Inbound & Outbound Agent Training Material

2019

Chapter 5: Tegsoft CRM (Customer Relationship Management)

CRM is used as an abbreviation of "Customer Relationship Management". CRM should be considered as a corporate philosophy. CRM software should be seen only as tools used to pass this philosophy into real life. CRM has a customer-based structure. Being customer-based means centering its customers to shape the structure of the company. All channels such as customer management, sales management, service management, and even call center management, need to be restructured. It should be considered as software that keeps customer information up-to-date and records all relevant activities and keeps the history of the business not only on financial basis but also on customer basis.

Tegsoft Call Center application TegsoftCC has an integrated CRM module that holds information about customers who perform operations through Call Center.

With this module integrated in the system, the following operations can be performed for the customers:

- Creating a new customer account,
- Screening and editing the existing customer information,
- Recording of calls made through all communication channels (Voice, SMS, E-mail, Web-chat, Fax) between the customer and the call center and tracking their history,
- Keeping detailed notes for the customer,
- Describing activity for the customer,
- Monitoring customer orders,
- Displaying the customer's existing demand and/or complaint information,
- Editing customer specific survey, displaying the past survey information.

The TegsoftCC CRM Module is fully integrated with the call center product. If a registered customer calls the call center, the relevant customer registration is automatically opened on the agent screen and all the information can be accessed. In addition, thanks to advanced integration patterns, companies can integrate their own internal CRM software into the system or can interoperate them.

In order for the CRM department to be active, one of three different situations must be achieved.

a. By making a data research by setting criteria in the "**Search**" section,

b. By clicking on the icon ➕ from the "**Operation**" section and attempting to register a new one,

c. When the agent is in the "**Ready**" status, in the case of inbound call from a registered customer,
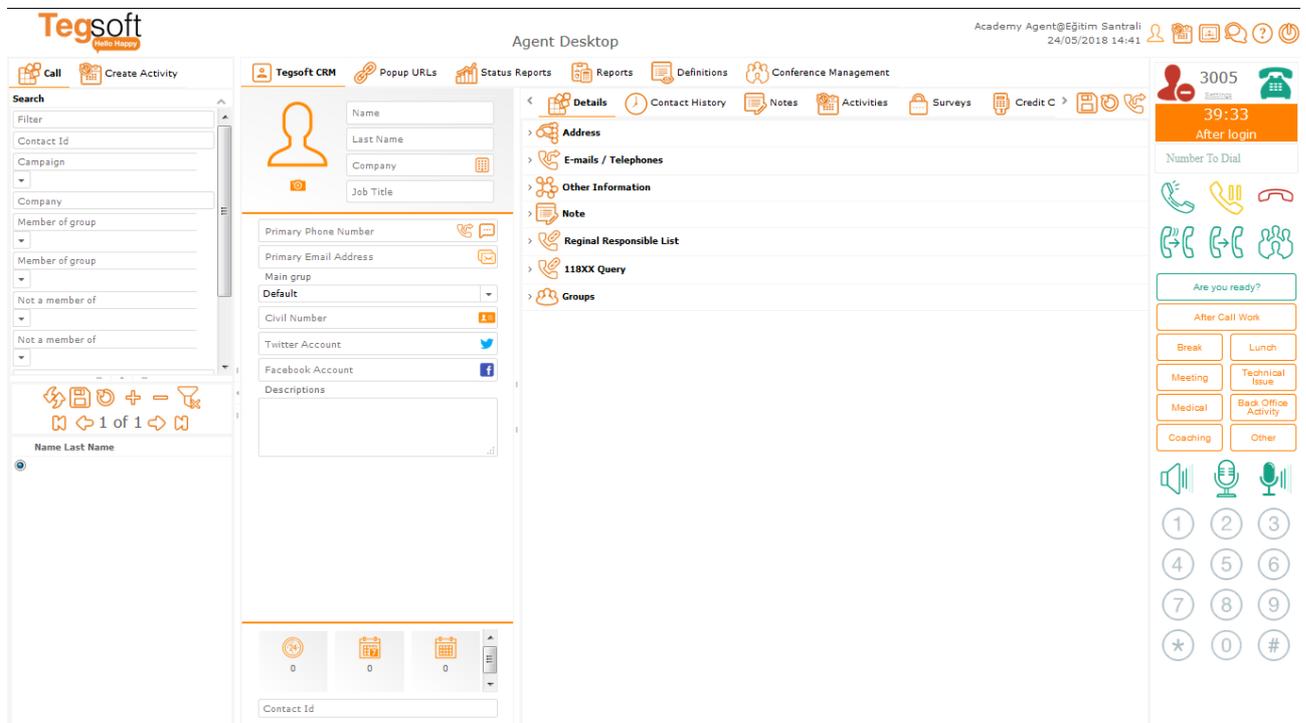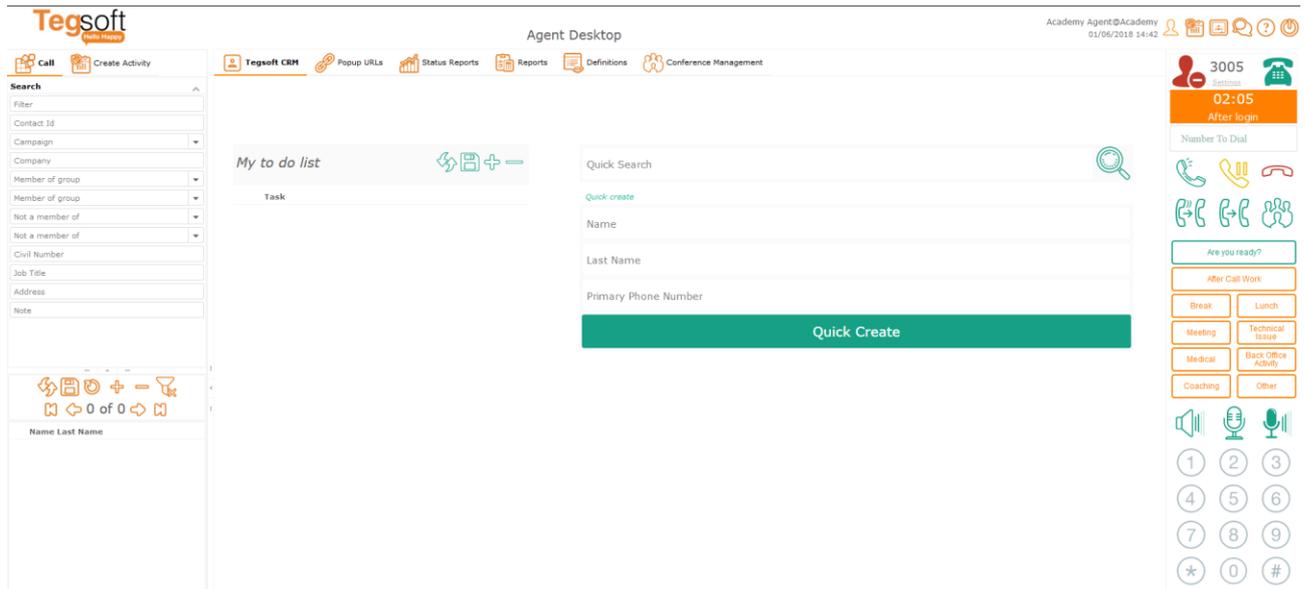
There are many different fields in the CRM contact record. These fields are aimed to provide more detailed records of customer information and to increase customer satisfaction by knowing the customer.
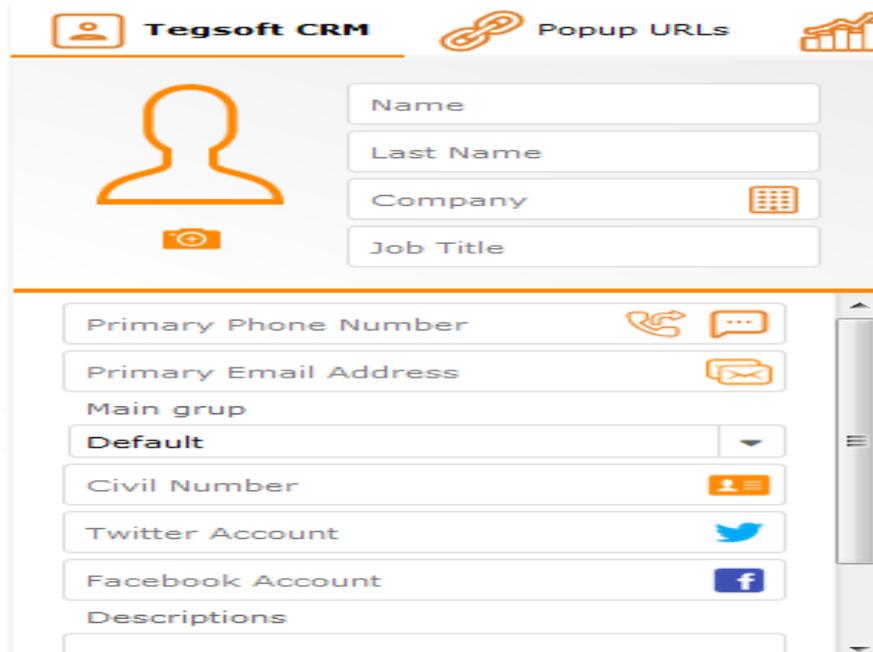
Many operations can be done on TegsoftCC CRM. These operations are collected in 7 areas under Tegsoft CRM section. If VPOS module is on, credit card operations can be done. The following screen shots show the titles of these sections.
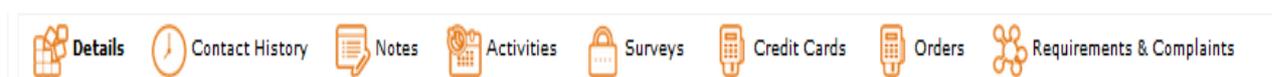
TegsoftCC CRM Details

It is important to record the activity of Customer Relationships. The details tab can also be considered as a contact card. This field is where the information dependent to the customer is written. The fields under the details tab provide a lot of information about the customer.

Basic Knowledge: Contact: It includes Name-Surname, Identity Tax Number, Main group, Company, Task, and short note area. "**Unique ID"** in this area is an identification number automatically assigned to this customer by the system.

E-mails / Phones / Social Media Accounts: The area where the contact information belongs to the customer. This area includes sections such as Business e-mail, Home e-mail, Other e-mail, Mobile Phone, Business Phone, Pager, Twitter and Facebook.

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Address: The area is where the address information of customer is located. The address information of the customer is entered in this field via the drop-down menus. These fields can be filled by selecting Country, City, District, Neighborhood, Street fields from drop-down menu. Also, if there is no street/street information indicated by the customer in the opening address area, free address in the form of Address 1 can be written with the help of fields to be entered.

Country	TÜRKİYE TURKEY
State/province	İSTANBUL
City	KAĞITHANE
District	---
Address 1	

Other Information: The field where more detailed information belongs to the customer is included. Job information (Occupation, Department, etc.), Communication information (Phone, Fax, etc.), Special information (Birthday, Gender, Spouse, etc.)

Other Information

Personal web	
Business url	
Profession	
Department	
Manager	
Assistant	
Calendar url	
Birth place	
Father name	
Mother name	
Account code	
Password	
Web-log	
Other	
Users	
Preferred channel	E-Mail
Gender	
Birthday	
Anniversary	
Spouse	

Note: It is used to take detailed notes belonging to the customer. This field is used as it is in a normal word writing process. Fonts, sizes, color can be changed.

Note

In TegsoftCC CRM there are 3 different noting fields for the purpose of taking notes about the customer. Two of them are found under the Details tab. You can use the note section in the "**Contact**" area for a single-line note, and the "**Note**" section for a more detailed note. Notes on both fields can be changed / deleted later. Thirdly, there is a "**Notes**" tab under TegsoftCC CRM. The "**Notes**" tab will be explained in detail later under the "Notes" heading. This field is where unchangeable/ nondeletable notes are written.

Regional Responsible List: This is the section in which the regional responsible for the identified customer is specified. Through this field, the agent can reach the information of the regional responsible. He/She may contact the responsible person or send an e-mail. The appointment of the regional responsible is not the responsibility of the agent. Reginal Responsible represents the people in the groups like sales representative, portfolio manager, technical responsible, brand manager, special customer representative.

 118XX Query: If there is an integration with 118 service, it is the field where the data queried via 118 for the customer is listed.

Groups: This field is where the customer is assigned of group information. The agent can make a group assignment to the customer within the groups which he/she can see within his/her authority. For example; VIP Group, Black List, etc.

Tegsoft

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