VERINT ENGAGEMENT MANAGEMENT – APPLICATION GUIDE

INBOX – VIEWS: Click button to show (expand) or hide (contract) Inbox. Cursor over changes button to or . Above right-side scroll bar click button to maximize or to revert to previous size.

Below right-side scroll bar click button and drag up or down to resize as desired.

INBOX – FILTER: 

Left side: drop-down menu filters by “All,” “Case,” “Message,” “Email,” etc. **Center:** “Filter…” text field allows direct input search, e.g. keyword(s), service request number, date, etc. **Right side:** buttons filter by “Show All” (green or black bars) or “Show Taken” (white checkmark in black or green circle).

INBOX – PAGE NAVIGATION (filter by “All”): 

Click > button for “Next Page” or >> button for “Last Page.” Click << button for “First Page” or < button for “Previous Page.”

INBOX – COLUMNS:

Type	Created	Updated	Associated	Identifier	Description	Work Queue	SLA

Click on column headers to sort A – Z, Low – High, Newest – Oldest, etc.; click again to reverse the order; click “Show All” button (filter) to return to default view. Click and drag on column dividers to resize width (like Excel), or click button to “Size columns to fit.”

NOTE: Case = Service Request

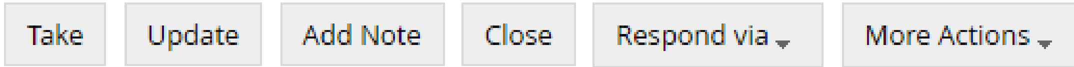
– CASES:
New Case link starts the service request creation process; NOTE: most departments will not use this.
Case Search link opens the “Case Search” interface; search: Case Ref (by service request number); Created After and/or Created Before (by date); Status (by All Cases, Open Cases, Closed Cases); Allocated to Queue or User (by drop-down menus); etc.

– HANDLE CASES: (all links provide “Export” options, e.g. Excel, PDF, etc.)
My Cases link shows all cases you have ownership of.
Organize link shows all cases you have ownership of and allows for various actions on multiple cases.
Create Detailed View link allows for opening case(s) in a summary view in a separate browser tab.

– ORGANIZE: (all links provide “Export” options, e.g. Excel, PDF, etc.)
Take Cases link shows all cases that a user can take ownership of; can take one or more at a time.
Open Cases link shows all open cases, regardless of whether a user has taken ownership of them.
Available Cases link shows all cases that a user can take ownership of; can view one case at a time.
Organize All Cases link allows for various actions on one or more cases; “Next” button goes to the “Case Search” interface for selection of case(s).

VIEWING AN INDIVIDUAL CASE

CASE – HANDLING:



NOTE: available buttons and associated options are determined by assigned user permissions and may vary based on department processes.

Take: "locks" the case to the specific user and removes it from the "Take Cases" and "Available Cases" lists.
Update: interface provides the ability to change case parameters, title, description, etc.
Add Note: allows the user to add a note to the case and attach a file.
Close: interface allows for adding a "Title" and "Description" before closing a case.
Respond via:

- **Email:** respond to customer via Email; can be sent using an existing Email template or free-form; can attach a file from an existing attachment template or other file source.
- **Letter:** respond to customer via a letter.

More Actions: (depending on user permissions)

- **Add Eform:** adds an Eform to a case; NOTE: most cases will already have an associated Eform.
- **Create Link:** links two cases together with an appropriate "Link Type."
- **Reallocate:** allows the user to reallocate a case to another work queue or user, and include "Title" and "Description."
- **Release:** releases the case back to the work queue it was taken from.

– SEARCH: (all links provide "Create New" option for "Organization" or "Individual")

Search Individuals link allows for various search parameters, e.g. Name, Phone, Address, etc.
Search Organizations link allows for various search parameters, e.g. Name, Phone, Email, etc.
Search Properties link allows for various search parameters, e.g. Street Number, Street Name, Point of Interest, etc.
Search Streets link allows for various search parameters, e.g. Street Name, Town/City, State

– CREATE:

Create individual link allows for creation of an "Individual" record, including Name, Address, Email, Phone Number, Affiliation, etc.
Create Organization link allows for creation of an "Organization" record, including Name, Industry Classification, Address, Affiliation, Email, Phone Number, etc.

Please refer to the VERINT ENGAGEMENT MANAGEMENT – USER GUIDE for information and basic instructions on logging in to the application, taking and handling cases, etc.

Case Attributes: a case (or service request) may contain one or more of the following, and each will have a date and time stamp:

- **Eform:** the electronic form containing the data for the service request.
- **Events:** may include case creation, case closure, case reallocation, case updated, etc.
- **Interactions:** the record of interactions with the customer, e.g. customer called, email sent out, etc.
- **Notes:** added to the case to document pertinent information, actions taken to handle the case, automated processes, etc.