

# Astadia Customer Care Platform



## Abstract

The Astadia Customer Care Platform allows internally and externally focused support teams to easily track, manage, and report on a wide-range of service issues. Accommodating a variety of industries, the Astadia Customer Care Platform has been built to handle a wide range of service and support issues facing any organization.

## Description

With the Astadia Customer Care Platform, your support organization will be able to more effectively track, manage and report on all types of customer care and support issues. Organizations large and small across all types of industries will value the effectiveness and depth of this application.

Astadia combined its deep knowledge in customer support with its industry leading experience with Salesforce.com to provide an application that's easy to use, but sophisticated enough to handle complex, multi-level issues. From pre-sales to support, all the important must-haves were addressed including case tracking, knowledge management, escalation, prioritization, auto-response, workflow, and much more.

Dashboards provide insight to all levels of the organization including representative, manager and company executives. Real-time graphics offer details on service levels, open cases by priority, issue types, escalations, and more. Out-of-the-box, the Astadia Customer Care Platform is pre-configured to enable a self-service portal and web-to-case functionality.

As comprehensive as this application is, Astadia understands your business is unique. With that in mind, Astadia's consultants, located coast to coast and in Europe, stand-by ready to help you enable your specific business processes.

## Highlights

Name	Description	Type
Order Tracking	Allows your company to manage RMA's, product, and marketing material shipments	■ ☰
About Platform	Details about the Customer Service platform	☰

■ = Custom Object, ☰ = Custom Tab, ● = Custom Link, ⚡ = Custom S-Control  
⌘ = Plug-In, ✕ = Composite Component

## Features & Benefits

- **Accept, track and manage** internal and/or external cases through phone, web and client portal
- **Communicate and collaborate** across the organization on client related pre-sales, customer care and technical support issues
- **Prioritize knowledge management and critical development** based on the actual voice of the customer
- **Focus on key productivity measures** through real-time dashboards and reporting

## Key Reports & Dashboards

Name	Description
Dashboard - Company	Analyze the trends in your support including type, source, escalations, and productivity.
Dashboard - Rep/Agent Performance	Track and manage your open cases, escalations, and case history by Agent
Dashboard - Case Type Specific Metrics	Report on various types of cases being used by Company.

## Requirements

<b>External Service</b> <b>Salesforce.com Edition</b>	www.astadia.com Professional Enterprise Unlimited Developer
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## Specifications

<b>Publisher</b>	Astadia Consulting, LLC
<b>Type</b>	Native Application
<b>Salesforce.com Certification</b>	None
<b>Pricing: as Configured</b>	FREE
<b>Pricing: New Implementation or Existing Deployment Optimization</b>	Contact Us

## Screenshot

**New Case**  
Select Case Record Type

Select a record type for the new case. To skip this page in the future, change your record type settings on your personal setup page.

**Select Case Record Type**

Record Type of new record: Schedule Installation

[Continue](#) [Cancel](#)

**Available Case Record Types**

Record Type Name	Description
Application Development	Use this record type to track new product feature requests and their approval
Billing Inquiry	Use this record type to track billing issues and requests
Delivery Confirmation	Use this record type to track delivery of a shipment
Pre Sales	Use this record type to track sales requests
Return / RMA	Use this record type to issue an RMA # (Case #) to your customer
Schedule Installation	Use this record type to schedule a product installation
Technical Support	Use this record type to track a problem a customer is experiencing with a product

**Case Edit**  
New Case

[Save](#) [Save & Close](#) [Save & New](#) [Check Spelling](#) [Cancel](#)

**Case Information**

Case Record Type	Technical Support	Status	New
Case Owner	Support Admin	Category	--None--
Parent Case	<input type="text"/>	Sub-Category	--None--
Contact Name	<input type="text"/>	Priority	Medium
Account Name	<input type="text"/>	Case Origin	--None--
Asset	<input type="text"/>		

**Description Information**

Subject:

Description:

Internal Comments:

**Optional**

Assign using active assignment rules

Send notification email to contact

[Save](#) [Save & Close](#) [Save & New](#) [Check Spelling](#) [Cancel](#)

**Case**  
00001076

[Printable View](#) | [Customize Page](#) | [Help](#)

[Open Activities \(1\)](#) | [Activity History \(0\)](#) | [Solutions \(0\)](#) | [Case Comments \(0\)](#) | [Attachments \(0\)](#) | [Case History \(3\)](#)

**Case Detail** [Edit](#) [Delete](#) [Close Case](#) [Clone](#)

Case Record Type	Schedule Installation <a href="#">[Change]</a>	Status	Scheduled
Case Owner	Pending Install Schedule Queue <a href="#">[Change]</a>	Priority	
Case Number	00001076	Contact Phone	
Contact Name	Shell Black	Contact Email	sblack@astadia.com
Account Name	Astadia	Case Origin	Web
Installer Requested			
Asset			

**Scheduling**

Day of Week Preferred (1st Choice)	Monday	Day of Week Preferred (2nd Choice)	Tuesday
AMPM (1st Choice)	PM	AMPM (2nd Choice)	AM
Duration1 (Hours)	1	Duration2 (Hours)	1
Equipment Needed	Laptop; Patch Cables; Router		
Date/Time Opened	6/21/2007 4:55 PM	Date/Time Closed	

**Description Information**

Subject: Laptop, Cables and Router need to be installed

Description: Purchase has been completed. Need to schedule technician to visit with client and complete installation of the appropriate equipment.

**System Information**

Created By: Support Admin, 6/21/2007 4:55 PM

Last Modified By: Support Admin, 6/22/2007 8:57 AM

[Edit](#) [Delete](#) [Close Case](#) [Clone](#)

**Open Activities** [New Task](#) [New Event](#) [Open A...](#)

Action	Subject	Name	Task	Due Date	Status	Priority	Assigned To
<a href="#">Edit</a>   <a href="#">Cls</a>	Please review the ROI		✓	6/22/2007	Not Started	High	Support Admin

**Activity History** [Log A Call](#) [Mail Merge](#) [Send An Email](#) [View All](#) [Activity](#)

No records to display

**Solutions** [View Suggested Solutions](#) or  in All Solutions [Find Solution](#)

No Solutions Attached