

# Eccentex ServiceJourney

Enterprise Customer Service Software  
Product Datasheet



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

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



# Solution Summary

ServiceJourney 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, ServiceJourney 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

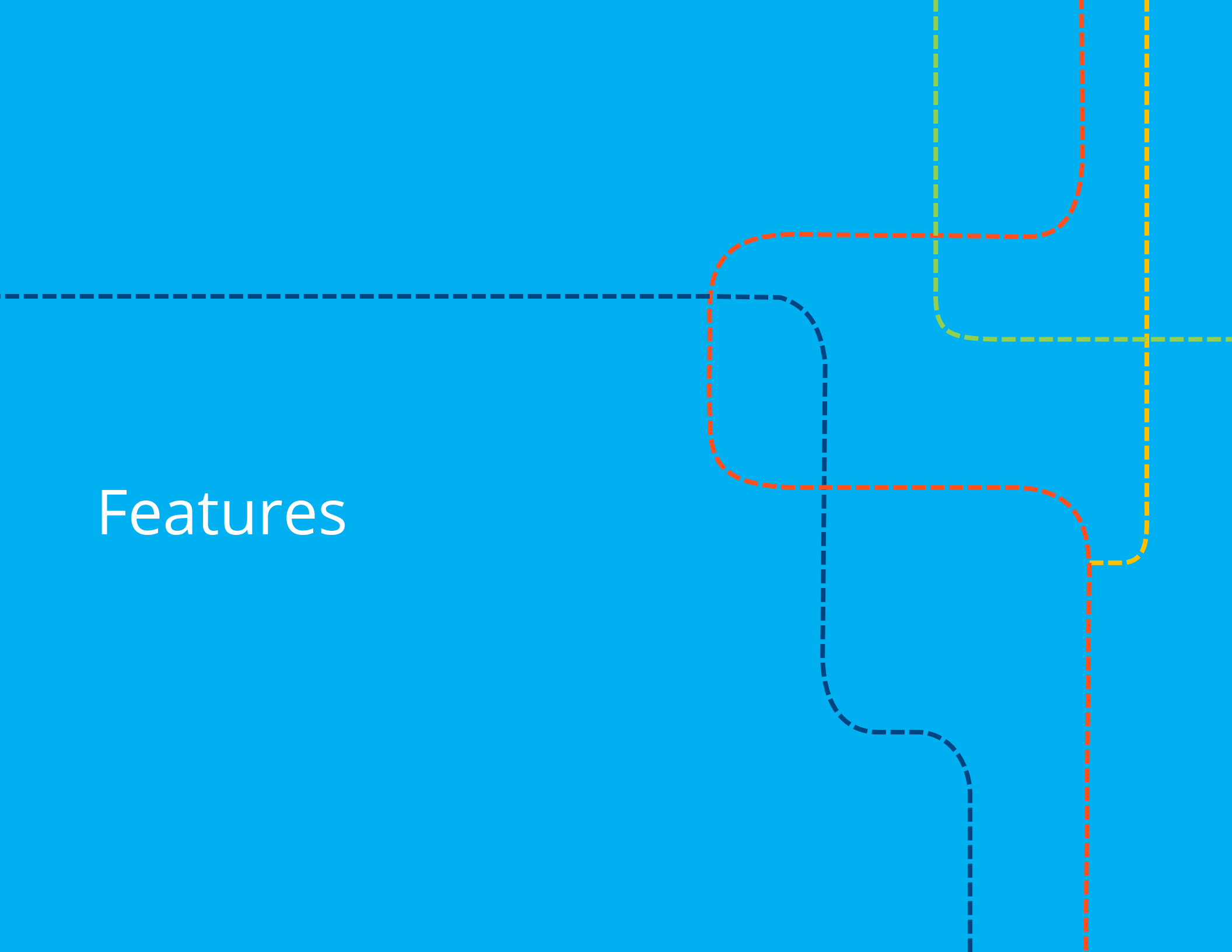
## Cloud & Delivery

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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

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

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

Close Window

Assign Case Issue Refund Escalate to Manager Deny Refund More

Refresh Up Arrow

Case ID: **CASE-2020-465**  
 Case Owner: **Morgan Smithson (Agent)**

Milestone: ▶ **In Review**  
 Case SLA: - 1d 16h 47m

Priority: ▲ **Normal**  
 Resolution:

Total: **€ 1,146.00 EUR**

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

Advanced Search

Order & Articles	# Qty.	Wished Resol...	Return Amount
<b>#1028064427 for Molle Mocker</b> <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>

Order Details
Customer Profile

Order Status: ✔ **Completed**
Refresh

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
to		
Monday, 18 November 2019 19:00	STANDARD	CUSTOMER_ADDRESS
Timezone: Europe/Paris		

**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

People (4)
Notes (14)
KB

Add to Case

MG **Morgan Smithson**  
Case Creator  
Case Worker

M **Managers**  
Managers Work Basket  
Team

PT **Pat Thompson**  
Customer  
External Party

TL **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

**eccentex** ACME Customer Service App

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

€ **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**  
 Case Owner: **Morgan Smithson (Agent)** Case SLA: **- 1d 20h 55m** Resolution:

Refund Articles Refund Details **Tasks (5)** Documents (6) Discussions (1)

+ Add Task(s)  Closed  In Process  Auto Assigning  Not Started  Started

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		

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# 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**. **Country** and **AccountExecutive** are also shown as related entities.

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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 'Order Reason Resolution' and 'Article Return Reason'. 'Payment' is connected to 'Transactions'. 'Products' is connected to 'Order Reason Resolution' and 'Article Return Reason'. 'Resolution' is connected to 'Order Reason Resolution' and 'Article Return Reason'. 'Reason Codes' is connected to 'Order Reason Resolution' and 'Article Return Reason'. 'Billing' is connected to 'Order Reason Resolution' and 'Article Return Reason'. 'Transactions' is connected to 'Order Reason Resolution' and 'Article Return Reason'. 'Order Reason Resolution' is connected to 'Article Return Reason'. 'Article Return Reason' is connected to 'Order Reason Resolution'.

The left-hand navigation pane includes sections for 'General', 'System Reference Objects', 'Other Reference Objects', and 'Reusable Objects'. The right-hand panel shows 'Attributes (20)' with a list of attributes and their types, and 'Forms and Searches' with associated search grids and forms.

Attribute Name	Type
Refund Request Type	Text
Selling Unit	Text
Action Unit	Text
Refund Amount Reques...	Text
Refund Eligibility	Text
Refund Details	Text Area
Refund Amount	Text
Tax Adjustment	Text
Total Refund Amount	Text
SELARTICLES	Text Area
SELRESCODES	Text Area
SELREASONCODES	Text Area
SELQUANTITY	Text
TEMPCREATEDFROM	Text
Currency Code	Text

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# 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 status is 'In Review' with a priority of 'Normal'. The case owner is Morgan Smithson (Agent). 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 in a kitchen. The modal includes fields for 'Name' (BrokenChair - Customer Email.jpeg), 'Document Type' (Customer Sent), 'Remarks', 'Source' (Email), and 'Email' (pat@someemail.com). Buttons for 'Save & Close', 'Cancel', 'Save & Prev', 'Save & Next', 'Undo', 'Download', and 'Popup' are visible. The footer contains copyright information for 2007-2020 Eccentex, Inc. and version details: Version 6.7 R2 Update 2(6.7.20.24).

# 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 'Case Management' and 'Email Indexing' highlighted. The main area is divided into three sections: a filter sidebar, an email list, and a detailed email view.

**Filter Sidebar:**

- 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)

**Email List:**

- Pat Thompson 8:32 PM: Ordered wrong color but already ...
- Paula Sheridan 8:29 PM: Complaint - Order #876213
- Janae Schofield 8:29 PM: Overcharged at store
- Maksim Gill 8:28 PM: Chair doesn't have proper screws
- Edan Reeve 8:28 PM: Employee was rude
- Maksim Gill 8:28 PM: Complaint - Order #878213
- Maksim Gill 8:27 PM: General question about chair
- Maksim Gill 8:27 PM: How to return item that I already as...
- Trixie Ballard 8:27 PM: Ordered wrong color but alre...
- Евгений Петров Apr 3: test
- Евгений Петров Apr 3: test
- Евгений Петров Apr 3: test
- Евгений Петров Apr 3: test

**Email Detail View:**

April 13, 2020 8:32 PM | DOC-2020-69

**Ordered wrong color but already assembled**


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

Attachments: 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 how effective new initiatives are.

# User Dashboard + AppBase BI

The screenshot displays a user dashboard for the 'ACME Customer Service App'. The interface includes a sidebar with navigation options like 'Home', 'Case Management', 'Case Inbox', and 'Task Inbox'. The main content area is divided into several sections:

- My Tasks:** A list of tasks with status indicators (In Process, Closed).
- My Cases Chart By Priority:** A pie chart showing the distribution of cases by priority.
- Row Count per Priority:** Four pie charts showing the percentage distribution of cases across different priority levels: Assignment (66.7%), Closed (50.0%), In Process (25.0%), and New (60.0%).
- Histogram - Date Received:** A bar chart showing the number of cases received per day in March 2018.
- Row Count per State, Date Received and Case Type:** A table showing the relationship between state, year, month, and case type.
- Case Inventory by Case State:** A table showing the distribution of cases across different states.
- Filters:** A sidebar on the right with search filters for Case Number, Case Type, Date Received, Priority, and Case Owner.

At the bottom of the dashboard, there is a footer with copyright information: 'Copyright © 2007-2020 Eccentex, Inc. All rights reserved.' and version information: 'Version: 6.7 R2 Update 2(6.7.20.24) | Privacy | Security | Terms of Use'.

# 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

The screenshot displays the 'eccentex' ACME Customer Service App interface. The main content area shows a case titled 'Retail Refund' for Order #1028064427, valued at 1,146.00 EUR, owned by Pat Thompson. The case is currently 'In Review' with a priority of 'Normal' and a remaining SLA of 1d 1h 47m. A navigation bar includes buttons for 'Assign Case', 'Issue Refund', 'Escalate to Manager', 'Deny Refund', and 'More'. Below this, tabs for 'Refund Articles', 'Refund Details', 'Tasks (8)', 'Documents (6)', 'Case Emails (6)', 'Related (2)', 'Discussions (5)', 'History', and 'Interactions' are visible. The 'Discussions' tab is active, showing a thread with three messages. The first message is from Emma Lindblad (CW) asking about home pick-up. The second is from Liam Sparv (TL) providing a list of locations. The third is from Morgan Smithson (Agent) explaining a partial refund. A 'Respond' button is at the bottom of the thread. On the right, a sidebar shows a list of 'Notes (4)' with details for each, including call logs and agent actions. A 'Comment here...' input field and a 'Post' button are at the bottom of the sidebar. The footer contains copyright information for 2007-2020 Eccentex, Inc., version 6.7 R2 Update 2(6.7.20.24), and links for Privacy, Security, and Terms of Use.

**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:**

**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!

**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** - 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

eccentex ACME Customer Service App

Home Case Types Case Type - Retail Refund Milestone Diagram - Retail Refund

Milestone Diagram Retail Refund

File Edit View Arrange Extras

100%

Save Reset

Properties

Event Type:  
**Execute Rule**

Name \*:  
Execute Rule

Permanent Code \*:  
EXECUTE\_RULE

Enable For Specific Transition:

Event Moment:  
After

Rule \*:  
CUST\_addDeliveryToOrder

Parameters:

CaseId	No value
ContactEMail	No value
ContactFirstN...	No value
ContactLastN...	No value
ContactLocale	No value
ContactMobile	No value
ContactPhon...	No value
DeliveryCont...	No value
DeliveryCont...	No value
DestinationT...	No value
Email	No value
FromLocaleDT	No value
OrderId	No value
PriceCurrenc...	No value
PriceExcludin...	No value
PriceIncludin...	No value
ReferencedIT...	No value
ServiceID	No value

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```

graph LR
    New((New)) -- "Auto-Assign Case" --> Assignment((Assignment))
    Assignment -- "Start Work on Case" --> InProcess((In Process))
    InProcess -- "Resolve Case" --> Resolved((Resolved))
    Resolved -- "Close Case" --> Closed((Closed))
    
    Assignment -- "Auto-Assign Case" --> New
    InProcess -- "Auto-Assign Case" --> Assignment
    Resolved -- "Auto-Assign Case" --> Assignment
    Closed -- "Auto-Assign Case" --> Assignment
    
    New -- "Restart Case" --> Assignment
    InProcess -- "Restart Case" --> Assignment
    Resolved -- "Restart Case" --> Assignment
    Closed -- "Restart Case" --> Assignment
    
    InProcess -- "Continue Work on Case" --> Resolved
    Resolved -- "Continue Work on Case" --> Closed
  
```

# 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 desktop.



## 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 browser address bar shows the URL: <https://apps.mypurecloud.com/directory/#/person/347cc434-b499-42f0-bcfd-704b990acc48>. The interface includes a top navigation bar with tabs for Activity, Directory, Documents, Performance, Reports, Apps, and Admin. A search bar and 'On Queue' indicator are also present.

**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.

**Service Requests:** A list of requests is shown on the left, including 'Excessive Fees Complaint' (CASE-2019-850, 3:34), 'Excessive Fees Complaint' (CASE-2019-604, 3:34), 'Account Complaint' (CASE-2019-603), 'BMW Auto Loan' (CASE-2019-546), and 'Auto Loan for Wife' (CASE-2019-025).

**Case Journey:** A timeline diagram shows the progression of the 'Excessive Fees Complaint' case. Key milestones include: 'Initial Assessment of Complaint' (Completed), 'Send Acknowledgement' (Completed), 'In Progress' (Completed), 'Collect Investigation Data' (Completed), and 'Investigation' (Completed). The final outcome is 'Closed - Customer Satisfied'.

**Alerts and Suggestions:** An alert states 'ALERT: holidays may impact store hours'. Suggestions include 'OFFER: Fee protection service', 'OFFER: Auto loan (new credit score)', 'Add a family member to the account', 'Eligible for a balance transfer', and 'Order new checks'.

**Account Management Form:** A form on the right allows for creating a case. Fields include Type (Account Management), Sub-Type (Credit Line Increase), Requested Amount (\$5,000.00), Current Income (\$100,000.00), and Account (061315-00003). A 'Submit' button is at the bottom.

**Overview Table:**

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
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 Viewed' articles. The main area shows a 'Total Refund: € 1,146.00 EUR' and a table with columns for '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
Full Refund	€ 6.00 EUR 5.00 + 1.00 VAT	€ 42.00 EUR 35.00 + 7.00 VAT
Full Refund	€ 6.00 EUR 5.00 + 1.00 VAT	€ 24.00 EUR 20.00 + 4.00 VAT
Partial Refund	€ 4.80 EUR 4.00 + 0.80 VAT	€ 19.20 EUR 16.00 + 3.20 VAT
Full Refund	€ 18.00 EUR 15.00 + 3.00 VAT	€ 72.00 EUR 60.00 + 12.00 VAT
Partial Refund	€ 13.20 EUR 11.00 + 2.20 VAT	€ 39.60 EUR 33.00 + 6.60 VAT
Partial Refund	€ 25.20 EUR 21.00 + 4.20 VAT	€ 50.40 EUR 42.00 + 8.40 VAT
Full Refund	€ 37.20 EUR 31.00 + 6.20 VAT	€ 74.40 EUR 62.00 + 12.40 VAT
Full Refund	€ 70.80 EUR 59.00 + 11.80 VAT	€ 141.60 EUR 118.00 + 23.60 VAT
Full Refund	€ 58.80 EUR 49.00 + 9.80 VAT	€ 117.60 EUR 98.00 + 19.60 VAT
Full Refund	€ 25.20 EUR 21.00 + 4.20 VAT	€ 50.40 EUR 42.00 + 8.40 VAT
Full Refund	€ 96.00 EUR 80.00 + 16.00 VAT	€ 192.00 EUR 160.00 + 32.00 VAT
Full Refund	€ 38.40 EUR 32.00 + 6.40 VAT	€ 38.40 EUR 32.00 + 6.40 VAT
Full Refund	€ 118.80 EUR 99.00 + 19.80 VAT	€ 118.80 EUR 99.00 + 19.80 VAT
Compensation	€ 31.20 EUR 26.00 + 5.20 VAT	€ 31.20 EUR 26.00 + 5.20 VAT
Full Refund	€ 43.20 EUR 36.00 + 7.20 VAT	€ 43.20 EUR 36.00 + 7.20 VAT
Full Refund	€ 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

**Calendar Main View**

Event Name \*: Inspection of refinery equipment Private:

From \*: 04/14/2020 12:30 PM To \*: 04/14/2020 2:30 PM

All day event:  Duration: 2 hours

Reminder: 1 hours before start Room: Conference Room-Culver City

Recurrence: Every 1 years

Description:

When: Occurs every Friday effective 04/14/2020 from 12:00 PM to 2:30 PM (UTC-08:00) Pacific Time (US & Canada).  
Where: Link and Dial-In Details Below

Join from Any Device: <https://eccentex.zoom.us/j/5557863331>

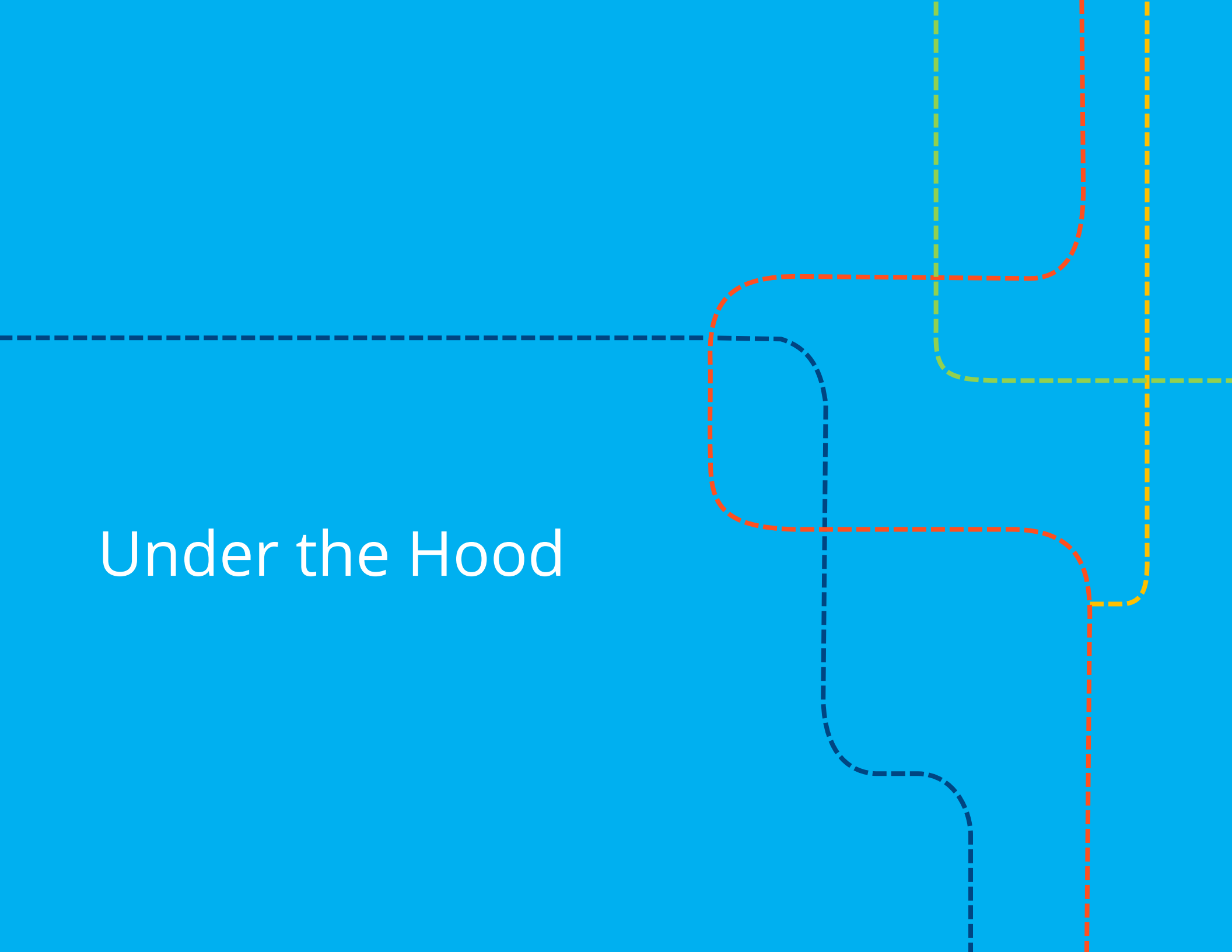
Participants (3 items)

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

Attachments (6 items)

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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 a "Retail Refund" case. 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 the case lifecycle.

**Case Detail Page Builder**

Case ID: Milestone: Priority: Total:  
Case Owner: Nobody Case SLA: Resolution:

**Toolbox**

- Buttons: Assignment, Milestone Routing, Action Button, Custom Widget
- Summary Fields: Refund Details, Refund Amount Request, 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 Request, Refund Request Type, Selling Unit, Action Unit, Refund Eligibility, Refund Amount, Total Refund Amount, Tax Adjustment, SELARTICLES, SELREASONCODES, SELREASONCODES, SELQUANTITY, TEMP\_CREATEDFROM, Currency Code
- Refs: Refund Articles, Refund Details, Tasks, Documents
- Standard Widget - Tasks

**Milestone Diagram**

The Milestone Diagram shows a flowchart of the case lifecycle with the following states and transitions:

- New** (Green circle) transitions to **Assignment** (Orange circle) via "Auto-Assign Case".
- Assignment** transitions to **In Process** (Orange circle) via "Start Work on Case".
- In Process** transitions to **In Review** (Orange circle) via "Send to In Review".
- In Review** transitions to **Closed** (Red circle) via "Send to Close".
- Closed** transitions back to **New** via "Restart Case".
- In Process** transitions back to **Assignment** via "Restart Case".
- In Review** transitions back to **In Process** via "Continue Work on Case".
- Assignment** transitions back to **New** via "Send to Assignment".
- In Process** transitions back to **New** via "Send to New".
- In Review** transitions back to **New** via "Send to New".
- Closed** transitions back to **New** via "Send to New".

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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, a central form design area, and a right-hand properties panel. A modal dialog titled "Action Button" is open, showing configuration options for a button.

**Form Builder Interface:**

- Header:** eccentex logo, ACME Customer Service App, and navigation icons.
- Navigation:** Home, Detail Page - Retail Refund, Data Models, Data Model - Retail Refund, Form - Retail Refund.
- Form Builder:** Edit Form Rules, View Source, Preview, Save, Reload.
- Toolbox:** Layout (Section, Simple Row, Columns), Title Separator, Custom Section, Custom Container, Components (Label field, Button, Custom Field), Complex fields (Address), Business Object fields, Child Business Objects (Customer Detail, Order, Reason Resolution, Selected Refund Items).
- Form Design:** Order Refund Details Diag. Fields include Refund Request Type, Refund Details, Selling Unit, and Action Unit. A button labeled "Fill in Missing Order Information" is visible.
- Properties Panel:** Type: button.

**Action Button Modal:**

- Buttons:** Apply, Cancel.
- Basic Settings:**
  - Color: NONE, GREEN, ORANGE, RED, BLUE.
  - Action: Call a rule.
  - Button Icon: Q search.
  - Button Text: Fill in Missing Order Information.
- Rule Settings:**
  - Rule code: CUST\_LookupOrder.
- Table:**

Name	Type	Value
OrderNumber	Bind To	CDM_MONEY_OUT_REFUND_DETA...
- Callbacks:**
  - None
  - Custom
- 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

```



# 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 on the left and a 'Case' view on the right. The editor is titled 'Add Coded Page - Credit Report' and contains the following JavaScript code:

```
JavaScript 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 case view on the right is titled 'ACME Customer Service App' and shows a 'Credit Report' widget. The widget displays a credit score of 700, calculated with GScore 4.0. A progress bar below the score indicates the score is 'Good'. The case details include Case State: In Process, Case Owner: Sarah Jones (Comptroller), and Case State: In Process. The widget is titled 'Credit Report' and is part of a case for 'Acme Supplies Co.' The case history table shows the following entries:

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



## Perimeter Security

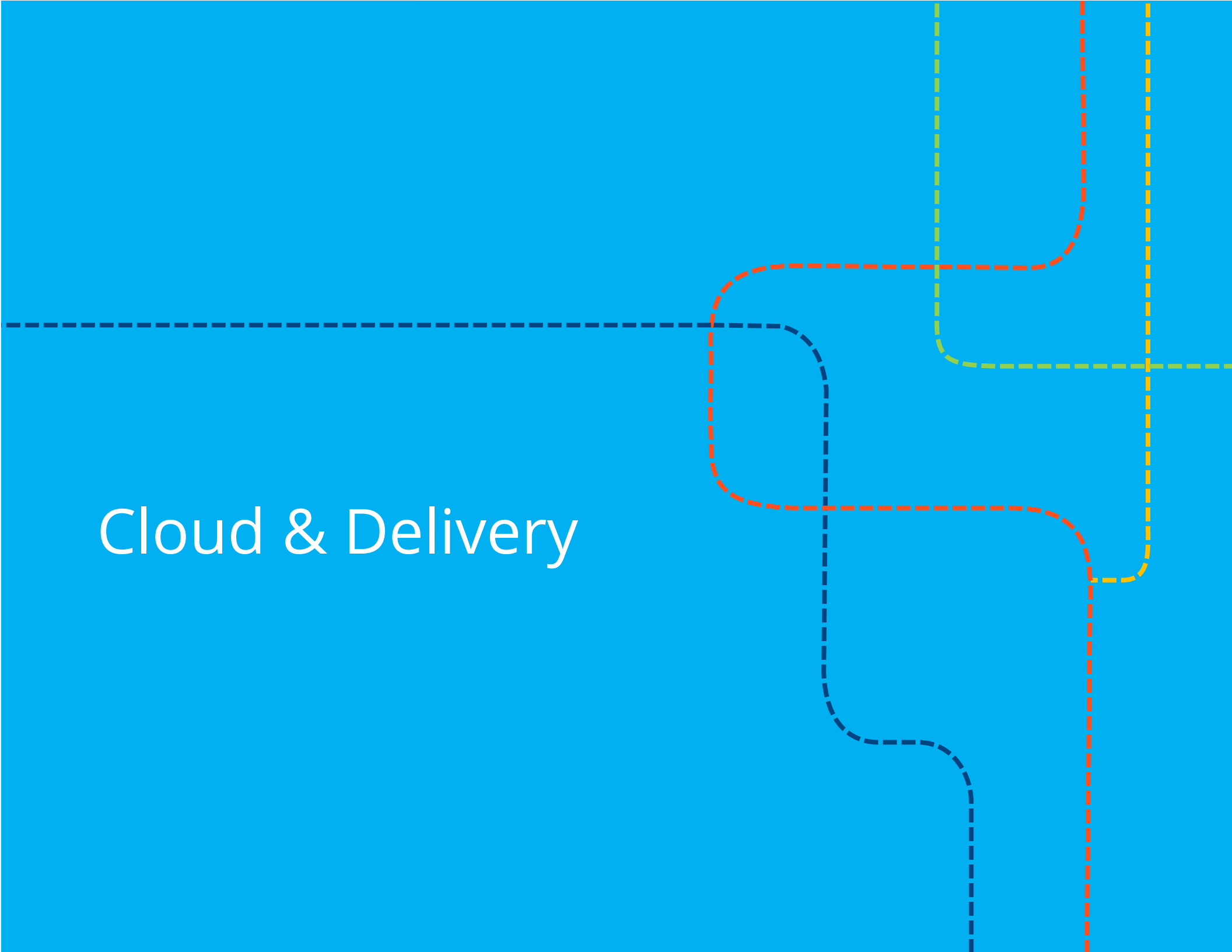
Comprehensive intrusion protection with hardened rules for how services and resources communicate with each other.



## Independent Security Audits

In addition to comprehensive internal audits, Eccentex 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.



## Eccentex 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 Eccentex 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.



## Implementation Services

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



## Managed Hosting Services

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



## Remote & On-Site Training

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



## Dedicated Teams

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



## 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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