3 and automatically adjusts the link so that defect 15 becomes a duplicate of defect 3, not a duplicate of defect 7.

Furthermore, if you tried to make defect number 3 a duplicate of defect number 1, the application would determine that defect 3 is the original defect for 15 and 7, and, therefore, would display an error message and not make defect 3 a duplicate of defect 1.

Linking and unlinking duplicate defects

To link a duplicate defect to its original:

1. On the Defect form, select the defect you want to mark as the duplicate of another defect.
2. Right-click in the Defect group and choose Make Duplicate from the right-click menu.
3. Enter the defect key number of the original defect in the Duplicate Defect dialog box and click OK.

To unlink a defect that has been designated as a duplicate:

1. In the Duplicate Defect group on the Duplicate Defect form, click Search and select the defect you want to unlink.
2. Click Change.
3. In the Defect field, delete the defect key number of the original defect.
4. Select a new state from the State drop-down list box.
5. Click Update.

Changing the original defect linked to a duplicate defect

To change the original defect linked to a duplicate defect:

1. In the Duplicate Defect group on the Duplicate Defect form, click Search and select the defect whose original defect you want to change.
2. Click Change.
3. In the Defect field, change the defect key number of the original defect to the new defect key number.
4. Click Update.

Closing a defect

Closing a defect requires input from both the defect’s resolver and confirmer.

The resolver's tasks

After you determine whether a defect can be solved or should be deferred:

1. On the Defect form, select the appropriate defect.
2. Click Change.
3. Set the Res Status field to the appropriate resolved status.
4. Specify the build in which the defect is fixed in the Resolve Build field.
5. Click Update.

The confirmer's tasks

When a resolver finishes with a defect, you need to confirm their findings. To do so:

1. On the Defect form, select the appropriate defect.
2. Click Change.
3. Set the Conf Status field to the appropriate resolved status.
4. Specify the build in which the defect's fix has been confirmed in the Confirm Build field.
5. Click Update.

Working with products

You can use the Product/Component form in the Defect Management focus for:

- Adding new products and components on page 69
- Finding and changing products and components on page 70

Adding new products and components

You can use the Defect Management focus to add new products. To do so:

1. On the Product/Component form, click New.

   Note:

   When you click New, The application highlights the labels of any required fields.

2. Type the product information in the fields in the Product group.

3. When you are finished, click Update.

To add a component for a product:

1. On the Product/Component form, select the product you want to add a component for in the Product group.
2. In the Component group, click New.
3. Enter the information about the component.
4. Click Update.

Finding and changing products and components

To find an existing product:

1. In the Product group on the Product/Component form, enter any information you want to use to constrain the search.
2. Click Search. The application displays any products that match the specified criteria in the browser.

To find an existing component:

1. In the Component group on the Product/Component form, enter any information you want to use to constrain the search.
2. Click Search. The application displays any components that match the specified criteria in the browser.

Changing a product

You can use the Defect Management focus to change products. To do so:

1. On the Product/Component form, select the product you want to change from the browser.
2. Click Change.
3. Make your changes and click Update.

Changing a component

To change a component:

1. On the Product/Component form, select the component you want to change from the browser.
2. Click Change.
3. Make your changes and click Update.

Working with builds

When you are developing a product, it goes through a series of incremental builds that can be tested by Development or Quality Assurance. A defect can then be reported against, fixed in, and confirmed fixed in any of these builds.

You can use the Build Version form in the Defect Management focus to:

- Add a new build
- Find or change existing builds

Adding a new build

To add a new build:

1. On the Build Version form, click New.

   Note:
   When you click New, The application highlights the labels of any required fields.

2. Type the build information in the fields in the Build Version group.
3. When you are finished, click Update.

Finding existing builds

To find an existing build:

1. On the Build Version form, enter any information you want to use to constrain the search in the Build Version group.
2. Click Search. The application displays any builds that match the specified criteria in the browser.

Changing an existing build

To change an existing build:

1. On the Build Version form, select the build you want to change from the browser.
2. Click Change.
3. Make your changes and click Update.

Managing workgroups

The Workgroup is a group of employees assigned to work on problems. When a call is assigned to a workgroup, all members are notified and one member of the group should take ownership of the call.

The Workgroup form lets you create and view workgroups. To add employees to a workgroup, you need to use the IC Manager. For details, see *IC Administration Volume 2: Agents, Customers, & Queues.*

Chapter 6: Using the Returns and Shipping focus

The Returns and Shipping Focus helps you manage and update existing returns from your customers. If you want to add a new return, you need to use the CustomerQ Call Entry or Call Management focus. (For details, see Authorizing a new return on page 49.)

Workflow

The workflow for this focus is:

Step	Description
1	Select the return you want to update.
2	In the Return Authorization group, click Change and make your changes, then click Update.
3	If you want to update the shipping address or return authorization, use the Shipping Update form.

This section contains the following topics:

Right-click menu items

Each group in this focus has a corresponding right-click menu that contains commonly-used commands. In addition, the right-click menu in the Customer group on the Org/Customer form includes additional commands.

Common right-click menu items

The following right-click menu items appear in multiple groups:

Menu Item	Description
Delete	Remove the record currently displayed in the group from the database
Local Search	Search the database table associated with the group, ignoring the information in any other group in the focus (perform an unconstrained search)
Search by Customer and Product	Search for any instances where the selected customer returned the selected product

Customer group (Org/Customer form) right-click menu items

The Customer group on the Org/Customer form includes the following additional right-click menu items:

Menu Item	Description
Similar	Search for customers whose last names are similar to the one entered in the Last Name field
Make Primary Contact	Make the currently-selected customer the primary contract for the associated organization.

Finding and changing existing returns

To view a limited list of returns that:

- Have some criteria in common, such as status or type, enter those criteria in the fields in the Return Authorization group on the Returns form
- Were made by a particular customer, enter the customer’s name in the Customer Full Name field (for more information see Finding existing customers on page 43)
- Were made about a particular product, enter the product name in the Name field of the Product group

When you have finished specifying the information you want to use to limit the list of calls, go to the Return Authorization group and click Search. The application displays a list of all calls that meet the selected criteria in the browser.

If you want to find all calls, either clear those groups or right-click in the Return Authorization group and select Local Search from the pop-up menu.

Changing an existing return

To change an existing return:

1. Select the return you want to change from the browser.
2. Click Change.
3. Make your changes and click Update.

Working with service centers

You can use the Service Center form to add new service centers or update existing information.

Adding a new service center

To add a new service center:

1. In the Service Center group, click New.

   Note:

   When you click New, The application highlights the labels of any required fields.
2. Enter the information about the center in the Service Center group fields.
3. Click Update.

Changing the information for a service center

To change an existing service center:

1. Click Search in the Service Center group and select the center you want to change from the browser.
2. Click Change.
3. Make your changes and click Update.

Chapter 7: Using the Warranty Entry focus

The Warranty Entry form lets you enter warranty information quickly. You may also delete a warranty from this focus.

Note:

The product and its associated model number must already be in the database. For more information, see Adding a new product on page 46.

Workflow

The workflow for this focus is:

Step	Description
1	Find the customer in the database. If this is the first contact from the customer, add the customer to the database.
2	Check the customer's information and correct as necessary.
3	Enter the warranty information.

Entering warranties

You can use the Warranty Entry form in the Warranty Entry focus to add warranty information for new or existing customers. There are generally two types of warranties: those submitted by people on behalf of a company, and those submitted by individuals.

If the customer has an associated company:

1. In the Customer Search group, enter the first few letters of the company's name in the Company Name field and click the Search icon to the right of that field.
2. If the company's name appears in the pop-up browser, click on it. If it does not appear, close the browser and type the full company name in the Company Name field.
3. Enter the customer's first and last name in the First Name and Last Name fields.
4. Click Search.

5. If the customer's name appears in the browser, click on it. If it does not appear, click Copy Customer in the Customer group, then fill in the appropriate information in the Customer group fields.
6. If the company already exists in the database, then the only fields you can change are the phone and fax numbers. To do so, click Change in the Customer group and enter the new numbers.

   Note:

   To change other company information, contact your system administrator.
7. Enter the warranty information in the Warranty group fields.
8. Click Next Card/Update to save your changes.

If the customer is an individual:

1. In the Customer Search group on the Warranty form, type the first few characters of the customer's last name in the Last Name field and click Search.

   If the customer's name appears in the browser, click on it and verify that the information is still correct. If it is incorrect, click Change in the Customer group and change the information as necessary.
2. If it does not appear, enter the customer's name and address in the Customer group fields.
3. Enter the customer's warranty information in the Warranty group fields.
4. To save the information, click Next Card/Update.

Appendix A: Standard reports

CustomerQ include eleven standard out-of-the-box reports that work with the Report Writer. These are general reports that concentrate on the Call Entry and Defect Management focuses. For details about using the Report Writer, see the *Business Application Tools User Guide*.

This section contains the following topics:

Call reports

The Call reports can work with either the Call Entry or Call Management focuses, depending on the associated relation sets.

Calls by Owner and Priority (Call_Owner) - Used for closed call counts. It shows the number of calls delineated by call priority and owner.

Calls by Customer (Call_Cust) - Used for tracking calls by customer. It lists all calls grouped by organization. It shows the customer name, the date of the call, the person entering the call, the owner of the call, the call ID, and its priority and status. A count is included for the number of calls from each organization.

Calls by Status (Call_Stat) - Used for tracking calls by status. All calls are listed with date reported, status, call ID, priority and organization.

Calls by Product (Call_Prod) - Lists calls by product. It lists all calls, grouped by product and call ID. It also includes a count of how many calls there are for each product.

Open Calls (Call_Open) - Lists all open calls, by ascending priority. An open call is a call where the status is New, Assigned, Reassigned, Owned, Parked, Pending, Change Request, Defect or Duplicate. This report shows the call ID, status, owner, problem summary, date reported, and action.

Defect Management reports

These reports are specific to the Defect Management focus and associated tables and relation sets.

Defect Summary (Def_Sum) - Lists the defect summary, showing the critical, high and medium priority defects with status. They are grouped by ascending priority and show the Reporter, Resolver, and Confirmer summary for each defect.

Defect by Component (Def_Comp) - Lists the defect summary grouped in ascending order by component. It also lists the priority and summary of the component defect.

Fixed Defects by Owner and Priority (Def_Fixed) - Shows the number of defects that have status Closed for each owner and for each Priority. It also shows the Defect ID and summary of the defect.

Open Defects by Status (Def_Stat) - Lists open defects grouped by status. It also shows the defect ID, priority, summary, and origin of the defect.

Defects by Product (Def_Prod) - Lists defects by product, grouped by product with a summary of the defects. It also shows the priority and defect ID and lists the total number of defects by product.

Additional reports

Solution Summary (Solns_sum) - Lists new solutions sorted by status. It details the date the solution was created, the original problem, and the solution.

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