



STEPS

Governance Framework

Achieve the highest level Step-by-Step



Case Management System

(Screen Shots)

www.stepsdatabase.com

This document provides screen shots illustrating some of the functionality available in the STEPS Case Management System.

Important to Note: These screen shots are provided for demonstration purposes and may not apply to your particular scenario. During implementation the system will be configured with the correct data fields, navigation and modules.



7 STEPS FOR EFFECTIVE CASE MANAGEMENT!

Follow these simple guidelines and customer care will become a breeze in any organisation where it is implemented.

- Keep record of all complaints, enquiries, supporting documentation and correspondence interlinked in ONE central database. All information about a case must be readily available when required.
- Send **automated reminders, notifications and courtesy messages** between callers and agents to avoid misunderstandings and build a trust relationship. This is key to a happy customer base.
- Demand **intelligent reports that identify negative trends** transpiring in the organisation BEFORE they become real problems. Reports should warn senior management when customers are still unhappy due to cases not being resolved efficiently.
- **Prioritise and delegate tasks** to ease the workload, escalate unresolved cases to team managers and hold employees accountable for the level of support that they provide.
- Build a **comprehensive knowledge library** with frequently asked questions and answers that empowers call agents to resolve cases quickly and efficiently.
- Maintain an **audit trail of all correspondence**, including Emails, SMS, Letters, Faxes and Voice Recordings for further investigations and quality control.
- Measure your success; through **automated satisfaction surveys** to gather feedback on the effectiveness of the procedure and to measure the customer's satisfaction with the outcome.

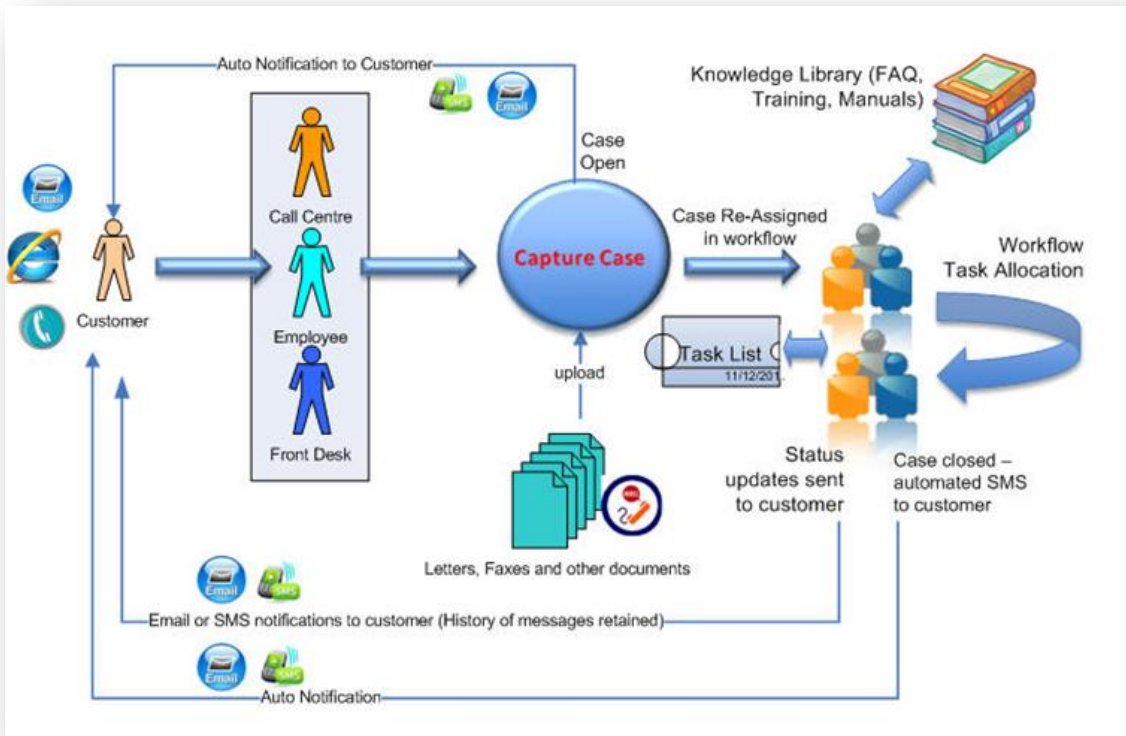
The STEPS Case Management system encapsulates all these features as well as additional functionality that's not yet available in other systems!

WORKFLOW EXAMPLE

The following workflow illustrates how these key elements have been incorporated in the STEPS Case Management System.

For each task in this diagram a user interface for the relevant actions is provided;





EXPLANATION OF WORKFLOW

- Members of the public can phone the help desk, or log a case through the organisation’s website.
- When the case is captured an automated SMS notification is sent to the caller.
- Complaints can be submitted through Email, SMS, Letter, Fax or by calling the help desk.
- Once the case is logged, it is assigned to a user in the form of a task that needs to be resolved.
- Tasks can be re-assigned, and callers updated through email or SMS regarding the status of the case.
- While working on a task, users may consult a knowledge library that contains frequently asked questions and answers and other helpful information.
- Each user is greeted with an updated list of tasks when they log into the system.
- When a case is closed another SMS notifies the customer.
- After the case is closed customers can rate the service that they received by sending an SMS to the call centre.

A Case Management System is implemented successfully when;

- It is **easy to use, with logical step-by-step user interfaces,**
- **Easy to maintain with low overhead costs,** and
- **Supported by a capable team** that provides friendly, pro-active service.



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Login Screen

Login credentials are encrypted for optimal security.



Home Page / Task List

Task list and navigation updated dynamically for each individual user.

PROJECTS
 [Show | Hide | Logout ALL]
You're logged into: COMPLAINTS SYSTEM - DSSL
 Only project/s to which you have access are displayed.

MY TASKS Received Assigned

The following tasks have been logged against your name across all projects . Removing a task that you assigned to someone else will also remove it from that person's task list.

STATUS **PRIORITY**

<< Please Select >> << Please Select >> FILTER

TASK NAME	PRIORITY	STATUS	TASK ID	CREATED	OVERDUE IN	OVERDUE	RECEIVED FROM			
Firearm License	High	Pending	201226-CF8-38C	06 Feb 2012 12:14 PM			Super Administrator	view	edit	remove
Vehicle Stolen No Feedback	High	Pending	201227-343-56F	07 Feb 2012 10:10 AM			Super Administrator	view	edit	remove
Incomplete Documentation	Low	Pending	201223-8FF-2EB	03 Feb 2012 9:40 AM	30 minutes		Super Administrator	view	edit	remove

<>

NEW TASK







Case Register














List of cases, searchable by description, case number, agent or customer. Each case links to a correspondence register, listing all communications between the agent and customer on a case-by-case basis.

CASE REGISTER


This screen contains a list of cases

Agent:  Records found: 3  FILTER  SHOW ALL

 [Correspondence History | Case Audits](#)

TITLE	STATUS	REFERENCE ID	CUSTOMER	SMS	EMAIL	ID NUMBER	CREATED	CLOSE NOTIFICATION
<input type="radio"/> Vehicle Stolen No Feedback	Open	201227-F84-FD9	Nick				07 Feb 2012	 
<input type="radio"/> Firearm License	Open	201226-F99-A52	Jack Daniels			6303305112080	06 Feb 2012	 
<input type="radio"/> Incomplete Documentation	Closed	201223-56A-43C	Henco Schoeman			6303305112080	03 Feb 2012	  

1

 NEW CASE

Capturing a Case

While capturing information, users may also:

- Upload and link supporting documents.
- Send the item (Logged Case/Complaint) on a workflow path where it can be reviewed and updated by multiple users before sign-off.
- Notify users via SMS or Email when any data is updated or required.

Data fields are customised depending on client's requirements. Options in drop down lists can easily be updated without the need for programming.

EDIT CASE DETAILS

Use this screen to create new or edit an existing case

Case Title:

Description:

Reference ID:

CUSTOMER INFO

Customer Name:

ID Number:

Account Number:

Cell:

Fax:

Email:

Correspondence Method: Email Sms Phone Fax Letter

CASE INFORMATION

Case Type:

Source of Information:

Complaint Category:

Expected Resolution:

Status:

Resolved First Contact:

Case Created Date: Year / Month / Day

Overdue Date: If CASE not closed on this date, it will escalate to team manager

Year / Month / Day

Closed Date: Year / Month / Day

DOCUMENTS

Upload Documents: Title:

Create duplicate copy

Allocating a Case

Allocating a case to another employee.

WORKFLOW

W. O. R. K. F. L. O. W. M. A. N. A. G. E. R.

Select the names to whom you want to allocate this task. Only names added by yourself can be removed. When a name is removed the task is also removed from the person's tasklist.

(Search by name, id, or cell number)

Administrator Super

Max 25 names are displayed. If the name is not in the list, refine your search.

NOTIFY SELECTED PERSONNEL

Status: Status:
Pending


Priority:
High

Comment:

Task ID:: 201226-CF8-38C | [Edit/View Task](#)

Automated Notification to Agents

Agents are notified through email as soon as a new task is allocated to them.



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To Henco

The following workflow item has been allocated to you by **SUPER ADMINISTRATOR**; for resolution.

Please login and review all pending TASKS on your homepage;
<http://localhost:52759/HomePageExt/myLogin.aspx>

ITEM COMMENT:
[Please check the client's statement and check if amount was captured incorrectly](#)

TITLE
Deposit amount incorrect

REFERENCE ID
20111114-E79-608

CUSTOMER NAME
Henco Schoeman



Updating Workflow Tasks


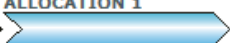
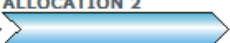
- A history of workflow allocations is maintained.
- Tasks can be prioritised while comments or instructions are logged with each update.
- Overdue tasks are flagged in the user's own task list.
- Call agents receive email alerts when new tasks are assigned to them. When they log into the system a list of un-resolved tasks, ordered by priority is displayed.
- Tasks can be re-assigned and a full audit history, including status, allocated to- and allocation date is recorded

EDIT TASK

Create new or update an existing task

Task Updated


WORKFLOW HISTORY

START	ALLOCATION 1	ALLOCATION 2
		
Date: 06 Feb 2012 Created By: Henco Schoeman	To: Super Administrator From: Super Administrator Received: 06 Feb 2012 Status: Pending	To: Henco Schoeman From: Super Administrator Received: 08 Mar 2012 Status: Re-assigned

Task Title:

Task Unique ID:
201226-CF8-38C

Description:

[VIEW TRACKED ITEM](#) 

Task Title:
Firearm License

VIEW TRACKED ITEM 

Task Unique ID:
201226-CF8-38C

Description:
Customer applied for fire arm license. No license has been allocated for 2 years.

Task Created On:
Mon, 06 Feb 2012 12:14 PM

W. O. R. K. F. L. O. W. M. A. N. A. G. E. R.

Select the names to whom you want to allocate this task. Only names added by yourself can be removed. When a name is removed the task is also removed from the person's tasklist.

 SEARCH

(Search by name, id, or cell number)

- Administrator Super
 - Schoeman Henco
- Max 25 names are displayed. If the name is not in the list, refine your search.

NOTIFY SELECTED PERSONNEL

Status: Status:
Re-assigned

Priority:
Medium

Comment:



Task ID:: 201226-CF8-38C | [Edit/View Task](#)

[Escalation time measured from the date/time when task was first created.]

Notify me if task not resolved in:

<< Please Select >>

-  DELETE TASK
-  ADD COMMENT
-  RETURN
-  SAVE TASK

COMMENT	COMMENT BY	DATE	
Please issue this client's license asap.	Super Administrator	06 Feb 2012	 delete
We've contacted the client to send through a copy of his ID. Please let us know when you receive the fax so that we can issue the license.	Super Administrator	08 Mar 2012	 delete



Sending SMS to Customer

Automated SMS notifications to clients when cases are opened or closed. Additional email and SMS messages can be sent and are all recorded in the correspondence register for future reference.

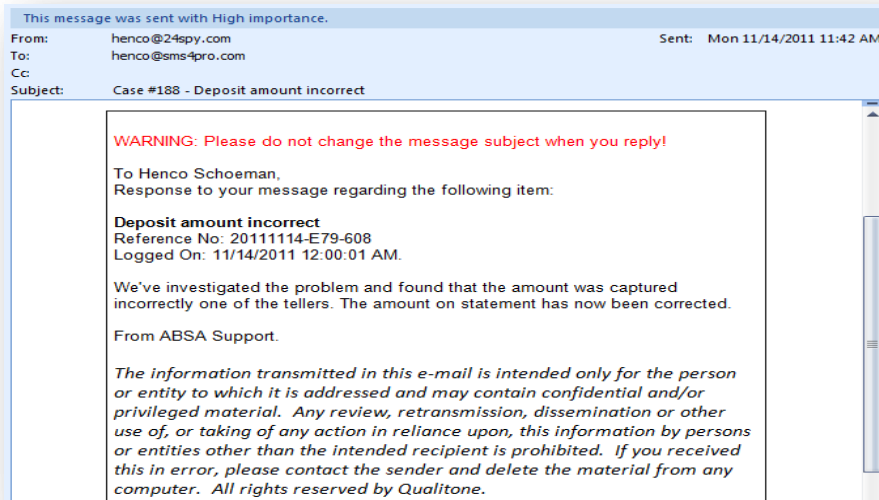
The screenshot shows the 'SEND SMS' interface in the STEPS Case Management system. The header includes the 'STEPS Case Management' logo and the ABSA logo with the tagline 'Today, tomorrow, together.' The user is logged in as 'Super Administrator'. The left sidebar contains a navigation menu with categories like HOME, ITEMS (Root), CASE INFORMATION, KNOWLEDGE LIBRARY, AUDIT QUESTIONNAIRES, WORKFLOW, and SECURITY. The main content area is titled 'SEND SMS' and contains instructions: 'Enter the receiver's number and a message, then click send. You have 160 prepaid SMS credits available.' Below this, there is a 'Number' field with the value '0839590911' and a 'Message' text area containing a pre-populated message: 'Dear Henco Schoeman. Case No: 20111114-E79-608 / Deposit amount incorrect. We are still busy investigating your complaint. We'll provide an answer soon.' A character count shows '157 of 160 Characters'. A note at the bottom states: 'When selecting names from a list the following people will be notified:'.

Sending Email to Customer

Templates for Email and SMS messages leads to faster reaction times. Messages are pre-populated with the receiver's name, Case ID, email address or phone number and other information that may be required.

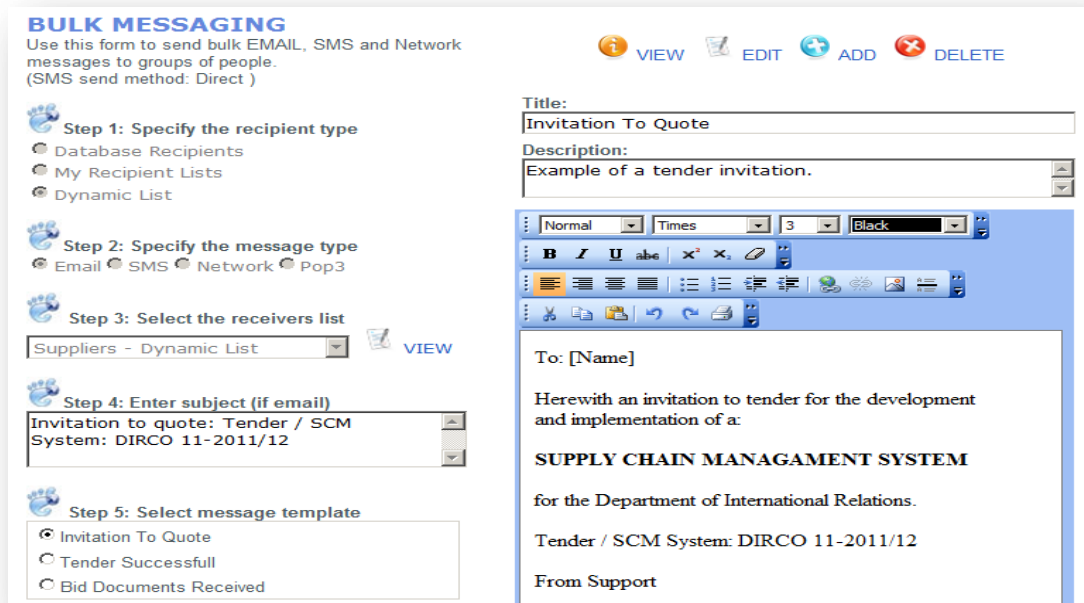
The screenshot shows the 'SEND EMAIL' interface in the STEPS Case Management system. The user is logged in as 'Super Administrator'. The left sidebar contains a navigation menu with categories like HOME, ITEMS (Root), CASE INFORMATION, KNOWLEDGE LIBRARY, AUDIT QUESTIONNAIRES, WORKFLOW, SECURITY, REPORTING, and COMMUNICATION. The main content area is titled 'SEND EMAIL' and contains instructions: 'Please fill out the required fields below and click 'SEND' to send your message.' Below this, there are fields for 'To: Henco Schoeman', 'Email: henco@sms4pro.com', and 'Subject: Case #188 - Deposit amount incorrect'. A 'Message' text area contains a pre-populated email template: 'WARNING: Please do not change the message subject when you reply! To Henco Schoeman, Response to your message regarding the following item: Deposit amount incorrect Reference No: 20111114-E79-608 Logged On: 11/14/2011 12:00:01 AM. We've investigated the problem and found that the amount was captured incorrectly one of the tellers. The amount on statement has now been corrected. From ABSA Support.' The interface also shows a rich text editor toolbar and a 'Design' button.

Incoming email messages can automatically be linked to existing cases by Integrating STEPS to the client's existing email system.



Bulk SMS and Email

automated alerts and notifications to stakeholders when additional information is required, updated or available for download. Users can extract names from the database, select the ones to notify, select a message template and send a personalized message.



Correspondence Audit Trail

With the new consumer legislation it is a requirement to track all communication between a call agent and the consumer. For each call logged, response messages are recorded in a correspondence register for auditing purposes.

Managers can view a list of messages sent between the agent and caller for each case during an investigation. Tracked messages may include Email, SMS, Letters, Faxes and Voice Recordings (if integrated with the phone system).

CORRESPONDENCE HISTORY

This screen contains a list of messages sent and received, including Email, SMS, Fax, Letters and Phone Recordings. You may search by sender, receiver or message content (E.g. case number).

FILTER


DATE	IN/OUT	MESSAGE/DOCUMENT	TO	FROM	TYPE	READ BY	VIEW DOC	EDIT	DELETE
03 Feb 2012	OUT	[VIEW MESSAGE] Dear Henco Schoeman. Case No: 201223-56A-43C / Incomplete Documentation. We received your address info and will send the information soon.	0839590911	35528	sms	Super Administrator			delete
03 Feb 2012	IN	FAX : Postal Address : 201223-56A-43C			fax	Super Administrator	DOC	edit	delete
03 Feb 2012	IN	PHONE : Postal Address (Request 2) : 201223-56A-43C			voice	Super Administrator		edit	delete
03 Feb 2012	IN	PHONE : Provide Postal Address : 201223-56A-43C			voice	Super Administrator		edit	delete
03 Feb 2012	OUT	[VIEW MESSAGE]	0839590911	35528	sms	Super Administrator			delete

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CANCEL

CUSTOMER CORRESPONDENCE

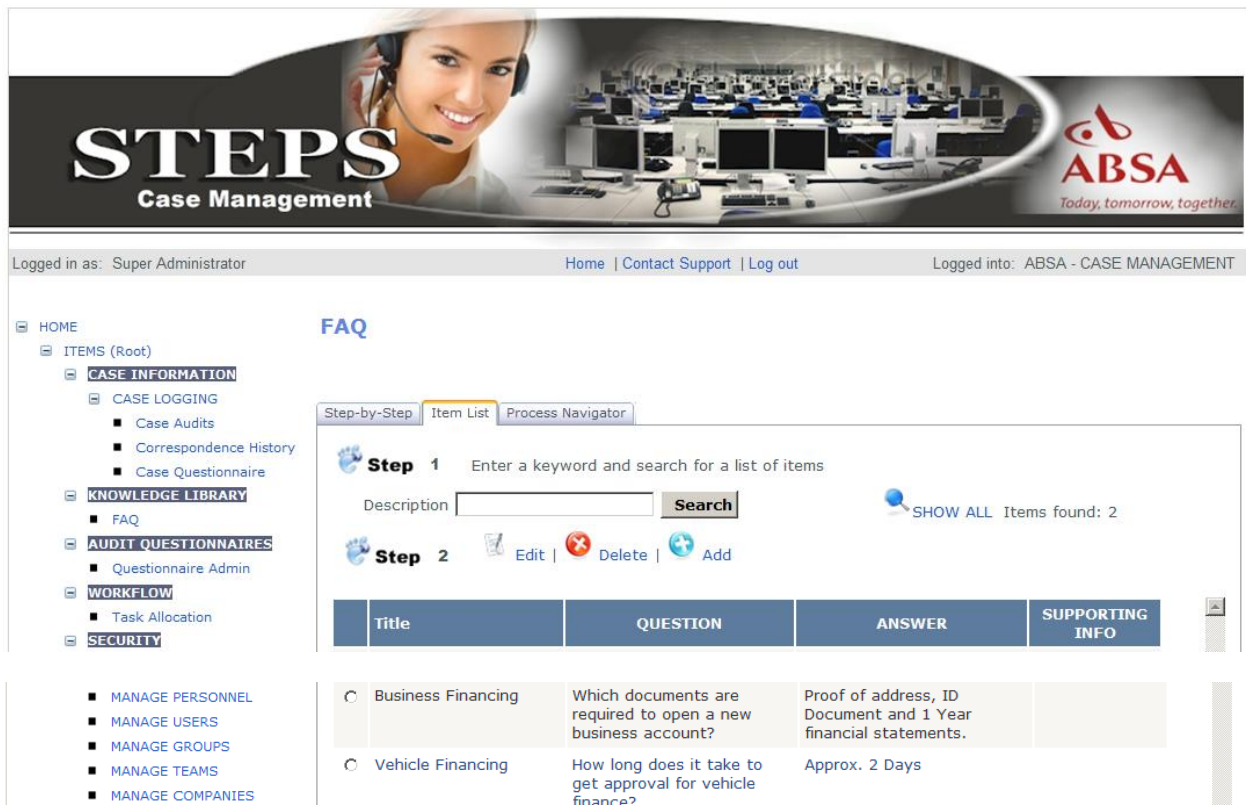
Send a message or upload a correspondence file (fax, letter, voice recording). Messages are linked to this item and stored for audit purposes.

Email Sms Phone Fax Letter 

[\[View Correspondence Items\]](#)

Knowledge Library

The knowledge library includes frequently asked questions and answers to help agents provide better support to the general public. The library is searchable and includes a document repository to upload additional information as well.



Logged in as: Super Administrator [Home](#) | [Contact Support](#) | [Log out](#) Logged into: ABSA - CASE MANAGEMENT

HOME

- ITEMS (Root)
 - CASE INFORMATION**
 - CASE LOGGING
 - Case Audits
 - Correspondence History
 - Case Questionnaire
 - KNOWLEDGE LIBRARY**
 - FAQ**
 - AUDIT QUESTIONNAIRES**
 - Questionnaire Admin
 - WORKFLOW**
 - Task Allocation
 - SECURITY**
- MANAGE PERSONNEL
- MANAGE USERS
- MANAGE GROUPS
- MANAGE TEAMS
- MANAGE COMPANIES

FAQ

Step-by-Step | Item List | Process Navigator

Step 1 Enter a keyword and search for a list of items

Description [SHOW ALL](#) Items found: 2

Step 2 Edit | Delete | Add

Title	QUESTION	ANSWER	SUPPORTING INFO
<input type="radio"/> Business Financing	Which documents are required to open a new business account?	Proof of address, ID Document and 1 Year financial statements.	
<input type="radio"/> Vehicle Financing	How long does it take to get approval for vehicle finance?	Approx. 2 Days	

Reporting

Reports are custom developed, categorised and access is limited to users that have the necessary access rights granted. Reports like the Number of cases logged over a period of time, A list of overdue cases, All correspondence linked to a particular case, Turnaround times for each step in the workflow, etc. can be created.

The system is capable of handling an unlimited number of reports.

CATEGORIES

[Add](#)
[Delete](#)
[Edit](#)

- Report Categories
 - Tracked Item Reports
 - Admin Reports
 - SMS Reports
 - SMS Messages Sent
 - Tell-a-Friend
 - Case Reports
 - Total Items
 - Case Info Report**
 - Tasks

REPORT CRITERIA

Chart Type: Column

CASE INFO REPORT

Display Name	Value
Account Number	<input type="text"/>
Case Type	<< Please Select >>
Source of Complaint	<< Please Select >>
Category	<< Please Select >>
Description	<input type="text"/>
Status	<< Please Select >>
Resolved First Contact	<input type="checkbox"/>

Report: TOTAL ITEMS

Project: STEPS GOVERNANCE PROJECT

Created On: Saturday, June 26, 2010 16h12

Filter Criteria:

Top Level Project: STEPS GOVERNANCE PROJECT

Governance Item: Document Register

Total Records: 8

[Export to Excel](#)
[Export to XML](#)
[Print](#)



Report: CASE INFO REPORT

Project: ABSA - CASE MANAGEMENT
Created On:
Monday, November 14, 2011 12h16

Filter Criteria:
Account Number:
Case Type: << Please Select >>
Source of Complaint: << Please Select >>
Category: << Please Select >>
Description:
Status: << Please Select >>
Resolved First Contact: no
Total Records: 8

Export to Excel Export to XML Print

TITLE	REFERENCE ID	CUSTOMER NAME	ACCOUNT NUMBER	CASE TYPE	SOURCE OF COMPLAINT	COMPLAINT CATEGORY	DESCRIPTION	STATUS	RESOLVED FIRST CONTACT	CASE CREATED DATE
Deposit amount incorrect	20111114-E79-608	Henco Schoeman	HJS 12345	Complaint	Customer	Business Banking	After making a deposit into business account on 10 November 2011, the amount on statement is incorrect. Please investigate.	Open	No	11/14/2011 12:00:01 AM
Autobank Not Working	20111112-518-F23	H Schoeman		Complaint	Customer	Business Banking	The autobank in Centurion, Lenchen	Closed	No	11/12/2011 12:00:01 AM

Security

Capturing user details, allocating to specific locations and resetting passwords.

- HOME
- ITEMS (Root)
 - MANAGE PATIENTS
 - Patients Search
 - Appointments Queue
 - Patients Queue AND Update [dr]
 - SECURITY
 - Manage Projects
 - Manage Groups
 - Manage Personnel
 - Manage Teams
 - Manage Users
 - Companies Database
 - REPORTING
 - Reports View
 - Reports Admin
 - DOCUMENT STORE
 - Document Register
 - SMS
 - Send SMS
 - LIVE VIDEO
 - Video Streaming
 - PUBLIC DOMAIN
 - COMMUNICATION
 - Send BULK Messages (TXT)
 - Info Pop Chat

USER DETAILS

This user will ONLY be visible in the 'STEPS GOVERNANCE' project.

QUESTIONNAIRE
DOCUMENT REGISTER

Add or Edit user details

First Name:

Title:

Cell No:

Role:

Location:

Surname:

Initials:

E-mail:

IN-visible in PARENT projects

Visible in CHILD projects

RESET PASSWORD
CANCEL
SAVE

ADDITIONAL INFORMATION

ID Number:

Gender:

Nationality:

S.A Citizen?

Date of Birth : Year / MM / DD

Marital Status:

Population Group:

Qualifications

Users only see the functionality to which access have been granted. The next screen is used to configure the Create, Read, Update and Archive permissions for groups of users.

- HOME
- ITEMS (Root)
 - MANAGE PATIENTS
 - Patients Search
 - Appointments Queue
 - Patients Queue AND Update [dr]
 - SECURITY
 - Manage Projects
 - Manage Groups
 - Manage Personnel
 - Manage Teams
 - Manage Users
 - Companies Database
 - REPORTING
 - Reports View
 - Reports Admin
 - DOCUMENT STORE
 - Document Register
 - SMS
 - Send SMS
 - LIVE VIDEO
 - Video Streaming
 - PUBLIC DOMAIN
 - COMMUNICATION
 - Send BULK Messages (TXT)
 - Info Pop Chat
 - SMS Messages

GROUP SYSTEM FUNCTIONS

This screen is used to set access permissions for groups to governance items or functional areas in the application

Group Name : **Administrators**

Functional Areas	Create	Read	Update	Archive	Admin
Application Form	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appointments Queue	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMMUNICATION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Companies Database	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Document Register	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DOCUMENT STORE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IN-BOUND SMS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Info Pop Chat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Info Pop Subscriptions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
INFO POPS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ITEMS (Root)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LIVE VIDEO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

CANCEL
SAVE



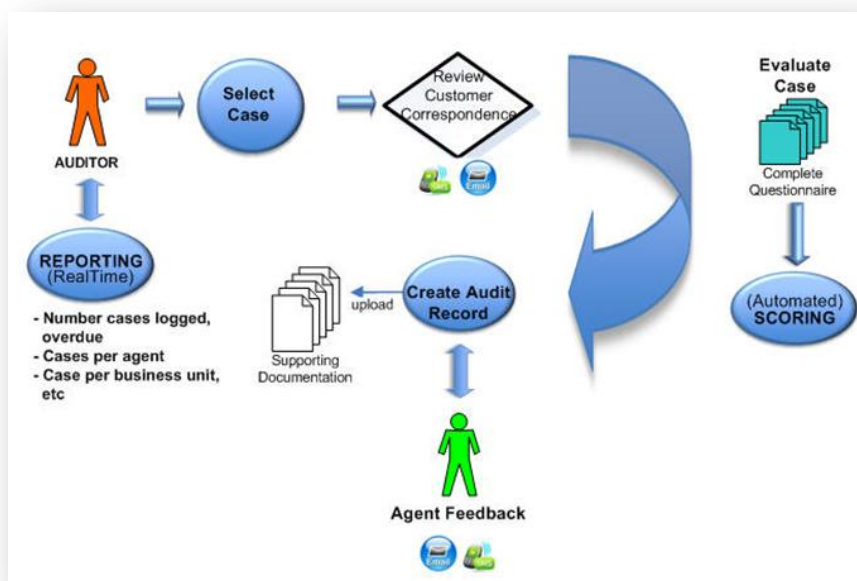
B. OPTIONAL MODULES

Case Auditing

Each case can be audited by reviewing incoming and outgoing correspondence and completing a questionnaire to evaluate the agent's interaction with customers. A customised scoring system provides valuable information during performance reviews.

By completing performance questionnaires for individual agents on a case-by-case basis, a fair performance evaluation can be conducted.

Performance questionnaires help to improve customer service and may also be used during performance reviews.



Auditing a Case

Supporting documentation can be uploaded and linked to individual cases and audits.

- HOME
- ITEMS (Root)
 - CASE INFORMATION
 - CASE LOGGING
 - Case Audits
 - Correspondence History
 - Case Questionnaire
 - KNOWLEDGE LIBRARY
 - FAQ
 - AUDIT QUESTIONNAIRES
 - Questionnaire Admin
 - WORKFLOW
 - Task Allocation
 - SECURITY
 - MANAGE PERSONNEL
 - MANAGE USERS
 - MANAGE GROUPS
 - MANAGE TEAMS
 - MANAGE COMPANIES
 - REPORTING
 - REPORTS VIEW
 - REPORTS ADMIN
 - COMMUNICATION
 - SCHEDULING
 - SEND SMS
 - SEND BULK SMS (TXT)

DEPOSIT AMOUNT INCORRECT :: CASE AUDITS

NOTE: Item linked under 'Deposit amount incorrect :: Case Audits' if NOT already linked elsewhere!


✖ CANCEL 📄 UPDATE

TITLE:

SUPPORTING DOCUMENTATION: Browse...

Save multiple documents 📄 Upload

CASE AUDIT: Save item before audit...




CORRESPONDENCE: Save item before send...

Email Sms Phone Fax Letter 📧 Send

[\[View Correspondence Items\]](#)

Audit Questionnaire

Questions can be presented through free type text boxes; drop down lists, multi-selects and other field types. Answers are linked to weighted scores and provide a balanced assessment of each agent's performance.



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THIS QUESTIONNAIRE EVALUATES THE PROCESS FOLLOWED BY HELP DESK AGENTS WHILE HANDLING CUSTOMER COMPLAINTS.

AGENT: Test Super User ID: Not Implemented Eval. Item: Deposit amount incorrect

DATE: 11/14/2011 CAPTURER: Super Administrator

Complaint Process Checklist

Select a user, then click refresh to load the saved questionnaire:

USER AUDITED:

🔄 REFRESH

SUBMISSION

In case of written complaints, was receipt of complaint acknowledged to the customer within SLA? Yes No

Did employees adhere to the correct call opening and closing script? Yes No

Did employees adhere to the correct holding and transferring procedure? Yes No

Did employees obtain and use customer name appropriately? Yes No

For call complaints, did employees follow security protocol for customer identification? Yes No

Did employees mention to the client that calls are recorded? Yes No

Did employees validate complaint details by repeating the information logged in the system? Yes No

LOGGING

Was the complaint logged with sufficient level of detail for complaint investigation and resolution? Yes No

Was the information captured with clear and appropriate use of language? Yes No

Was the complaint correctly categorized based on verbatim? Yes No



- ITEMS (Root)
 - CASE INFORMATION
 - CASE LOGGING
 - Case Audits
 - Correspondence History
 - Case Questionnaire
 - KNOWLEDGE LIBRARY
 - FAQ
 - AUDIT QUESTIONNAIRES
 - Questionnaire Admin
 - WORKFLOW
 - Task Allocation
 - SECURITY
 - MANAGE PERSONNEL
 - MANAGE USERS
 - MANAGE GROUPS
 - MANAGE TEAMS
 - MANAGE COMPANIES
 - REPORTING
 - REPORTS VIEW
 - REPORTS ADMIN
 - COMMUNICATION
 - SCHEDULING
 - SEND SMS
 - SEND BULK SMS (TXT)
 - SMS CONVERSATIONS
 - Framework Configuration
 - Personnel [Global]

QUESTIONNAIRE SCORING

This control page is used to check calculated scores after a questionnaire has been filled out for a particular profile. It contains a list of options together with required- and actual answers saved.

LEGEND

- Options marked in **green indicates a correct answer** was given and score will be applied.
- Options marked in **white indicates alternative answers that have not been selected.**
- An option marked in **red indicates the applicant has been disqualified.**

Selected Profile: **DEFAULT PROFILE**

OPTION DESCRIPTION	Required Answer	Actual Answer	Disqualified	Possible Score	Awarded Score
In case of written complaints, was receipt of complaint acknowledged to the customer within SLA?	Yes	Yes		3	3
	No			0	
Did employees adhere to the correct call opening and closing script?	Yes	Yes		1	1
	No			0	
Did employees adhere to the correct holding and transferring procedure?	Yes	Yes		1	1
	No			0	

[Split Screen]

Did employees mention to the client that calls are recorded?	Yes			1	
	No	No		0	0
Did employees validate complaint details by repeating the information logged in the system?	Yes	Yes		1	1
	No			0	
Was the complaint logged with sufficient level of detail for complaint investigation and resolution?	Yes	Yes		2	2
	No			0	
Was the information captured with clear and appropriate use of language?	Yes	Yes		1	1
	No			0	
Was the complaint correctly categorized based on verbatim?	Yes	Yes		2	2
	No			0	
Total score for the selected profile					12

Note: to change the score awarded for each option go to the option scoring page.



[BACK TO QUESTIONNAIRES](#)



[CLOSE WINDOW](#)



Check Lists

Used to verify that all the required steps are followed to resolve cases in a proper and efficient manner.

Incident and Risk Management

This module is used **for root cause analysis and resolution.**

For instance, in a Police Department;

During an audit, a monthly report may indicate that a number of cases are logged about "...the time it takes police to arrive on the scene after an incident." The report indicates it happens regularly at three police stations.

If a trend is picked up, indicating something fundamentally wrong within an organisation's processes or procedures one may have to take corrective action to avoid future problems of a similar nature.

With this module specific *INCIDENTS* are logged.

Each incident leads to an *INVESTIGATION* where the root cause of the problem is established. *(In the above example the root cause may be that a number of vehicles have broken down and officers cannot respond to a call until a working vehicle becomes available).*

Following the investigation, a *RECOMMENDATION* explaining how the problem should be resolved is logged and allocated to each police station through a 'TASK' assignment.

TASKS are then tracked to ensure they are fully implemented at each police station.

The main goal of this module is to maintain a full audit history of how incidents are resolved and to avoid future occurrences of the same problem.



Report Scheduling- Email/SMS

With the scheduling tool users can set reminders and send scheduled reports through email or to any mobile device.

MESSAGE SCHEDULER

This form is used to schedule repeat messages for delivery to individual or multiple users.

DATE & TIME
STEP 1:
Set the delivery date/time for your message.

March 2012						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

HOURLY: HOUR h MIN/S MIN/S

INTERVAL:
Once-off

MESSAGES ALREADY SENT: **0**

NUMBER MESSAGES SCHEDULED:

MESSAGE SETTINGS
STEP 2: Choose the message type to schedule.

Email SMS Network

[RESET](#) [CANCEL](#)

STEP 3: Enter receiver/s information.
Receiver No: << Please Select >>
IP / Shared Folder: << Please Select >>
Receiver Email: << Please Select >>

STEP 4: Email attachment, e.g. c:\file.txt (optional).

 Select to bypass proxy server when reading URL.

STEP 5: Email subject:

STEP 6: Stored procedure to read, URL to execute OR Txt file to read BEFORE sending the message.

STEP 7: Message:

Paragraph | Font | Size | Color | **B** | *I* | U | ABC | x² | x₂ |



Document Register

A document management system that is searchable by keywords, document title and author is linked to the case register.

DOCUMENT REGISTER

You may filter documents by; Title, Description, Keyword, Author or Version

Records found: 4

 FILTER | SHOW ALL

TITLE	DOCUMENT	AUTHOR	VERSION	UPDATED BY	UPDATED		
Explosion Photo		Henco Schoeman	1	Super Administrator	03 Feb 2012		
PHONE : Provide Postal Address : 201223-56A-43C				Super Administrator	03 Feb 2012		
PHONE : Postal Address (Request 2) : 201223-56A-43C				Super Administrator	03 Feb 2012		
FAX : Postal Address : 201223-56A-43C		From client		Super Administrator	03 Feb 2012		

1


ADD DOCUMENT

Appointment Calendar

The appointment calendar is used to schedule meetings and remind colleagues through SMS alerts when they need to attend.

STEPS

Case Management



Today, tomorrow, together.

Logged in as: Super Administrator
[Home](#) | [Contact us](#) | [Log out](#)
Logged into: Head Office

November 2011

30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

Step 1: SELECT LANGUAGE

Eng Afr

Monday, November 21, 2011

[\[PREVIOUS\]](#) [←](#) [TODAY](#) [→](#) [\[NEXT\]](#)

DIARY:

This is an evaluation version of [WebPlanner](#) and is not for production use. To purchase a license, please go to the [TMS Software Sales page](#).

	Doctor 1	Doctor 2	Doctor 3
6:00 AM			
6:15 AM			
6:30 AM			
6:45 AM			
7:00 AM			
7:15 AM			
7:30 AM			
7:45 AM			
8:00 AM			
8:15 AM			
8:30 AM			
8:45 AM			
9:00 AM			
9:15 AM			
9:30 AM			
9:45 AM			

Step 2: SELECT TEMPLATE

Reminder

SELECTED MESSAGE:
 Dear *Name*, you have an appointment *DateTime* with *Sender*. Send OK to 35528 or phone 012-6633510 to cancel.
 R3

You have
 155
 credits.

Step 3: SEND MESSAGE

ALL >

Event Drop Box::
 Drag appointments here to move to a different date calendar.



Field Agent Tracking


Used to track agents, drivers and sales personnel on their cell phones while they're on the move.

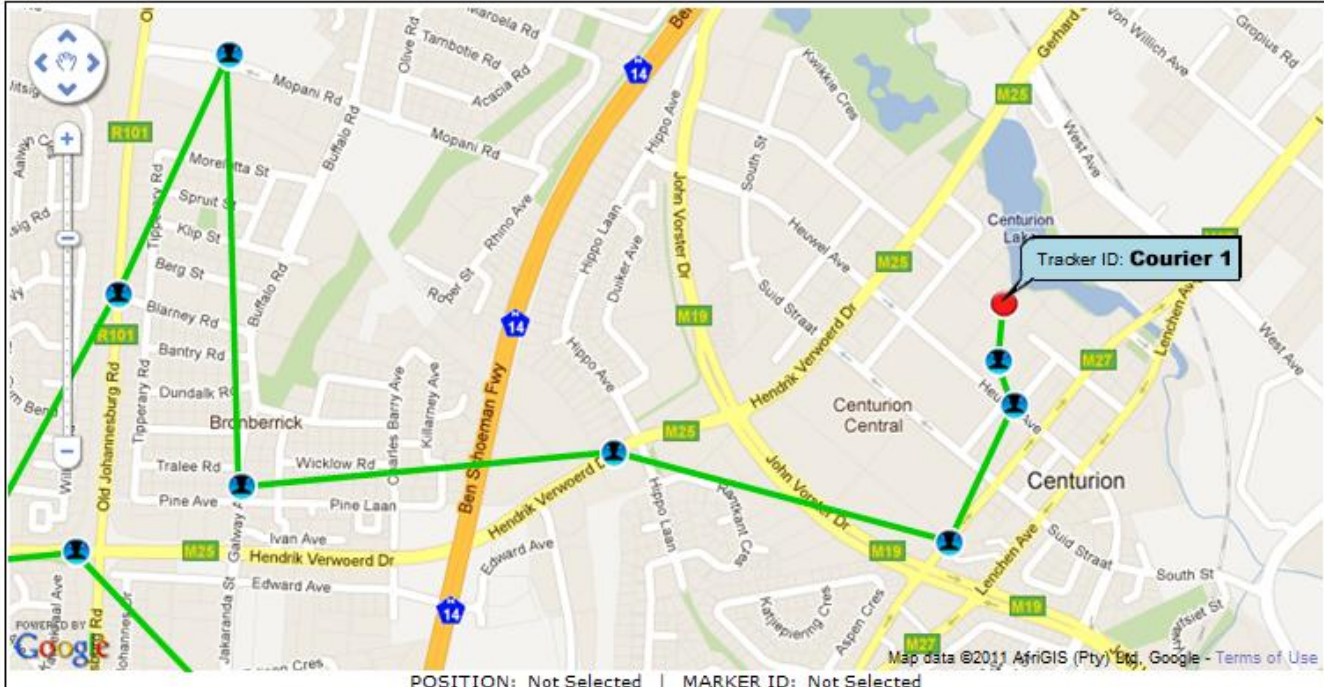
Map Type: Normal Satellite Hybrid

Date: Today Yesterday

Tracked ID: Courier 1 **Last Updated:** Wed, 07 Dec 2011 12:00 AM

Enable Live Updates
 Enable Street View








POSITION: Not Selected | MARKER ID: Not Selected

STEPS
Governance Framework
Achieve the highest level, step-by-step

MARKER DESCRIPTION:

 SAVE  DELETE
 CLOSE WINDOW

For More Information, Contact

Henco Schoeman

Technical Director: Qualitone Software Solutions

www.stepsdatabase.com

www.sms4pro.com

International: +2783 959 0911

Local: 083 959 0911

Fax: 0866 019 617

Email: henco@sms4pro.com

