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

- 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

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

Cloud & Delivery

- 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.

Flexible Forms

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

Customer Context

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

Sub-Cases & Linked Cases

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

Custom Milestones

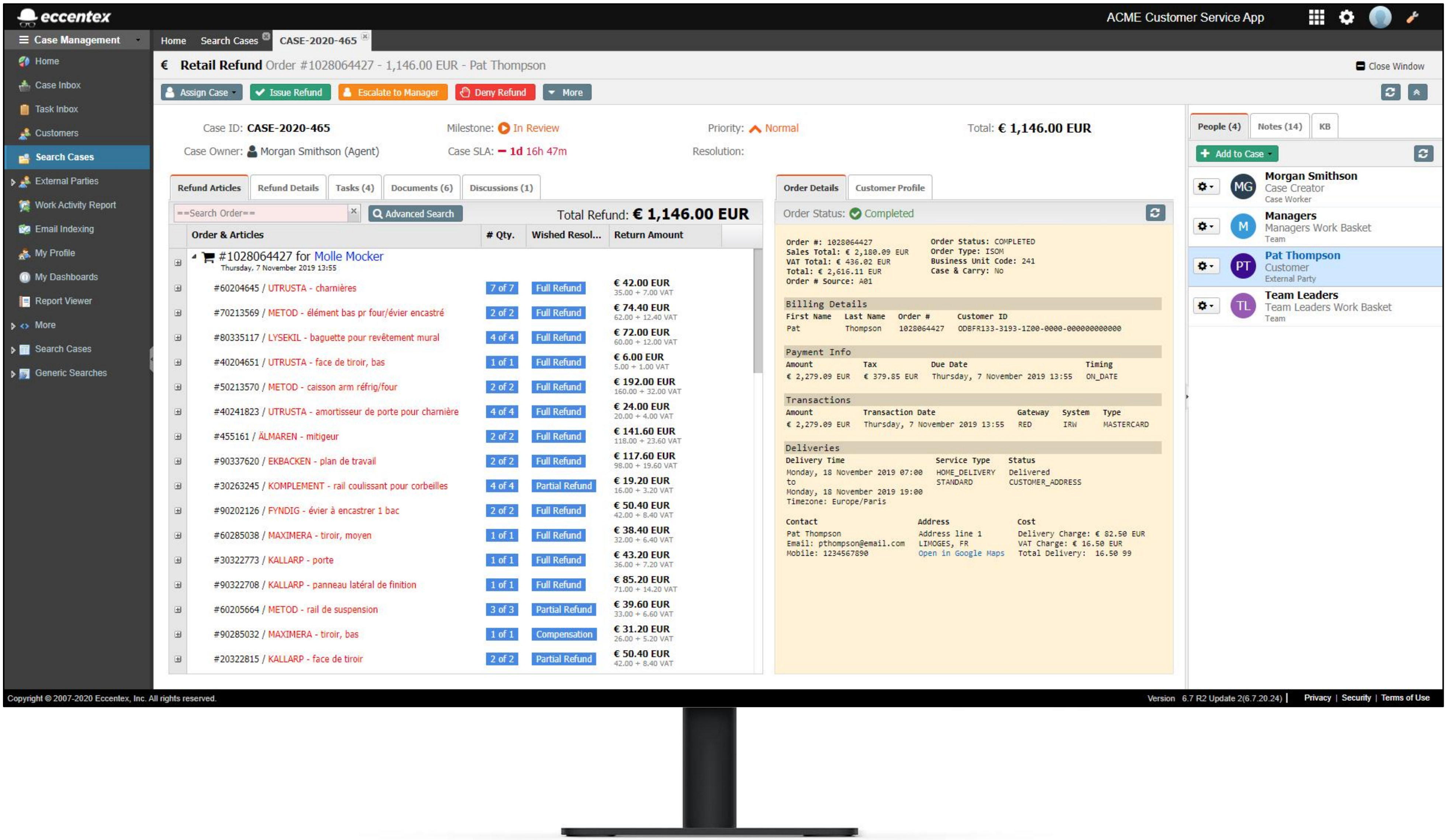
Track simple and complex cases with custom milestones tailored to how each case type should be resolved.

Ad-hoc Tasks

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

Screenshot

Case 360 Detail Page



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.

Business Rules

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

Team Inboxes

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

Smart Assignment

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

Integration & APIs

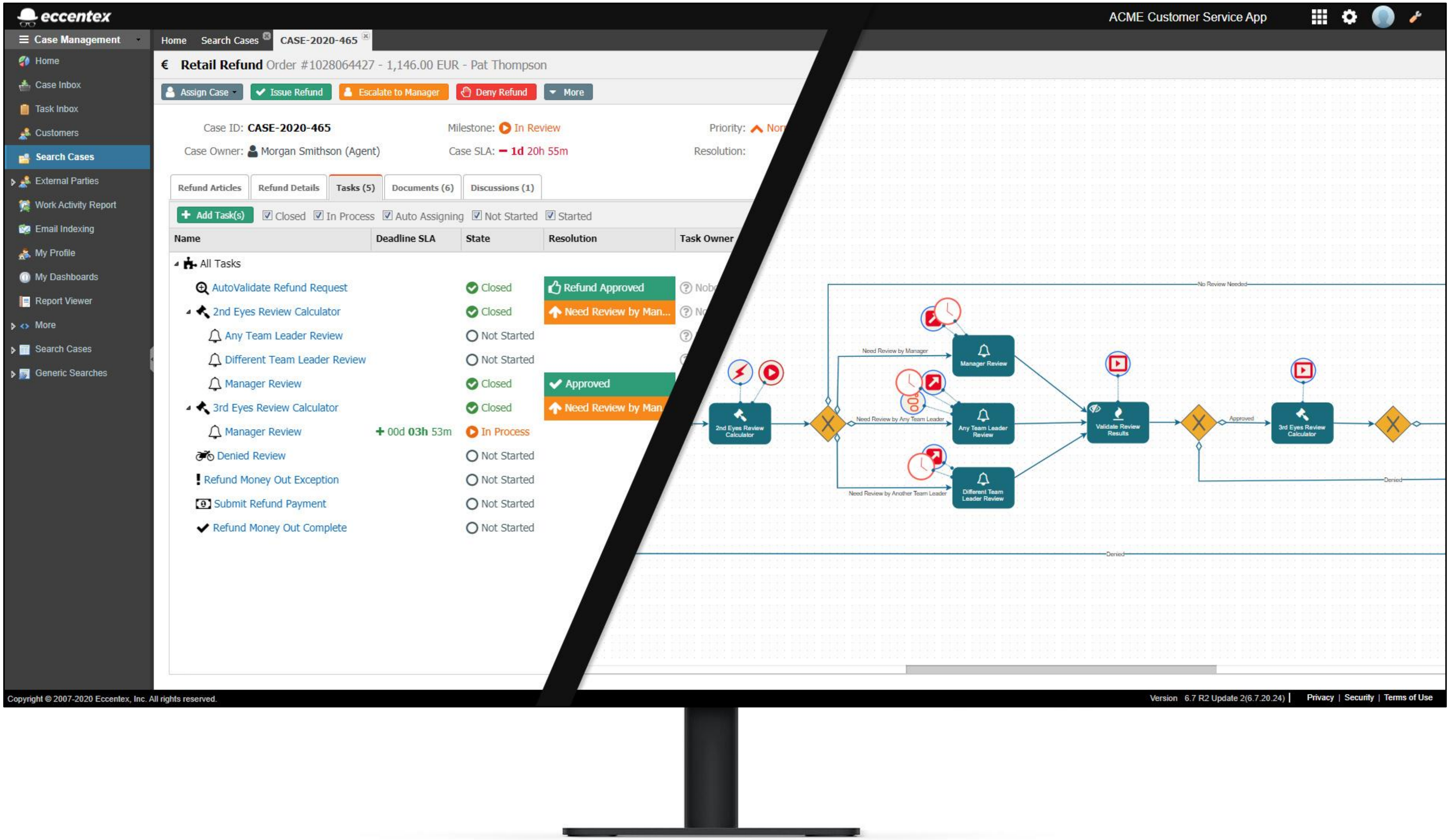
Send case data to other systems or allow other systems to push, create, update, route, and close work.

SLA Management

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

Screenshot

Tasks in a Case + Task Workflow



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.

Account Hierarchy

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

Custom Data Models

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

Connect to Data Sources

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

Two-Way Data Sync

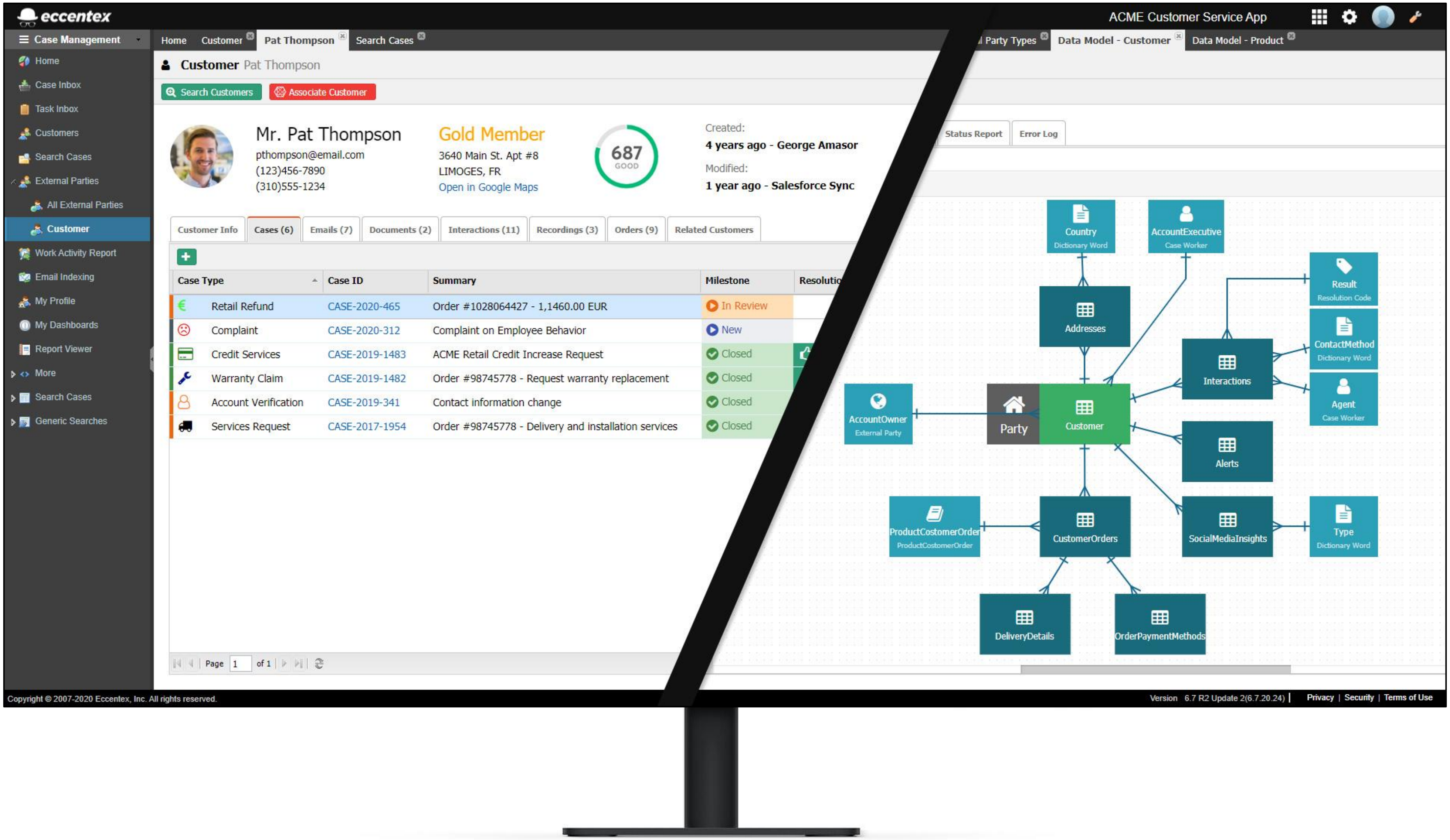
Maintain up-to-date information for use by all your software and offer company-wide, cross-channel customer experiences.

System of Record

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

Screenshot

Customer 360 Detail Page + Customer Data Model



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 Model Builder

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

Data Change Actions

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

Form & Page Builders

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

Open Data Model

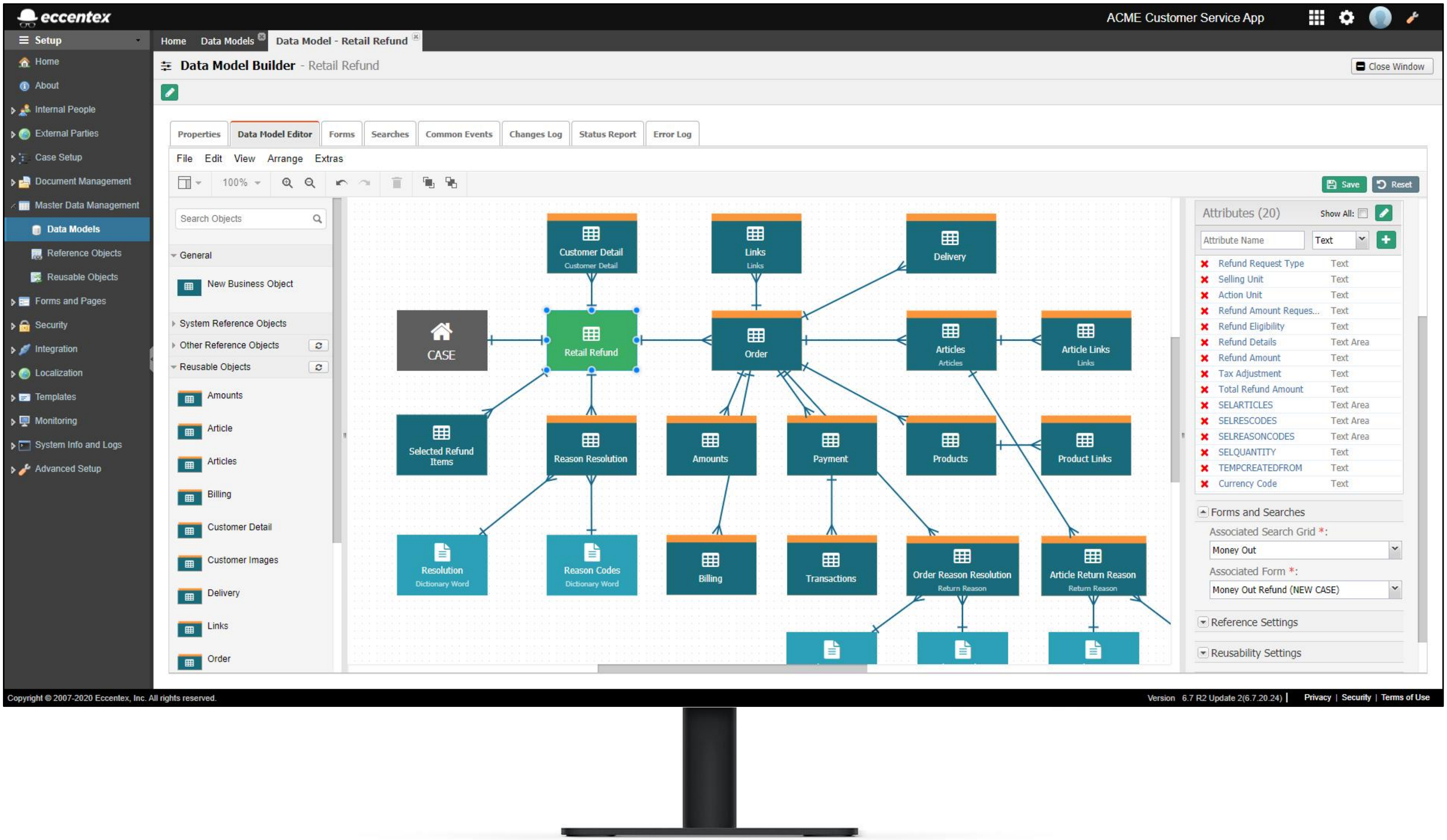
Data models deploy as real tables, columns, and foreign keys in the database, making them transparent to other systems.

Search Builder

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

Screenshot

Data Model Builder



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.

Optical Character Recognition (OCR)

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

Full Text Search (FTS)

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

Document Generation

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

Scanning and Barcoding

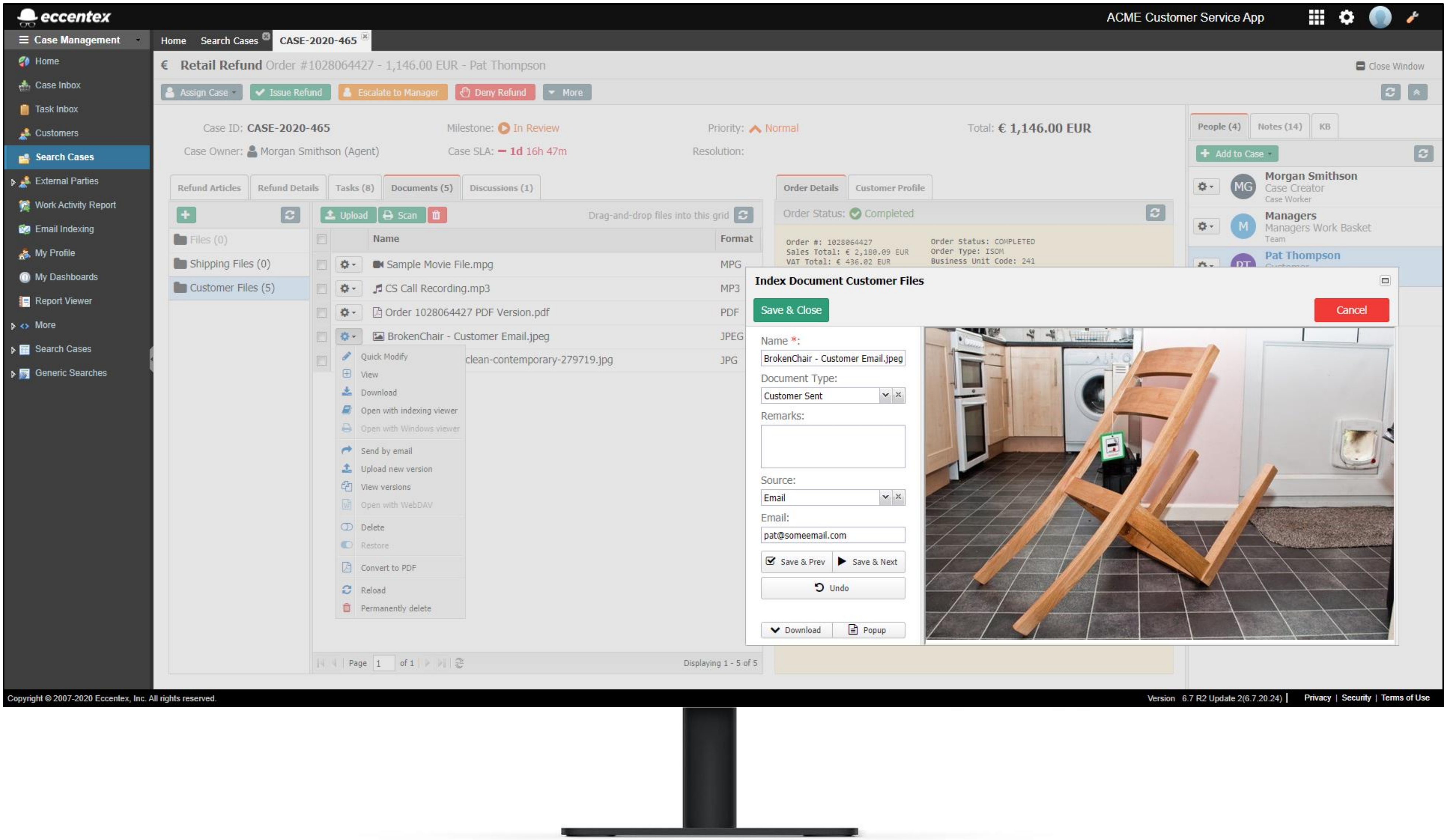
Scan multi-page documents right into a case or leverage high-volume scanning by separating packets with barcodes.

Document Annotations

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

Screenshot

Documents in Case



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.

Auto Indexing & Tagging

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

Context-Aware Conversations

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

Email Template Builder

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

Trigger Emails & SMS

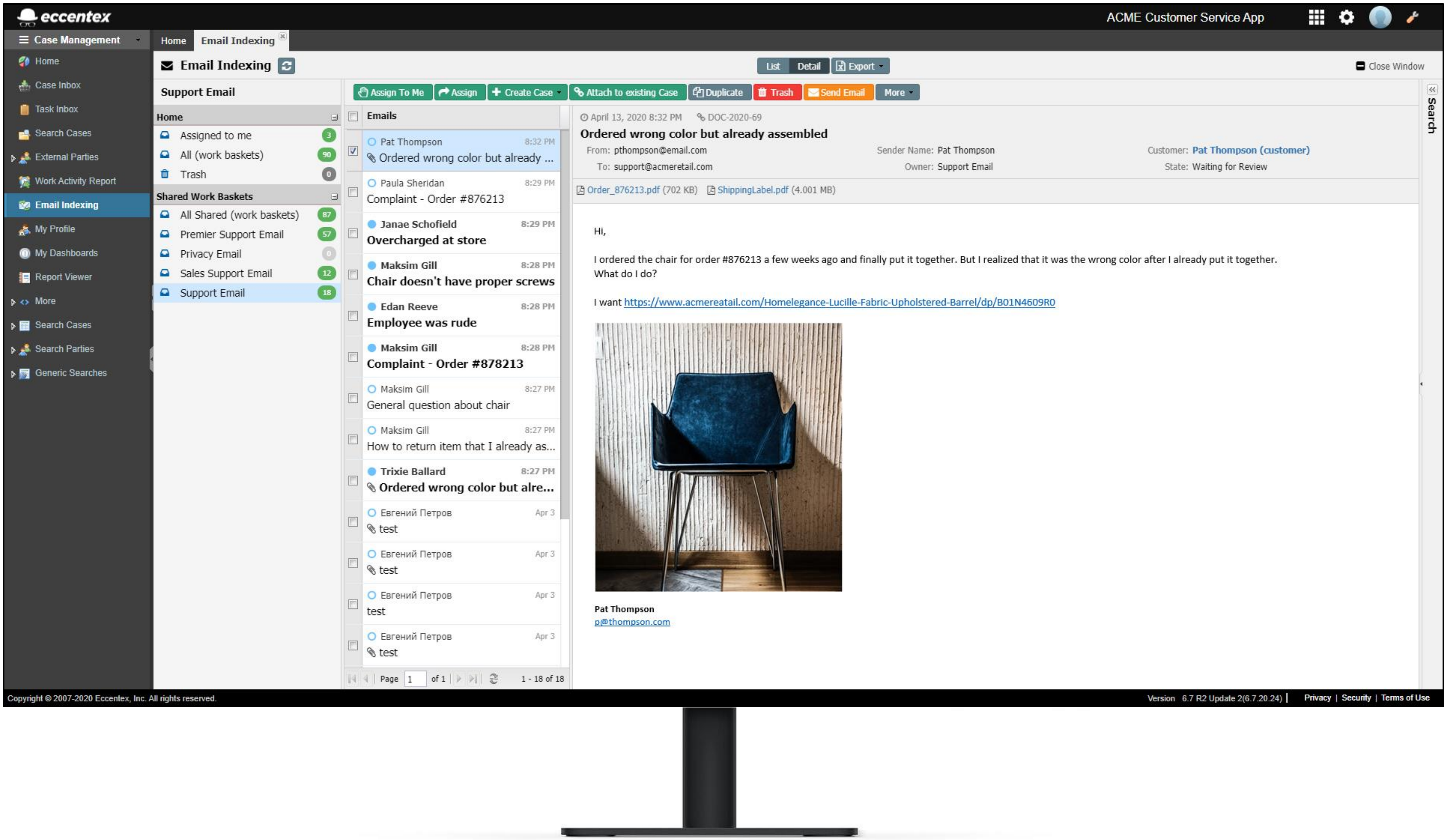
Automatically email customers about their cases, notify employees of changes and schedule periodic reminders.

Secure Connectors

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

Screenshot

Email Inbox and Indexing



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.

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.

AppBase Business Intelligence (BI)

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

Scheduled Reports

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

Open Data Model

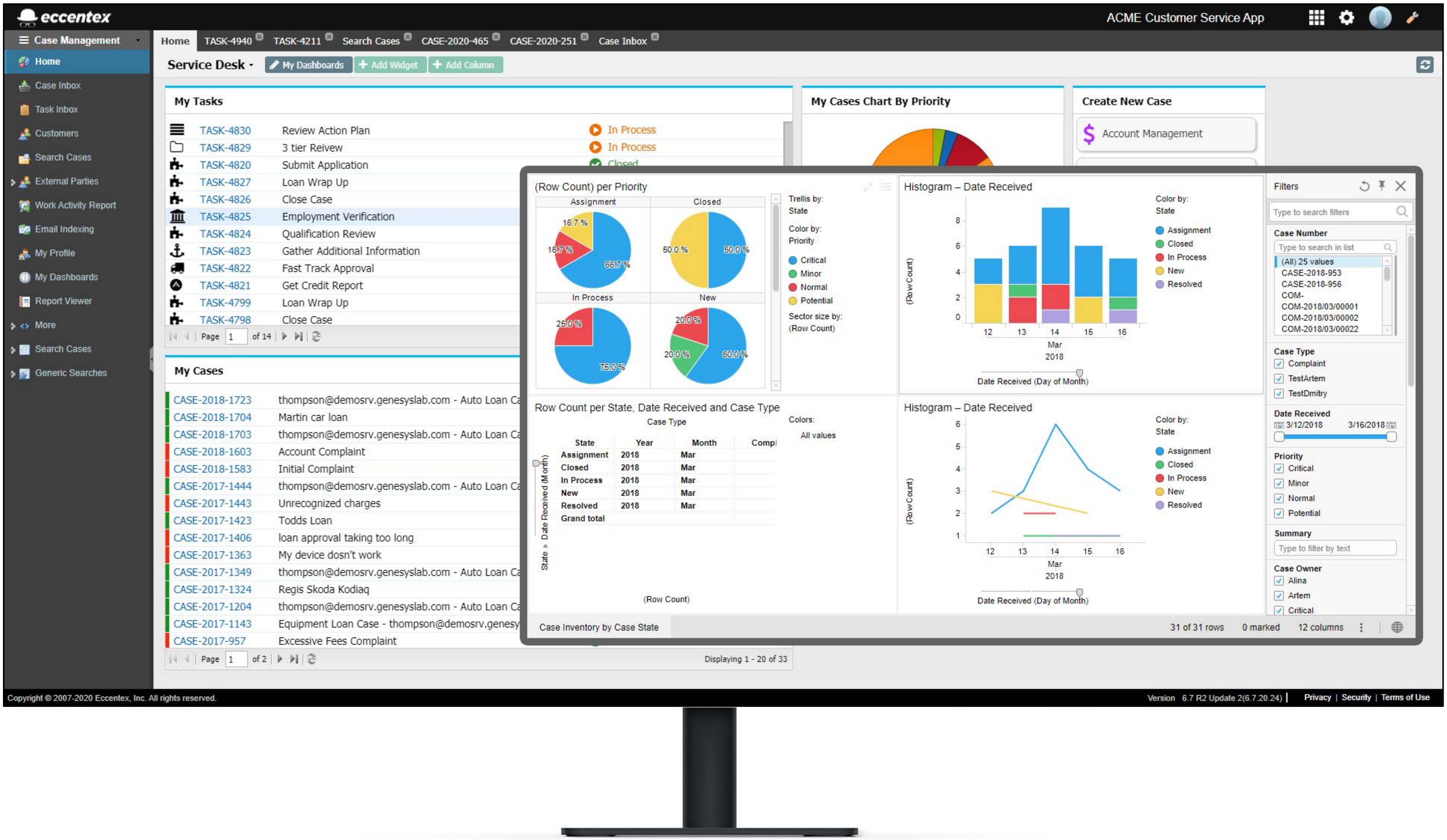
Easily analyze solution data with your in-house reporting tools by traversing real tables, columns, foreign keys and views.

KPI Tracking

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

Screenshot

User Dashboard + AppBase BI



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.

Case Parties

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

Automatic Notifications

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

Ad-hoc Tasks

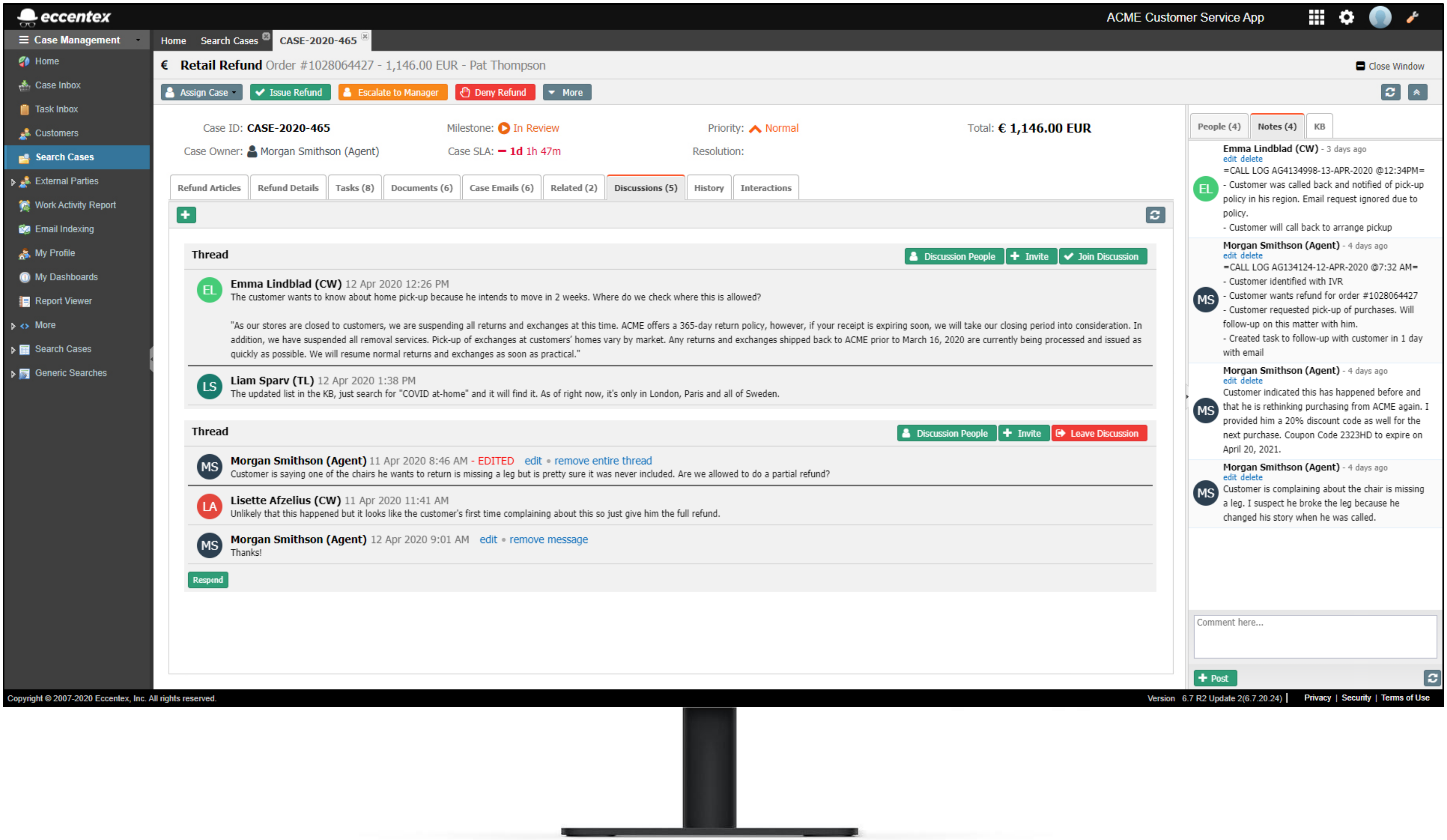
Create unplanned tasks such as requesting a review or approval and easily assign them to individual people or teams.

Case Notes

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

Screenshot

Case Discussion and Notes



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.

External Users

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

Public Knowledge Base

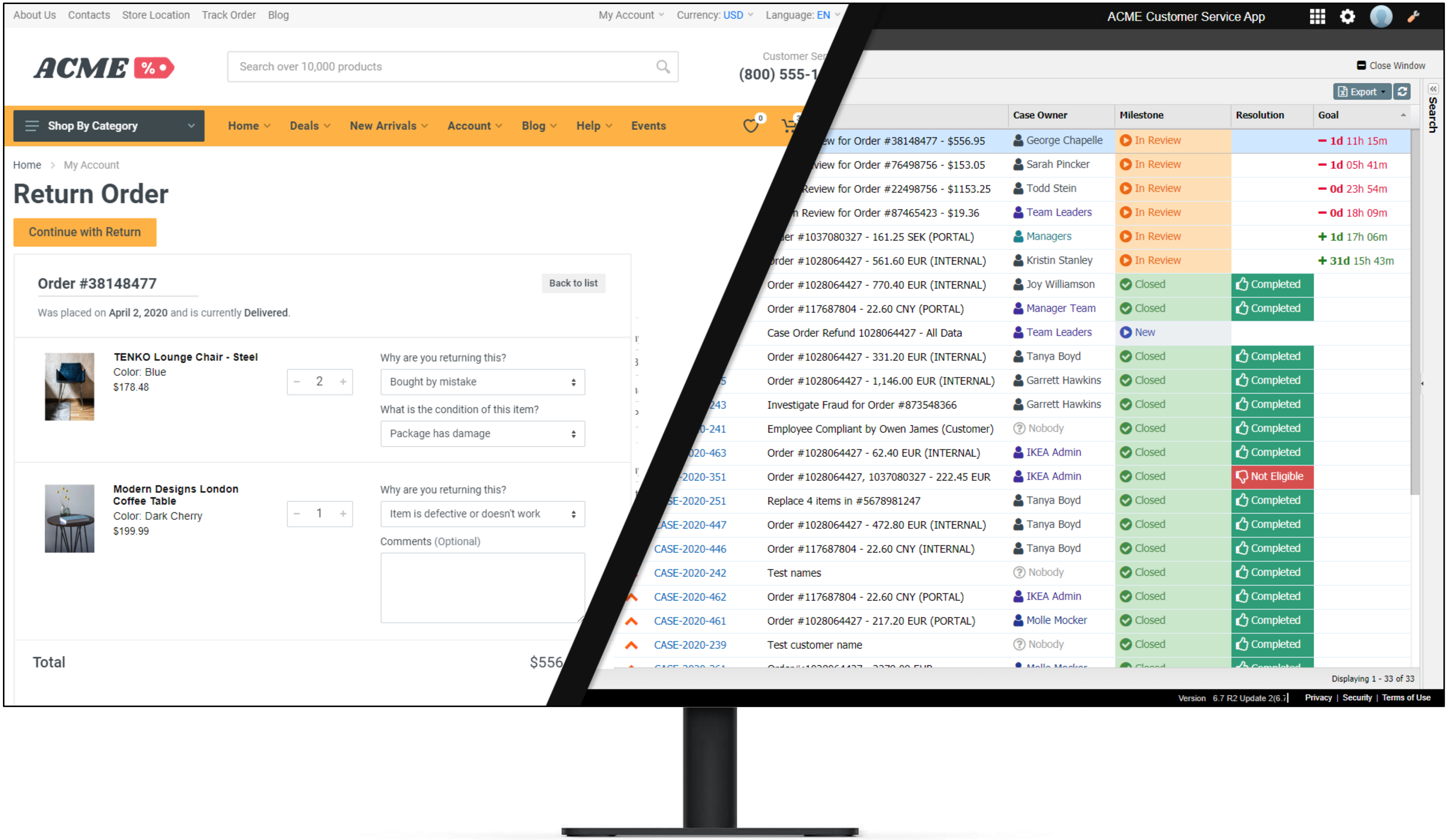
Embed your knowledge base into your website, making it completely open or only open to customers who are logged in.

Integration & APIs

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

Screenshot

Customer Portal + Cases Reports



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.

Teams, Skills & Roles

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

Organizational Chart

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

HR Workflows & Data Models

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

Employee APIs & Integration

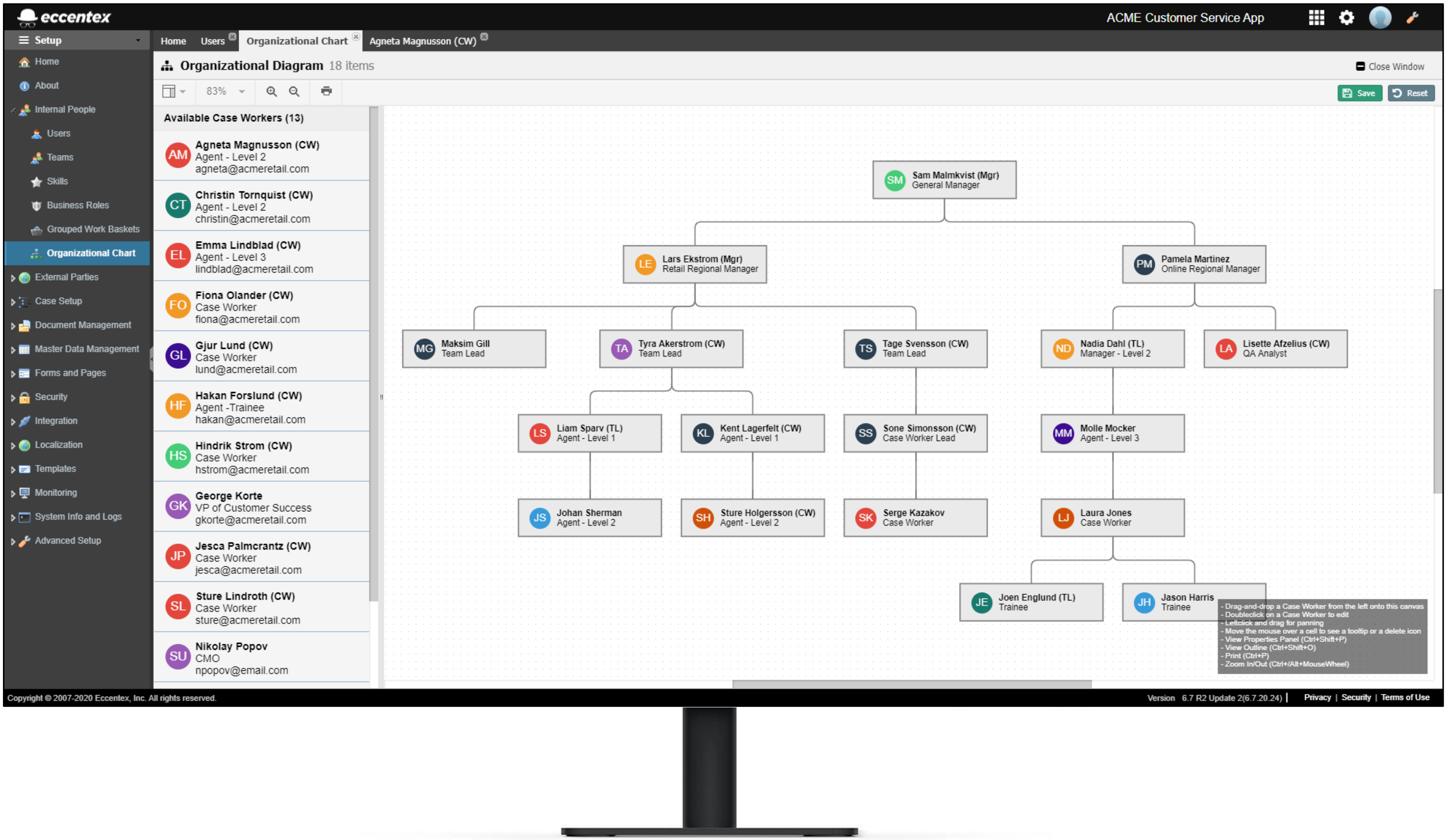
Enrich the employee profile with data from other systems and automate onboarding & offboarding requests to related systems.

HR Knowledge Bases

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

Screenshot

Organization Chart



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.

Scheduled Jobs

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

Folder Monitoring

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

Events & Triggers

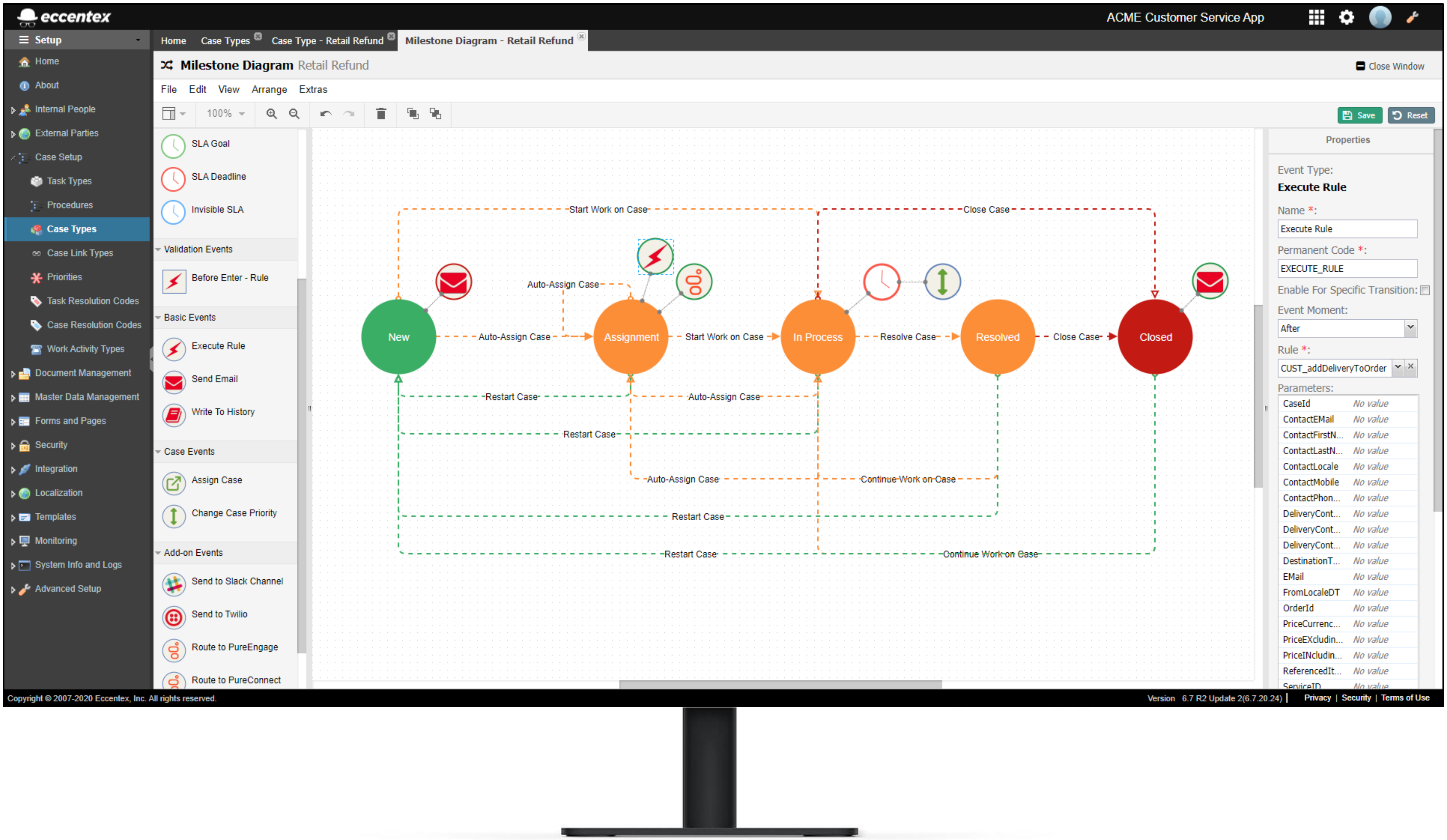
Attach automation rules practically anywhere including CRM data changes, case updates and employee events.

Custom REST APIs

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

Screenshot

Workflow Builder with events



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.

Time Tracking

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

Aggregated Notes

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

Automation Transparency

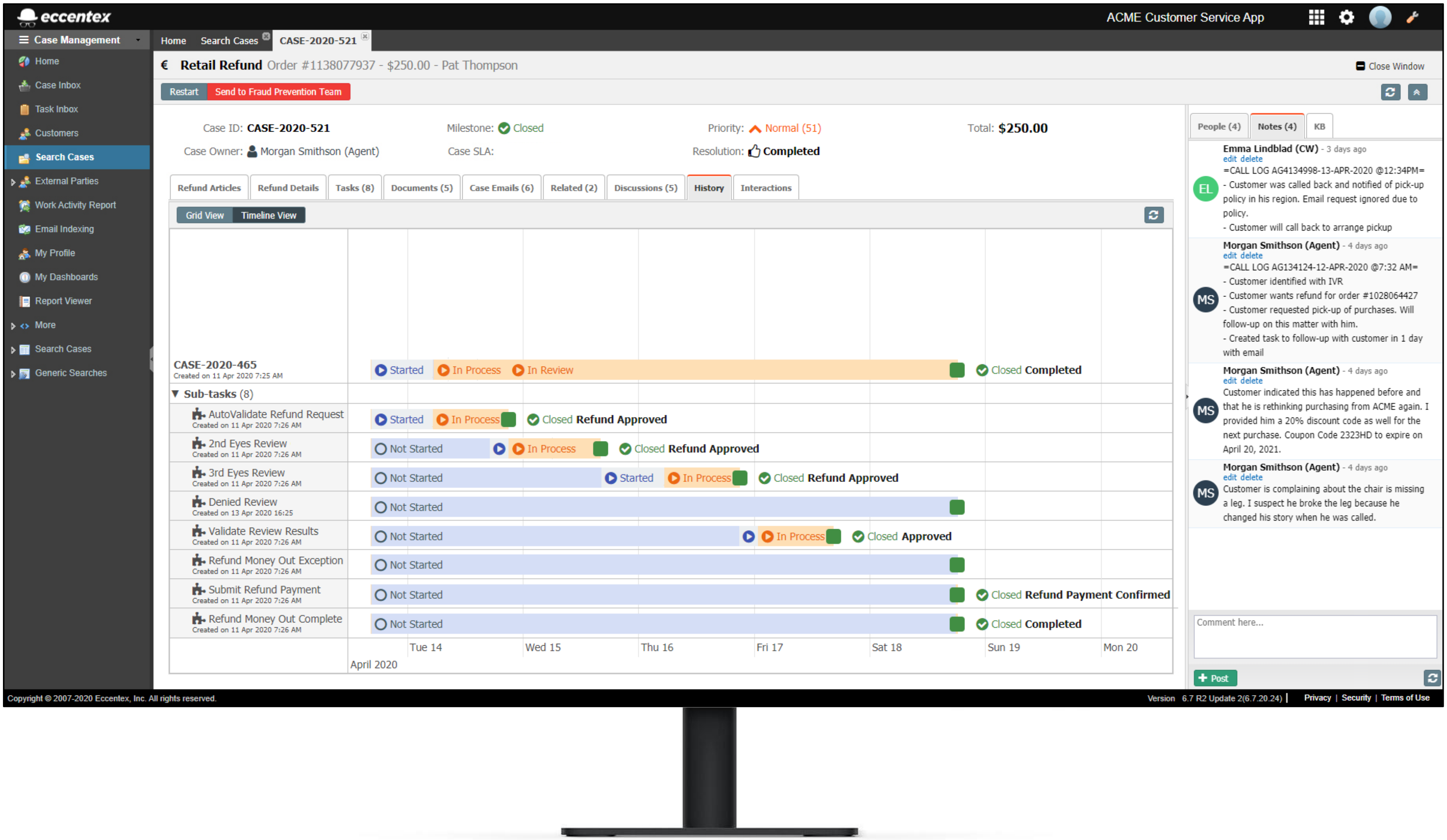
Keep a clear track of every automated decision that the system made by seeing inputs, outputs and actions taken.

Security & System Events

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

Screenshot

Case and Tasks History



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.

Genesys Cloud, Engage & Connect

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

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.

True Omni-Channel

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

Single-Screen Workspace

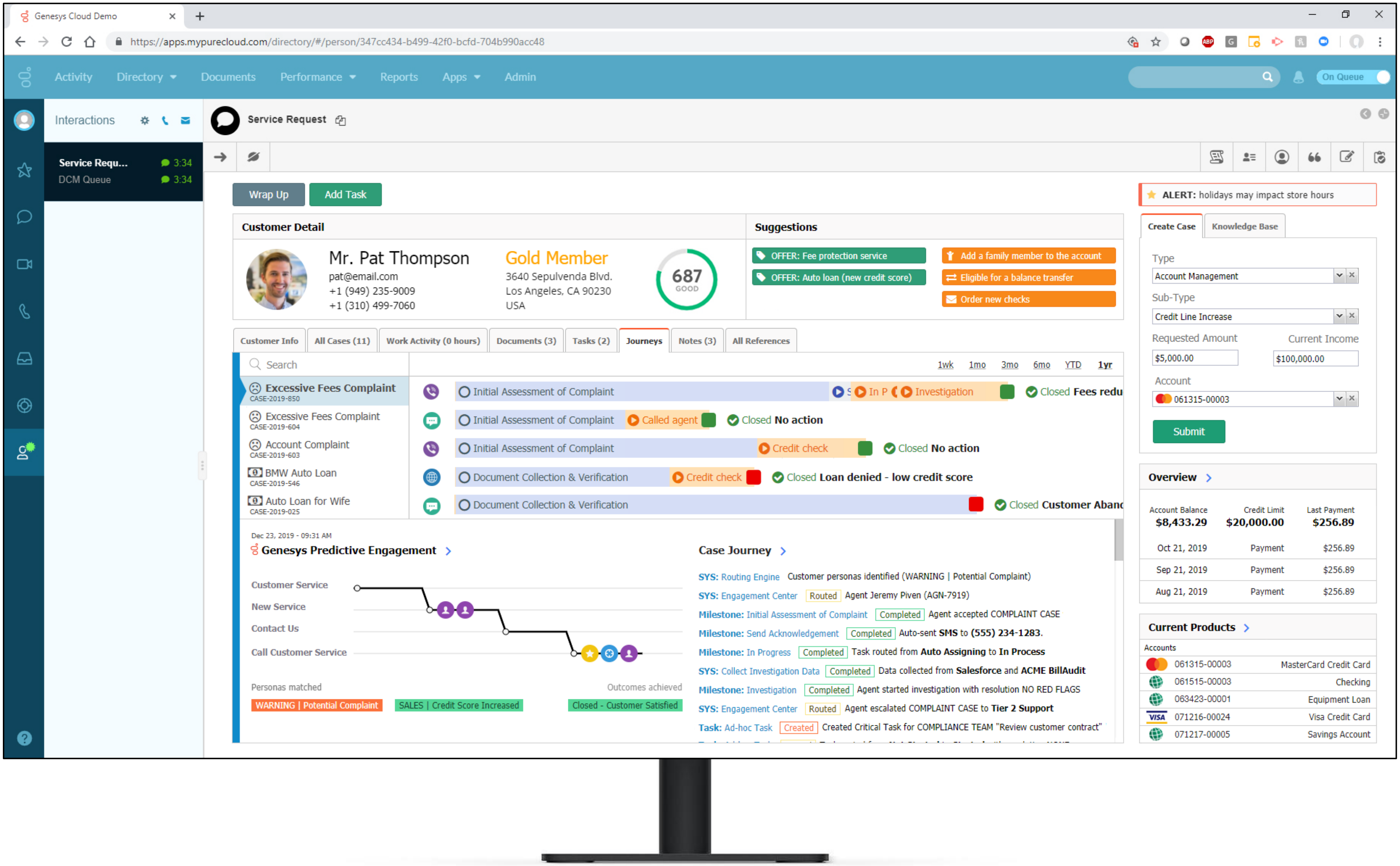
Unified UI allows agents to create cases, follow-up on existing ones, wrap-up and more without leaving the Genesys dekstop.

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.

Screenshot

Genesys Cloud with Customer 360 embedded



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.

Agent Assisted AI

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

Proactive Engagement

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

Hyper-Personalization

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

Modernize Communications

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

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.

Article Recommendations

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

Public or Internal Spaces

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

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.

Rich Content

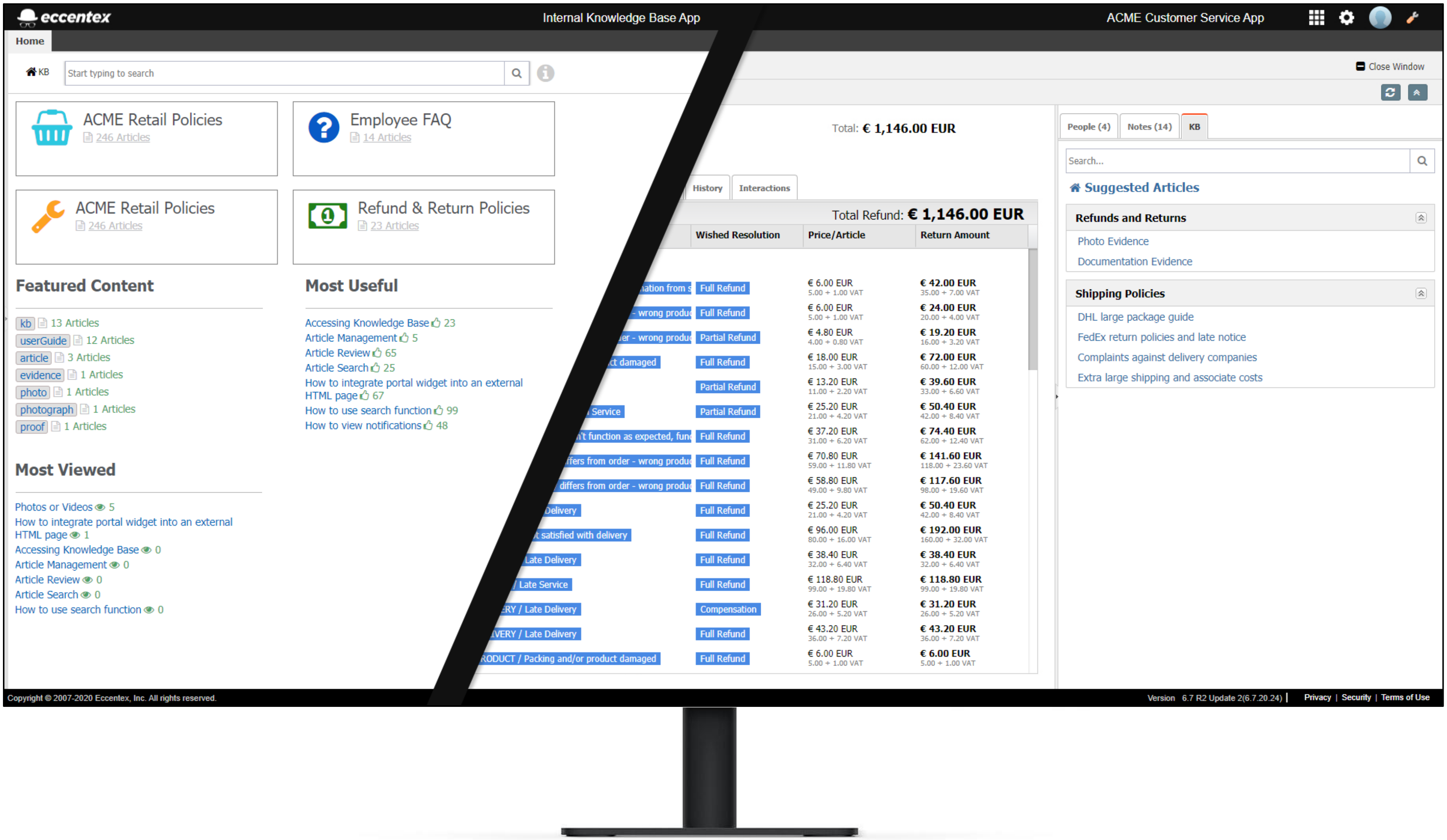
Include YouTube, videos, documents and pictures in your articles or go further with HTML, CSS and business rules.

Article Lifecycle Management

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

Screenshot

Knowledge Portal +
KB Recommendations in Case



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.

Sync with Office 365

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

Team Calendars

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

Appointments Reminders

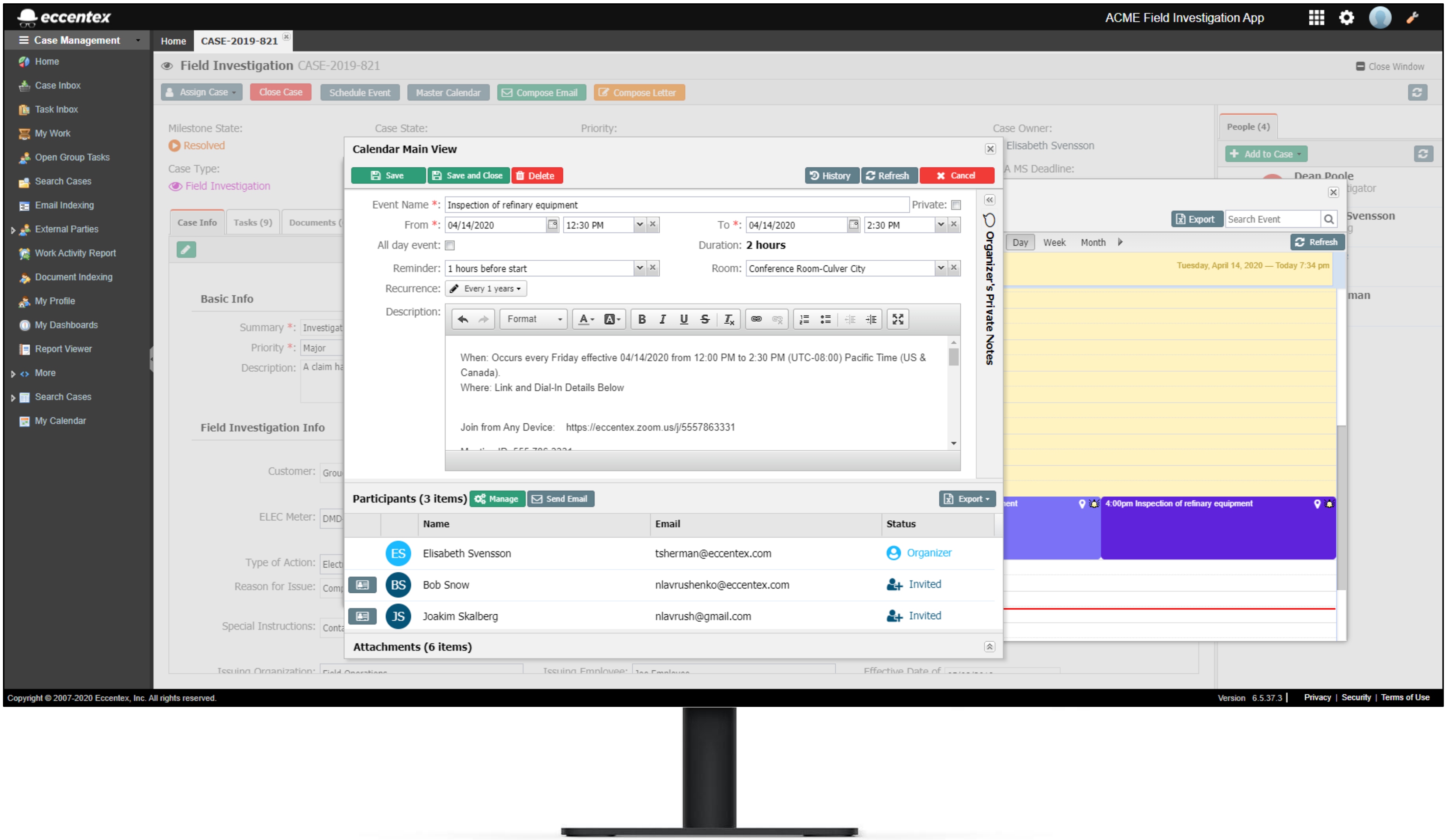
Set up SMS or email alerts of upcoming appointments and notify people if something is rescheduled or cancelled.

Calendar APIs & Integration

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

Screenshot

Appointments Management for Case



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.

Workflow Builders

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

Hybrid Development

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

UI Builders

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

Multilingual Support

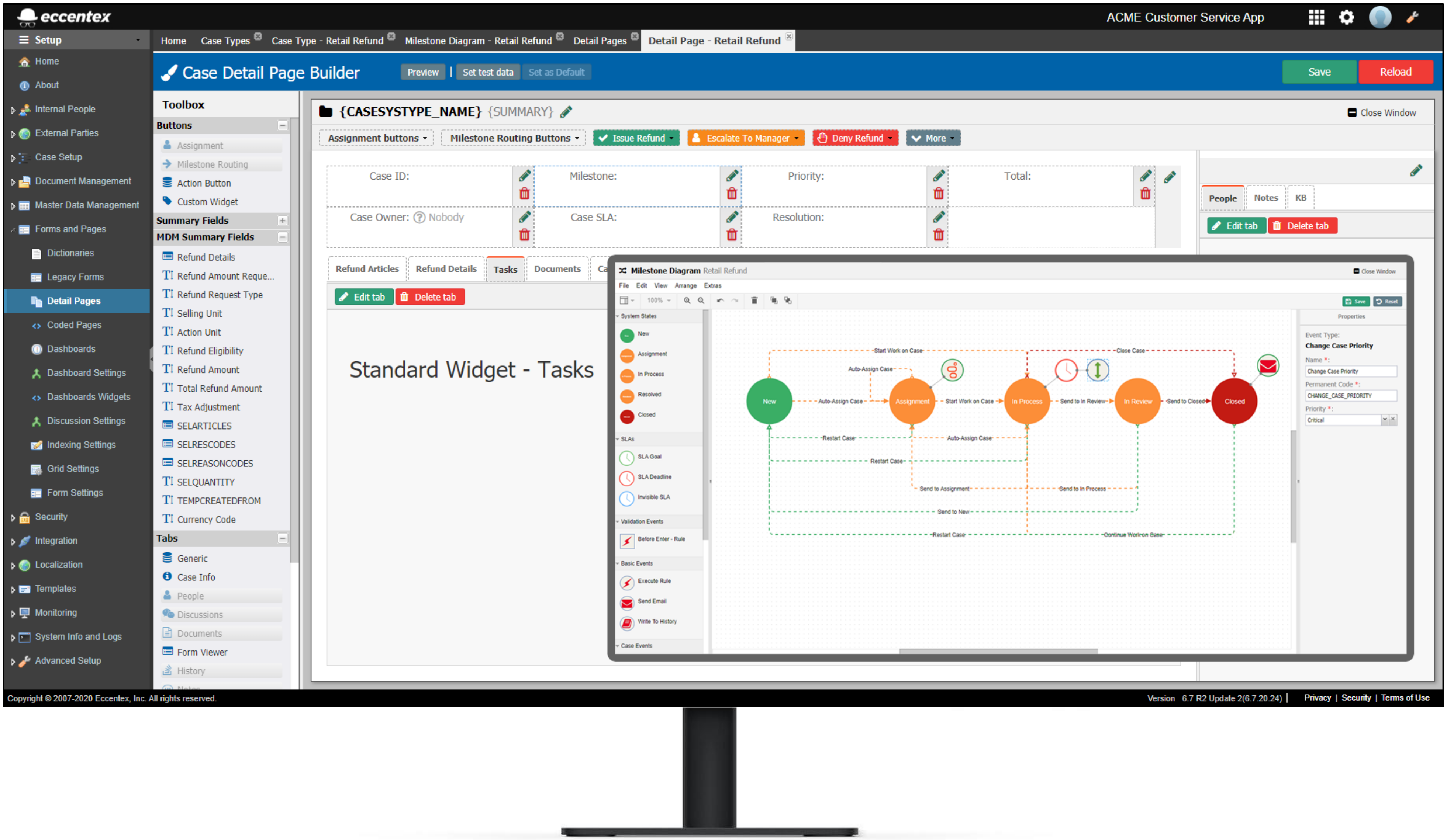
Scale your solution across multiple languages, time zones, and employee and customer preferences.

Single-click Deployment

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

Screenshot

Detail Page Builder + Milestone Builder



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.

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.

UI Overrides

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

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.

Widget Extensions

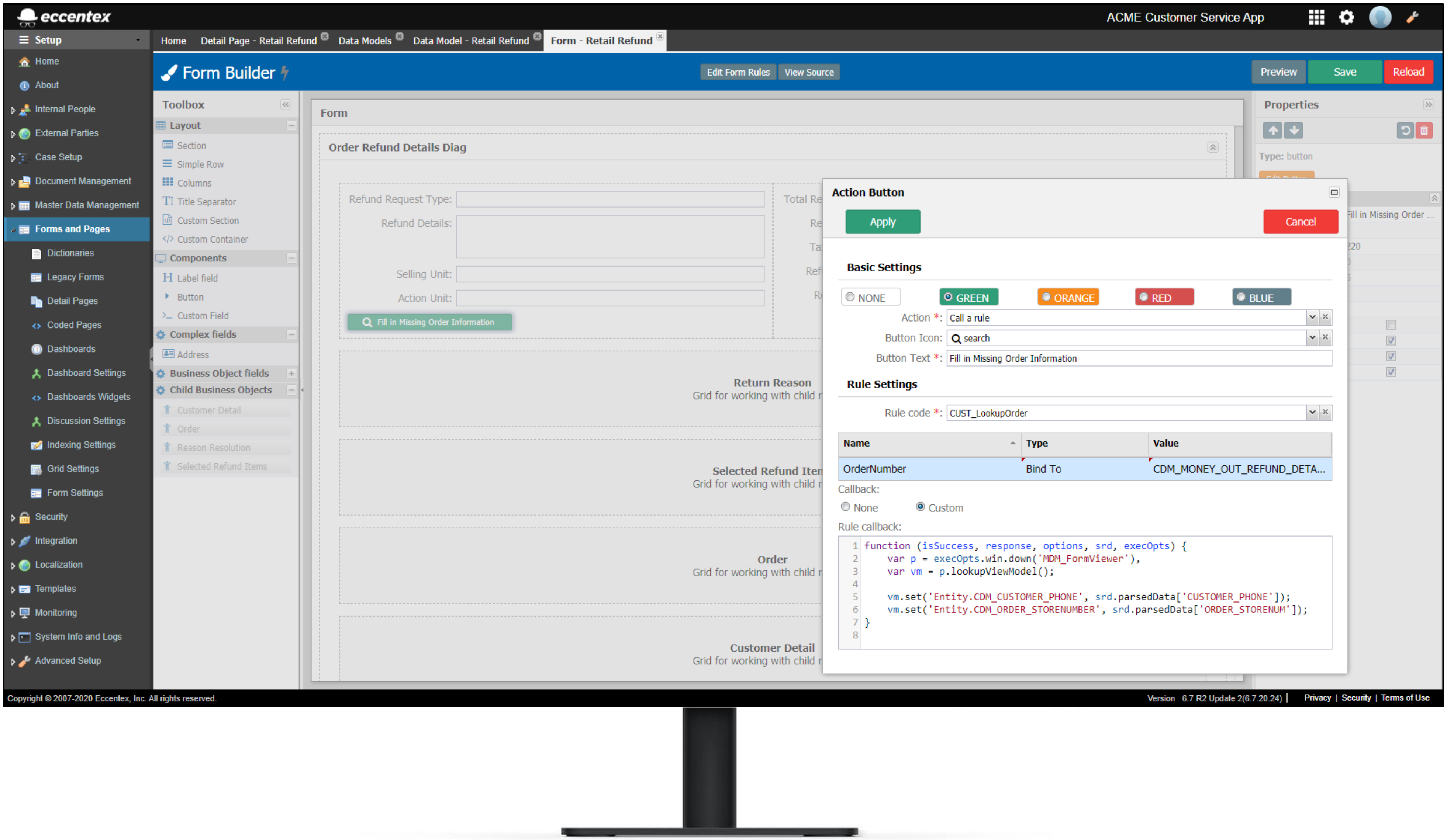
Extend existing widgets such as docment management to include additional buttons or to auto-create folders for new cases.

Rule Debugging

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

Screenshot

Form Builder with JavaScript snippets



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.

C# Rules

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

DLL Extensions

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

HTML, CSS, JS and ASPX

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

.NET SDK

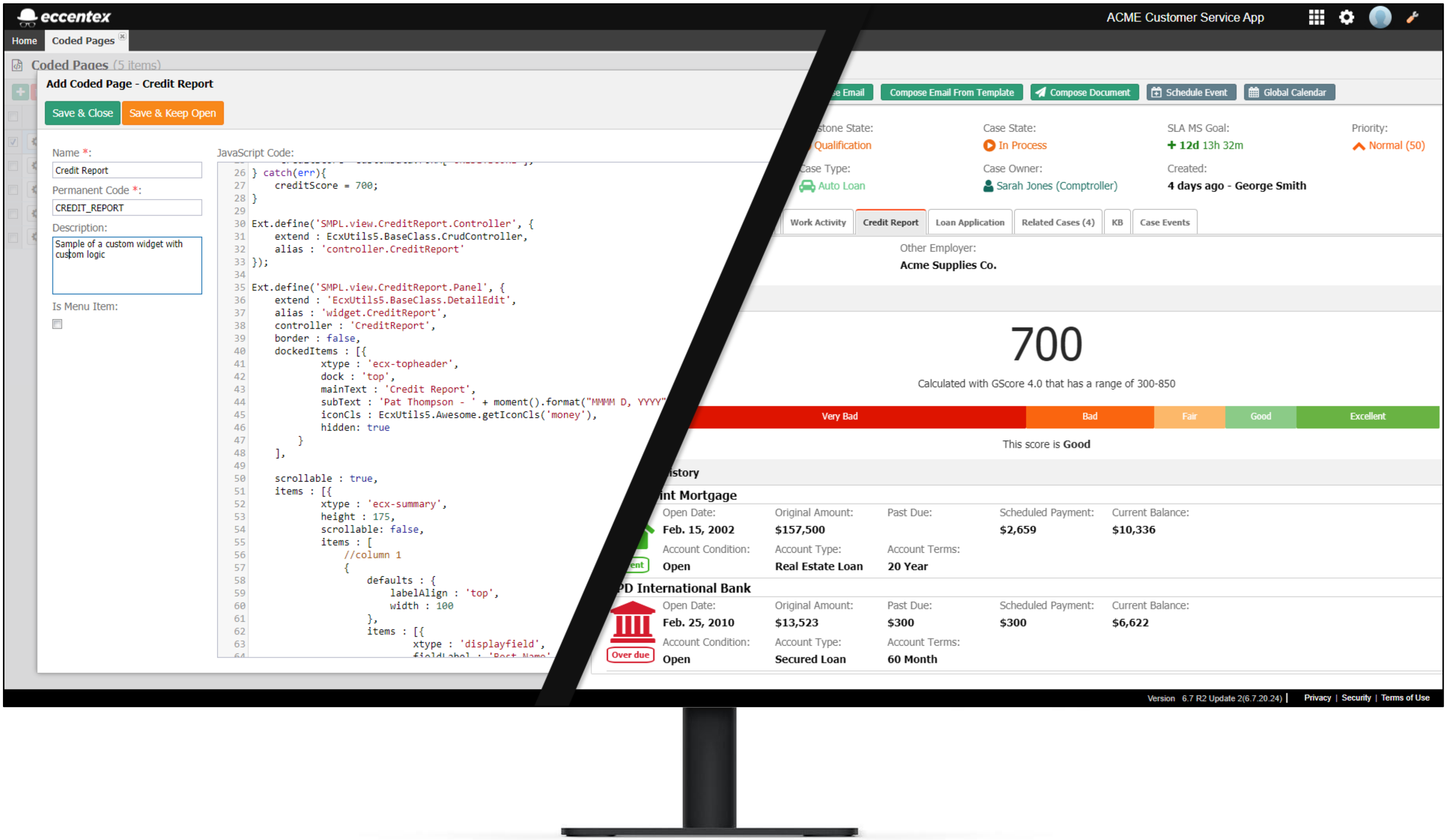
Import the platform's SDKs into Visual Studio to make it easier build, test and publish application components and logic.

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.

Screenshot

Custom Widget Editor + Widget inside Case



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 3rd-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.

Customer Managed Cloud

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

Partner Managed Cloud

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

On-Premise & Hybrid

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

Agnostic Hosting

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

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.