



“ We are now in production with your product and it has significantly changed the way we manage support... Its a great product!!!!

”  
– Portford Solutions Group, Inc.



Contact Management • CRM • Sales Automation • Customer Support - Help Desk • Project Management • ERP Integration • Time - Invoice Billing

### Customer Support - Help Desk

The bottom line in managing successful relationships is producing satisfied customers. And nothing influences customer relationships like support and service. EBSuite sets a new standard for excellence in improving customer satisfaction while lowering service costs.

### Customer Communication

The key is EBSuite's powerful database capabilities: capturing the details of relationships the way people actually interact in person. Integrated with the EBSuite Contact Manager, integrated email system to deliver personal automatic email templates to ensure fast, accurate, branded communication. EBSuite's SFA module is integrated with our CRM - Marketing Automation, Customer Support and Project Management modules to provide your organization with a complete suite of business tools.

### Customer Support 24x7x365

EBSuite's Customer Support module provides the tools to deliver superior customer service while actually reducing expense. Tools like the EBSuite Knowledge Base and the self-service web portal allow your customers to help themselves with 24/7 access to a searchable library of solutions. Case histories provide your organization with valuable information to improve services and products while reducing costs.

### Features/Benefits include:

**Contact Management** - The best contact manager available, including: Appointment Calendar, Task List, Team Collaboration, Customer/Contact Interaction History, Document Library, easy Outlook and ACT data import, HTML Email Templates, Mobile Access Notification, Attachments & Notes History.

**Case Tracking** - Resolve issues faster and make every contact a step forward. Track and report customer contact through phone calls, your web portal, and emails. Each case is automatically assigned to a service representative and recorded in the customer's history.

**Attach Knowledge to Issues and Cases** - Improve the efficiency and effectiveness of customer support. Provide easy access for service representatives on frequently requested issues or cases.

**Self-Service Customer Web Portal** - Customers can directly submit cases, track their case history and provide custom information about their troubles.

**Automatic Case Creation by Email** - Direct case creation and notification as your customers submit their problems by email, a case can be automatically created, dispatched and then notify/assign the proper support representative.

**Asset Management & Tracking** - For management of Fixed or IT Asset Tracking and service. Combine service desk automation with asset management to assist support agents to quickly and comprehensively access system configurations. Vital information to support each customer's system to save time during the customer resolution process.

**Customize Service Request Form** - Create unlimited number of custom fields for your customer web portal. Report and track the results as customers submit service requests.

**Unique Service Page for Each Customer** - Create a unique service page for each company. Use their brand, logo, colors and custom fields to provide a unique level of service tailored specifically for each organization.

E Business Suite

111 Mackintosh Ave. • Fremont, California 94539 • 1.888.CRM.EBS0 • www.ebsuite.com

**Document Library** - Allows every team member to see and share the same information. Each contact adds to the knowledge base.

**Searchable Knowledge Base** - Publish FAQs' or Knowledge Base solutions to support your internal customer support team and to support your customers through the 24/7 self-service customer service center access.

**Knowledge Base Metrics** - Provide service before there is a problem, and identify where customers are experiencing problems; Track and report which Knowledge articles or FAQs are viewed most frequently and by whom. Knowledge Base metrics will assist to improve service and products information and reduce customer service requests.

**Import/Export Knowledge Base Documents** - Export/Import your Knowledge Base articles to enhance your customers' experience.

**Service Report Analysis** - Identify what is working in your organization...and where you could improve. Sort reports by issues, products, time required to resolve, and more.

**Automatic Case Escalation** - Automatic case escalation notification/re-assignment. A rule-based hierarchy you define to escalate each case based on any data type including, time, product, agent. Create as complex an escalation tree as you desire. Provide and support customers based on your Service Level Agreements (SLA).

**Executive Case Alerts** - Alerts to management report case status for important customers. Never miss a dead-line, managers are automatically notified before it's too late.

**Multiple Level Support** - Put the right person on the case. Define multiple hierarchy levels of customer support cases that are automatically routed to pre-defined service representatives to facilitate optimal response.

**Instant Case Auto-Fill** - Save time, instant case auto-fill will automatically enter Organization - Contact information to save support representatives time.

**Web Portal Templates** - Automated messages delivered to service representatives as well as customers to report the status of a case.

**Automatic Email Notification** - Increase confidence, speed and simplify communications between customers and support staff. Customers automatically receive a confirmation email whenever a new case is open or closed.

**Case Reports** - Create and track service representatives' activity. Over 75 built-in standard reports, Reports include: service rep. cases by organization and/or customer, time period, case duration, actual rep. time, products, service level, as well as custom fields.

**Time Sheet** - Create and track service representatives activity. Create time sheets for each service rep. to invoice customers.

**Customer Searchable Service Requests** - Now, customers have the ability to search their list of submitted service requests to track the progress.

**LDAP Directory** - Connect directly to an LDAP directory server. Provides synchronized support to server.

**Case Tracking URL** - Send a customer a secure URL so they can track the status and / or update a case request.

**Uncover Decision Makers View Each Organizations' Hierarchy** - Automatically view each organization's hierarchy and uncover key decision makers with our Organization Tree diagram. Easily identify decision makers within the organization and share this information with the rest of your team. Let support staff know who they are interacting with.

**Fully Customize Every Field** - Use your business work flow to facilitate ease of use and adoption. Create and customize the layout, type and even assign the field names to standard and custom fields in the application.

**Customer Service Survey** - Give your customers the chance to tell you about their service experience. Review your teams' performance, survey information is input directly into their contact record.

**Custom Fields on Self Service Portal** - Collect all information from customers who visit your Self-Service Portal using custom fields. Now you can request/collect unique information as customers submit service requests.