



# Eccentex AppBase Platform

Enterprise Customer Service Software  
Product Datasheet



# AppBase unites all the capabilities required to deliver seamless, end-to-end customer service across your organization

Eccentex AppBase® is an award-winning platform for customer service. This unified suite includes case & task management, proactive engagement, scheduling, knowledge base, task routing, SLA management, integration with legacy data systems, and much more.



# Solution Summary

AppBase allows business users to design, configure and adapt applications with no-code, drag-and-drop ease, as well as provides advanced features for technical users. Powered on Microsoft Azure, AppBase delivers enterprise-grade performance, reliability, and security.

## Features

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- Dynamic Case Management
- Business Process Management
- Operational CRM
- Master Data Management
- Self-Service & Portal
- Employee Management
- Robotics & Automation
- Tracking & Audit
- Advanced Content Management
- Email Capture & Automation
- Dashboard & Reporting
- Collaboration & Teams
- Omnichannel with Genesys
- Proactive Engagement
- Knowledge Base
- Calendar & Appointments

## Under the Hood

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- No-Code Features
- Low-Code Features
- Deep-Code Features
- Security & Trust

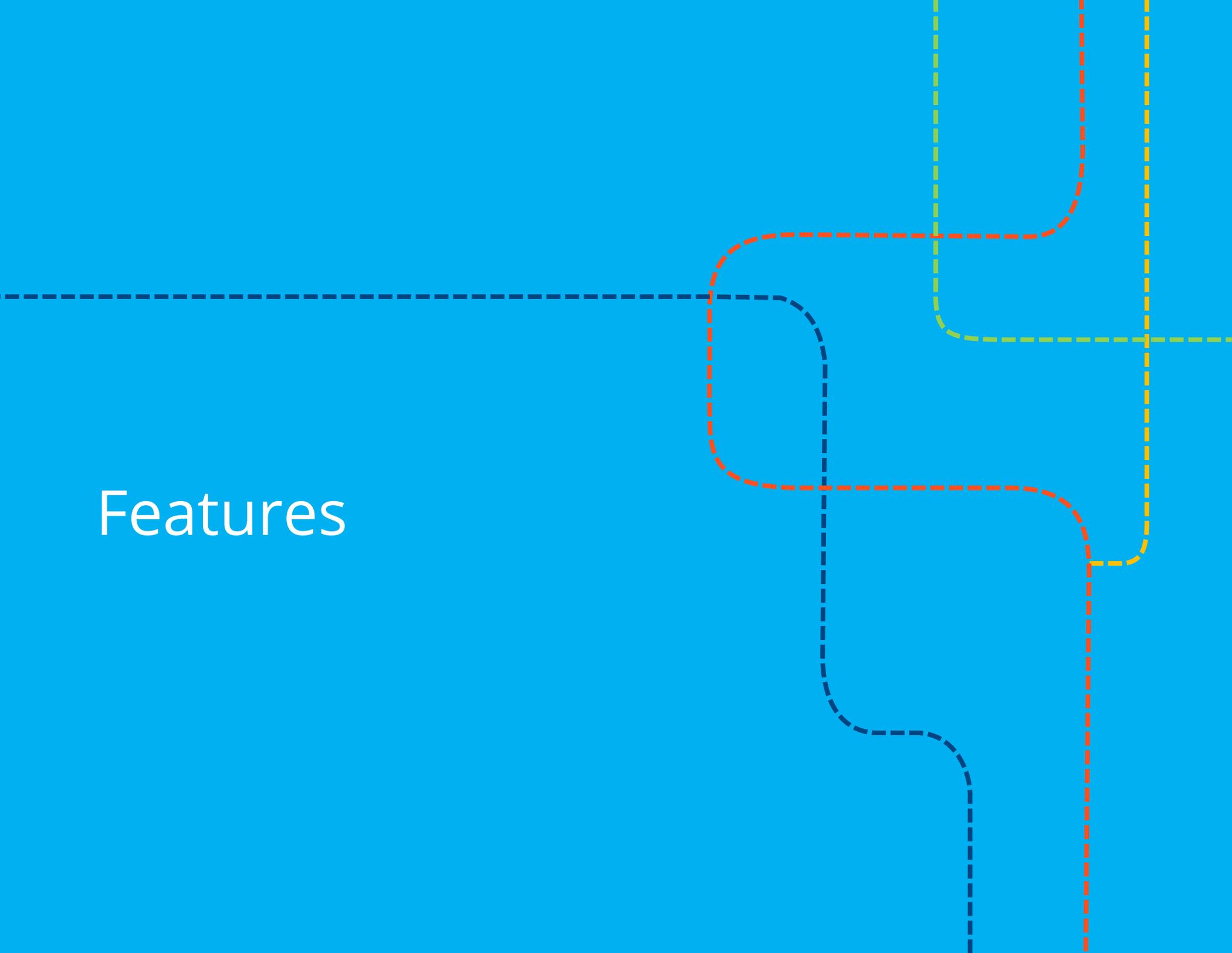
## Cloud & Delivery

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- Deployment & Hosting
- Professional Services

*Note: some features may require additional licenses or services.*

Features



# Dynamic Case Management

Orchestrate consistent and accurate resolutions every time with cases that can adapt to diverse and unpredictable situations.



## Case Types

Create any number of case types that have their own workflows, fields, SLAs, and business rules.



## Customer Context

Surface the most relevant and actionable information to employees based on the interaction or work at hand.



## Custom Milestones

Track simple and complex cases with custom milestones tailored to how each case type should be resolved.



## Flexible Forms

Add and modify forms that are important for each case type; add validations, field guides, and help messages.



## Sub-Cases & Linked Cases

Split complex, multi-stage issues into smaller pieces. Keep track of related issues to provide consistent responses.



## Ad-hoc Tasks

Create unplanned tasks such as requesting a review or approval and easily assign them to individual people or teams.

# Case 360 Detail Page

eccentex
ACME Customer Service App

Home Search Cases **CASE-2020-465**
Close Window

**€ Retail Refund** Order #1028064427 - 1,146.00 EUR - Pat Thompson

Case ID: **CASE-2020-465** Milestone: ▶ In Review Priority: ▲ Normal Total: **€ 1,146.00 EUR**

Case Owner: Morgan Smithson (Agent) Case SLA: - 1d 16h 47m Resolution:

Order Status: ✔ Completed

Order #: 1028064427 Order Status: COMPLETED  
 Sales Total: € 2,180.09 EUR Order Type: ISOM  
 VAT Total: € 436.02 EUR Business Unit Code: 241  
 Total: € 2,616.11 EUR Case & Carry: NO  
 Order # Source: A01

**Billing Details**

First Name	Last Name	Order #	Customer ID
Pat	Thompson	1028064427	00BFR133-3193-1200-0000-000000000000

**Payment Info**

Amount	Tax	Due Date	Timing
€ 2,279.09 EUR	€ 379.85 EUR	Thursday, 7 November 2019 13:55	ON_DATE

**Transactions**

Amount	Transaction Date	Gateway	System	Type
€ 2,279.09 EUR	Thursday, 7 November 2019 13:55	RED	IRH	MASTERCARD

**Deliveries**

Delivery Time	Service Type	Status
Monday, 18 November 2019 07:00	HOME_DELIVERY	Delivered
Monday, 18 November 2019 19:00	STANDARD	CUSTOMER_ADDRESS

**Contact**

Contact	Address	Cost
Pat Thompson	Address line 1	Delivery Charge: € 92.50 EUR
Email: pthompson@gmail.com	LIMOGES, FR	VAT Charge: € 16.50 EUR
Mobile: 1234567890	Open in Google Maps	Total Delivery: 16.50 99

Refund Articles Refund Details Tasks (4) Documents (6) Discussions (1)

==Search Order==   Total Refund: **€ 1,146.00 EUR**

Order & Articles	# Qty.	Wished Resol...	Return Amount
#1028064427 for Molle Mocker <small>Thursday, 7 November 2019 13:55</small>			
#60204645 / UTRUSTA - chamières	7 of 7	Full Refund	€ 42.00 EUR <small>35.00 + 7.00 VAT</small>
#70213569 / METOD - élément bas pr four/évier encastré	2 of 2	Full Refund	€ 74.40 EUR <small>62.00 + 12.40 VAT</small>
#80335117 / LYSEKIL - baguette pour revêtement mural	4 of 4	Full Refund	€ 72.00 EUR <small>60.00 + 12.00 VAT</small>
#40204651 / UTRUSTA - face de tiroir, bas	1 of 1	Full Refund	€ 6.00 EUR <small>5.00 + 1.00 VAT</small>
#50213570 / METOD - caisson arm réfrig/four	2 of 2	Full Refund	€ 192.00 EUR <small>160.00 + 32.00 VAT</small>
#40241823 / UTRUSTA - amortisseur de porte pour chamière	4 of 4	Full Refund	€ 24.00 EUR <small>20.00 + 4.00 VAT</small>
#455161 / ÅLMAREN - mitigeur	2 of 2	Full Refund	€ 141.60 EUR <small>118.00 + 23.60 VAT</small>
#90337620 / EKBACKEN - plan de travail	2 of 2	Full Refund	€ 117.60 EUR <small>98.00 + 19.60 VAT</small>
#30263245 / KOMPLEMENT - rail coulissant pour corbeilles	4 of 4	Partial Refund	€ 19.20 EUR <small>16.00 + 3.20 VAT</small>
#90202126 / FYNDIG - évier à encastrer 1 bac	2 of 2	Full Refund	€ 50.40 EUR <small>42.00 + 8.40 VAT</small>
#60285038 / MAXIMERA - tiroir, moyen	1 of 1	Full Refund	€ 38.40 EUR <small>32.00 + 6.40 VAT</small>
#30322773 / KALLARP - porte	1 of 1	Full Refund	€ 43.20 EUR <small>36.00 + 7.20 VAT</small>
#90322708 / KALLARP - panneau latéral de finition	1 of 1	Full Refund	€ 85.20 EUR <small>71.00 + 14.20 VAT</small>
#60205664 / METOD - rail de suspension	3 of 3	Partial Refund	€ 39.60 EUR <small>33.00 + 6.60 VAT</small>
#90285032 / MAXIMERA - tiroir, bas	1 of 1	Compensation	€ 31.20 EUR <small>26.00 + 5.20 VAT</small>
#20322815 / KALLARP - face de tiroir	2 of 2	Partial Refund	€ 50.40 EUR <small>42.00 + 8.40 VAT</small>

People (4) Notes (14) KB

+ Add to Case

- Morgan Smithson**  
Case Creator  
Case Worker
- Managers**  
Managers Work Basket  
Team
- Pat Thompson**  
Customer  
External Party
- Team Leaders**  
Team Leaders Work Basket  
Team

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# Business Process Management

Boost efficiency and transparency across multiple channels and organization silos by automating work when possible, deferring to human judgment when required.



## End-to-end Workflows

Visually model your business workflow with manual and automatic steps that can have their own actions, SLAs, and validations.



## Team Inboxes

Track tickets coming from multiple channels and assign them to individuals, teams, departments, or specialized queues.



## Integration & APIs

Send case data to other systems or allow other systems to push, create, update, route, and close work.



## Business Rules

Automate assignment & routing, decisions, field calculations and communication with other systems or people.



## Smart Assignment

Assign cases and tasks to employees or teams based on their workload, skill set or allow them to pick their own assignments.



## SLA Management

Set deadlines for when a case or specific task needs to be resolved and automatically escalate at-risk items or notify stakeholders.

# Tasks in a Case + Task Workflow

The screenshot displays the 'eccentex' Case Management interface for a case titled 'Retail Refund Order #1028064427 - 1,146.00 EUR - Pat Thompson'. The case ID is CASE-2020-465, owned by Morgan Smithson (Agent), with a milestone of 'In Review' and a priority of 'Normal'. The Case SLA is 1d 20h 55m. The interface shows a list of tasks with their status and resolution, and a detailed task workflow diagram.

**Case Overview:**

- Case ID: CASE-2020-465
- Milestone: In Review
- Priority: Normal
- Case Owner: Morgan Smithson (Agent)
- Case SLA: 1d 20h 55m
- Resolution:

**Task List:**

Name	Deadline SLA	State	Resolution	Task Owner
All Tasks				
AutoValidate Refund Request		Closed	Refund Approved	Nob...
2nd Eyes Review Calculator		Closed	Need Review by Man...	N...
Any Team Leader Review		Not Started		
Different Team Leader Review		Not Started		
Manager Review		Closed	Approved	
3rd Eyes Review Calculator		Closed	Need Review by Man...	
Manager Review	+ 00d 03h 53m	In Process		
Denied Review		Not Started		
Refund Money Out Exception		Not Started		
Submit Refund Payment		Not Started		
Refund Money Out Complete		Not Started		

**Task Workflow Diagram:**

The workflow diagram illustrates the process flow for a refund case. It starts with a '2nd Eyes Review Calculator' task, which leads to a decision point. From there, the flow branches into three paths: 'Need Review by Manager' leading to 'Manager Review', 'Need Review by Any Team Leader' leading to 'Any Team Leader Review', and 'Need Review by Another Team Leader' leading to 'Different Team Leader Review'. All three paths converge into a 'Validate Review Results' task. This task leads to another decision point, which branches into 'Approved' leading to '3rd Eyes Review Calculator' and 'Denied' leading to a 'Denied' state. A 'No Review Needed' path also branches from the initial decision point to the '3rd Eyes Review Calculator' task.

# Operational CRM

Capture all data, journeys, processes, and events about your customer and use them to drive positive outcomes with exceptional customer experience.



## Customer 360

Create a unified view of your customer that shows all their cases, interactions, appointments and internal or external data.



## Custom Data Models

Extend or create data models specific to your business, such as products, assets, vendors, accounts, and so on.



## Two-Way Data Sync

Maintain up-to-date information for use by all your software and offer company-wide, cross-channel customer experiences.



## Account Hierarchy

Organize customers, departments, accounts, and contacts into parent-child views and link them to cases.



## Connect to Data Sources

Show and use data from other sources such as point-of-sale systems, product databases, mainframes, or marketing platforms.



## System of Record

Use the operational CRM as the single-source-of-truth that other systems can reference, update, and query.

# Customer 360 Detail Page + Customer Data Model

The screenshot displays the ACME Customer Service App interface. The left sidebar contains navigation options: Home, Case Inbox, Task Inbox, Customers, Search Cases, External Parties, All External Parties, Customer (selected), Work Activity Report, Email Indexing, My Profile, My Dashboards, Report Viewer, More, Search Cases, and Generic Searches.

The main content area shows the customer profile for **Mr. Pat Thompson**, a Gold Member. Contact information includes email (pthompson@email.com), phone numbers ((123)456-7890 and (310)555-1234), and address (3640 Main St. Apt #8, LIMOGES, FR). A score of 687 GOOD is displayed. Activity history shows creation 4 years ago by George Amasor and modification 1 year ago by Salesforce Sync.

Below the profile is a table of cases:

Case Type	Case ID	Summary	Milestone	Resolution
Retail Refund	CASE-2020-465	Order #1028064427 - 1,1460.00 EUR	In Review	
Complaint	CASE-2020-312	Complaint on Employee Behavior	New	
Credit Services	CASE-2019-1483	ACME Retail Credit Increase Request	Closed	
Warranty Claim	CASE-2019-1482	Order #98745778 - Request warranty replacement	Closed	
Account Verification	CASE-2019-341	Contact information change	Closed	
Services Request	CASE-2017-1954	Order #98745778 - Delivery and installation services	Closed	

On the right, a data model diagram illustrates the relationships between various entities. The central entity is **Customer**, which is linked to **Party** and **AccountOwner**. **Customer** is also connected to **Addresses**, **Interactions**, **Alerts**, **SocialMediaInsights**, **CustomerOrders**, **DeliveryDetails**, and **OrderPaymentMethods**. **Interactions** is further linked to **Result**, **ContactMethod**, and **Agent**. **SocialMediaInsights** is linked to **Type**. **CustomerOrders** is linked to **ProductCustomerOrder**.

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# Master Data Management

Remove data silos by easily configuring data models that provide accurate and complete information about your customers, products, assets, core data and more.



## Multi-level Data

Create true-to-life data models with tables, parent-child relationships, many-to-many linking and drill down views.



## Data Change Actions

Automatically notify employees or other systems when data changes and prevent actions that can lead to data corruption.



## Open Data Model

Data models deploy as real tables, columns, and foreign keys in the database, making them transparent to other systems.



## Data Model Builder

Visually define your tables, columns, and relationships; then automatically generate configurable forms, pages, search screens.



## Form & Page Builders

Drag-and-drop simple textboxes, complex formula fields, editable grids for child data, tabs, and conditional logic.



## Search Builder

Create pre-built filters by drag-and-dropping columns and search fields that query across case types, people, and related data objects.

# Data Model Builder

The screenshot displays the 'Data Model Builder' interface for a 'Retail Refund' data model. The main workspace shows a hierarchical diagram of data objects and their relationships. The central object is 'Retail Refund', which is connected to 'CASE', 'Order', and 'Reason Resolution'. 'Order' is further connected to 'Customer Detail', 'Links', 'Delivery', 'Articles', 'Article Links', 'Amounts', 'Payment', 'Products', and 'Product Links'. 'Reason Resolution' is connected to 'Resolution' and 'Reason Codes'. 'Articles' is connected to 'Article Return Reason'. 'Payment' is connected to 'Transactions', 'Order Reason Resolution', and 'Article Return Reason'. 'Products' is connected to 'Article Return Reason'. 'Resolution' is connected to 'Resolution' (Dictionary Word). 'Reason Codes' is connected to 'Reason Codes' (Dictionary Word). 'Billing' is connected to 'Billing'. 'Transactions' is connected to 'Transactions'. 'Order Reason Resolution' is connected to 'Order Reason Resolution' (Return Reason). 'Article Return Reason' is connected to 'Article Return Reason' (Return Reason). The left-hand navigation pane shows a tree view of the data model, including 'General', 'System Reference Objects', 'Other Reference Objects', and 'Reusable Objects'. The right-hand panel shows the 'Attributes (20)' list, which includes various attributes such as 'Refund Request Type', 'Selling Unit', 'Action Unit', 'Refund Amount Reques...', 'Refund Eligibility', 'Refund Details', 'Refund Amount', 'Tax Adjustment', 'Total Refund Amount', 'SELARTICLES', 'SELRESCODES', 'SELREASONCODES', 'SELQUANTITY', 'TEMPCREATEDFROM', and 'Currency Code'. The interface also includes a 'Properties' tab, a 'Data Model Editor' tab, and a 'Forms' tab. The top of the interface shows the 'ACME Customer Service App' logo and a 'Close Window' button.

# Advanced Content Management

Give case workers easy access to all the emails, paper documents, and digital files necessary to make decisions and resolve cases.



## Document Management

Feature-rich file management with file versioning, indexing, conversion, and online viewing.



## Full Text Search (FTS)

Search for all mentions of a specific phrase or customer involvement across all cases, people, records, documents, and emails.



## Scanning and Barcoding

Scan multi-page documents right into a case or leverage high-volume scanning by separating packets with barcodes.



## Optical Character Recognition (OCR)

Convert hand-filled forms or images into searchable documents that can recognize forms, read hand-writing and auto-index.



## Document Generation

Generate Word documents, emails, PDFs, and other content using internal and external data.



## Document Annotations

Online support for annotating, redacting, commenting and stamping PDFs as well as converting files to PDFs.

# Documents in Case

The screenshot displays the 'eccentex' ACME Customer Service App interface. The main case view for 'Retail Refund Order #1028064427 - 1,146.00 EUR - Pat Thompson' is shown. The case is in 'In Review' status with a priority of 'Normal'. The case owner is Morgan Smithson. The interface includes tabs for 'Refund Articles', 'Refund Details', 'Tasks (8)', 'Documents (5)', and 'Discussions (1)'. A file list under 'Customer Files (5)' contains: 'Sample Movie File.mpg', 'CS Call Recording.mp3', 'Order 1028064427 PDF Version.pdf', and 'BrokenChair - Customer Email.jpeg'. A context menu is open over the 'BrokenChair - Customer Email.jpeg' file, showing options like 'Quick Modify', 'View', 'Download', and 'Send by email'. An 'Index Document Customer Files' modal is open, displaying a photo of a broken wooden chair and a form with fields for 'Name', 'Document Type' (set to 'Customer Sent'), 'Remarks', 'Source' (set to 'Email'), and 'Email' (set to 'pat@someemail.com'). The modal also includes 'Save & Close', 'Cancel', 'Save & Prev', 'Save & Next', 'Undo', 'Download', and 'Popup' buttons. The footer contains copyright information for 2007-2020 Eccentex, Inc. and version details: 'Version 6.7 R2 Update 2(6.7.20.24) | Privacy | Security | Terms of Use'.

# Email Capture & Automation

Capture emails from multiple addresses and automatically acknowledge, prioritize, and assign them to the right people.



## Email-to-Case

Convert your emails into new cases or attach to existing cases, bringing all attachments with them.



## Context-Aware Conversations

Email customers back-and-forth from different cases, their replies automatically attach to the correct threads.



## Trigger Emails & SMS

Automatically email customers about their cases, notify employees of changes and schedule periodic reminders.



## Auto Indexing & Tagging

Automatically link emails to correct customer, react to content and notify employees of important events.



## Email Template Builder

Design context-aware email templates that can consume data from the case, customer, employee, and external systems.



## Secure Connectors

Capture from and reply using your existing email boxes by utilizing secure standards such as IMAP, or Microsoft 365 Graph API.

# Email Inbox and Indexing

The screenshot displays the ACME Customer Service App interface. On the left is a navigation sidebar with categories like Case Management, Home, Case Inbox, Task Inbox, Search Cases, External Parties, Work Activity Report, Email Indexing (highlighted), My Profile, My Dashboards, Report Viewer, and More. The main area is titled 'Email Indexing' and contains a list of support emails. The selected email is from Pat Thompson, dated April 13, 2020, with the subject 'Ordered wrong color but already assembled'. The email body includes a complaint about a chair's color and a link to the product page. An image of a blue chair is attached to the email. The interface also shows various action buttons like 'Assign To Me', 'Assign', 'Create Case', 'Attach to existing Case', 'Duplicate', 'Trash', 'Send Email', and 'More'. The footer contains copyright information for Eccentex, Inc. and version details for the app.

**ACME Customer Service App**

**Email Indexing**

**Support Email**

**Home**

- Assigned to me (3)
- All (work baskets) (90)
- Trash (0)

**Shared Work Baskets**

- All Shared (work baskets) (87)
- Premier Support Email (57)
- Privacy Email (0)
- Sales Support Email (12)
- Support Email (18)

**Assign To Me** **Assign** **Create Case** **Attach to existing Case** **Duplicate** **Trash** **Send Email** **More**

**DOC-2020-69**

**Ordered wrong color but already assembled**

From: pthompson@email.com  
To: support@acmeretail.com  
Sender Name: Pat Thompson  
Owner: Support Email  
Customer: Pat Thompson (customer)  
State: Waiting for Review

Order\_876213.pdf (702 KB) ShippingLabel.pdf (4.001 MB)

Hi,

I ordered the chair for order #876213 a few weeks ago and finally put it together. But I realized that it was the wrong color after I already put it together. What do I do?

I want <https://www.acmeretail.com/HomeElegance-Lucille-Fabric-Upholstered-Barrel/dp/B01N4609R0>



Pat Thompson  
[p@thompson.com](mailto:p@thompson.com)

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# Dashboards & Reporting

Maintain situational awareness and discover ways to improve customer satisfaction and employee performance.



## Real-time Dashboards

Configure role-based, visually appealing dashboards or create custom ones with internal or external data.



## AppBase Business Intelligence (BI)

Use advanced reporting and dashboarding with powerful predictive, AI-driven analytics to gain better business insights.



## Open Data Model

Easily analyze solution data with your in-house reporting tools by traversing real tables, columns, foreign keys and views.



## Curated & Custom Reports

Leverage built-in reports to help you track important data, visually design your own PDF reports or export data sets to Excel.



## Scheduled Reports

Schedule reports to generate periodically and sent to your inbox and move complicated analysis to off-peak times.



## KPI Tracking

Track important metrics for how well cases are resolved, how productive employees are and how effective new initiatives are.

# User Dashboard + AppBase BI

**eccentex** ACME Customer Service App

Home | TASK-4940 | TASK-4211 | Search Cases | CASE-2020-465 | CASE-2020-251 | Case Inbox

Service Desk | My Dashboards | + Add Widget | + Add Column

**My Tasks**

- TASK-4830 Review Action Plan
- TASK-4829 3 tier Reivew
- TASK-4820 Submit Application
- TASK-4827 Loan Wrap Up
- TASK-4826 Close Case
- TASK-4825 Employment Verification
- TASK-4824 Qualification Review
- TASK-4823 Gather Additional Information
- TASK-4822 Fast Track Approval
- TASK-4821 Get Credit Report
- TASK-4799 Loan Wrap Up
- TASK-4798 Close Case

**My Cases Chart By Priority**

**Create New Case**

Account Management

**(Row Count) per Priority**

Priority	Count	Percentage
Assignment	667	66.7%
Closed	500	50.0%
In Process	250	25.0%
New	200	20.0%

**Row Count per State, Date Received and Case Type**

State	Year	Month	Compi
Assignment	2018	Mar	
Closed	2018	Mar	
In Process	2018	Mar	
New	2018	Mar	
Resolved	2018	Mar	
Grand total			

**Case Inventory by Case State**

31 of 31 rows | 0 marked | 12 columns

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# Collaboration & Teams

Provide quick and accurate resolutions by enabling your employees to work together on resolving the more complex cases.



## Case Discussions

Ask peers for expertise resolving a case by posting questions or ideas; inviting people to participate in forum-like discussions.



## Automatic Notifications

Automatically notify employees of changes to their cases by email or SMS, or assign follow-up tasks into their inboxes.



## Case Notes

Take notes while working on a case to communicate internally with others and notify them of updates to cases.



## Case Parties

Clearly see all employees and external parties involved in a resolving a case, invite others to participate in different capacities.



## Ad-hoc Tasks

Create unplanned tasks such as requesting a review or approval and easily assign them to individual people or teams.

# Case Discussion and Notes

**eccentex** ACME Customer Service App

Home Search Cases **CASE-2020-465** Close Window

€ **Retail Refund** Order #1028064427 - 1,146.00 EUR - Pat Thompson

Assign Case Issue Refund Escalate to Manager Deny Refund More

Case ID: **CASE-2020-465** Milestone: **In Review** Priority: **Normal** Total: **€ 1,146.00 EUR**

Case Owner: **Morgan Smithson (Agent)** Case SLA: **1d 1h 47m** Resolution:

Refund Articles Refund Details Tasks (8) Documents (6) Case Emails (6) Related (2) **Discussions (5)** History Interactions

**Thread** Discussion People Invite Join Discussion

**EL Emma Lindblad (CW)** 12 Apr 2020 12:26 PM  
The customer wants to know about home pick-up because he intends to move in 2 weeks. Where do we check where this is allowed?

"As our stores are closed to customers, we are suspending all returns and exchanges at this time. ACME offers a 365-day return policy, however, if your receipt is expiring soon, we will take our closing period into consideration. In addition, we have suspended all removal services. Pick-up of exchanges at customers' homes vary by market. Any returns and exchanges shipped back to ACME prior to March 16, 2020 are currently being processed and issued as quickly as possible. We will resume normal returns and exchanges as soon as practical."

**LS Liam Sparv (TL)** 12 Apr 2020 1:38 PM  
The updated list in the KB, just search for "COVID at-home" and it will find it. As of right now, it's only in London, Paris and all of Sweden.

**Thread** Discussion People Invite Leave Discussion

**MS Morgan Smithson (Agent)** 11 Apr 2020 8:46 AM - **EDITED** edit • remove entire thread  
Customer is saying one of the chairs he wants to return is missing a leg but is pretty sure it was never included. Are we allowed to do a partial refund?

**LA Lisette Afzelius (CW)** 11 Apr 2020 11:41 AM  
Unlikely that this happened but it looks like the customer's first time complaining about this so just give him the full refund.

**MS Morgan Smithson (Agent)** 12 Apr 2020 9:01 AM edit • remove message  
Thanks!

Respond

People (4) **Notes (4)** KB

**Emma Lindblad (CW)** - 3 days ago  
edit delete  
=CALL LOG AG4134998-13-APR-2020 @12:34PM=  
- Customer was called back and notified of pick-up policy in his region. Email request ignored due to policy.  
- Customer will call back to arrange pickup

**Morgan Smithson (Agent)** - 4 days ago  
edit delete  
=CALL LOG AG134124-12-APR-2020 @7:32 AM=  
- Customer identified with IVR  
- Customer wants refund for order #1028064427  
- Customer requested pick-up of purchases. Will follow-up on this matter with him.  
- Created task to follow-up with customer in 1 day with email

**Morgan Smithson (Agent)** - 4 days ago  
edit delete  
Customer indicated this has happened before and that he is rethinking purchasing from ACME again. I provided him a 20% discount code as well for the next purchase. Coupon Code 2323HD to expire on April 20, 2021.

**Morgan Smithson (Agent)** - 4 days ago  
edit delete  
Customer is complaining about the chair is missing a leg. I suspect he broke the leg because he changed his story when he was called.

Comment here...

Post

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# Self-Service & Portal

Reduce cost and provide convenience by giving customers access to the information and actions they seek.



## Portal Forms

Embed forms inside your portal for customers to create or update cases and update or see status of existing ones.



## Public Knowledge Base

Embed your knowledge base into your website, making it completely open or only open to customers who are logged in.



## External Users

Give limited access to partners and consultants to upload additional documents or update their cases.



## Integration & APIs

Connect your mobile app and existing portal with comprehensive APIs and the ability to create new APIs.

# Customer Portal + Cases Reports

The screenshot displays the ACME Customer Service App interface. On the left, a 'Return Order' form is visible for order #38148477, which was placed on April 2, 2020, and is currently delivered. The form includes two items for return: a 'TENKO Lounge Chair - Steel' (Color: Blue, \$178.48) and a 'Modern Designs London Coffee Table' (Color: Dark Cherry, \$199.99). Each item has a dropdown menu for the reason for return and a text area for comments. The total amount for the return is \$556.

On the right, a 'Cases Report' table is shown, listing various cases with their owners, milestones, resolutions, and goals. The table includes columns for Case Owner, Milestone, Resolution, and Goal. The cases are sorted by goal, showing a mix of 'In Review' and 'Completed' statuses.

Case ID	Case Owner	Milestone	Resolution	Goal
Review for Order #38148477 - \$556.95	George Chapelle	In Review		- 1d 11h 15m
Review for Order #76498756 - \$153.05	Sarah Pincker	In Review		- 1d 05h 41m
Review for Order #22498756 - \$1153.25	Todd Stein	In Review		- 0d 23h 54m
Review for Order #87465423 - \$19.36	Team Leaders	In Review		- 0d 18h 09m
Order #1037080327 - 161.25 SEK (PORTAL)	Managers	In Review		+ 1d 17h 06m
Order #1028064427 - 561.60 EUR (INTERNAL)	Kristin Stanley	In Review		+ 31d 15h 43m
Order #1028064427 - 770.40 EUR (INTERNAL)	Joy Williamson	Closed	Completed	
Order #117687804 - 22.60 CNY (PORTAL)	Manager Team	Closed	Completed	
Case Order Refund 1028064427 - All Data	Team Leaders	New		
Order #1028064427 - 331.20 EUR (INTERNAL)	Tanya Boyd	Closed	Completed	
Order #1028064427 - 1,146.00 EUR (INTERNAL)	Garrett Hawkins	Closed	Completed	
Investigate Fraud for Order #873548366	Garrett Hawkins	Closed	Completed	
Employee Compliant by Owen James (Customer)	Nobody	Closed	Completed	
Order #1028064427 - 62.40 EUR (INTERNAL)	IKEA Admin	Closed	Completed	
Order #1028064427, 1037080327 - 222.45 EUR	IKEA Admin	Closed	Not Eligible	
Replace 4 items in #5678981247	Tanya Boyd	Closed	Completed	
Order #1028064427 - 472.80 EUR (INTERNAL)	Tanya Boyd	Closed	Completed	
Order #117687804 - 22.60 CNY (INTERNAL)	Tanya Boyd	Closed	Completed	
Test names	Nobody	Closed	Completed	
Order #117687804 - 22.60 CNY (PORTAL)	IKEA Admin	Closed	Completed	
Order #1028064427 - 217.20 EUR (PORTAL)	Molle Mocker	Closed	Completed	
Test customer name	Nobody	Closed	Completed	

# Employee Management

Make sure the right people are equipped for the job by getting a complete view of your work force and their performance.



## Employee 360

Create a unified view of your employees to show all their cases, interactions, appointments, and data from other systems.



## Organizational Chart

Generate org charts for your organization that can be used for HR purposes, case assignment, or to manage escalation paths.



## Employee APIs & Integration

Enrich the employee profile with data from other systems and automate onboarding & offboarding requests to related systems.



## Teams, Skills & Roles

Assign employees to various teams, skills and roles that automatically give them access to team inboxes and drive auto-assignment.



## HR Workflows & Data Models

Model employee onboarding, complaints, and reviews with the same flexibility as you would for customers.



## HR Knowledge Bases

Create knowledge spaces for your employees about HR policies or job-specific knowledge that departments can own.

# Organization Chart

**Available Case Workers (13)**

- AM Agneta Magnusson (CW)**  
Agent - Level 2  
agneta@acmeretail.com
- CT Christin Tornquist (CW)**  
Agent - Level 2  
christin@acmeretail.com
- EL Emma Lindblad (CW)**  
Agent - Level 3  
lindblad@acmeretail.com
- FO Fiona Olander (CW)**  
Case Worker  
fiona@acmeretail.com
- GL Gjur Lund (CW)**  
Case Worker  
lund@acmeretail.com
- HF Hakan Forslund (CW)**  
Agent - Trainee  
hakan@acmeretail.com
- HS Hindrik Strom (CW)**  
Case Worker  
hstrom@acmeretail.com
- GK George Korte**  
VP of Customer Success  
gkorte@acmeretail.com
- JP Jesca Palmcrantz (CW)**  
Case Worker  
jesca@acmeretail.com
- SL Sture Lindroth (CW)**  
Case Worker  
sture@acmeretail.com
- SU Nikolay Popov**  
CMO  
npopov@email.com

**Organizational Chart Hierarchy:**

- SM Sam Malmkvist (Mgr)** General Manager
  - LE Lars Ekstrom (Mgr)** Retail Regional Manager
    - MG Maksim Gill** Team Lead
    - TA Tyra Akerstrom (CW)** Team Lead
      - LS Liam Sparv (TL)** Agent - Level 1
        - JS Johan Sherman** Agent - Level 2
      - KL Kent Lagerfelt (CW)** Agent - Level 1
        - SH Sture Holgersson (CW)** Agent - Level 2
    - TS Tage Svensson (CW)** Team Lead
      - SS Sone Simonsson (CW)** Case Worker Lead
        - SK Serge Kazakov** Case Worker
  - PM Pamela Martinez (Mgr)** Online Regional Manager
    - ND Nadia Dahl (TL)** Manager - Level 2
      - MM Molle Mocker** Agent - Level 3
        - LJ Laura Jones** Case Worker
          - JE Joel Englund (TL)** Trainee
          - JH Jason Harris** Trainee
    - LA Lisette Afzelius (CW)** QA Analyst

# Robotics & Automation

Reduce manual labor and mistakes by automating routine tasks, optimizing complex decisions, and bridging systems.



## Form Pre-Fill

Automatically pre-fill new case forms with customer info, data from other systems and interaction details.



## Folder Monitoring

Monitor folders on shared network drives and react when new files are uploaded, such as parsing and importing new data.



## Custom REST APIs

Expose existing APIs or create new APIs that execute practically any functionality from auto-creating a case to merging documents.



## Scheduled Jobs

Schedule resource-heavy scripts to execute during off-peak times for data sync, mass emails, archival and custom business logic.



## Events & Triggers

Attach automation rules practically anywhere including CRM data changes, case updates and employee events.

# Workflow Builder with events

The screenshot displays the Eccentex Workflow Builder interface for a "Retail Refund" case. The main workspace shows a milestone diagram with five states: New (green), Assignment (orange), In Process (orange), Resolved (orange), and Closed (red). Transitions between states are labeled with events and actions:

- New to Assignment: Auto-Assign Case (envelope icon)
- Assignment to In Process: Start Work on Case (clock icon)
- In Process to Resolved: Resolve Case (clock icon)
- Resolved to Closed: Close Case (envelope icon)
- Assignment to In Process: Auto-Assign Case (envelope icon)
- In Process to Assignment: Restart Case (green dashed line)
- Resolved to Assignment: Restart Case (green dashed line)
- Resolved to In Process: Continue Work on Case (green dashed line)
- Resolved to New: Restart Case (green dashed line)
- Resolved to New: Continue Work on Case (green dashed line)
- Assignment to New: Restart Case (green dashed line)
- Assignment to New: Continue Work on Case (green dashed line)
- Assignment to New: Auto-Assign Case (envelope icon)
- Assignment to New: Start Work on Case (clock icon)
- Assignment to New: Close Case (envelope icon)

The left sidebar contains a navigation menu with categories like Setup, Case Types, and Validation Events. The right sidebar shows the Properties panel for the selected event, "Execute Rule", with fields for Name, Permanent Code, and Rule.

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# Tracking & Audit

Stay compliant with internal and regulatory bodies, discover ways to improve case resolution and get the complete picture if you ever want to review how a case was processed.



## Full History

Track every detail of how a case was resolved, who was involved, when how long everything took and what went wrong.



## Aggregated Notes

See an aggregated view of notes, comments and forums, discussions from the case and any involved tasks.



## Security & System Events

Track every action a user has taken including logins, searches, documents they've viewed or touched data in anyway.



## Time Tracking

Log time employees spent on handling cases and related work; get better insight into employee performance.



## Automation Transparency

Keep a clear track of every automated decision that the system made by seeing inputs, outputs and actions taken.

# Case and Tasks History

**eccentex** ACME Customer Service App

Home Search Cases **CASE-2020-521** Close Window

€ **Retail Refund** Order #1138077937 - \$250.00 - Pat Thompson

Restart Send to Fraud Prevention Team

Case ID: **CASE-2020-521** Milestone: ✔ Closed Priority: ▲ Normal (51) Total: **\$250.00**

Case Owner: Morgan Smithson (Agent) Case SLA: Resolution: ✔ Completed

Refund Articles | Refund Details | **Tasks (8)** | Documents (5) | Case Emails (6) | Related (2) | Discussions (5) | **History** | Interactions

Grid View Timeline View

<b>CASE-2020-465</b> <small>Created on 11 Apr 2020 7:25 AM</small>	<span style="color: blue;">▶</span> Started	<span style="color: orange;">▶</span> In Process	<span style="color: orange;">▶</span> In Review	<span style="color: green;">✔</span> Closed	<b>Completed</b>			
<b>Sub-tasks (8)</b>								
<span style="font-size: small;">AutoValidate Refund Request Created on 11 Apr 2020 7:26 AM</span>	<span style="color: blue;">▶</span> Started	<span style="color: orange;">▶</span> In Process	<span style="color: green;">✔</span> Closed	<b>Refund Approved</b>				
<span style="font-size: small;">2nd Eyes Review Created on 11 Apr 2020 7:26 AM</span>	<span style="color: blue;">○</span> Not Started	<span style="color: orange;">▶</span> In Process	<span style="color: green;">✔</span> Closed	<b>Refund Approved</b>				
<span style="font-size: small;">3rd Eyes Review Created on 11 Apr 2020 7:26 AM</span>	<span style="color: blue;">○</span> Not Started	<span style="color: blue;">▶</span> Started	<span style="color: orange;">▶</span> In Process	<span style="color: green;">✔</span> Closed	<b>Refund Approved</b>			
<span style="font-size: small;">Denied Review Created on 13 Apr 2020 16:25</span>	<span style="color: blue;">○</span> Not Started							
<span style="font-size: small;">Validate Review Results Created on 11 Apr 2020 7:26 AM</span>	<span style="color: blue;">○</span> Not Started	<span style="color: orange;">▶</span> In Process	<span style="color: green;">✔</span> Closed	<b>Approved</b>				
<span style="font-size: small;">Refund Money Out Exception Created on 11 Apr 2020 7:26 AM</span>	<span style="color: blue;">○</span> Not Started							
<span style="font-size: small;">Submit Refund Payment Created on 11 Apr 2020 7:26 AM</span>	<span style="color: blue;">○</span> Not Started							
<span style="font-size: small;">Refund Money Out Complete Created on 11 Apr 2020 7:26 AM</span>	<span style="color: blue;">○</span> Not Started							
	April 2020	Tue 14	Wed 15	Thu 16	Fri 17	Sat 18	Sun 19	Mon 20

People (4) **Notes (4)** KB

**Emma Lindblad (CW)** - 3 days ago  
edit delete  
=CALL LOG AG4134998-13-APR-2020 @12:34PM=  
- Customer was called back and notified of pick-up policy in his region. Email request ignored due to policy.  
- Customer will call back to arrange pickup

**Morgan Smithson (Agent)** - 4 days ago  
edit delete  
=CALL LOG AG134124-12-APR-2020 @7:32 AM=  
- Customer identified with IVR  
- Customer wants refund for order #1028064427  
- Customer requested pick-up of purchases. Will follow-up on this matter with him.  
- Created task to follow-up with customer in 1 day with email

**Morgan Smithson (Agent)** - 4 days ago  
edit delete  
Customer indicated this has happened before and that he is rethinking purchasing from ACME again. I provided him a 20% discount code as well for the next purchase. Coupon Code 2323HD to expire on April 20, 2021.

**Morgan Smithson (Agent)** - 4 days ago  
edit delete  
Customer is complaining about the chair is missing a leg. I suspect he broke the leg because he changed his story when he was called.

Comment here...

+ Post

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# Omnichannel with Genesys

Deliver a unified customer experience with award-winning engagement, predictive AI, intelligent workforce management and more.



## Interaction Screen-Pop

Show an agent the complete customer view, highlight their open cases and next-best-actions related to the interaction context.



## Smart "Caller" Recognition

Organize all contact info in the Operational CRM and use it to automatically identify who an agent is working with, across all channels.



## Single-Screen Workspace

Unified UI allows agents to create cases, follow-up on existing ones, wrap-up and more without leaving the Genesys deskstop.



## Genesys Cloud, Engage & Connect

Seamless integration with the entire Genesys product line in cloud and on-premise, including Engage iWD.



## True Omni-Channel

Provide consistent, context-aware service even as customers switch between phone, email, SMS, chat and social.



## AI Bots

Train Genesys AI to help customers on their open issues, let them create new cases or update existing ones using Voice, Chat and SMS Bots.

# Genesys Cloud with Customer 360 embedded

The screenshot displays the Genesys Cloud interface for a customer profile. The top navigation bar includes 'Activity', 'Directory', 'Documents', 'Performance', 'Reports', 'Apps', and 'Admin'. The main header shows 'Interactions' and 'Service Request' tabs. A left sidebar contains navigation icons and a 'Service Requ...' section with a 'DCM Queue' and a '3:34' timer.

**Customer Detail:** Mr. Pat Thompson, Gold Member, 3640 Sepulveda Blvd., Los Angeles, CA 90230 USA. Contact info: pat@email.com, +1 (949) 235-9009, +1 (310) 499-7060. A '687 GOOD' score is displayed in a green circle.

**Suggestions:** OFFER: Fee protection service, OFFER: Auto loan (new credit score), Add a family member to the account, Eligible for a balance transfer, Order new checks.

**Customer Info:** All Cases (11), Work Activity (0 hours), Documents (3), Tasks (2), Journeys, Notes (3), All References.

**Case List:**

- Excessive Fees Complaint (CASE-2019-850): Initial Assessment of Complaint, In Progress, Investigation, Closed, Fees reduced.
- Excessive Fees Complaint (CASE-2019-604): Initial Assessment of Complaint, Called agent, Closed, No action.
- Account Complaint (CASE-2019-603): Initial Assessment of Complaint, Credit check, Closed, No action.
- BMW Auto Loan (CASE-2019-546): Document Collection & Verification, Credit check, Closed, Loan denied - low credit score.
- Auto Loan for Wife (CASE-2019-025): Document Collection & Verification, Closed, Customer Abandoned.

**Genesys Predictive Engagement:** Dec 23, 2019 - 09:31 AM. Customer Service, New Service, Contact Us, Call Customer Service. Personas matched: WARNING | Potential Complaint, SALES | Credit Score Increased. Outcomes achieved: Closed - Customer Satisfied.

**Case Journey:**

- SYS: Routing Engine - Customer personas identified (WARNING | Potential Complaint)
- SYS: Engagement Center - Routed, Agent Jeremy Piven (AGN-7919)
- Milestone: Initial Assessment of Complaint - Completed, Agent accepted COMPLAINT CASE
- Milestone: Send Acknowledgement - Completed, Auto-sent SMS to (555) 234-1283.
- Milestone: In Progress - Completed, Task routed from Auto Assigning to In Process
- SYS: Collect Investigation Data - Completed, Data collected from Salesforce and ACME BillAudit
- Milestone: Investigation - Completed, Agent started investigation with resolution NO RED FLAGS
- SYS: Engagement Center - Routed, Agent escalated COMPLAINT CASE to Tier 2 Support
- Task: Ad-hoc Task - Created, Created Critical Task for COMPLIANCE TEAM "Review customer contract"

**Alerts:** ALERT: holidays may impact store hours

**Create Case / Knowledge Base:** Type: Account Management, Sub-Type: Credit Line Increase, Requested Amount: \$5,000.00, Current Income: \$100,000.00, Account: 061315-00003. Submit button.

**Overview:**

Account Balance	Credit Limit	Last Payment
\$8,433.29	\$20,000.00	\$256.89
Oct 21, 2019	Payment	\$256.89
Sep 21, 2019	Payment	\$256.89
Aug 21, 2019	Payment	\$256.89

**Current Products:**

Accounts	Product
061315-00003	MasterCard Credit Card
061515-00003	Checking
063423-00001	Equipment Loan
VISA 071216-00024	Visa Credit Card
071217-00005	Savings Account

# Proactive Engagement

Enable proactive engagement and communications from both the front-office and back-office, engaging the customer at every step of the journey on their preferred channel.



## Case Management Conversations

Engage customers throughout their entire case management journey, across all channels and case types.



## Proactive Engagement

Increase online sales and improve loyalty by proactively engaging customers before they even know they have a problem.



## Modernize Communications

Expand how you engage with customers whether it's through new channels, new self-service options or cultural trends.



## Agent Assisted AI

Engage with customers using AI and hand off parts of the conversation to a live agent when needed.



## Hyper-Personalization

Fold all conversations with a customer across all channels and cases into a single dialogue.



## Expanded Self-Service

Let customers schedule call backs and appointments, complete tasks, sign document, and engage along their journey.

# Knowledge Base

Help employees and customers help themselves by making sure content is organized, accessible and easy to manage.



## Knowledge Spaces

Separate knowledge into different product lines, departments, customer segments and roles.



## Public or Internal Spaces

Create knowledge spaces for your internal staff, external partners, logged-in customers or completely open it to the public.



## Rich Content

Include YouTube, videos, documents and pictures in your articles or go further with HTML, CSS and business rules.



## Article Recommendations

Suggest articles that may help an employee resolve a case based on content, people involved and historical data.



## Bot Assisted Self-Service

Knowledge can be presented using Genesys Chat and SMS Bots to help customers help themselves, with an agent always ready to assist.



## Article Lifecycle Management

Instantly publish articles or go through a formal lifecycle process with drafts, publishing and expirations.

# Knowledge Portal + KB Recommendations in Case

The screenshot displays the 'Internal Knowledge Base App' interface. On the left, there are navigation panels for 'ACME Retail Policies' (246 Articles), 'Employee FAQ' (14 Articles), and 'Refund & Return Policies' (23 Articles). Below these are sections for 'Featured Content' and 'Most Useful' articles. The main area shows a case summary with a 'Total Refund: € 1,146.00 EUR' and a table of 'Wished Resolution', 'Price/Article', and 'Return Amount'. A right sidebar contains 'Suggested Articles' under categories like 'Refunds and Returns' and 'Shipping Policies'. The footer includes copyright information and version details.

Wished Resolution	Price/Article	Return Amount
Refund from order - wrong product	€ 6.00 EUR 5.00 + 1.00 VAT	€ 42.00 EUR 35.00 + 7.00 VAT
Refund from order - wrong product	€ 6.00 EUR 5.00 + 1.00 VAT	€ 24.00 EUR 20.00 + 4.00 VAT
Refund from order - wrong product	€ 4.80 EUR 4.00 + 0.80 VAT	€ 19.20 EUR 16.00 + 3.20 VAT
Product damaged	€ 18.00 EUR 15.00 + 3.00 VAT	€ 72.00 EUR 60.00 + 12.00 VAT
Late Delivery	€ 13.20 EUR 11.00 + 2.20 VAT	€ 39.60 EUR 33.00 + 6.60 VAT
Late Service	€ 25.20 EUR 21.00 + 4.20 VAT	€ 50.40 EUR 42.00 + 8.40 VAT
Refund from order - wrong product	€ 37.20 EUR 31.00 + 6.20 VAT	€ 74.40 EUR 62.00 + 12.40 VAT
Refund from order - wrong product	€ 70.80 EUR 59.00 + 11.80 VAT	€ 141.60 EUR 118.00 + 23.60 VAT
Refund from order - wrong product	€ 58.80 EUR 49.00 + 9.80 VAT	€ 117.60 EUR 98.00 + 19.60 VAT
Late Delivery	€ 25.20 EUR 21.00 + 4.20 VAT	€ 50.40 EUR 42.00 + 8.40 VAT
Late Delivery	€ 96.00 EUR 80.00 + 16.00 VAT	€ 192.00 EUR 160.00 + 32.00 VAT
Late Service	€ 38.40 EUR 32.00 + 6.40 VAT	€ 38.40 EUR 32.00 + 6.40 VAT
Late Service	€ 118.80 EUR 99.00 + 19.80 VAT	€ 118.80 EUR 99.00 + 19.80 VAT
Late Delivery / Late Delivery	€ 31.20 EUR 26.00 + 5.20 VAT	€ 31.20 EUR 26.00 + 5.20 VAT
Late Delivery / Late Delivery	€ 43.20 EUR 36.00 + 7.20 VAT	€ 43.20 EUR 36.00 + 7.20 VAT
PRODUCT / Packing and/or product damaged	€ 6.00 EUR 5.00 + 1.00 VAT	€ 6.00 EUR 5.00 + 1.00 VAT

# Calendar & Appointments

Easily organize events and meetings with colleagues, customers, and teams in relation to specific cases.



## Scheduling Dashboard

See a bird's eye view of a team or person's calendar and schedule appointments, follow-ups, and case deadlines.



## Team Calendars

Manage calendars for individual people or entire teams, each can manage their own availability and holidays.



## Calendar APIs & Integration

Let other systems manage appointments or send scheduling information to other booking systems.



## Sync with Office 365

Connect to personal or group calendars in Office 365 and sync appointments to avoid overbooking or double-booking.



## Appointments Reminders

Set up SMS or email alerts of upcoming appointments and notify people if something is rescheduled or cancelled.

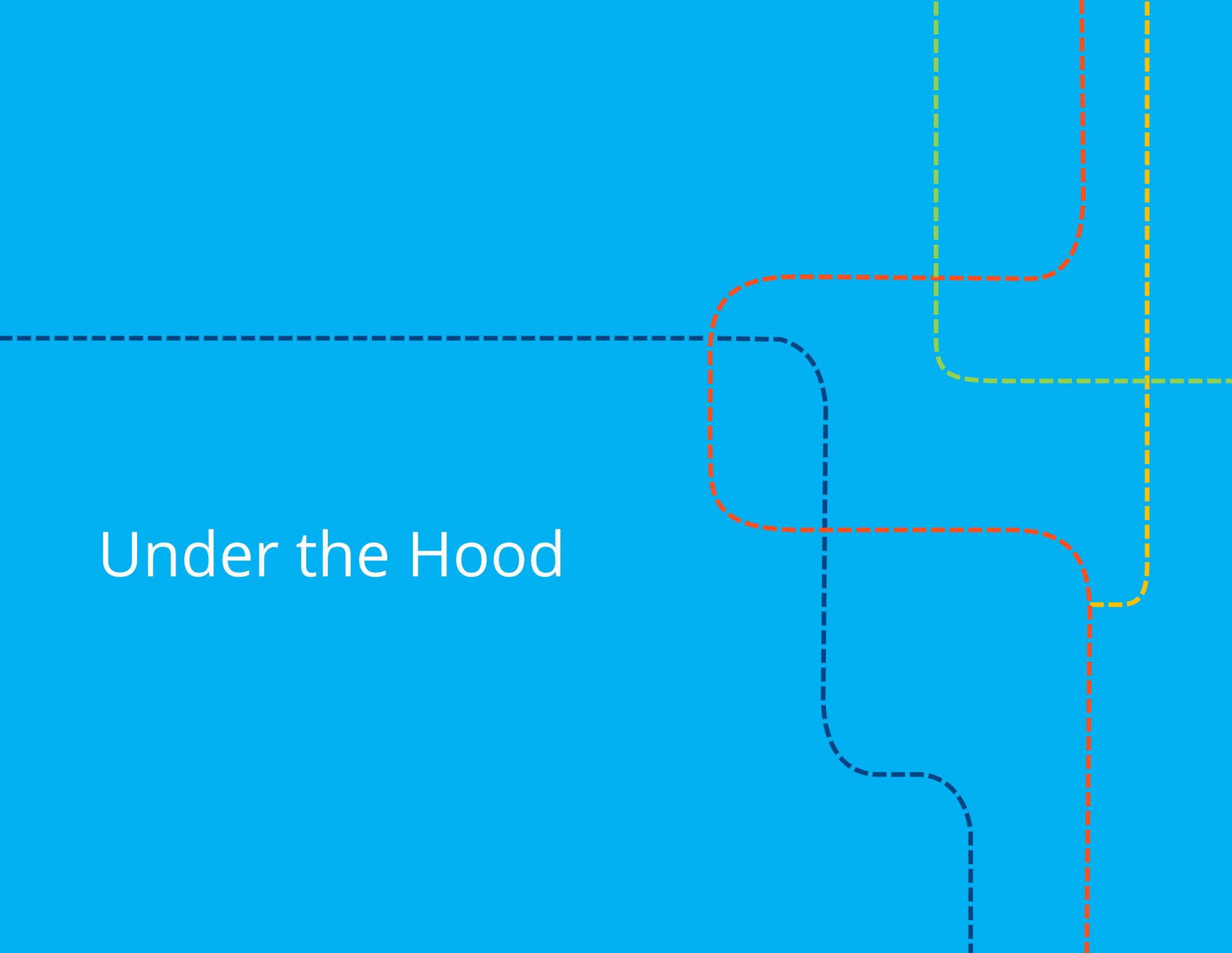
# Appointments Management for Case

The screenshot displays the ACME Field Investigation App interface. The main window shows details for Case-2019-821, including Case State (Resolved), Case Type (Field Investigation), and Case Owner (Elisabeth Svensson). A 'Calendar Main View' modal is open, showing event details for 'Inspection of refinery equipment' on 04/14/2020 from 12:30 PM to 2:30 PM. The event is set to recur every 1 year and is held in Conference Room-Culver City. The description includes a Zoom link: <https://eccentex.zoom.us/j/5557863331>. Below the event details, a 'Participants (3 items)' table lists the attendees:

Name	Email	Status
ES Elisabeth Svensson	tsherman@eccentex.com	Organizer
BS Bob Snow	nlavrushenko@eccentex.com	Invited
JS Joakim Skalberg	nlavrush@gmail.com	Invited

The interface also shows a calendar view on the right with a yellow event block for Tuesday, April 14, 2020, from 7:34 pm to 4:00 pm. The footer contains copyright information for Eccentex, Inc. (2007-2020) and version details (6.5.37.3).

Under the Hood



# No-Code Features

Empower your front-line, business professionals to continuously improve the system without relying on IT departments.



## Citizen Developer

Allow non-technical business users to configure applications with visual drag-and-drop tools and guard rails.



## Hybrid Development

Custom components created by professional developers can be used by citizen developers in most builders.



## Multilingual Support

Scale your solution across multiple languages, time zones, and employee and customer preferences.



## Workflow Builders

Visually design sequential or state machine workflows, define your own transition rules and use them to track or automate work.



## UI Builders

Build information-rich pages from feature-rich blocks, custom fields, actions, security profiles and custom widgets.



## Single-click Deployment

Deploy changes to workflows, logic, pages, and email templates immediately; deploy data model changes with a single-click.

# Detail Page Builder + Milestone Builder

The screenshot displays the eccentex Case Detail Page Builder and Milestone Builder interface. The main window is titled "Case Detail Page Builder" and shows a form for building a case detail page. The form includes fields for Case ID, Milestone, Priority, Total, Case Owner, Case SLA, and Resolution. The interface also features a "Toolbox" on the left with various widgets and buttons, and a "Milestone Diagram" window showing a flowchart of case states and transitions.

**Case Detail Page Builder Interface:**

- Navigation:** Home, Case Types, Case Type - Retail Refund, Milestone Diagram - Retail Refund, Detail Pages, Detail Page - Retail Refund.
- Buttons:** Assignment, Milestone Routing, Action Button, Custom Widget.
- Summary Fields:** Refund Details, Refund Amount Requested, Refund Request Type, Selling Unit, Action Unit, Refund Eligibility, Refund Amount, Total Refund Amount, Tax Adjustment, SELARTICLES, SELREASONCODES, SELREASONCODES, SELQUANTITY, TEMP\_CREATEDFROM, Currency Code.
- MDM Summary Fields:** Refund Details, Refund Amount Requested, Refund Request Type, Selling Unit, Action Unit, Refund Eligibility, Refund Amount, Total Refund Amount, Tax Adjustment, SELARTICLES, SELREASONCODES, SELREASONCODES, SELQUANTITY, TEMP\_CREATEDFROM, Currency Code.
- Form Fields:** Case ID, Milestone, Priority, Total, Case Owner (Nobody), Case SLA, Resolution.
- Buttons:** Issue Refund, Escalate To Manager, Deny Refund, More.
- Actions:** Edit tab, Delete tab.

**Milestone Diagram Interface:**

- System States:** New, Assignment, In Process, Resolved, Closed.
- SLAs:** SLA Goal, SLA Deadline, Invisible SLA.
- Validation Events:** Before Enter - Rule.
- Basic Events:** Execute Rule, Send Email, Write To History.
- Case Events:** Start Work on Case, Auto-Assign Case, In Review, Send to In Review, Send to Close, Close Case, Restart Case, Auto-Assign Case, Send to Assignment, Send to In Process, Send to New, Continue Work on Case.
- Properties:** Event Type: Change Case Priority, Name, Change Case Priority, Permanent Code, CHANGE\_CASE\_PRIORITY, Priority, Critical.

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# Low-Code Features

Let technical business users or IT customize even more with simple scripts and advanced configuration options without getting into the weeds.



## Form Rules & Snippets

Use a simple logic builder for form validations and field dependencies or write a few lines of JavaScript for more flexibility.



## UI Overrides

Decide what data or actions to highlight or present in a more business-friendly way using simple CSS and JavaScript overrides.



## Widget Extensions

Extend existing widgets such as document management to include additional buttons or to auto-create folders for new cases.



## Custom Rules

Customize backend logic with a few lines of code, such as where to reassign an overdue case based on the customer's issue and city.



## Synchronous & Async Rules

Decide which rules have to be run before the user is allowed to do anything else or execute them in the background.



## Rule Debugging

Debug business rules by simulating conditions such as different input data, or different user profiles.

# Form Builder with JavaScript snippets

The screenshot displays the Eccentex Form Builder interface for configuring a form titled "Form - Retail Refund". The interface includes a sidebar with navigation options like "Setup", "Internal People", and "Forms and Pages". The main workspace shows a form layout with fields for "Refund Request Type", "Refund Details", "Selling Unit", and "Action Unit". A green button labeled "Fill in Missing Order Information" is visible on the form.

An "Action Button" dialog box is open, showing configuration options for the button. The dialog includes sections for "Basic Settings" (Color, Action, Icon, Text) and "Rule Settings" (Rule code, Name, Type, Value, Callback, and Rule callback).

**Action Button Dialog Configuration:**

- Basic Settings:**
  - Color:  GREEN
  - Action: Call a rule
  - Button Icon: Q search
  - Button Text: Fill in Missing Order Information
- Rule Settings:**
  - Rule code: CUST\_LookupOrder

**Rule Settings Table:**

Name	Type	Value
OrderNumber	Bind To	CDM_MONEY_OUT_REFUND_DETA...

**Rule callback:**

```

1 function (isSuccess, response, options, srd, execOpts) {
2   var p = execOpts.win.down('MDM_FormViewer'),
3       vm = p.lookupViewModel();
4
5   vm.set('Entity.CDM_CUSTOMER_PHONE', srd.parsedData['CUSTOMER_PHONE']);
6   vm.set('Entity.CDM_ORDER_STORENUMBER', srd.parsedData['ORDER_STORENUM']);
7 }
8

```

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# Deep-Code Features

Unleash the innovators with true developer-level tools using industry-standard programming languages and paradigms.



## SQL Rules

Create custom triggers, functions, queries, views, and CRUD operations using low-level SQL code.



## DLL Extensions

Import custom or vendor-supplied DLLs into the solution that contain advanced logic that can be used in your C# rules.



## .NET SDK

Import the platform's SDKs into Visual Studio to make it easier build, test and publish application components and logic.



## C# Rules

Build advanced integrations and code custom complex actions using the industry-standard, open-source C# language.



## HTML, CSS, JS and ASPX

Design or customize pages and widgets using existing UI libraries or import UI frameworks of your choice.



## Automated Testing-Ready

Flexible APIs allow you to build automated testing tools for the front-end and back-end with tools like Selenium and JMeter.

# Custom Widget Editor + Widget inside Case

The screenshot shows the 'eccentex' Custom Widget Editor interface. On the left, the 'Add Coded Page - Credit Report' form is visible, with fields for Name (\*), Permanent Code (\*), and Description. The JavaScript Code editor contains the following code:

```
26 } catch(err){
27   creditScore = 700;
28 }
29
30 Ext.define('SMPL.view.CreditReport.Controller', {
31   extend : EcxUtils5.BaseClass.CrudController,
32   alias : 'controller.CreditReport'
33 });
34
35 Ext.define('SMPL.view.CreditReport.Panel', {
36   extend : 'EcxUtils5.BaseClass.DetailEdit',
37   alias : 'widget.CreditReport',
38   controller : 'CreditReport',
39   border : false,
40   dockedItems : [{
41     xtype : 'ecx-topheader',
42     dock : 'top',
43     mainText : 'Credit Report',
44     subText : 'Pat Thompson - ' + moment().format('MMMM D, YYYY'),
45     iconCls : EcxUtils5.Awesome.getIconCls('money'),
46     hidden: true
47   }],
48 },
49
50 scrollable : true,
51 items : [{
52   xtype : 'ecx-summary',
53   height : 175,
54   scrollable: false,
55   items : [
56     //column 1
57     {
58       defaults : {
59         labelAlign : 'top',
60         width : 100
61       },
62       items : [{
63         xtype : 'displayfield',
64         fieldLabel : 'Post Name'
```

The right side of the interface shows a case view for 'ACME Customer Service App'. The case state is 'In Process' with a priority of 'Normal (50)'. The case owner is Sarah Jones (Comptroller). The case is titled 'Credit Report' and shows a credit score of 700, calculated with GScore 4.0. A progress bar indicates the score is 'Good'. Below the score, there is a table of financial history:

Account Condition:	Account Type:	Account Terms:
Open	Real Estate Loan	20 Year
Open	Secured Loan	60 Month

# Security & Trust

Rest assured that data, employees and customers are always safe with comprehensive permission management, full auditing and a highly-resilient security architecture.



## Identity Management & SSO

Easily integrate your applications with SAML, OAuth, Active Directory, LDAP, or most third-party identity management system.



## Role-Based Access

Manage what users can see and do based on their roles and responsibilities solution-wide or for specific types of cases.



## Secure System Integration

Connect to other systems securely with HTTPS, Direct Connect, Virtual Private Network, SFTP and whitelisted IPs.



## Encryption & Data Isolation

By default, AppBase Cloud uses AES 256-bit encryption for data at rest and FIPS 140-2 compliant TLS 1.2 for data in transit.



## Perimeter Security

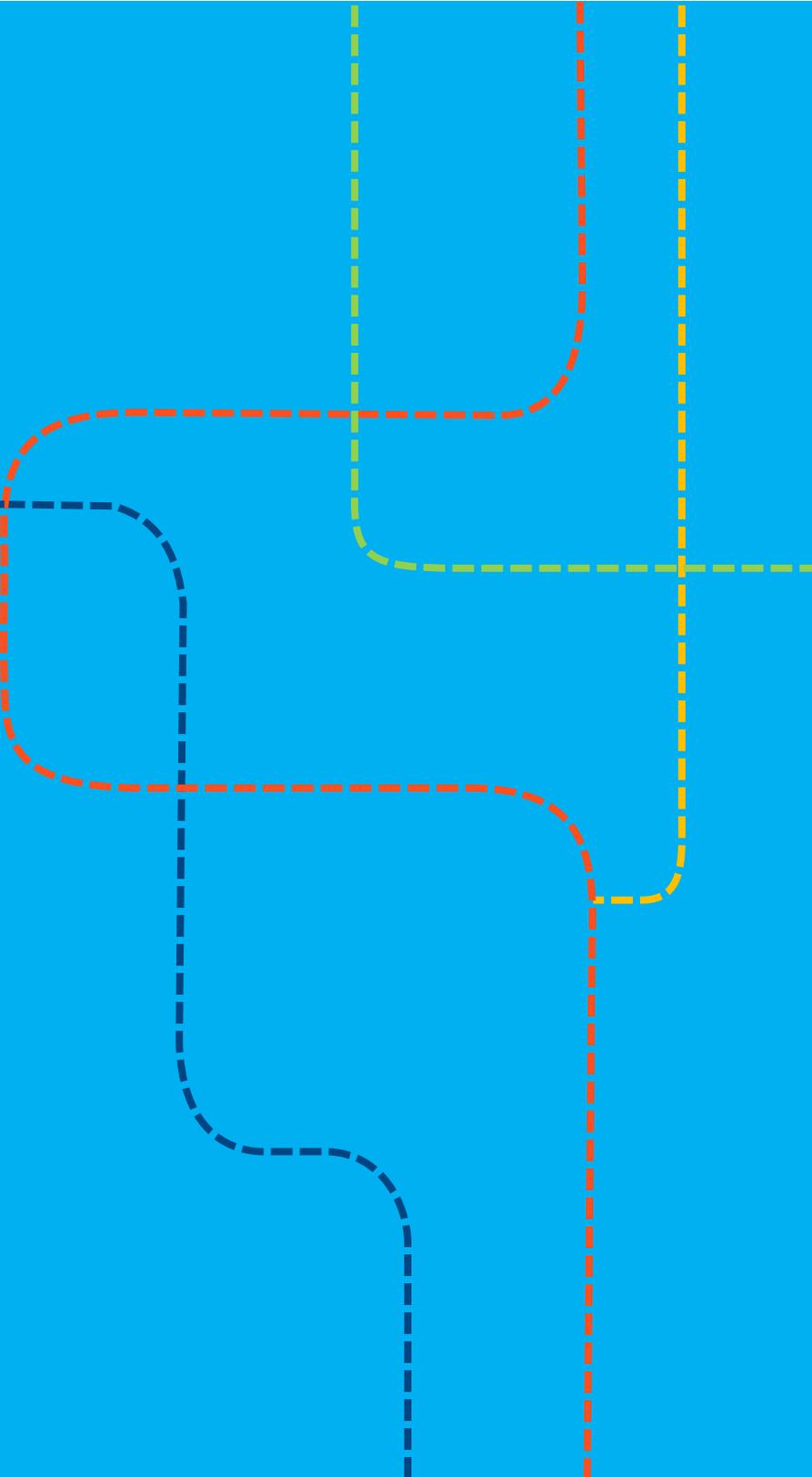
Comprehensive intrusion protection with hardened rules for how services and resources communicate with each other.



## Independent Security Audits

In addition to comprehensive internal audits, AppBase undergoes 3<sup>rd</sup>-party front-end to back-end penetration tests.

# Cloud & Delivery



# Deployment & Hosting

Run the solution where you want; our cloud, your cloud or even on-premise if it's best for your organization.



## AppBase Cloud

Managed cloud platform built on Microsoft Azure and architected for both private and shared offerings.



## Partner Managed Cloud

Business partner owned and controlled environments that hosts the solution or a purpose-built application service provider.



## Agnostic Hosting

Solutions are easy to migrate; start configuring your solution on the AppBase Cloud and move it later if needed.



## Customer Managed Cloud

Customer owned and controlled environments that run within their private clouds or running on IaaS.



## On-Premise & Hybrid

Full installation on the customer's hardware or hybrid installation such as everything in the cloud but an on-premise database.



## Cloud Options

Many available options such as higher-levels of disaster recovery, hot-standby, extensive storage options, and industry-specific security options.

# Professional Services

We help you spearhead your digital transformation journey from requirements to implementation, from quick-wins to complex initiatives.



## Business Consulting

Leverage our tailored, strategic direction and best practices to help you take charge of your digital transformation initiatives.



## Managed Hosting Services

Focus on streamlining your business and let us manage the infrastructure, backups, performance, and availability.



## Dedicated Teams

Reserve a dedicated team of AppBase experts to deliver a full project and continuously improve your solutions.



## Implementation Services

Get it done fast and right the first time with our expert team that delivers everything from requirements to go-live.



## Remote & On-Site Training

Accelerate your expertise with a wide range of remote and in-classroom offerings.



## Partner Ecosystem

Work with our worldwide certified partners who can bring additional subject matter expertise, local resources, and additional services.



Eccentex delivers software for customer service, customer journey automation and back-office automation. Eccentex's flexible, cloud-architected software – built on its unified AppBase Platform – empowers people to rapidly deploy and easily extend and change applications to meet strategic business needs.

Over its history, Eccentex has delivered award-winning capabilities in case management and business process automation (BPM) powered by robotic automation and advanced document management, to help the world's leading brands and governments achieve breakthrough results.

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