



Sales Automation



Marketing Automation



Digital CX Automation



Insights & Analytics



Artificial Intelligence & Robotics



# UNFYD<sup>®</sup> COMPASS

## Knowledge Portal MX/SX/CX

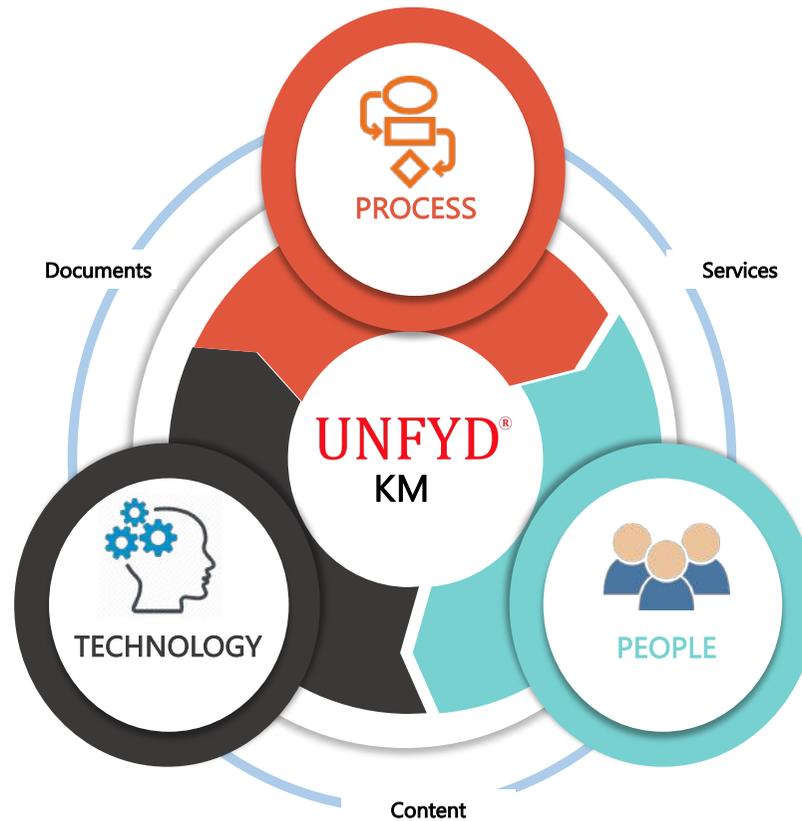


Social Media | Messengers | Chat Apps | Website | Web App | Mobile App | IoT

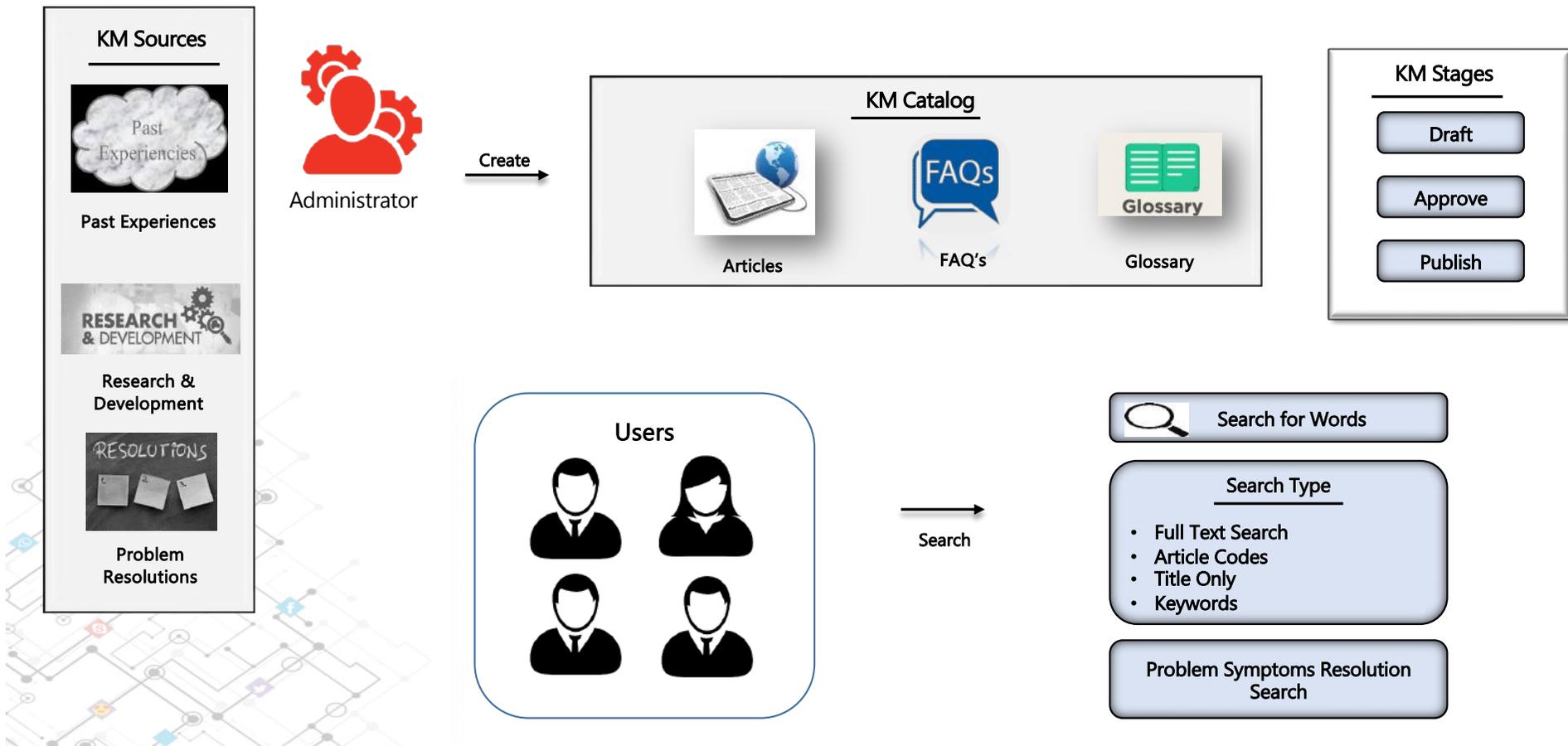


Devices

# Knowledge Management



# Knowledge Management Portal



# Knowledge Base – Articles & FAQ



Article

Category	Article Code	Article Title	Suggested By	Created By	Created On	Rating
KnowledgeBase	ART12	Blogs	Admin Delaware	Admin Delaware	11/15/2013	6
Administrator	ART17	Functional Info	Admin Florida	Admin Florida	12/27/2013	6
Repository	ART9	Journals	Elegant	chazin	11/14/2013	9
Depot Third party Insurance	ART31	Administrator	Admin Florida	Admin Florida	03/25/2014	NA

Field Agent  
ContractManager  
Sales Coordinator  
CSR

KnowledgeBase >> Explore >> FAQ's

FAQ's

Category	Index
FAQ	Q: Will insurance help my beneficiary pay off my debt? A: Once a claim is paid, use of the funds is at the discretion of the beneficiary you've designated. Suggested By: Daniel Clarke Created On: 09/26/2013
Administrator	Q: How long does approval take? A: Depending on the type of insurance and the steps involved, it may take as little as several days or as much as several weeks for a policy to be approved. Suggested By: Michelle Clarke Created On: 09/26/2015

+ Add



# Approve & Publishing Article



The screenshot shows the 'Approve Article' dialog box in the UNFYD KM system. The dialog is titled 'Approve Article' and has a breadcrumb path: 'KnowledgeBase >> Manage >> ArticleCatalog >> Approve'. It contains a 'Manage Article' form with the following fields:

Article Title *	KnowledgeBase	Article Keywords *	KnowledgeBase
Article Type	Info	Article Category	Administrator
Valid From *	11/18/2016	Valid Till *	11/30/2016
Synopsis *	KnowledgeBase		

Below the form, there are sections for 'Related Articles' (with a 'Select' dropdown) and 'Related Attachments' (with a link to 'logins.txt'). At the bottom of the dialog are 'Save' and 'Cancel' buttons. The background shows the main application interface with a navigation menu on the left and a top header with user information and date.

# Knowledge Management – Glossary View



**Glossary**

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Enter Text

**Title :** GlossI **Created On:** 11/15/2013

Tell me the Admin Functions

**Title :** Admi

Administrator

**Article**

KnowledgeBase >> Explore >> Glossary >> View

Email Article Print Article

**Article Information**

<b>Article Title</b>	Functional Info	<b>Article Keywords</b>	f
<b>Article Type</b>	Glossary	<b>Article Category</b>	Administrator
<b>Created on</b>	12/27/2013	<b>Last Modified on</b>	03/25/2014
<b>Valid From</b>	03/25/2014	<b>Valid To</b>	12/31/2015
<b>Suggested By</b>	Admin Florida	<b>Created By</b>	Admin Florida
<b>Description</b>	na		

**Related Articles**

[FAQ2](#) [FAQ1](#)

**Related Attachments**

No Attachments

**Rate Article** My Previous Ratings

**Relevancy**  **Useful & Informative**

**Easy to Read**



# Article Creation



Administrator admin 18 August 2017 Home Profile Help

UNFYD<sup>®</sup> KM

Explore

Manage

- Category
- Article Catalog
- Create Article
- Create FAQ's
- Create Glossary
- Recent Article

Questions

Notification

Search

Reports

An Enterprise Solution From DEB

**New Article**

KnowledgeBase >> Manage >> Create Article

**Manage Article**

Article Type *	Info ▼	Article Title *	<input type="text"/>
Article Category *	Select ▼	Article Keywords *	<input type="text"/>
Valid From *	08/18/2017 <input type="calendar"/>	Valid Till *	<input type="calendar"/>
Synopsis *	<input type="text"/>		

**Related Articles**

Select ▼

**Attachments** ( The file size should be less than 2 MB )

No file chosen

Security Analytics PM

Search

Modified Date	Status
	DRAFT
	Expired

# FAQ Creation



Administrator admin 18 August 2017 Home Profile Help

UNFYD<sup>®</sup> KM

Explore

- Article
- FAQ**
- Glossary

Manage

- Questions
- Notification
- Search
- Reports

KnowledgeBase >> Manage >> Create FAQ

### Create FAQ

Manage Article

Article Type *	FAQ	Article Title *	
Article Category *	Select	Article Keywords *	
Valid From *	08/18/2017	Valid Till *	
Question *			
Answer *			
Suggestion			

Save Cancel

+ Add

An Enterprise Solution From DES



# Glossary Creation



The screenshot displays a web application interface for creating a glossary. The main window is titled "Create Glossary" and is part of a "KnowledgeBase >> Manage >> Create Glossary" path. The form is divided into several sections:

- Manage Article:** This section contains several required fields (marked with a red asterisk):
  - Article Type:** A dropdown menu with "Glossary" selected.
  - Article Category:** A dropdown menu with "Select" selected.
  - Article Title:** A text input field.
  - Article Keywords:** A text input field.
  - Valid From:** A date picker with "08/18/2017" selected.
  - Valid Till:** A date picker.
- Description:** A large text area for entering the article's description.
- Related Articles:** A section with a "Select" dropdown menu and a plus icon to add related articles.
- Attachments:** A section with a note "( The file size should be less than 2 MB )" and a "Choose file" button with "No file chosen" text.

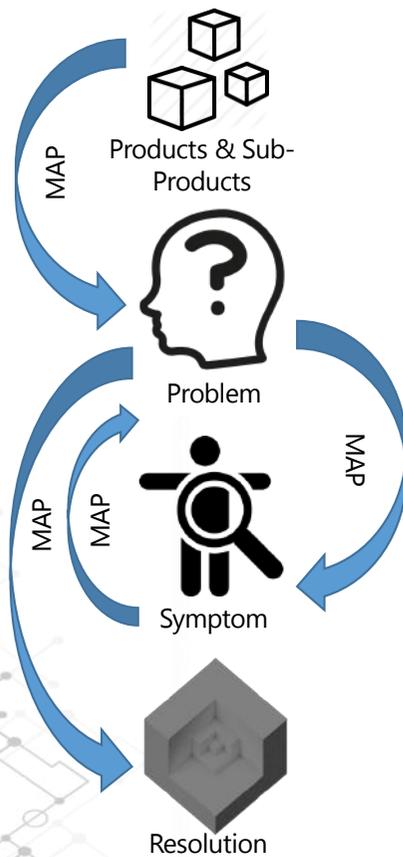
At the bottom of the form, there are "Save" and "Cancel" buttons. The background interface includes a navigation menu on the left with options like "Explore", "Manage", "Questions", "Notification", "Search", and "Reports". The top of the page shows the user "Administrator admin" and the date "18 August 2017".

# Framework - Problem-Symptom-Resolution

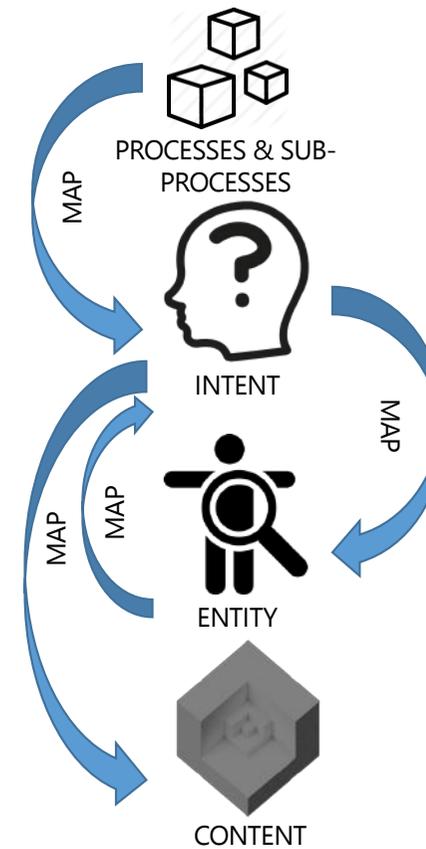


## Current & Customization

### Currently - Field Service Management



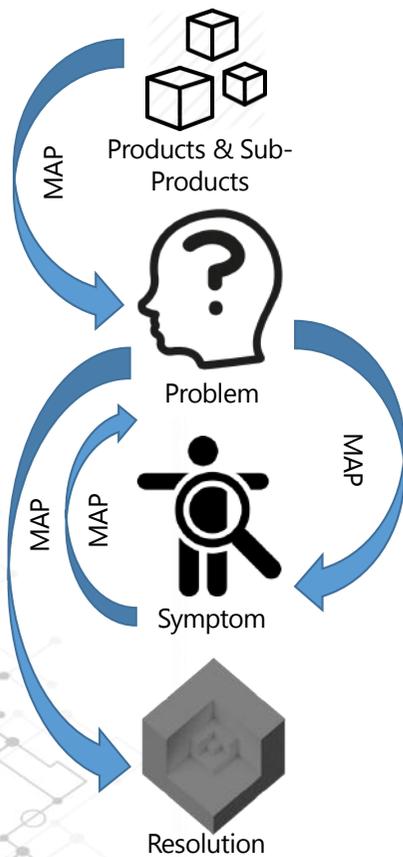
### Customer Service Management (Customization)



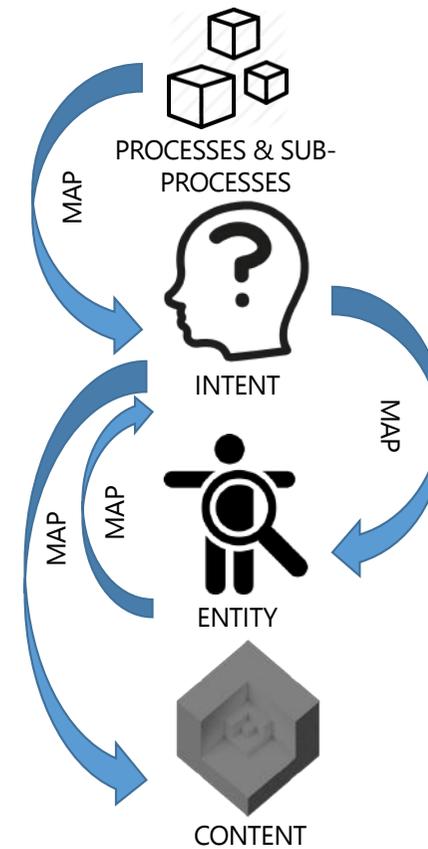
# Framework - Problem-Symptom-Resolution



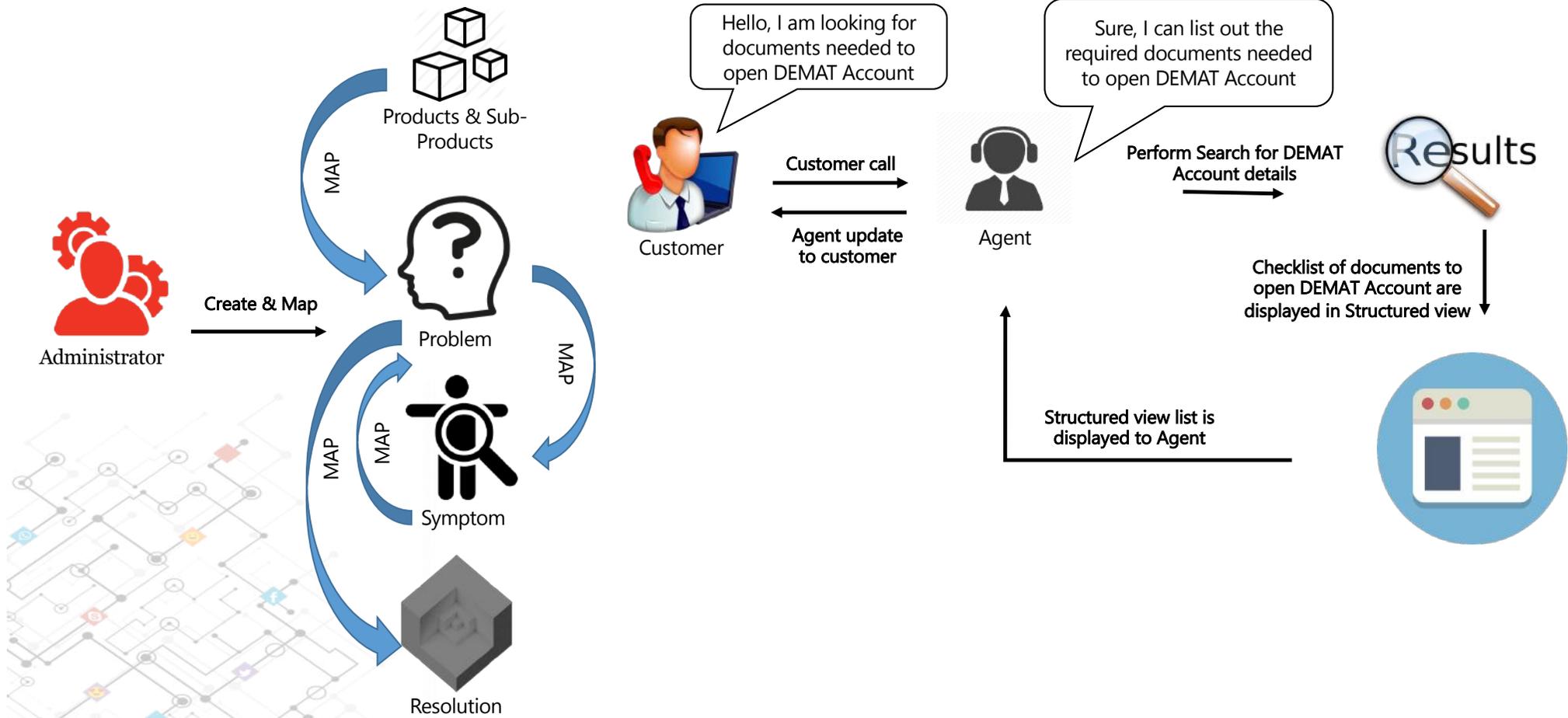
Currently - Field Service Management



Customer Service Management  
(Customization)



# Problem-Symptom-Resolution-Ideal Scenario



# Product – Problem Mapping



List	Product	Problem
1	Car Insurance	Need car insurance for 3 years with low/High premium
2	Travel Insurance	Add-on's to Travel insurance policy
3	Health Insurance	Change of Policy Vendor
4	Health Insurance	Cancellation Policy
5	Travel Insurance	Need Travel insurance with low/H
6	Car Insurance	Change of Policy Vendor
7	Travel Insurance	Change of Policy Vendor

**Add ProductProblems**

Administrator >> Knowledge Base >> Mappings >> Product-Problems >> Add

**Product Details**

Product: Group [v] Car Insurance [v]

**Problems**

Need car insurance for 3 years with low/High premi  
Add-on's to policy  
Cancellation Policy  
Need Health insurance with low/High premium  
Add-on's to Health insurance policy  
CChange of Policy Vendor  
Need Travel insurance with low/High premium  
Add-on's to Travel insurance policy  
Add-on's to Travel insurance policy

Change of Policy Vendor

Save Cancel



# Problem – Symptom Mapping

Product-Problems Problems-Symptoms Problems-Services Products-Documents

Problem  Symptom

List	Problem	Symptom
1	Need car insurance for 3 years with low/High premium	Need Car insurance
2	Add-on's to policy	Need Customization
3	Change of Policy Vendor	
4	Cancellation Policy	
5	Need Health insurance with low/High premium	
6	Add-on's to Health insurance policy	
7	Change of Policy Vendor	
8	Need Travel insurance with low/High premium	
9	Add-on's to Travel insurance policy	
10	Add-on's to Travel insurance policy	

**Add ProblemSymptoms**

Administrator >> Knowledge Base >> Mappings >> Problem-Symptom >> Add

**Problem Details**

Problem \* Need car insurance

Symptom

Need Car insurance  
Change of Policy Vendor  
Twisted brake Shoes  
Need Health insurance  
Need Travel insurance  
Need Customization  
Twisted brake Shoes

Need Customization

# Problem – Resolution Mapping



Product-Problems Problems-Symptoms Problems-Services Products- Documents

Products Select

List	Document Code	Document	Mapped At
1	ITEM0001	Health Insurance Documents	Group
2	ITEM0002	Travel Insurance Documents	Group
3	ITEM0003	Car Insurance Documents	
4	ITEM0004	Health Insurance Documents	
5	ITEM0005	Health Insurance Documents	
6	ITEM0006	Travel Insurance Documents	

+ Add

**Add ProductSpares**

Administrator >> Knowledge Base >> Mappings >> Product- Documents >> Add

**Product Details**

Product \* Group Bajaz Allianz Genera

**Spare Part \***

Health Insurance  
Travel Insurance  
Health Insurance  
Policy Documents  
Chips  
Driver's License  
Sockets  
Switches

Car Insurance

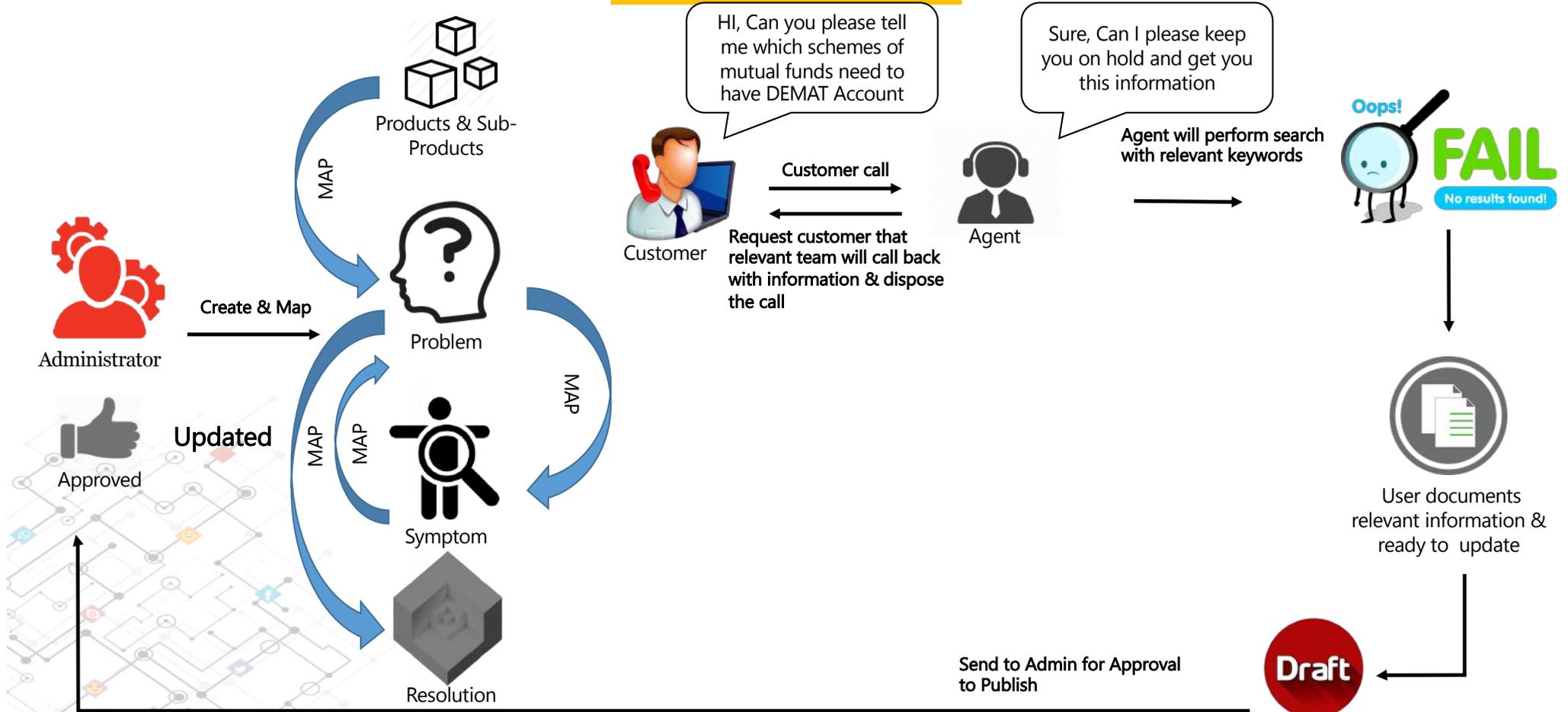
> >> < <<

Save Cancel

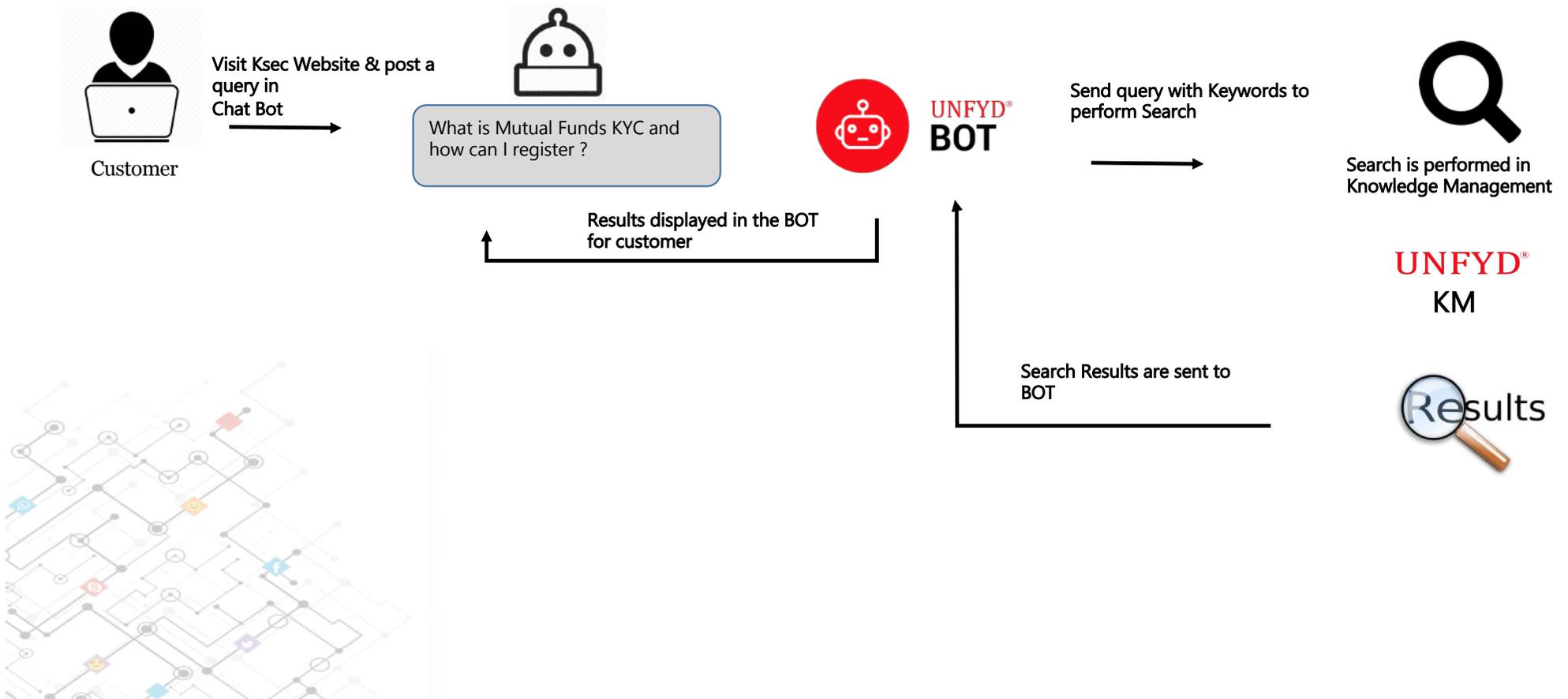


# Problem-Symptom-Resolution

## Exceptional Scenario



# Knowledge Management & UNFYD<sup>®</sup> BOT



# Administrator Activities



Administrator

## Service Operations

- Organisation Structure
- Domains
- Service Areas
- Products
- Sub-Products
- Processes
- Sub-Processes

## Knowledge Base

- Problem
- Symptoms
- Resolutions
- Skills
- Services
- Service Activities
- Mappings

## Resource Management

- Agents
- Agents Information
- Teams
- Roles
- Shift Assignments
- Activity Preferences
- Domain Transfers

# Admin – Organisation Unit



Administrator admin 29 August 2017 Home Profile Help

UNFYD<sup>®</sup> KM

Contract Inventory Depot Repair Dispatcher Administrator Service Engineer Contact Center Knowledge Base Security Analytics PM

Service Operations

Organization Units  
Zip Codes  
Service Areas  
Domains  
Product Info  
Service Info  
Holidays  
Breaks  
Shifts  
Account Types  
Standard Activities  
Article Category

Knowledge Base  
Resource Management  
Configurations  
Scheduling Admin  
Contract Settings

Administrator >> Service Operations >> Organization Units

Organization Units

Organization Select

List	Organization Code	Organization	Parent Organization
1	ORG0008	Asus World	Dell Inc
2	ORG0009	Dell Inc	Laptop Repair World
3	ORG0006	HP World	Mabood Electronics
4	ORG0001	Laptop Repair World	-NA-
5	ORG0002	Laptop World Private Limited	Laptop Repair World
6	ORG0004	Lenovo Service Center	S.S Technologies
7	ORG0005	Mabood Electronics	Laptop Repair World
8	ORG0007	PioneerElabs	HP World
9	ORG0003	S.S Technologies	Laptop World Private Limited

+ Add    ✎ Modify    🗑 Delete

An end-to-end Service Function Management Solution

# Admin – Create Organisation Unit



Administrator admin 29 August 2017 Home Profile Help

UNFYD<sup>®</sup> KM

**Add Organization Unit**

LSI Number		LSI Number	
<b>Communication Details</b>			
Address1 *	<input type="text"/>	Address2	<input type="text"/>
City *	<input type="text"/>	State *	<input type="text"/>
Zip Code *	<input type="text"/>	Country *	Select country ▼
Phone *	<input type="text"/>	Phone 2	<input type="text"/>
Fax	<input type="text"/>	Fax 2	<input type="text"/>
Mobile	<input type="text"/>	E-mail *	<input type="text"/>
<b>Contact Person Details</b>			
Salutation	Mr. ▼	First Name *	<input type="text"/>
Middle Name	<input type="text"/>	Last Name *	<input type="text"/>
Designation	<input type="text"/>	Business Phone *	<input type="text"/>
Alt. Phone	<input type="text"/>	Mobile	<input type="text"/>
Fax	<input type="text"/>	E-mail	<input type="text"/>

Save Cancel

Service Operations

- Organization Units
- Zip Codes
- Service Areas
- Domains
- Product Info
- Service Info
- Holidays
- Breaks
- Shifts
- Account Types
- Standard Activities
- Article Category

Knowledge Base

Resource Management

Configurations

Scheduling Admin

Contract Settings

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Service

# Admin – Resource Management



Admin Mumbai 07 July 2017 Home | Profiles | Help

UNFYD<sup>®</sup> KM

Contract Inventory Depot Repair Dispatcher Administrator Service Engineer Contact Center Knowledge Base Security Analytics PM

Service Operations  
Knowledge Base  
**Resource Management**  
SE Info  
Shift Assignment  
SE Preferences  
Domain Transfers  
Configurations  
Scheduling Admin  
Contract Settings  
Inventory Settings

Administrator >> ResourceMgmt >> SE Info >> Personal Info

Personal Info Address Shifts Skills Start From Leave Change Password

Service Engineer  Search

List	SE Code	Service Engineer	EffectiveFrom	EffectiveTo	Reporting To	Status
1	Rishabh	Rishabh Agarwal	11/13/2015	03/11/2020	Admin	Active
2	Anurag	Anurag Doshi	11/13/2015	03/11/2020	Admin	Active
3	Nikhil	Nikhil Gupta	12/04/2015	03/11/2020	Admin	Active
4	Rakesh	Rakesh Mehta	12/04/2015	02/26/2020	Admin	Active
5	Varun	Varun Rathod	01/19/2016	01/24/2020	Admin	Active
6	Anjan	Anjan Gosh	12/04/2015	02/26/2020	Admin	Active
7	Anupam	Anupam Tripathi	01/19/2016	01/24/2020	Admin	Active
8	Sumeet	Sumeet Dubey	01/04/2015	02/26/2020	Admin	Active
9	Akshay	Akshay Jaishwal	01/19/2016	01/24/2020	Admin	Active

+ Add [pencil icon] Modify [power icon] Inactive

An end-to-end Service Function Management Solution Service 360

# Agent Activities



Users/Agents

Login with Active Directory  
Credentials

- Articles
- FAQ's
- Glossary



Create



Update



Delete



Rate



Email



Print



Search



Sort





# KB – Search

Administrator admin 29 August 2017 Home Profile Help

UNFYD<sup>®</sup> KM

Contract Inventory Depot Repair Dispatcher Administrator Service Engineer Contact Center Knowledge Base Security Analytics PM

KnowledgeBase >> Search >> Search

### Search

**Advanced Search**

Search for word(s) \*

Search Type Full Text

Values All of the words ente

Created Anytime

Article Category \*

Contract  
Inventory

**Article Type(s) \***

<input type="checkbox"/> Info	<input type="checkbox"/> Bugs	<input type="checkbox"/> Problem-Symptom-Resolution
<input type="checkbox"/> FAQ's	<input type="checkbox"/> Release	<input type="checkbox"/> Glossary

Search Reset

An end-to-end Service Function Management Solution Service Source



# KB – Search Results

Administrator admin 29 August 2017 Home Profile Help

UNFYD® KM

Contract Inventory Depot Repair Dispatcher Administrator Service Engineer Contact Center Knowledge Base Security Analytics PM

Explore

- Article
- FAQ
- Glossary

Manage

Questions

Notification

Search

Reports

KnowledgeBase >> Search >> Search >> Result

**Consumer**

A person who buys goods or services but not as part of their business A company can be a consumer for contracts not related to its business especially for goods or services it buys for its employees

Category- Contract Rating - 8 Last Modified Date - 11/04/2016

**Administrator Tasks**

Service 365 Administrator will define the service related information, organisation objectives, business policies

Category- Administrator Rating - NA Last Modified Date - 08/29/2017

**Administrator**

Service Administrator module acts as a Centralized Repository of the information related to the Service Organization

Category- Administrator Rating - 8 Last Modified Date - 08/17/2016

**Contract Management**

Contract management is the process which ensures that both parties to a contract fully meet their respective obligations as efficiently and effectively as possible, in order to deliver the business and operational objectives required from the contract and in particular to provide value for money It is an integral part of the informed customer capability

Category- Contract Rating - NA Last Modified Date - 11/04/2016

Back

An end-to-end Service Function Management Solution Service

# KB – View Search Results



The screenshot displays a web application interface for viewing search results in a KnowledgeBase. The main window is titled "View" and shows the path "KnowledgeBase >> Search >> Search >> Result >> Article". The article is titled "Administrator Tasks" and is categorized as "Info". It was created on 08/29/2017 and is valid until 08/31/2017. The article is suggested by "Administrator admin". The synopsis states: "Service 365 Administrator will define the service related information, organisation objectives, business policies". There are no related articles or attachments. The article has a rating of "My Previous Ratings" and is marked as "Useful & Informative". The interface includes a sidebar with navigation options like "Explore", "Manage", "Questions", "Notification", "Search", and "Reports". The top navigation bar shows the user "Administrator admin" and the date "29 August 2017". The bottom of the page features the text "An end-to-end Service Function Management Solution" and the "Service" logo.

Article Information			
Article Title	Administrator Tasks	Article Keywords	Tasks
Article Type	Info	Article Category	Administrator
Created on	08/29/2017	Last Modified on	08/29/2017
Valid From	08/29/2017	Valid To	08/31/2017
Suggested By	Administrator admin	Created By	Administrator admin
Synopsis Service 365 Administrator will define the service related information, organisation objectives, business policies			
Related Articles			
Administrator			
Related Attachments			
No Attachments			
Rate Article	My Previous Ratings		
Relevancy	Select	Useful & Informative	Select
Easy to Read	Select		

# KB – View Search Results



Administrator admin 29 August 2017 Home Profile Help

UNFYD® KM

Explore

- Article
- FAQ
- Glossary

Manage

Questions

Notification

Search

Reports

**View**

<b>Suggested By</b>	Administrator admin	<b>Created By</b>	Administrator admin
<b>Synopsis</b>	Service 365 Administrator will define the service related information, organisation objectives, business policies		
<b>Related Articles</b>			
<b>Administrator</b>			
<b>Related Attachments</b>			
No Attachments			
<b>Rate Article</b>	My Previous Ratings 🗲		
<b>Relevancy</b>	Select ▼	<b>Useful &amp; Informative</b>	Select ▼
<b>Easy to Read</b>	Select ▼		
<b>Suggestions/Comments</b>			
<input type="text"/>			
<b>Overall Rating (1-10) *</b>	★★★★★★★★		
<b>Subscribe Article</b>			
<input type="checkbox"/> Do you want to Subscribe to this article? Any update regarding this article will be alerted to you.			

Save Close

An end-to-end Service Function Management Solution Service Sana





# Smart Connect

Innovate | Transform | Enterprise

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Thank  
you



Srikanth SESH

Talk: +91 9819712091

[sriksesh@unfyd.com](mailto:sriksesh@unfyd.com)

 sriksesh / unfydcompass