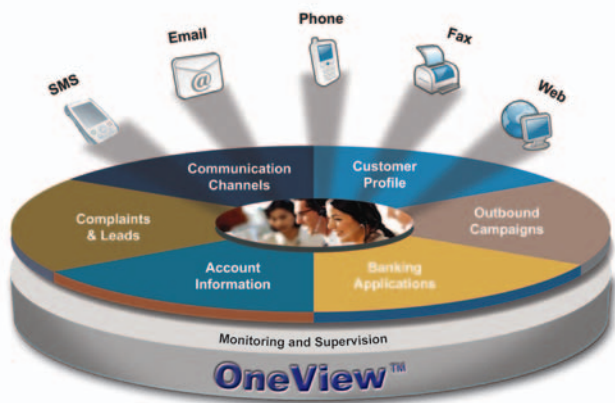




PRODUCT OVERVIEW

# OneView™ Customer Relationship Management

Complaints, Leads, Inquiries, Customer views, more



## CONTACT MANAGEMENT CENTER

OneView Customer Relationship Management (CRM) Solution gives contact centers a flexible pre-integrated application suite for managing customer interactions, complaints, leads and inquiries from one unified platform. When coupled with OneView Communication Center (CC), it can produce and deliver powerful capabilities that will empower agents, supervisors and business users alike to elevate productivity and performance as well as customer service, no matter where they are.

The architecture of OneView CRM is highly flexible. The system manager has complete control over the various modules that are available to various agent groups or departments. The application modules are compliant with all industry-standard database systems such as Oracle, SQL Server, etc. Applications can use localized database or can be integrated with corporate databases. Similarly, OneView CRM is extendable, in other words, a business can have any type of in-house or external applications integrated into the framework of OneView CRM resulting in simplified usage, easy access to all the applications from a single access point, while keeping the look and feel of the desktop as per company standard.

OneView CRM is very easy to implement and manage resulting in time savings of IT support personnel. The application modules are designed to be of plug-and-play nature that seamlessly integrate in the OneView Desktop Framework and provide the same look and feel as the rest of the interface. Because OneView applications run on the industry-standard PC and LAN environment, there is no need for maintaining specialized black box hardware or expensive and specialized skilled staff. OneView CRM provides centralized administration in a single interface, and reduces the complexity often associated with managing separate applications and databases.

## ONEVIEW CRM KEY HIGHLIGHTS

### Best fits

OneView CRM is well-suited for contact centers from 4-500 single-site and multi-site centers with multiple groups and departments all working together to make customers happy and satisfied.

### Key benefits

OneView's proven design and open standards architecture leads to benefits that are unique in the contact center industry.

**Faster return on investment** by leveraging OneView's unmatched functionality as a complete customer relationship management solution that works with your existing PBX, or by using OneView Communication Center to replace legacy PBX equipment and add unified messaging throughout your organization for increased performance and productivity.

**Increased customer satisfaction** is achieved by using integrated desktop that presents all the key customer profile and account related information on a unified desktop. These and other service applications such as Complaint Registration and Tracking, Lead Capturing, E-Forms are the options that produce the best experience possible for customers.

**A lower total cost of ownership** by replacing multiple isolated applications with OneView integrated application suite and single set of business objects, anchored by a single administrative interface for customer profile management and service delivery related matters, and other OneView functions. Simplified interface and centralized reporting features reduce training costs with one intuitive set of applications for agents, supervisors and business users alike.



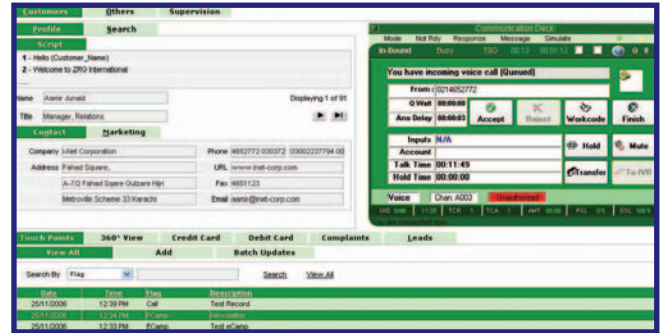
## CUSTOMER VIEWS

### Customer Profile Screen Pop up

OneView Customer Profile component displays details about registered customers such as customer account number, identification codes, customer type flags, address, Phone and fax numbers, etc. This screen pops up automatically at the time of the arrival of customer call, email, fax or SMS. A search option allows retrieval of customer by using SQL based filters.

### Customer Interaction and History Views

A key requirement during customer contact handling is the agent's ability to view a record of previous interactions with that customer. The Interaction History View module presents a list of all the previous customer interactions along with date, time



OneView CTI screen displays customer details in a profile pop up screen and provides a list of recent interactions.

Touch Points		360° View		Complaints		Leads	
Client History		Create Ticket		Search Tickets			
ID	Date	Type	Created By				
37	06/11/2006 05:55 PM	Parents not get through ATM	Khurram Panjwani				
66	14/11/2006 05:36 PM	Documentation	Khurram Panjwani				
67	14/11/2006 05:37 PM	Merchant recieved 'Call to Bank' message	Khurram Panjwani				
68	14/11/2006 05:38 PM	Support	Khurram Panjwani				
69	14/11/2006 05:41 PM	check book not received	Khurram Panjwani				

OneView Complaint Management allows your agents to register new complaints, search and retrieve existing complaints.

## COMPLAINT REGISTRATION AND TRACKING MODULE

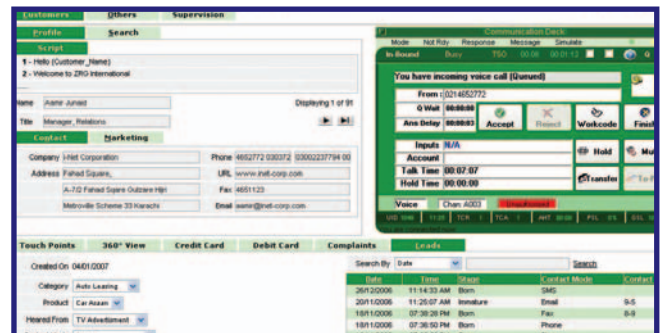
OneView Complaint Management Application module makes registration, tracking, processing and reporting of customer complaints really simple. The agent can view pending and finished complaints, review the status of existing records or registration of new complaints.

A full-featured back office component allows quick assignment and processing of registered complaints in a completely transparent way. An integrated MIS reporting module allows generation of key MIS reports enables the concerned manager to generate comprehensive reports by pressing a few buttons

## SALES LEADS

When prospective customers contact your center, they represent an opportunity for you to generate revenue. OneView Leads Capturing application enables your contact center agents to easily gather key information about the prospect and the product in question.

OneView CRM module for lead capturing and processing allows the entry of leads from existing and potential customer. Key data about customers is automatically populated during lead registration, enabling your agents to conduct cross selling. The captured leads can be routed to the defined destination. The system manager can define the turnaround time and an escalation matrix. Various teams can be defined in the system as routing destination. Lead records can be automatically assigned to the most relevant sales force.



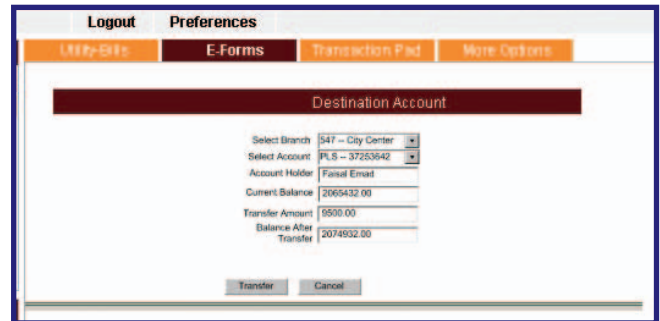
With OneView Leads Capturing module, it becomes very easy to capture key data about potential customers.



## E- FORMS

OneView E-Form Module supports paper-less office initiative that results in faster processing of customer requests. By using on-screen forms, customer requests are registered and routed to the concerned department for processing. A Back Office Processing module enables viewing and processing of such requests. Here are some key features of this module:

- Definition of business forms
- Allows the routing of forms
- Forms can be linked with the database fields
- Definition of turnaround time
- Facility to integrate the forms with the back end systems
- Allows definition of teams against the forms
- Automatically populated with all the customer data
- Track all the form-related activities performed
- Provides the assignment of the origination



This module helps contact center in creating a paper-less environment. All kinds of request and application forms can be defined with complete routing rules.



OneView Reporter interface provides a wide variety of reports that can be easily generated using standard point-and-click method.

## COMPREHENSIVE MIS REPORTS

OneView Comprehensive MIS Reporting tool makes it very simple to generate detailed and summarized reports on all aspects of CRM activities. Regardless of which modules you order for your CRM, the reporting package with its consistent interface enables you to get reports on any of your target activity. Fully supports data export in standard format. Ready reports can be viewed on the following basis:

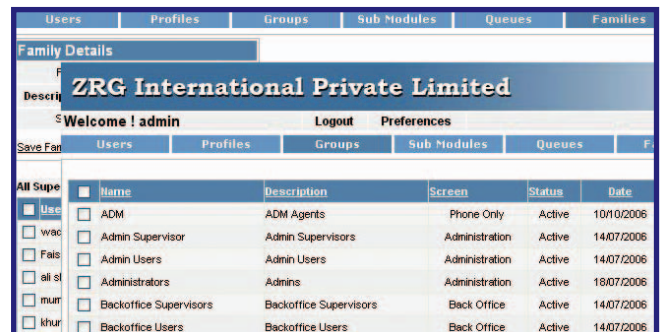
- Date wise listing
- Status Reports for accepted, in-process and closed
- Agent wise details and summaries
- Reports by type of record
- Routing reports
- Front office activities
- Back Office processing
- Customer wise
- Daily, weekly and monthly

## SYSTEM MANAGEMENT AND ADMINISTRATION

OneView CRM framework and applications are very simple to manage. Standards based ODBC calls allows easy integration with any industry standard databases.

The configuration module enables the system manager to define the agent desktop differently for different groups. This allows you to provide access to only the required and relevant applications on the agent desktop.

In addition to the OneView CRM applications, the dynamic tab creation module allows you to define new tabs that can be linked with any of your applications.



System manager can perform administration activities from a single interface.



## FINANCIAL INDUSTRY SPECIFIC MODULES

### Financial and Banking

OneView CRM users benefit from instantly available information about account balances, transactions, and status of Credit, Debit and ATM cards, PIN Management. OneView Banking module protects unauthorized customer data viewing by blocking the view screen until and unless agent has authenticated the customer through the specified procedure using IVR assistance or by asking certain questions that pop up on the screen

Billings	e-Forms	Complaints	Leads	Credit Card	Debit Card	Transactions
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### Credit and Debit Cards

Provides all the details of card such as balance, limits, status and transactions on the desktop. Can be integrated with middleware or any other data source.

### ATM and PIN Management

Enables your agents to support ATM card holders. Fetches the information from the data source and displays on the desktop. PIN Management features allows for generation and setting up of PIN codes. With appropriate linking with the underlying database, services such as de-activating and blocking of ATM cards can be offered to the clients.

### Transaction Pad

This module provides support for online transactions. Provides automatic account, card and other instrument numbers for transactions. Allows dispatch of transaction details through various communication channels from the same console. Supports a wide range of connectivity options including middleware or integration component.

### Bills Payment

This module allows your agents to accept payment of utility bills and generate transaction entries for the settlement. Supports multiple database for phone, electric, gas and other types of bills.

### Funds Transfer

With this module, the agent can perform either an on-line funds transfer or generate a request for funds transfer between the authorized accounts. System creates the required entries with credit and debit instructions.

## RESULT YOU NEEDS

Developing a CRM strategy isn't an easy task. Complex organizational design, comprehensive technologies and ever-changing customer demands are just the beginning. Customer driven CRM means that organizations first understand the customer, and then move inward to operations. Within the context of the customer, the systems and infrastructure capabilities needed to serve those customers and segmentation-based requirements must be reassessed. It's imperative to explore the skills and competency requirements for the people component of the CRM design. A decade of CRM has taught us that nothing happens until your people interact with the customer in a manner consistent with new CRM customer strategies and systems.

OneView CRM solution allows you to identify existing profitable customer segments and determine what will establish a profit-based profile for moving forward. With OneView CRM, you will be well positioned to apply predictive modeling algorithms to establish a model with exceptional accuracy. OneView CRM lets you do that – effectively and efficiently.

## MORE INFORMATION

To learn more about these solution, contact us today by visiting our website URL [www.zrg.com](http://www.zrg.com) or send us an email at [info@zrg.com](mailto:info@zrg.com)

## ZRG International

ZRG is the leading Contact Center Solutions provider and consulting organization. We are highly focused in the area of Computer-Telephony Integration (CTI) and Customer Contact handling solutions.

ZRG holds an excellent reputation for the robust solutions, technical strength and project management capabilities. ZRG offers intelligent call management solutions that are based on open standards based technology and are highly flexible in nature

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