



Sales Automation



Marketing Automation



Digital CX Automation



Insights & Analytics



Artificial Intelligence & Robotics



UNFYD[®] COMPASS

Overview & Snapshots



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



Devices



The Business Problem



No **Accountability** & **Traceability**



Duplication of Efforts



Ineffective **Communication**



Participation & **Collaboration** of Internal Teams & Partners

Disconnected Systems & Complex **Integrations**



Unable to **Track**



Long **Resolution** Time & **Lost** Issues



Agent **Skills** & **Productivity**



Inception of **Digital** & **Social** Communication Channels



Lack of **Visibility**



Dynamic Business Operations

Difficult to **Measure**

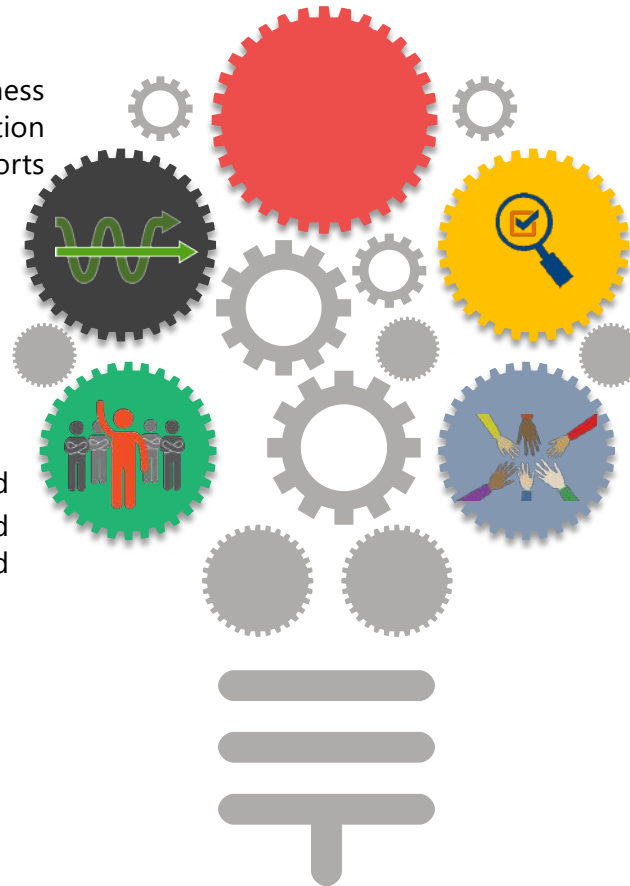




The Solution – UNFYD® LINK

01

Streamline business process & reduce duplication of efforts



02

Visibility by providing the Stakeholders a common view to understand the context of their participation

03

Accountability and tracking for people and groups involved

04

Collaboration by providing a common thread for tracking communications and workflow to get everyone on the same page



UNFYD® LINK - Snapshot



Snapshot

- Bring the power of collaboration to business process
- Build relationships with customers, not messages
- Involve the right person at the right time
- Bring everyone together – Teams, Customers, Partners, Suppliers...
- Track the processes and interactions in a common dialogue
- Ensure Service Levels across business attributes
- Workflow based, business rule driven interaction management system
- Communicate through various digital channels
- Build a strong knowledge base to improve agent skills & productivity
- Customize the business processes at any time through configurations



Features

Platform

01

- + Client Management – Accounts & Contacts
- + Partner/Vendor Management
- + Product Management
- + Agents & Teams
- + Multi-Channel
- + Process Customization
- + Multi-Tenancy
- + History & Audit Tracking

Case Management

02

- + Case ID Management
- + Case Classification
- + Interaction Management
- + Interaction Templates
- + Attachments
- + Configurable Business Attributes
- + Service Contracts
- + Multi-Channel Notifications
- + Business Hours
- + Case Search Engine & Filters

Process Automation

03

- + Configurable Business Rules
- + Business Rules Based Workflows
- + Auto Case Assignments
- + Auto Case Updates
- + SLA Reminders /Escalations
- + Email Incorporation
- + Email Commands
- + Customer Feedback

Collaboration

04

- + Agent & Customer Web Portals
- + Mobile/Tablet Apps
- + Knowledge Base
- + Categories & Article Management
- + KB Search Engine
- + KB Article Views, Likes & Dislikes

Analytics

05

- + Standard Reports
- + Business Configurable Reports
- + Real-Time Web/Mobile Dashboards
- + Business Insight Reports
- + Reports Scheduler
- + Print & Export

Key Capabilities



Case life-cycle Management

- ◊ Case ID Management
- ◊ Case Auto Response
- ◊ Interaction Management
- ◊ Configurable Business Attributes
- ◊ Multi-Channel Notifications
- ◊ Dynamic Case Management
- ◊ Customer & Case Mgmt. with complete history



Social Ticketing

- ◊ Integrated Social Media Channels
- ◊ Case resolution through Social Channels
- ◊ Social Profiles for Accounts & Contacts
- ◊ Social Media Conversations related to Case
- ◊ Channel includes Social Media options



Multi Channel Platform

- ◊ Client Management – Accounts, Contacts & Requestors
- ◊ Partner/Vendor Management
- ◊ Full view of Customer with Multi Channel strategy
- ◊ Agents & Teams
- ◊ Process Customization
- ◊ Multi-Tenancy



Collaboration

- ◊ Agent & Customer Web Portals
- ◊ Single Agent desktop unifying communications
- ◊ Mobile/Tablet Apps
- ◊ Collaborate with CRM Applications
- ◊ Collaboration with external parties
- ◊ CTI Integration

Key Capabilities



Security & Roles based Control

- ✔ Effective role engineering
- ✔ Role hierarchy that matches corporate structure
- ✔ Role based access management
- ✔ Map Roles to Modules and Features
- ✔ Multiple Roles to Agents



Agent/Customer/Partner Engagement

- ✔ Facilitate Omni Channel customer service with Case Routing Engine
- ✔ Insight from real time customer data & analytics
- ✔ Orchestrate Agent/Customer/Partner journey integrating communication Channels



Rules Management

- ✔ Business rules to determine process routing
- ✔ Rules designer
- ✔ Business rule based on Case type
- ✔ Business rule based on Service Contracts
- ✔ Ability to Mapping custom parameters to external sources



Knowledge Management

- ✔ Consistency & Agility with Knowledge Management
- ✔ Self Service KB System
- ✔ Categories & Article Management
- ✔ KB Search Engine
- ✔ KB Reviews & Ratings
- ✔ Involve participants in design of knowledge base

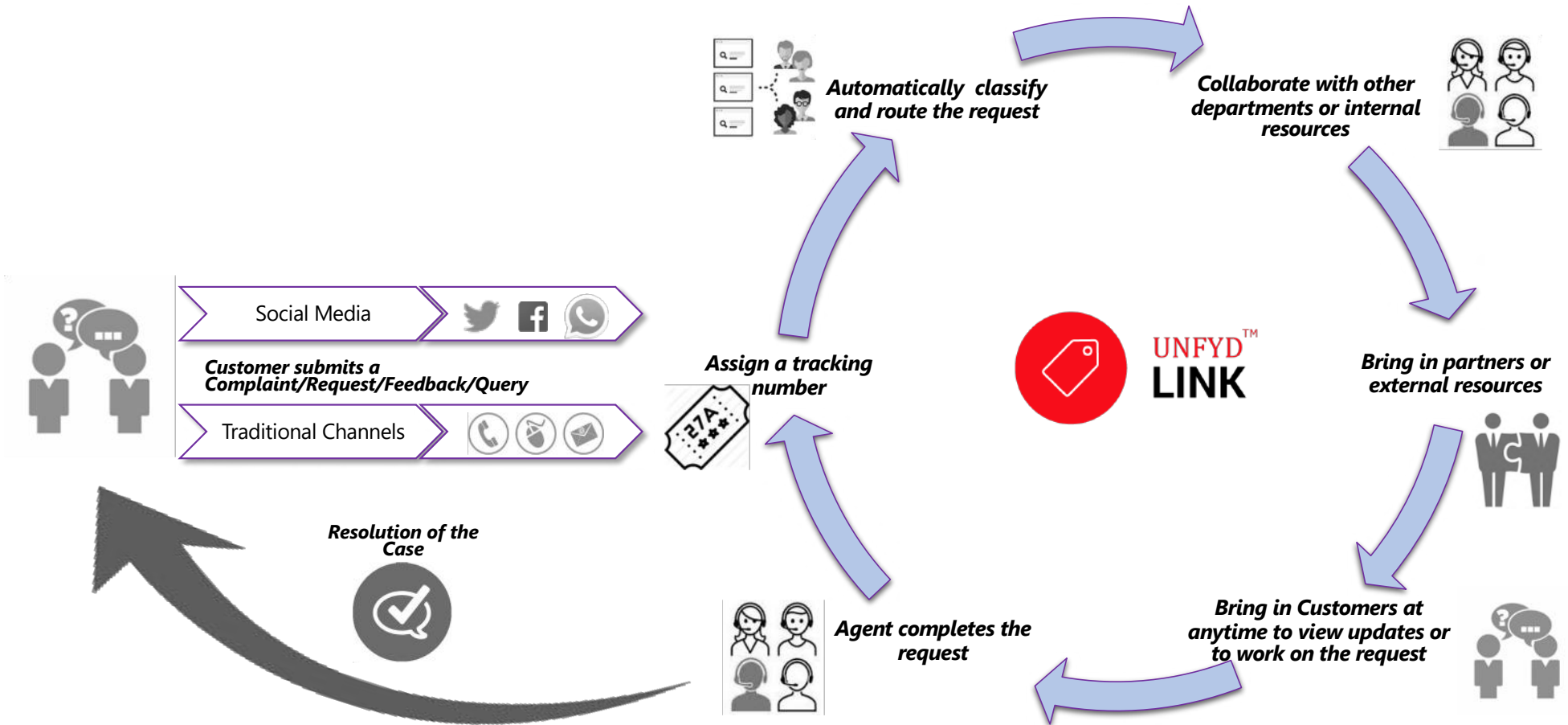


Why UNFYD® LINK

- ⦿ Rapid & efficient problem resolution
- ⦿ Better accountability and tracking
- ⦿ Visibility to all parties involved
- ⦿ Service level adherence
- ⦿ Reduce cost of resolving multi-step interactions
- ⦿ Avoid duplication of efforts
- ⦿ Sophisticated process automation
- ⦿ Service quality & consistency
- ⦿ Scalability & reliability

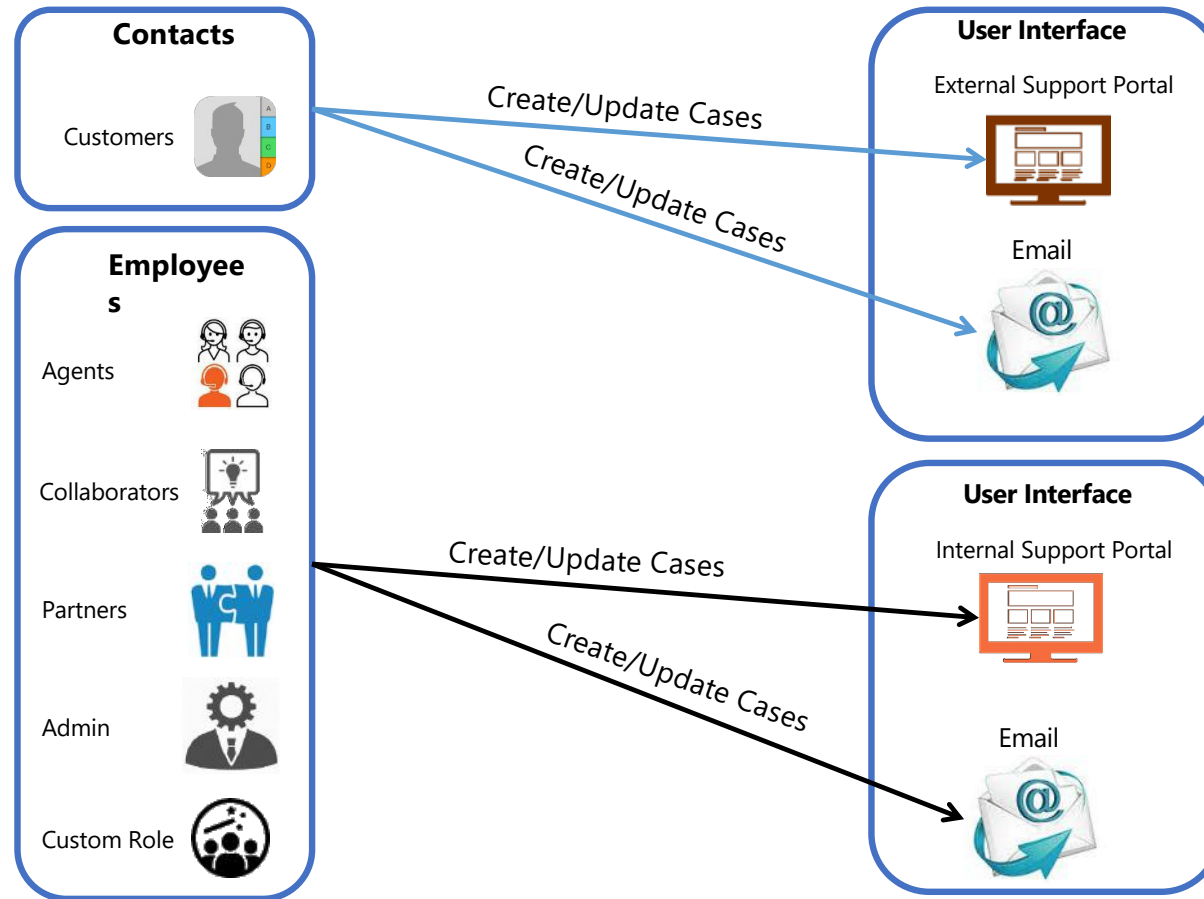


Functional Flow

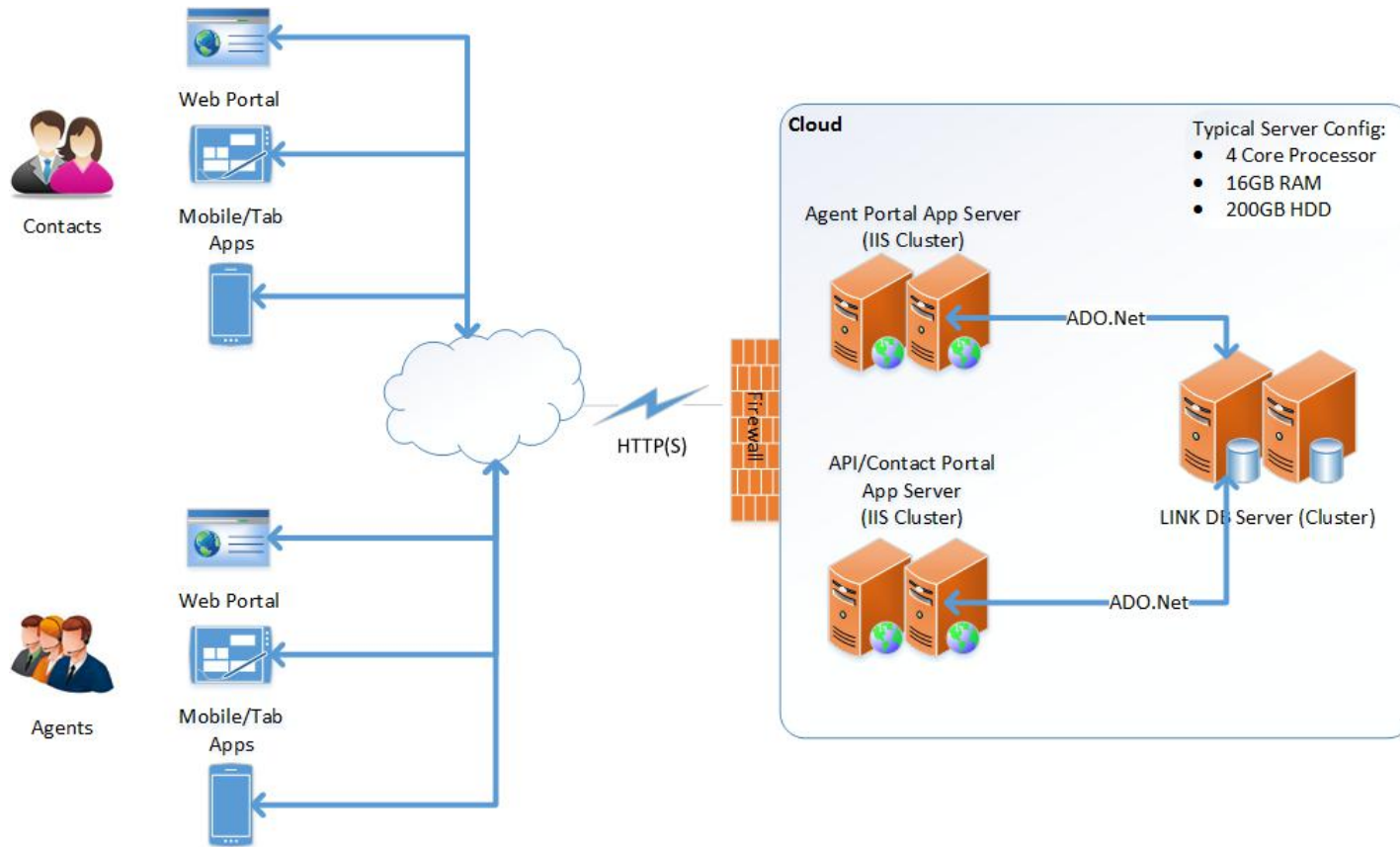




Roles & User Interfaces



Deployment Architecture



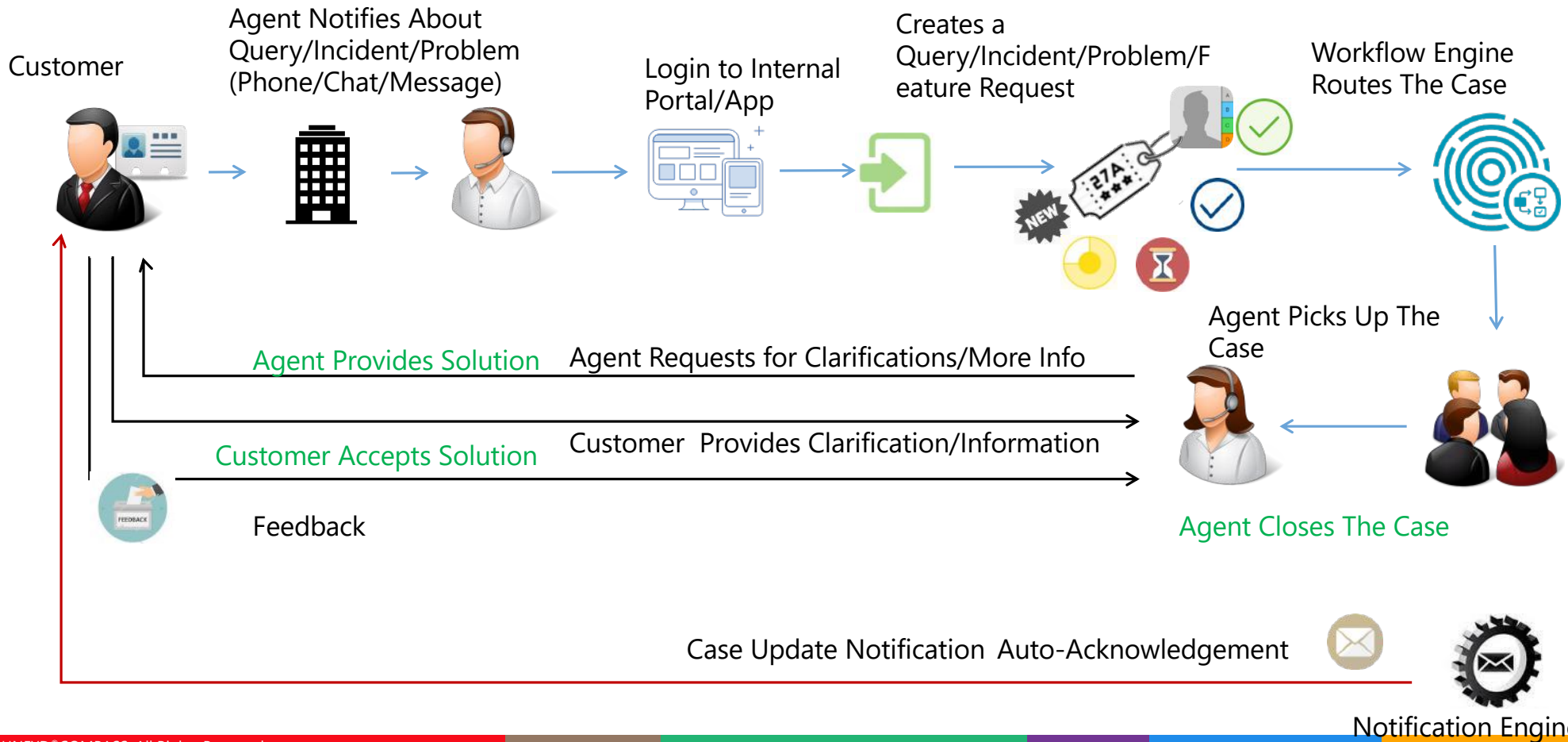


Use Cases





Case Management – Agent Case Creation

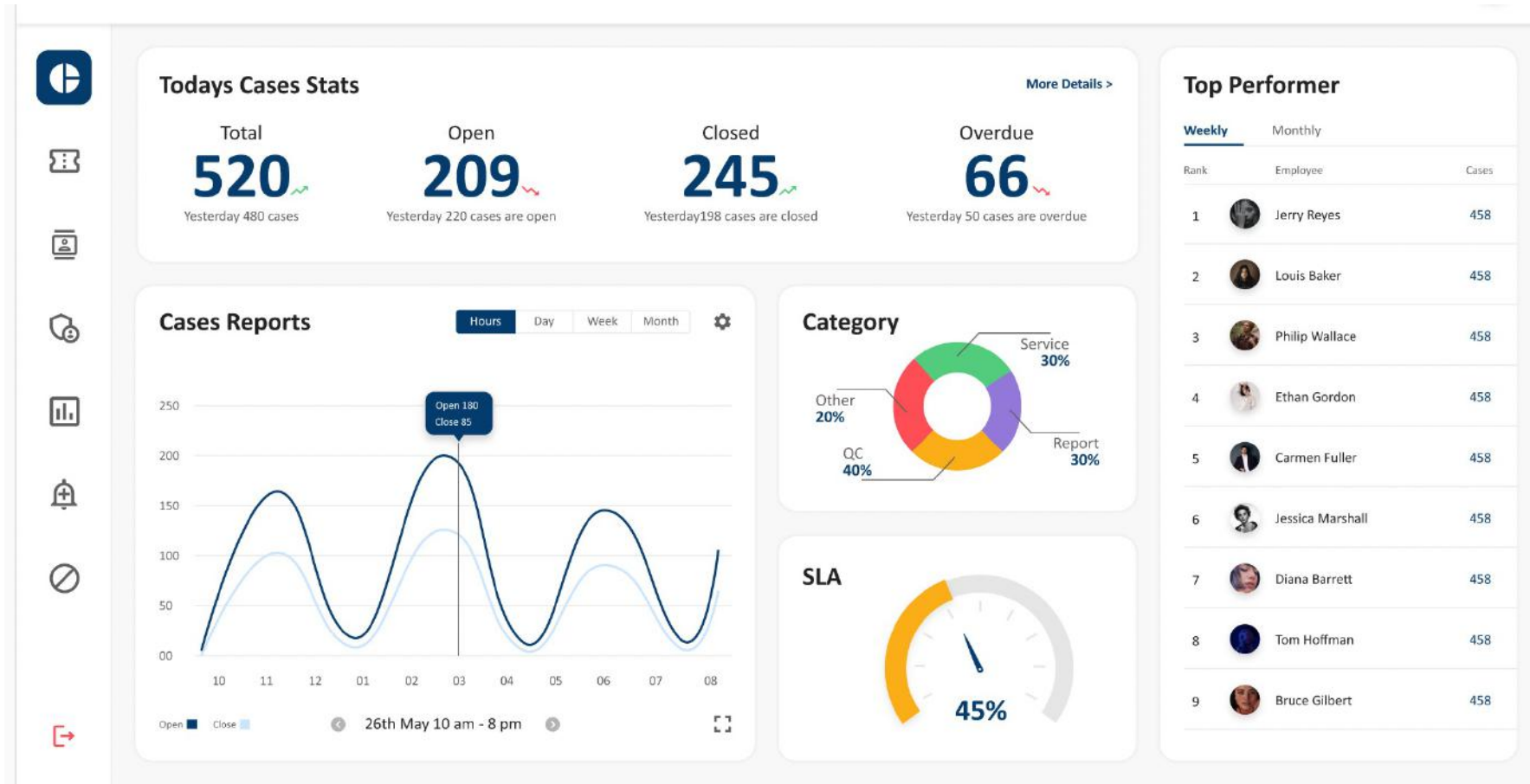




Enriched UI/UX



Dashboard





Active Cases

The screenshot displays a customer support dashboard with the following components:

- Header:** Logo 'U', 'All Projects' dropdown, search bar, and utility icons (plus, settings, bell, profile).
- Case Filter:** Tabs for 'Open', 'Pending', 'Closed', and 'Unassigned'. A 'My Open Cases (25)' dropdown is visible.
- Case List:** A list of five cases, all titled 'Website not working', created 20 minutes ago and assigned to 'Credit Card - Amit Patil'. The priority levels are High, Low, Medium, and High.
- Case Detail View:** Selected case ID 2405454. Title: 'Website not working'. Status: 'Open'. Priority: 'High'. Type: 'Support Team'. Assign to: 'Amit Patil'. Created On: '05/01/2021 19:27'. Due Date: '10/01/2021 19:27'.
 - Message:** From Carlos Reyes, reported in issue. Content: 'Hi, With dummy text you can view your website as it's supposed to look'. Includes three placeholder file icons (PDF, DOC, PPT).
 - Signature:** 'Regards, Carl Reyes, M : +91- 99742 37872'.
 - Actions:** 'Reply to all' and 'Add Notes' buttons.
- Right Panel:** 'Case Info', 'Customer Info', 'Side Conversation (1)', and 'Logs' sections.

Past Cases



The screenshot shows a user interface for managing cases. At the top, there is a search bar and navigation icons. Below, a list of cases is displayed, with a modal window titled "Carol Reyes Past Cases" overlaid. The modal shows a table of 25 cases, with the first 10 entries visible. The table columns are: Select, Case ID, Subject, Created On, Owner, Status, and Priority. The cases listed are:

Select	Case ID	Subject	Created On	Owner	Status	Priority
<input type="checkbox"/>	14541231	Address Change	12/30/2020 2:24:36 PM	Rajan Sharma	Open	High
<input type="checkbox"/>	14541231	Website is not working	12/30/2020 2:24:36 PM	Rajan Sharma	Open	High
<input type="checkbox"/>	14541231	Address Change	12/30/2020 2:24:36 PM	Rajan Sharma	Open	Low
<input type="checkbox"/>	14541231	Address Change	12/30/2020 2:24:36 PM	Rajan Sharma	Open	Medium
<input type="checkbox"/>	14541231	Address Change	12/30/2020 2:24:36 PM	Rajan Sharma	Open	Medium

The modal also includes an "Export" button, a pagination indicator showing "Showing 1 to 10 of 80 entries", and a set of navigation arrows.

Assign To



The screenshot displays a CRM interface with a sidebar on the left containing navigation icons. The main area is titled "All Projects" and features a search bar and a user profile icon. Below the header, there are tabs for "Open", "Pending", "Closed", and "Unassigned". A list of cases is shown, each with a status (e.g., "Open"), priority (e.g., "High", "Low", "Medium"), and a subject line "Website not working". A modal window titled "Assign To" is open, showing two dropdown menus: "Team" and "Agent". Below the dropdowns are two buttons: "Assign to me" and "Assign". The background shows a detailed view of a case with a subject line "Website is not working" and a status of "Open". The case details include "Case ID: 2405454", "Created On: 20/05/2021 2:30PM", and "Last Updated On: 21/05/2021 4:48". The "Case Info" section shows "Status: Open", "Priority: High", "Type: Support Team", "Assign to: Amit Patil", "Case ID: 2405454", "Created On: 05/01/2021 19:27", and "Due Date: 10/01/2021 19:27". The "Customer Info" and "Side Conversation (1)" sections are also visible.

New Case



The screenshot displays a user interface for managing cases. On the left, a sidebar contains navigation icons. The main area shows a list of cases under the heading 'All Projects'. A modal window titled 'Create New Case' is open, allowing a user to create a new case. The modal includes the following fields and options:

- Requestor Type:** Radio buttons for 'Existing Requestor for' (selected) and 'New Requestor'.
- CC:** Text input field containing 'roger.cook@mail.com , roger.cook@mail.com , roger.cook@mail.com'.
- Subject:** Text input field containing 'Website not working'.
- Description:** Text area containing 'Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen'.
- Rich Text Editor:** A toolbar with options for Attachment, font face (Arial), font size, bold (B), italic (I), underline (U), text color (A), list, link, and other formatting tools.
- Priority:** Dropdown menu set to 'High'.
- Status:** Dropdown menu set to 'Pending'.
- Request Type:** Dropdown menu set to 'Complaint'.
- Team:** Dropdown menu set to 'Service'.
- Agent:** Dropdown menu set to 'Sagar Patil'.
- Assign To Me:** A button to assign the case to the user.
- Channel:** Dropdown menu set to 'Email'.
- Reminder:** Text input field set to '2021-06-01 12:30:00' with a calendar icon.

Contact - Cases



The screenshot displays a CRM interface. On the left, a sidebar lists agents: Debra Lucas, Walter Cook, Keanu Wagner, Natasha Porter, Richard McCoy, and Sara Powell. The main area shows the profile for Debra Lucas, including her contact information and a list of 25 cases. The cases table has columns for Select, Case ID, Subject, Created On, Owner, Status, and Priority. The cases listed are all for Case ID 14541231, with subjects like 'Address Change' and 'Website is not working'. The status is 'Open' and priority varies from High to Low. A pagination bar at the bottom shows 'Showing 1 to 10 of 80 entries' and a page selector with '1' highlighted.

Select	Case ID	Subject	Created On	Owner	Status	Priority
<input type="checkbox"/>	14541231	Address Change	12/30/2020 2:24:36 PM	Rajan Sharma	Open	High
<input type="checkbox"/>	14541231	Website is not working	12/30/2020 2:24:36 PM	Rajan Sharma	Open	High
<input type="checkbox"/>	14541231	Address Change	12/30/2020 2:24:36 PM	Rajan Sharma	Open	Low
<input type="checkbox"/>	14541231	Address Change	12/30/2020 2:24:36 PM	Rajan Sharma	Open	Medium
<input type="checkbox"/>	14541231	Address Change	12/30/2020 2:24:36 PM	Rajan Sharma	Open	High
<input type="checkbox"/>	14541231	Address Change	12/30/2020 2:24:36 PM	Rajan Sharma	Open	Medium
<input type="checkbox"/>	14541231	Address Change	12/30/2020 2:24:36 PM	Rajan Sharma	Open	Medium
<input type="checkbox"/>	14541231	Address Change	12/30/2020 2:24:36 PM	Rajan Sharma	Open	Low
<input type="checkbox"/>	14541231	Address Change	12/30/2020 2:24:36 PM	Rajan Sharma	Open	Medium

Contacts



U Clients Search + ⚙️ 🔔

Agent

- Debra Lucas**
(129)240-2788
debra.lucas@mail.com
- Walter Cook**
(606)087-7528
kevin.jordan@mail.com
- Keanu Wagner**
(656)880-1739
frank.matthews@mail.com
- Natasha Porter**
(365)044-8265
chad.garrett@mail.com
- Richard McCoy**
(480)427-7503
joe.chavez@mail.com
- Sara Powell**
(753)292-2813
nicolas.patel@mail.com

Debra Lucas

Mobile 1: +91 9778482251
Mobile 2: +91 9778482251
Email 1: carlos.reyes@gmail.com
Email 2: carlos.reyes@gmail.com
carlos.reyes@facebook.com
carlos.reyes@insta.com

Other Details
Status : Active Language : English TimeZone : (UTC+05:30) Chennai
Address : 4/d Shivram Sadan, VS Road, 400080
City : Mumbai

Total 25 Cases



Merge Cases

The screenshot displays a support ticket management interface. At the top, there's a navigation bar with a search bar and user profile. Below it, a list of tickets is shown, all with the subject 'Website not working'. A 'Merge Ticket' dialog box is open in the center, showing a 'Case ID: 2405456' and a 'Merge' button. Below this, a section titled 'Select and merge' lists three other tickets with the same subject, each with a checkbox for selection. A 'Merge' button is at the bottom of the dialog. The background shows a sidebar with navigation icons and a main panel with tabs for 'Open', 'Pending', 'Closed', and 'Unassigned'.



Respond to Case

The screenshot displays a CRM interface with a 'Reply To' modal open. The modal contains the following information:

- Case ID:** carol.reyes@gmail.com
- CC:** nicolas.fox@mail.com, adam.guerrero@mail.com, eliza.reyes@mail.....
- Case ID:** Website is not working
- Message:** Hi, With dummy text you can view your website as it's supposed to look
- Signature:** U Regards, Amit Patil, SmartConnect Technologies, Talk : +91- 9833159143, Email - amitp@smartconnectt.com
- Rich Text Editor:** Includes an attachment icon, font family dropdown (Arial), and various text formatting options (bold, italic, underline, link, text color, background color, bulleted list, numbered list, table, link icon).
- Buttons:** Discard and Send

The background interface shows a list of cases under 'My Open Cases (25)'. The first case is 'Website not working' with a status of 'Open' and a priority of 'High'. Other cases in the list have different priorities like 'Low' and 'Medium'. The right sidebar shows 'Case Info' for Case ID 2405454, with details such as Status (Open), Priority (High), Type (Support Team), Assign to (Amit Patil), Case ID (2405454), Created On (05/01/2021 19:27), and Due Date (10/01/2021 19:27). There is also a 'Customer Info' section and a 'Side Conversation (1)' indicator.



Reports

U Cases Search + ⚙️ 🔔

Case Level Report ×

From Date: 01/05/2021
To Date: 31/05/2021
Teams: Abhishek Team
Agents: Service
Channel Source: Intellect Design
Search

Interaction Report +

Agent Performance Report +

1st May to 31st May 2021

Day	Open	Close
1	0	0
2	50	20
3	100	40
4	120	60
5	140	80
6	150	90
7	140	80
8	100	50
9	50	20
10	20	10
11	10	5
12	20	10
13	50	30
14	100	60
15	150	100
16	170	110
17	180	85
18	150	100
19	100	50
20	50	20
21	20	10
22	50	30
23	100	60
24	120	80
25	130	90
26	120	80
27	100	50
28	50	20
29	20	10
30	50	30
31	100	60

Total 25 Cases Export

Select	Case ID	Subject	Case Source	Created Date	Requested By	Status
<input type="checkbox"/>	14541231	Address Change	intellectdesign0@gmail.com	2020-12-21 19:43:31	Ankita Ambre	Open
<input type="checkbox"/>	14541231	Address Change	intellectdesign0@gmail.com	2020-12-21 19:43:31	Ankita Ambre	Close
<input type="checkbox"/>	14541231	Address Change	intellectdesign0@gmail.com	2020-12-21 19:43:31	Ankita Ambre	Open
<input type="checkbox"/>	14541231	Address Change	intellectdesign0@gmail.com	2020-12-21 19:43:31	Ankita Ambre	Close
<input type="checkbox"/>	14541231	Address Change	intellectdesign0@gmail.com	2020-12-21 19:43:31	Ankita Ambre	Open



Solution Snapshots



New Case Created By Agent



UNFYD LINK

New Case

Route

Team: Select Agent: Select

Case Info

Subject: Issue With Digital Payment

Description: Please find the below Issue
1. I Ordered an Electronic device and make payment through Online, but the transaction is not successful, but the money is deducted from my account.
2. When can I expect my refund.

Type: Query

Priority: Select

Contact: Customer (ccustomer08...)

Account: Select

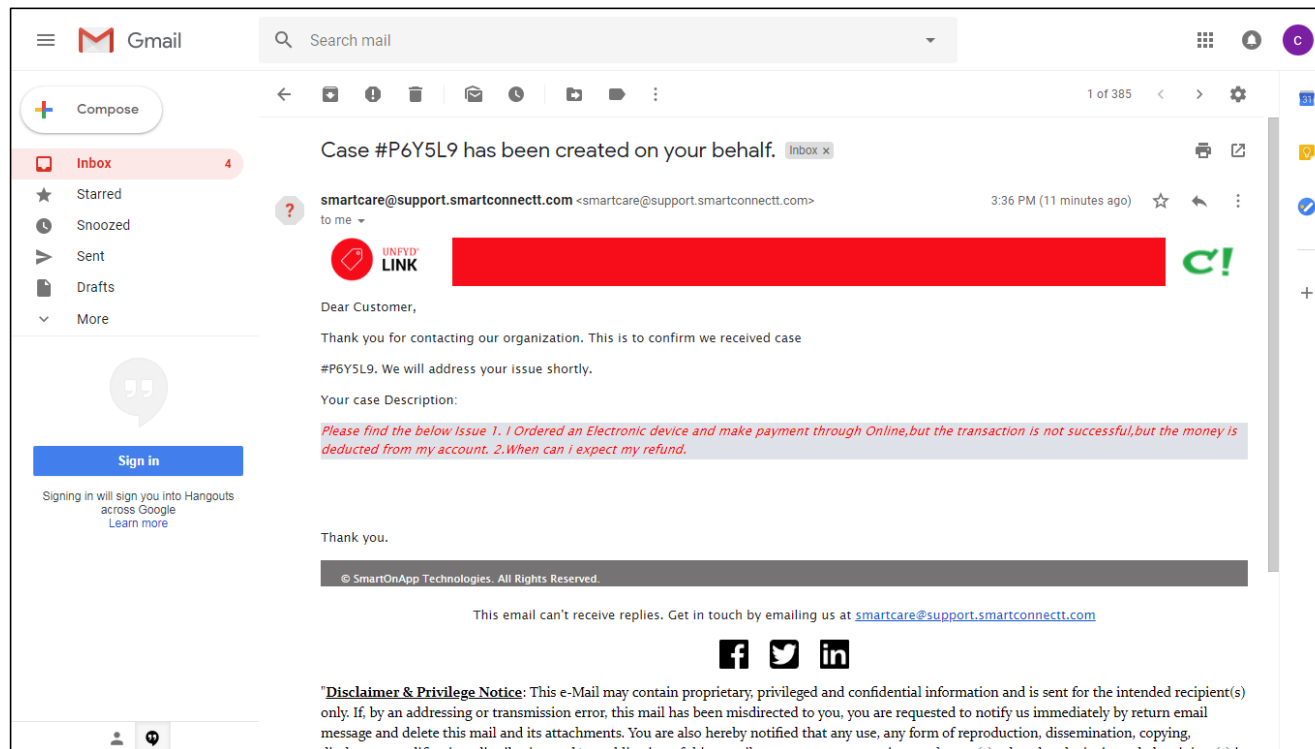
Product: Digital Payments

Due On:

Attachments: 209/2048

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Case Creation Notification to the Customer



Business Rules Configuration for Routing



UNFYD® LINK

Admin - Add CaseRoutingRules

Basic Mode

Rule Name: Digital Payment Description: [Empty]

Events

Any of the following events happen

CaseCreated

Performer: Agent Contact System Requester Anyone

Object Properties

Match Any of the below Match All of the below

ProductName Is Digital Payments

Actions

RouteTo Online Banking Supp... Mounika Koppuravuri

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Case Routed to Respective Team - Business Rules



The screenshot displays the UNFYD LINK case management interface. The top navigation bar is red with the UNFYD LINK logo on the left and search, help, chat, and user profile icons on the right. Below the navigation bar, the case title is '#P6Y5L9 | Issue Regarding Digital Payment'. The left sidebar contains sections for 'Requested by: Mounika Koppuravuri', 'Created on: 06/25/2018 15:33', 'Owner: Mounika Koppuravuri', 'Contact Info' (Customer, cccustomer08@gmail.com), and 'Routed To' (Online Banking Support Team, Mounika Koppuravuri). The main content area shows the 'Case Info' tab selected, with a 'Description' section containing the text: 'Please find the below Issue' followed by a list of two items: '1. I Ordered an Electronic device and make payment through Online, but the transaction is not successful, but the money is deducted from my account.' and '2. When can I expect my refund.'. Below the description is an 'Other Info' section. The bottom of the interface shows the copyright notice '© SmartOnApp Technologies. All Rights Reserved.' and the version number 'v 0.0.1.9'.

Agent Assigned Request



UNFYD® LINK

Cases

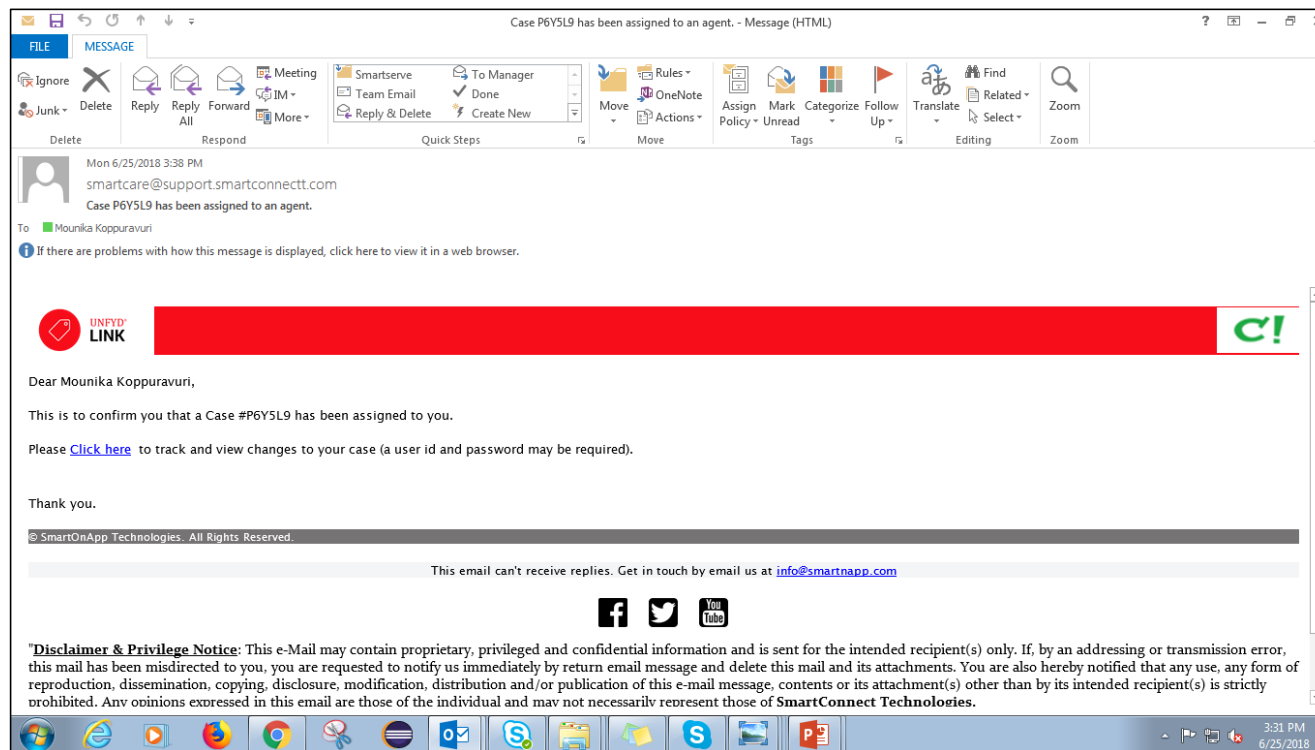
My Cases

Page 1 of 2

<input type="checkbox"/>	CaseID	Subject	Contact	Routed Agent	Routed Team	Source	Priority	Status	Created On
<input type="checkbox"/>	P6Y5L9	Issue Regarding Digital Pay...	Customer	Mounika Koppuravuri	Online Banking Suppor...	📧	High	Open	06/25/2018 15:33
<input type="checkbox"/>	EU4V3J	Test for email			SCT	✉	Low	Open	06/23/2018 16:18
<input type="checkbox"/>	QZR9E8	test			SCT	✉	Low	Closed	04/03/2018 19:28
<input type="checkbox"/>	EVN4A3	Test for Incoming Emails on ...			SCT	✉	Low	Closed	04/04/2018 10:25
<input type="checkbox"/>	G0T14B	#GN8E9R - case issue			SCT	✉	Low	Closed	02/23/2018 17:49
<input type="checkbox"/>	C729SZ	Test for Email Notifications			SCT	✉	Low	Closed	02/23/2018 15:26
<input type="checkbox"/>	4W36BS	Test for Incoming mails with...		Elango Ashok	SCT	✉	Low	Closed	02/20/2018 17:28
<input type="checkbox"/>	V354K1	Test			SCT	✉	Low	Closed	02/20/2018 18:33
<input type="checkbox"/>	36BSK1	Test for excel			SCT	✉	Low	Closed	02/20/2018 18:45
<input type="checkbox"/>	2HAQIZa	Test	Link-er	Hema Karedla	UNFYD® LINK Defects S...	📧	Medium	Open	02/14/2018 11:22

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Case Assigned Notification to the Agent





Agent – Picks Up The Case

The screenshot shows the UNFYD LINK interface. At the top, there is a red header with the UNFYD LINK logo and navigation icons. Below the header, there is a 'Cases' section with a 'My Cases' dropdown and a toolbar containing icons for search, refresh, and other actions. A 'Pickup' button is highlighted with a black box. Below the toolbar is a table of cases with columns for CaseID, Subject, Contact, Routed Agent, Routed Team, Source, Priority, Status, Created On, and Due On. The first case is selected with a checkmark. At the bottom right, there is a red circular button with a white plus sign. The footer contains the text '© SmartOnApp Technologies. All Rights Reserved.' and 'v 0.0.1.9'.

<input type="checkbox"/>	CaseID	Subject	Contact	Routed Agent	Routed Team	Source	Priority	Status	Created On	Due On
<input checked="" type="checkbox"/>	P6Y5L9	Issue Regarding Digital ...	Customer	Mounika Koppur...	Online Banking Sup...		High	Open	06/25/2018 15:33	
<input type="checkbox"/>	EU4V3J	Test for email			SCT		Low	Open	06/23/2018 16:18	
<input type="checkbox"/>	QZR9E8	test			SCT		Low	Closed	04/03/2018 19:28	
<input type="checkbox"/>	EVN4A3	Test for Incoming Email...			SCT		Low	Closed	04/04/2018 10:25	
<input type="checkbox"/>	G0T14B	#GN8E9R - case issue			SCT		Low	Closed	02/23/2018 17:49	
<input type="checkbox"/>	C729SZ	Test for Email Notificati...			SCT		Low	Closed	02/23/2018 15:26	
<input type="checkbox"/>	4W36BS	Test for Incoming mails...		Elango Ashok	SCT		Low	Closed	02/20/2018 17:28	
<input type="checkbox"/>	V354K1	Test			SCT		Low	Closed	02/20/2018 18:33	
<input type="checkbox"/>	36BSK1	Test for excel			SCT		Low	Closed	02/20/2018 18:45	
<input type="checkbox"/>	2HAQIZa	Test	Link-er	Hema Karedla	UNFYD® LINK Defect...		Medium	Open	02/14/2018 11:22	

Case Attributes



The screenshot displays the UNFYD LINK case management interface. The header includes the UNFYD LINK logo and navigation icons. The main content area shows case details for issue #P6Y5L9, titled "Issue Regarding Digital Payment".

Case Info: #P6Y5L9 | Issue Regarding Digital Payment

Requested by: Mounika Koppuravuri
Created on: 06/25/2018 15:33
Owner: Mounika Koppuravuri

Contact Info:

- Customer
- ccustomer08@gmail.com

Routed To:

- Online Banking Support Team
- Mounika Koppuravuri

Case Info Navigation: Case Info, Interactions, Sub Cases, Merged Cases, Cases History

Description:

Other Info:

Status:	Open	Type:	Query
Priority:	High	Channel:	Web
Product:	Digital Payments	Due on:	
Category:	Select	Dependent Team:	Select

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Agent Adds Interaction

The screenshot displays the UNFYD LINK agent interface. At the top, the header includes the UNFYD LINK logo, a search icon, a help icon, a chat icon, a home icon, a user profile icon, and a 'C!' status indicator. Below the header, the case title is '#P6Y5L9 | Issue Regarding Digital Payment'. The interface is divided into several sections:

- Case Info:** Shows 'Requested by: Mounika Koppuravuri', 'Created on: 06/25/2018 15:33', and 'Owner:'.
- Contact Info:** Includes 'Customer', 'cccustomer08@gmail.com', and social media icons for Facebook and WhatsApp.
- Routed To:** Lists 'Online Banking Support Team' and 'Mounika Koppuravuri'.
- Interactions:** The active tab, showing the 'Add Interaction' form with fields for 'Channel' (set to 'Email'), 'Cc:', 'Description' (with the text 'Please give the details like, when you made the transaction'), and 'Attachments'. A character count '59 /2048' is visible at the bottom right of the description field.
- Interaction History:** A section below the form, currently empty, with a blue arrow icon on the right.

At the bottom left, the footer reads '© SmartOnApp Technologies. All Rights Reserved.' and at the bottom right, it shows 'v 0.0.1.9'. A red circular button with a white plus sign is located in the bottom right corner of the main content area.

Agent Interaction Notification to Customer



The screenshot shows a Gmail interface with a notification email from smartcare@support.smartconnectt.com. The email subject is "Case #P6Y5L9 has been updated". The sender is smartcare@support.smartconnectt.com, and the recipient is "me". The email content includes a "UNFYD LINK" button, a "Dear Customer," greeting, and a message stating "Case #P6Y5L9 has been updated with a new interaction." The description added is "Please give the details like, when you made the transaction". The email also includes a "Thank you." message, a copyright notice for SmartOnApp Technologies, and a disclaimer. The footer contains social media icons for Facebook, Twitter, and LinkedIn, and a virus warning.

Case #P6Y5L9 has been updated

smartcare@support.smartconnectt.com <smartcare@support.smartconnectt.com> 3:56 PM (0 minutes ago)

UNFYD LINK

Dear Customer,

Case #P6Y5L9 has been updated with a new interaction.

Description Added:

Please give the details like, when you made the transaction

Thank you.

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This email can't receive replies. Get in touch by emailing us at smartcare@support.smartconnectt.com

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Agent Adds Interaction

The screenshot displays the UNFYD LINK support interface. At the top, the header includes the UNFYD LINK logo, navigation icons, and a user profile. The main content area is titled "#P6Y5L9 | Issue Regarding Digital Payment". Below the title, there are tabs for "Case Info", "Interactions", "Sub Cases", "Merged Cases", and "Cases History". The "Interactions" tab is active, showing an "Add Interaction" button and an "Interaction History" section. The interaction history contains three entries:

- 16:09 | 06/25/2018** (Agent: "Mounika Koppuravuri"): "Dear Customer, Your deducted money will be refunded in 24hrs Thanking You"
- 16:01 | 06/25/2018** (Agent: "Customer"): "I made a transaction on 22nd June"
- 15:57 | 06/25/2018** (Agent: "Mounika Koppuravuri"): "Please give the details like, when you made the transaction"

On the left side, there are sections for "Requested by: Mounika Koppuravuri", "Created on: 06/25/2018 15:33", "Owner: Mounika Koppuravuri", "Contact Info" (Customer, cccustomer08@gmail.com), and "Routed To" (Online Banking Support Team, Mounika Koppuravuri). A red plus button is visible in the bottom right corner of the interface.

Agent Updates the Case Status

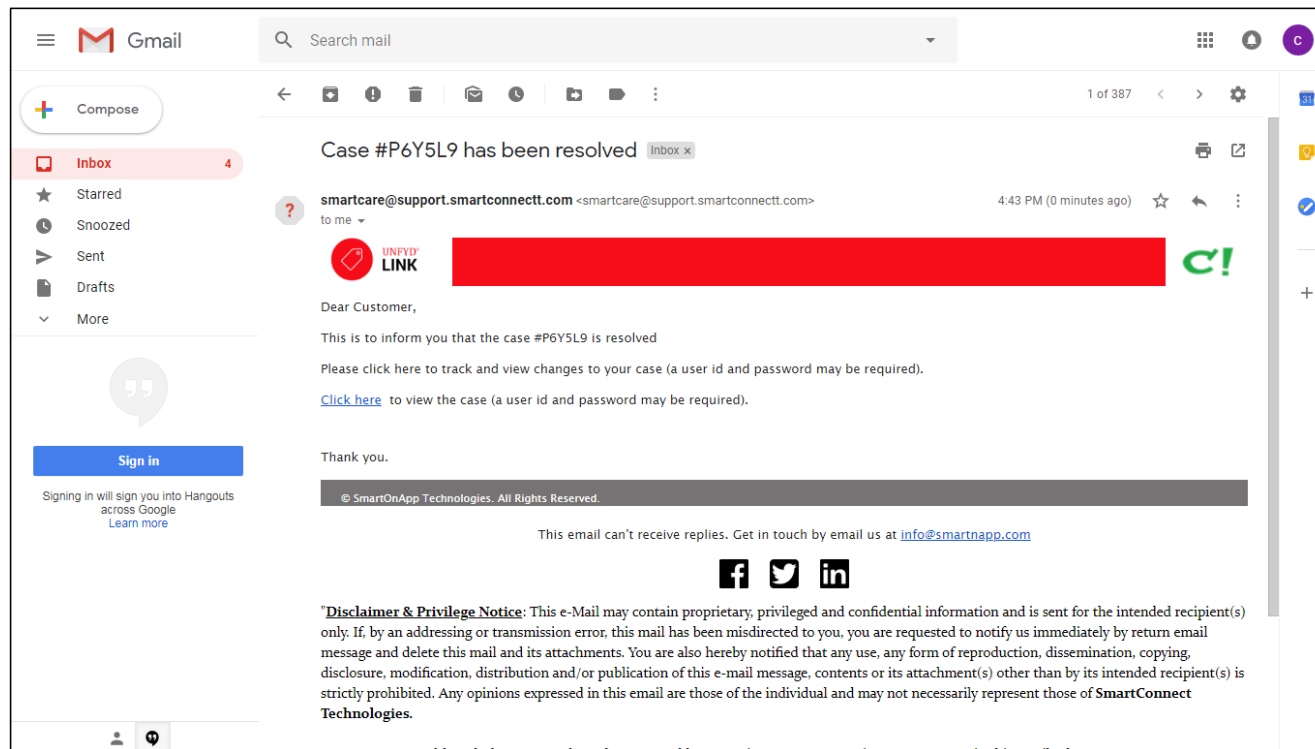


The screenshot displays the UNFYD LINK case management interface. The top navigation bar is red and contains the UNFYD LINK logo, search, help, chat, home, and user profile icons. Below the navigation bar, the case ID #P6Y5L9 and the title "Issue Regarding Digital Payment" are shown. The interface is divided into several sections:

- Case Info:** Includes tabs for Case Info, Interactions, Sub Cases, Merged Cases, and Cases History.
- Description:** A section for entering the case description.
- Other Info:** A section for updating case details, including:
 - Status: Resolved (dropdown)
 - Priority: High (dropdown)
 - Product: Digital Payments (dropdown)
 - Category: Select (dropdown)
 - Type: Query (dropdown)
 - Channel: Web (dropdown)
 - Due on: (text input)
 - Dependent Team: Select (dropdown)
- Contact Info:** Includes fields for Customer, Email (cccustomer08@gmail.com), and social media links.
- Routed To:** Lists the Online Banking Support Team and the assigned agent, Mounika Koppuravuri.

The bottom of the interface shows a red plus icon for adding new information and a footer with the text "© SmartOnApp Technologies. All Rights Reserved." and version "v 0.0.1.9".

Agent Updated Status Notification to Customer



Administration



UNFYD[®] LINK

Admin

Configure Channels

- Portal
- Email
- Mobile App

Settings

- Agents
- Teams
- Collaborator
- Service Contracts
- Business Hours
- Service Desk
- Roles
- Email Notifications
- Business Rules
- Products
- Templates
- Channel Transmission
- CaseID Generation
- Auto Close

Feedback

- Customer Feedback

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Send Notifications Based on Business Rules



The screenshot displays the 'Admin - Add WorkFlowRules' interface in the UNFYD CRM system. The interface is divided into two main sections: 'Object Properties' and 'Actions'.

Object Properties: This section allows for defining business rule conditions. It features two radio buttons: 'Match Any of the below' (selected) and 'Match All of the below'. Below these, there are three fields: a dropdown menu for 'Job Title', a dropdown menu for the operator 'Is', and a dropdown menu for the value 'Assistant General Mana...'. There are also icons for adding (+) and removing (-) conditions.

Actions: This section is used to define the actions triggered by the business rule. It starts with a dropdown menu for 'SendNotification'. Below this, there are fields for 'From', 'To', 'CC', and 'Subject', each with a text input box. The 'From' field includes radio buttons for 'Owner', 'Assigned Agent', and 'Others'. The 'To' field includes checkboxes for 'Owner', 'Assigned Agent', and 'Lead'. The 'Template' field includes a rich text editor with a toolbar containing icons for bold (B), underline (U), italic (I), font color (A), background color, bulleted list, numbered list, indent, table, link, image, video, unlink, source code (</>), and help (?). The text 'Edit Message here' is visible in the editor area. A red circular button with a white plus sign is located at the bottom right of the Actions section.

The footer of the interface contains the text: © SmartOnApp Technologies. All Rights Reserved. v 0.0.1.6

Service Contract Rules



UNFYD® LINK Q ? 🗨️ 🏠 👤 C!

Admin - View ServiceContractRules ✎ ⬅

Basic Mode

Rule Name: Description:

Object Properties

Match Any of the below Match All of the below

<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Priority	Is	Critical
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Type	Is	Performance

Attach Service Contract

Attach:

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Reminders and Escalations

The screenshot displays the 'View Service Contract' page in the UNFYD LINK application. The interface is organized into several sections:

- Service Contract Header:** Includes the UNFYD LINK logo, search, help, and user profile icons. The title is 'View Service Contract'.
- Service Contract Details:** Fields for Name (Default Service Contract), Description (Default Service Contract), and IsActive (checked).
- Configuration Fields:** Priority (Critical), Type (Performance), Response Time (15 Min), Resolution Time (30 Min), and Business Hours (Morning Shift).
- Reminders Section:**
 - Response Time Reminders:** Includes a 'Remind' checkbox and options for Owner, Routed Agent (checked), Routed Team, Collaborators, and Others. A 'Before' time of 5 Min is set.
 - Resolution Time Reminders:** Includes a 'Remind' checkbox and the same options. A 'Before' time of 10 Min is set.
- Escalations Section:**
 - Response Time Escalations:** Includes an 'Escalate' checkbox and the same options. An 'After' time of 10 Min is set.
 - Resolution Time Escalations:** Includes an 'Escalate' checkbox and the same options. An 'After' time of 20 Min is set.

A red '+' button is located at the bottom right of the Escalations section. The footer contains the text '© SmartOnApp Technologies. All Rights Reserved.' and 'v 0.0.1.9'.

Administration – Roles & Permissions



The screenshot displays the 'View Role' configuration page in the UNFYD LINK system. The role name is 'Admin' and the role description is also 'Admin'. The permissions are organized into three columns: Cases, Clients, and Admin. Each permission is accompanied by a checked checkbox, indicating that the role has access to that function.

Category	Permissions
Cases	<ul style="list-style-type: none"><input checked="" type="checkbox"/> Create All Cases<input checked="" type="checkbox"/> View All Cases<input checked="" type="checkbox"/> Edit All Cases<input checked="" type="checkbox"/> Upload Case Attachments<input checked="" type="checkbox"/> Download Case Attachments<input checked="" type="checkbox"/> Pickup All Cases<input checked="" type="checkbox"/> Route All Cases<input checked="" type="checkbox"/> Close All Cases<input checked="" type="checkbox"/> Sub Cases<input checked="" type="checkbox"/> Merge Cases<input checked="" type="checkbox"/> View Case History<input checked="" type="checkbox"/> Update Multiple Cases<input checked="" type="checkbox"/> Delete All Case
Clients	<ul style="list-style-type: none"><input checked="" type="checkbox"/> Enable Accounts<input checked="" type="checkbox"/> Create New Account<input checked="" type="checkbox"/> View Account<input checked="" type="checkbox"/> Upload Account Attachments<input checked="" type="checkbox"/> Download Account Attachments<input checked="" type="checkbox"/> Edit Account<input checked="" type="checkbox"/> Delete Account<input checked="" type="checkbox"/> Import Account<input checked="" type="checkbox"/> Export Account<input checked="" type="checkbox"/> Enable Contacts<input checked="" type="checkbox"/> Create Contact<input checked="" type="checkbox"/> View Contact<input checked="" type="checkbox"/> Edit Contact
Admin	<ul style="list-style-type: none"><input checked="" type="checkbox"/> Enable Agents<input checked="" type="checkbox"/> Create Agents<input checked="" type="checkbox"/> View Agents<input checked="" type="checkbox"/> Edit Agents<input checked="" type="checkbox"/> Delete Agents<input checked="" type="checkbox"/> Export Agents<input checked="" type="checkbox"/> Enable Teams<input checked="" type="checkbox"/> Create Teams<input checked="" type="checkbox"/> Map Agents to Teams<input checked="" type="checkbox"/> View Teams<input checked="" type="checkbox"/> Edit Teams<input checked="" type="checkbox"/> Delete Teams<input checked="" type="checkbox"/> Export Teams

Administration – Email Notifications



UNFYD LINK Mounika

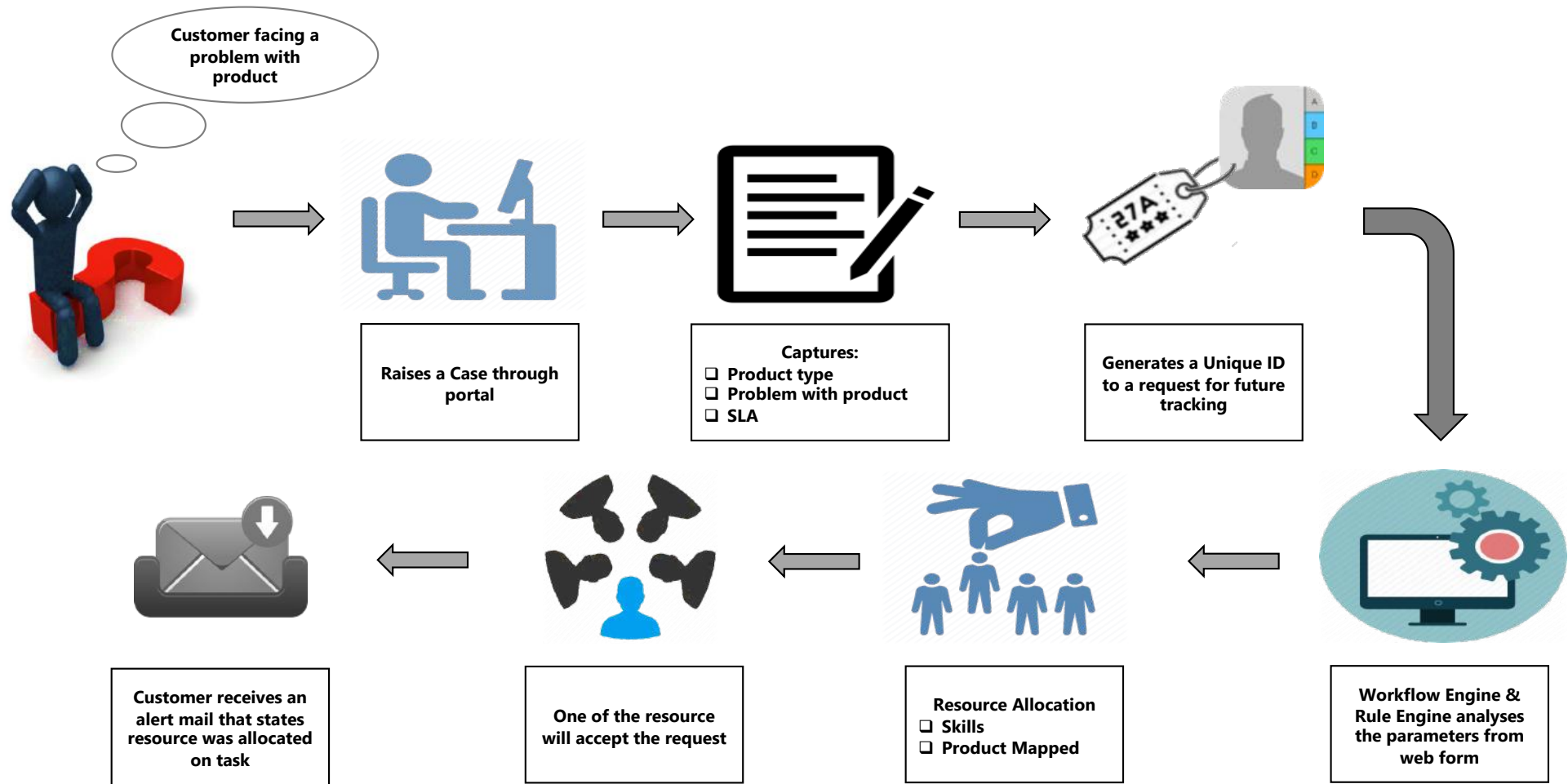
Settings - Email Notifications

Search

Agent Notifications	Contact Notifications	CC Notifications
<input checked="" type="checkbox"/> New Case Created	<input checked="" type="checkbox"/> New Case Created	<input checked="" type="checkbox"/> Customer Interaction Added
<input checked="" type="checkbox"/> Case Assigned To Team	<input checked="" type="checkbox"/> Agent Interaction Added	<input checked="" type="checkbox"/> Agent Interaction Added
<input checked="" type="checkbox"/> Case Assigned To Agent	<input checked="" type="checkbox"/> Case Resolved	<input checked="" type="checkbox"/> Case Resolved
<input type="checkbox"/> Case Updated	<input checked="" type="checkbox"/> Case Closed	<input checked="" type="checkbox"/> Case Closed
<input checked="" type="checkbox"/> Case Collaborator Added	<input checked="" type="checkbox"/> Contact Email Activation	<input checked="" type="checkbox"/> Collaborator Added
<input checked="" type="checkbox"/> First Response Reminder	<input checked="" type="checkbox"/> Contact Password Reset	<input checked="" type="checkbox"/> Collaborator Removed
<input checked="" type="checkbox"/> First Response Escalation		
<input checked="" type="checkbox"/> Resolution Reminder		
<input checked="" type="checkbox"/> Resolution Escalation		
<input checked="" type="checkbox"/> Password Reset		
<input checked="" type="checkbox"/> Article Published		

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Case Created by Customer Via Web Portal





Email Use Cases





Case 1 - Existing Contact & New Email

Contact
santosh@tcs.com

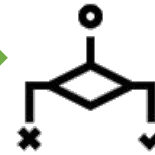


Existing Contact sends an email to the common support email ID

Support Email
smartserve@smarnapp.com

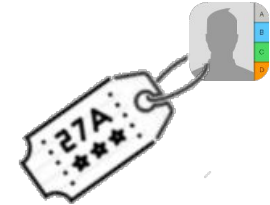


1. Contact exists?
2. Subject has an existing Case ID?



1. Yes; 2. No

Create a new Case and associate it with this Contact



If Contact's Account = TCS Then route the case to TCS Workgroup



Case 2 - Existing Contact & Existing Case

Contact
santosh@tcs.com

Support Email
smartserve@smarnapp.com



Existing Contact sends a follow-up email to the common support email ID with Case ID in Subject



- 1. Contact exists?
- 2. Subject has an existing Case ID?

1. Yes; 2. Yes

Add an Interaction to the Case



Notifications on Portal & Email to Case owner & collaborators





Case 3 - New Contact & New Email

Contact
apurva@hdfclife.com

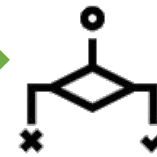


New Contact sends an email to the common support email ID

Support Email
smartserve@smarnapp.com



1. Contact exists?
2. Subject has an existing Case ID?



1. No; 2. No

Create a new Contact without mapping any Account (to be mapped manually)



Create a new Case and associate it with this contact



If Contact's Email ID Domain = hdfclife.com Then route the case to HDFC Life Workgroup





Case 4 - New Contact & Existing Case

Contact

apurva@hdfclife.com



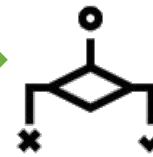
New Contact sends a follow-up email to the common support email ID with Case ID in Subject

Support Email

smartserve@smarnapp.com



1. Contact exists?
2. Subject has an existing Case ID?



1. No; 2. Yes

Create a new Contact without mapping any Account (to be mapped manually)



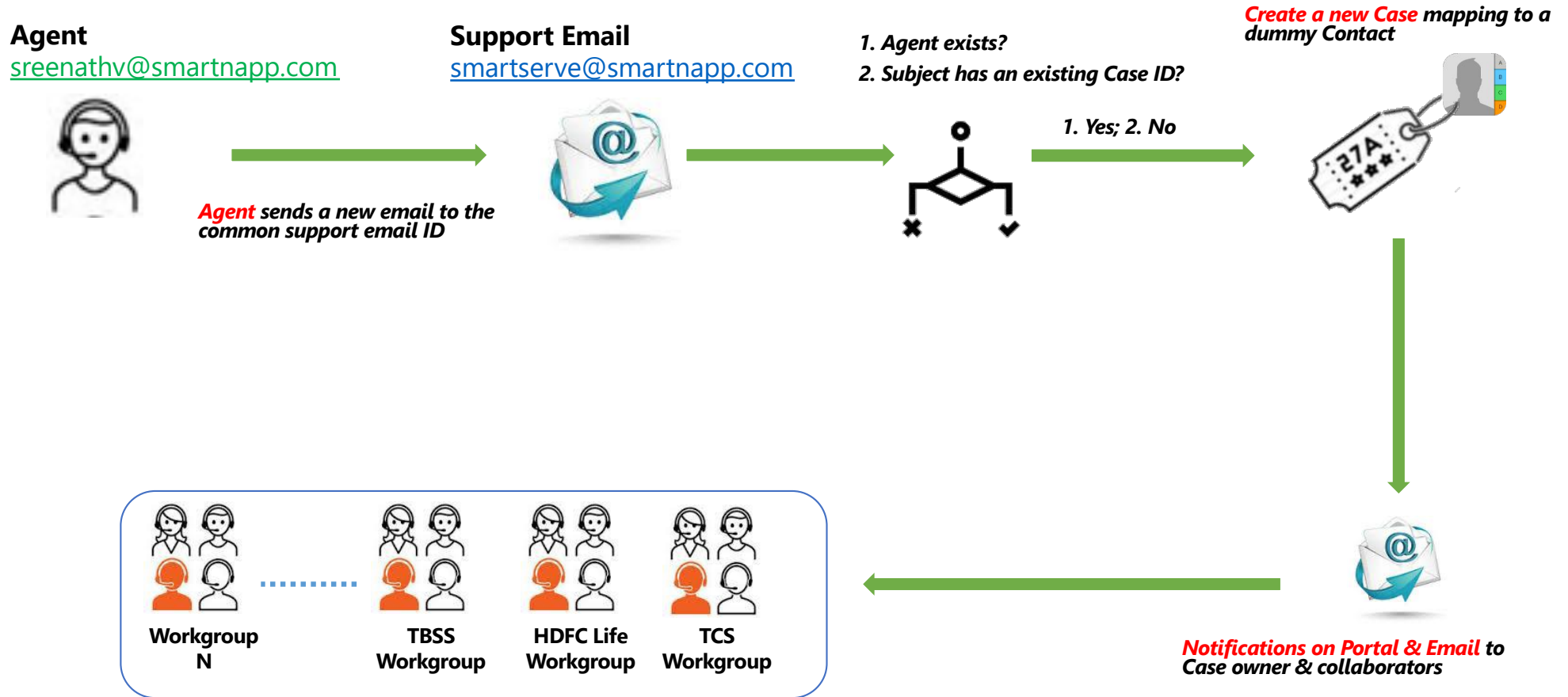
Add an Interaction to the Case



Notifications on Portal & Email to Case owner & collaborators



Case 5 – Agent & New Email





Case 6 – Agent & Existing Case

Agent
sreenathv@smarnapp.com

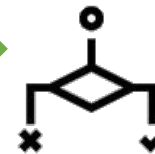
Support Email
smartserve@smarnapp.com



Agent sends a follow-up email to the common support email ID with Case ID in Subject



- 1. Agent exists?
- 2. Subject has an existing Case ID?

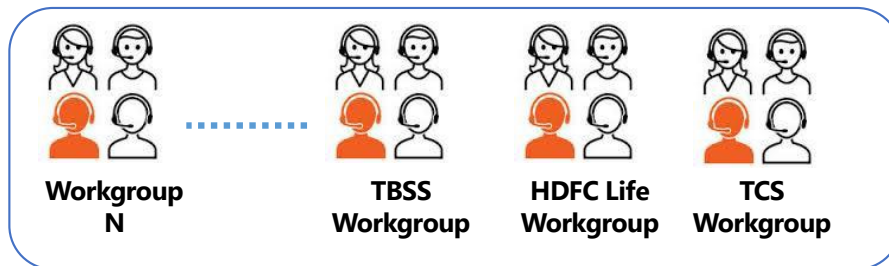


1. Yes; 2. Yes

Add an *Interaction* to the Case



Notifications on Portal & Email to Case owner & collaborators





Case 9 – Collaborator & New Email

Collaborator
senthil@smartconnectt.com

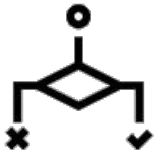
Support Email
smartserve@smartnapp.com



Collaborator sends a new email to the common support email ID



- 1. Collaborator exists?
- 2. Subject has an existing Case ID?



1. Yes; 2. No

Create a new Case mapping to a dummy Contact



Notifications on Portal & Email to Case owner & collaborators





Case 10 – Collaborator & Existing Case

Collaborator
senthil@smartconnectt.com

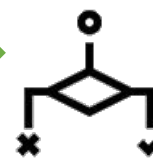
Support Email
smartserve@smarnapp.com



*Collaborator sends a follow-up email to the common support email ID with **Case ID** in Subject*



1. Collaborator exists?
2. Subject has an existing Case ID?



1. Yes; 2. Yes

Add an *Interaction* to the Case



Notifications on Portal & Email to Case owner & collaborators



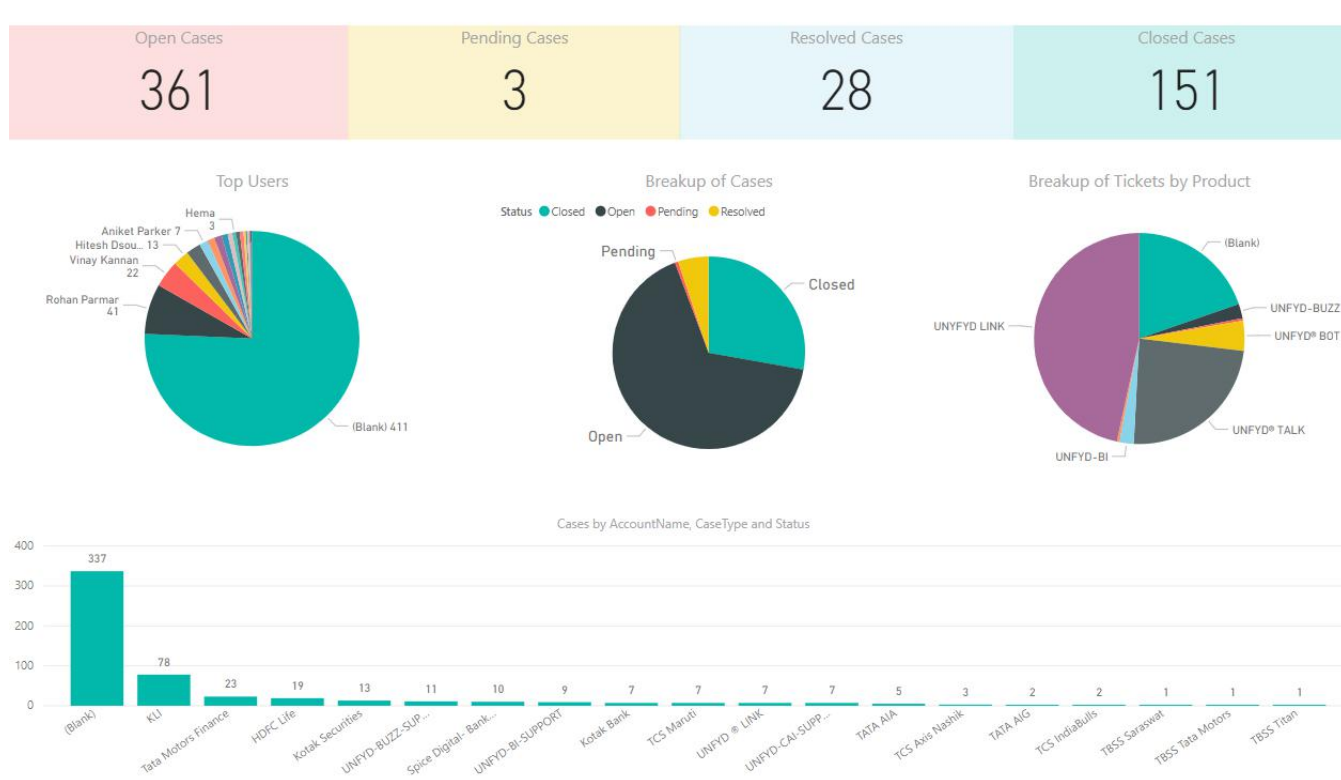


Business Intelligence



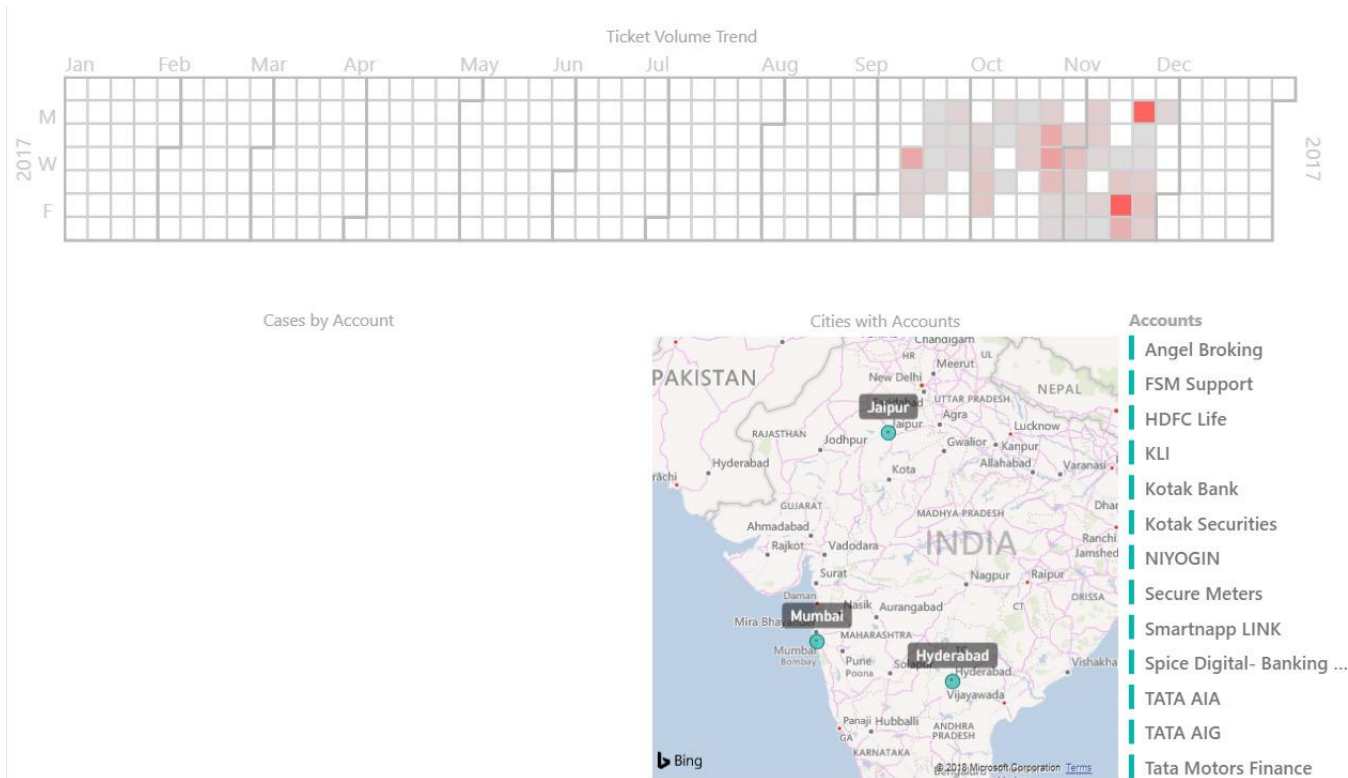


Case Summary Dashboard



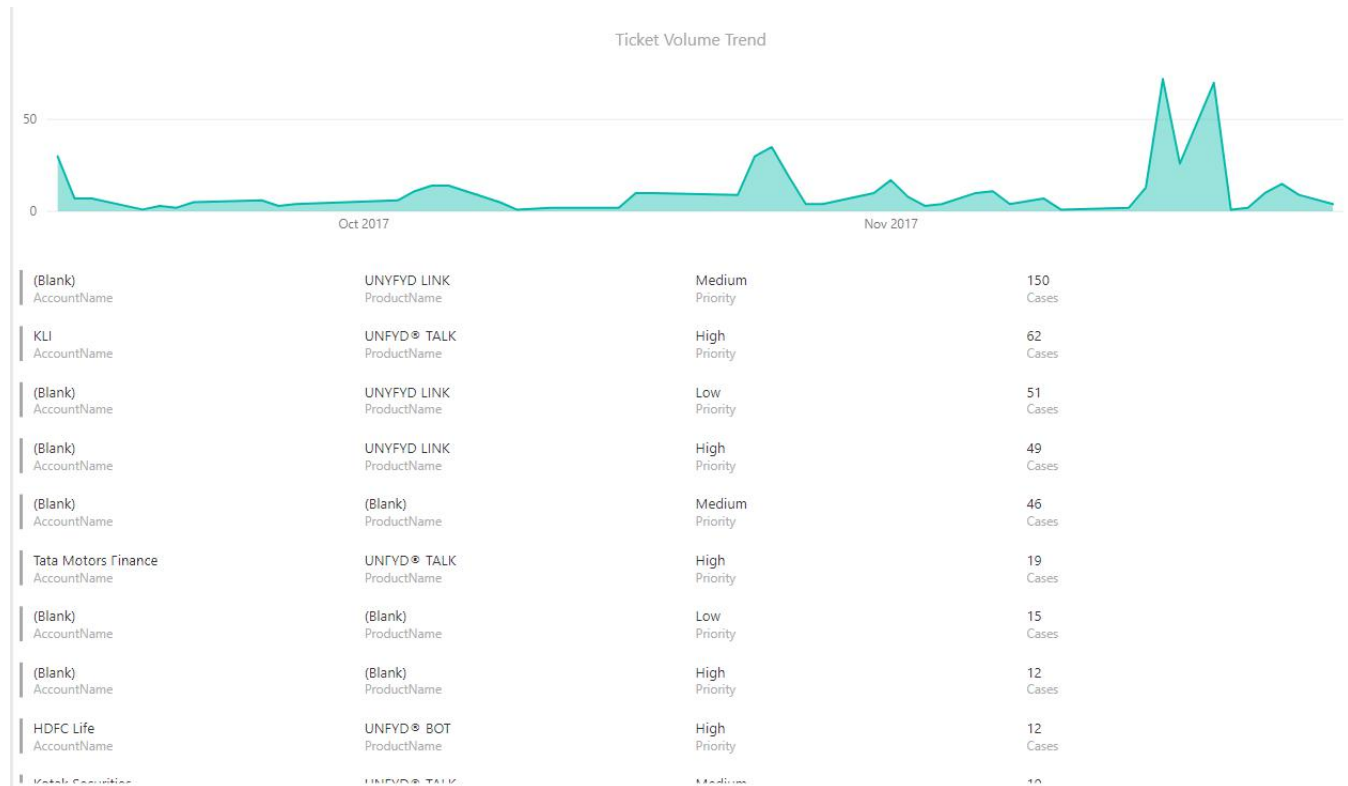


Case Volume Trend





Case Volume Trend

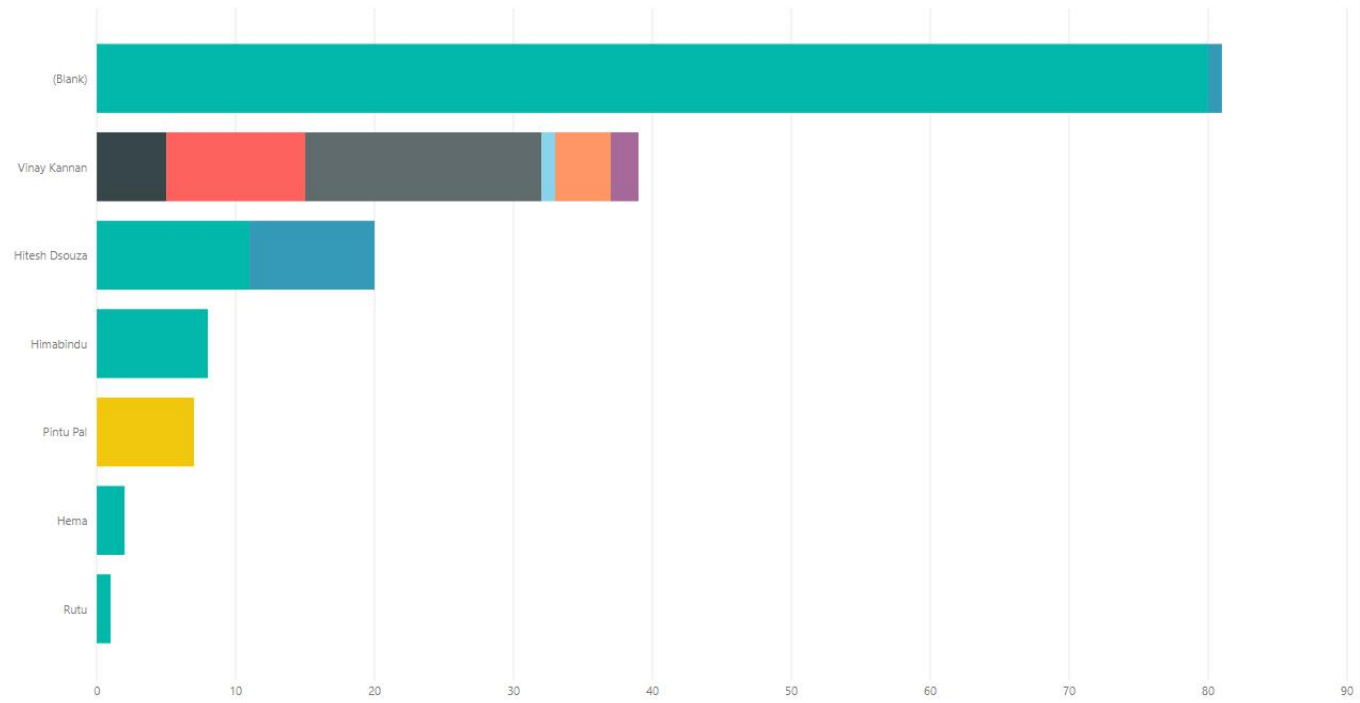


Agent Interaction Summary



Count of InteractionID by FullName and AccountName

AccountName: (Blank) TATA AIG TBSS Saraswat TBSS Titan TCS Axis Nashik TCS IndiaBulls TCS Maruti UNFYD * LINK UNFYD-BI-SUPPORT







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Thank
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