



TRACKER EVENT ENGINE

PhaseWare Business Rules Module

How to Use Event Engine

- Automate e-mail responses acknowledging customer incident submissions
- Suggest articles for resolution prior to Self-Service Center incident submission based on incident description
- Send alerts to one or more parties upon status change of an incident such as escalation (notification via e-mail, pop-up, or text message)
- Track defective parts and return loaned parts
- Notify managers of incident aging past pre-set time or of critical incidents
- Monitor specific e-mail subject lines to automatically create an incident that has automated multiple step processes
- Monitor for specific journal entry and automatically update or send a notification about an incident
- Monitor your forum activity and send notifications of posts and replies. Allow your customers to subscribe to forum discussions of interest.
- Respond automatically to 'forgot password' requests from your web portal customers
- Notify sales or account managers automatically when customer support contracts are up for renewal
- Handle new customers with efficiently by kicking off an multistep process with automatic emails and notifications

Monitor data and activities and automate actions based on your specific criteria

AUTOMATE ESCALATION AND NOTIFICATION

Stay on top of the hot issues by automatically identifying critical problems and assigning them to a higher support level. An alert then lets you know a new issue is on the way.

GENERATE TICKETS FROM E-MAIL AND WEB SUBMISSIONS

No need to assign an agent to monitor email or your web portal for issues as these are automatically turned into tickets with the event engine assigning them to technicians, including severity.

In addition, the response email contains suggested solutions from your knowledge base, FAQs, and other documentation.

UPDATE CUSTOMERS THROUGH REGULAR COMMUNICATION

Keep your customers up-to-date on the progress of their open tickets and let them know when the ticket is closed by setting Event Engine to send emails at important junctures.

The customer does not have to wonder when their problem will be solved. They will automatically receive an email as soon as the issue is resolved.

RECEIVE ALERTS FOR INCREASED ACTIVITY

Find out fast and react promptly if ticket queues start to back up, if you are about to miss a service level agreement deadline, or if there is unusual customer or problem activity of any kind. Don't let missed SLAs make a dent in the bottom line and in your customer satisfaction ratings.

CREATE AND DISTRIBUTE REPORTS

Reports on customer, agent, or incident ticket activity can be sent according to a predetermined schedule or threshold. No need to wait for reports to be issued manually on request.

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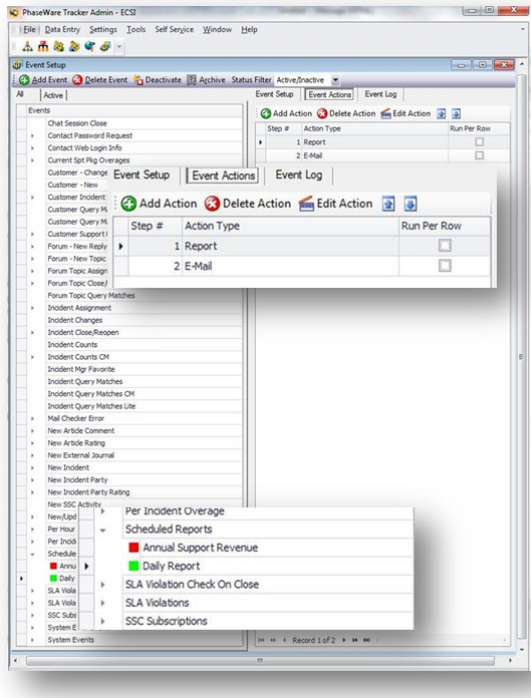
E-mail: Sales@PhaseWare.com

Toll-free: (866) 616-6629

Sales: (214) 295-8515

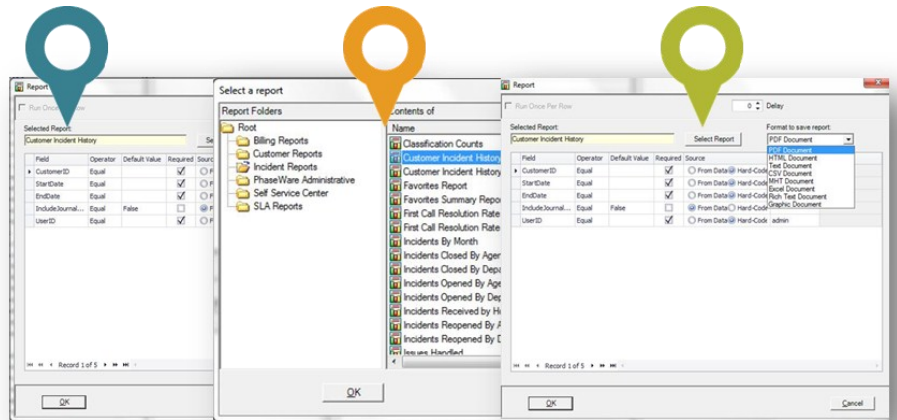
EVENT ENGINE WORKFLOW

Setting up a recurring report in Tracker Event Engine

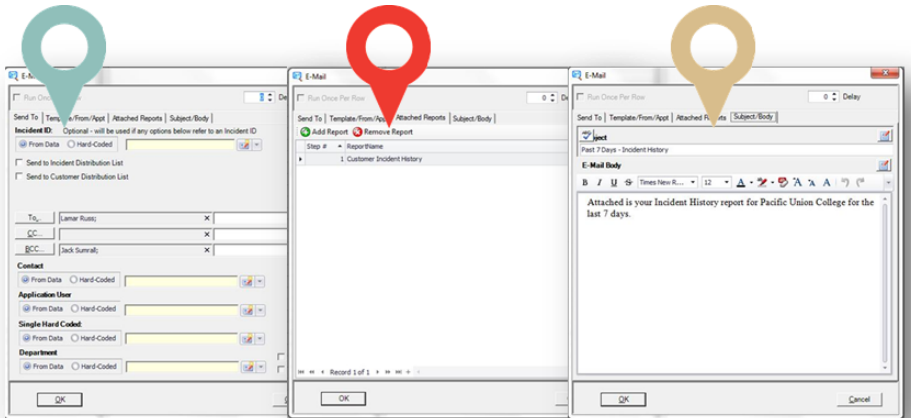


- Active events appear green in the Events List
- Two actions are presented for each event
 1. Pull the report
 2. Send the report via e-mail

- First select the conditions for sending the report,
- Choose the specific report to send when conditions are met
- Select your preferred distribution format (Excel, RTF, PDF, etc.)



- Choose contacts to include in the report distribution list
- Confirm the selected report
- Set up the body of the e-mail to be sent when the event is triggered



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