DATA PRO ACCOUNTING SOFTWARE, INC.

Advanced Accounting Software and Secure Internet Solutions

Customer Support Management

with Warranty Tracking and Call Center Billing

Part # 275

MODULE OVERVIEW

SYSTEM OVERVIEW

The **Customer Support Management** module is targeted to address management's need to be able to track and to bill customers for technical support or customer service/warranty calls made each day. This program allows a wide range of firms to perform the same kind of call center tracking in their own particular industry. Whether it is for just warranty purposes, tracking calls or actual management of calls and problem solving for billing purposes, the system is flexible enough to handle all of these types of issues.

CONVENIENT FEATURES

Many of the most convenient features of the system are its ability to perform **"quick adds and changes"** throughout the program. For instance, new customers calling for assistance may not already be set up in your **Accounts Receivable** module. Instead of leaving the program and going to the **Accounts Receivable** module, the **"Customer Quick Add"** feature allows for immediate creation and modification right from within the **Customer Support Management** module. The same is true for Serial Numbers as well.

A full set of **"inquiry"** options also allow customer service representatives the ease of instant look-ups. This includes inquiries on Customer Accounts, Serial Numbers and specific Service Tickets. Plus, the **"tickler"** feature can be one of the most important tools a support group needs when call volume is high.

This unique option allows a manager with the correct rights to assign a **"tickler"** to a specific support representative to handle. Once the assigned representative clears their current support ticket, the system will automatically flag them that they have return calls or projects that they must attend to. This reminder system is extremely important so that busy service personnel don't leave customers hanging by accidentally forgetting to return a call, fax or e-mail.

Overall, the **Customer Support Management** module is extremely powerful and flexible in its design. It's a powerful tool that will help almost any business better serve its customers in a wide variety of ways.

CUSTOMER INQUIRY

As part of this integration, you may want to see the customer's current payment status with your firm before you decide to provide any further kinds of service to them. This can easily be accomplished by simply performing a **Customer Inquiry** that will provide up to the minute billing and payment status on the customer's account. Should they be past due on their account, a **"hold"** status can be set by aging category that would prevent or warn the support representative before they continue providing their services.

TIME TRACKING

The time tracking feature of the system will automatically flag the beginning and ending time of each call.

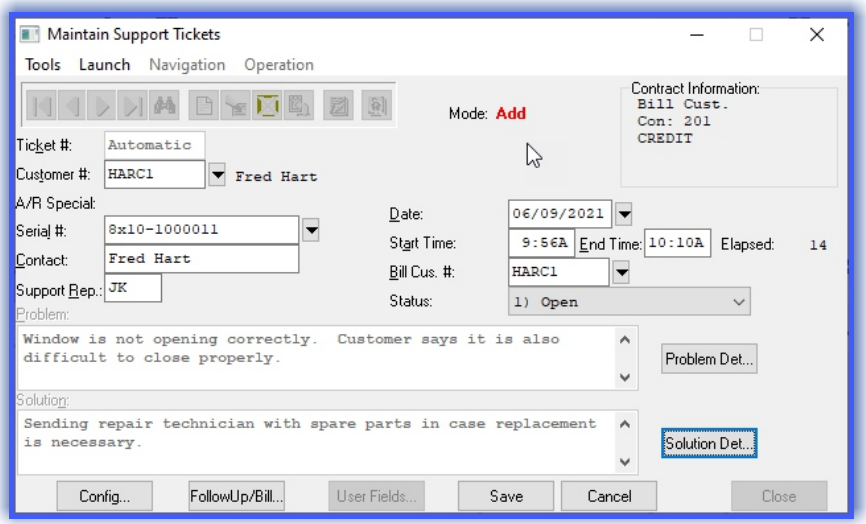
As such, immediate calculations of call length are automatically determined by the system. Configuration and version data can be entered regarding the customer's operating environment as well as what the follow-up and billing status of the call should be.

Each support ticket is then assigned a ticket number that may be reviewed and updated as frequently as is required.

Reports

- Support Billing
- Support Billing Statements
- Support Tickets
- Contract Renewal
- Renewal Statements
- Contract
- Serial Number

Go to next page for List of Features



If the ticket is a billable item, this process serves as an invoice writing option that will ultimately update the **Accounts Receivable** module which then in turn updates all the way to the company's **General Ledger** module ***(if integrated)***. It is this tight level of integration which makes this module so valuable to any company trying to manage their customer service business.

ACCOUNTS RECEIVABLE INTEGRATION

If a call or project is deemed as billable, this integration will allow billing to occur in this module which will directly update the customer's account in the **Accounts Receivable** module. The result is a single customer file that can be managed and updated from both Accounts Receivable and the Customer Support Management module.

SALES ORDER & DP/DASHBOARD

Further integration is expanded by adding the **Sales Order Entry** module and the **DP/DashBoard/CRM** modules. The **Support Database** module is fully deployed within **DP/DashBoard/CRM** through the web-interface which creates many advantages for users throughout an organization by enabling tablets and remote users access through a browser. Users can turn a **"Tickler"** directly into a **"Sales Order"** with full access to Inventory and Billing with a click of the mouse. Some calls may not require this, while others can easily fall into this category of requirements. This is very powerful!

SUPPORT TICKETS

This program is designed to keep a detailed log of each call or event performed by your internal staff by the entering of what we call **"support tickets."** A support ticket may be entered for each time a call is received from a customer, or when a trainer provides services onsite with a customer, when an e-mail or fax is responded to, or many other customer service options.

CONTRACT MANAGEMENT

The system allows companies to define a wide range of support contracts that they may provide to their customers. This may be managed in several increments such as minutes or hours or in blocks of time. Therefore, customers calling in may be able to purchase contracts that allow them to be provided technical support services either at a discounted price or on a higher per minute basis, depending on what they prefer.

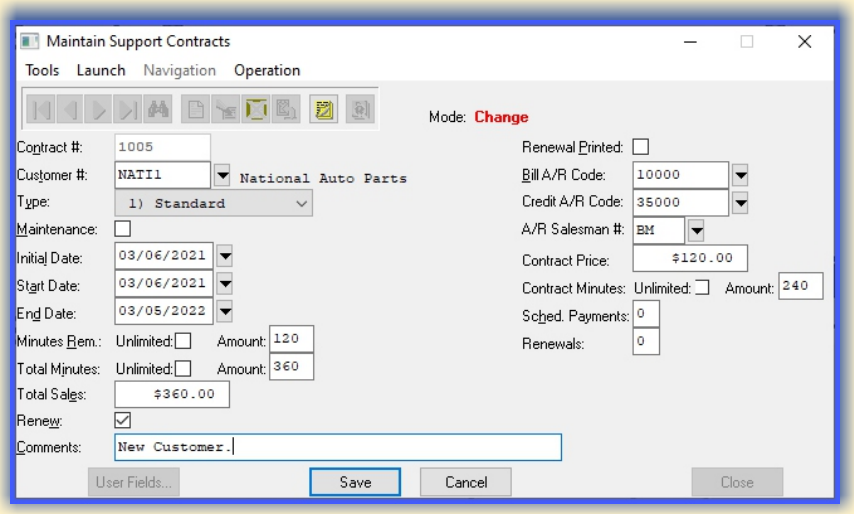
CREDIT CARD INTEGRATION

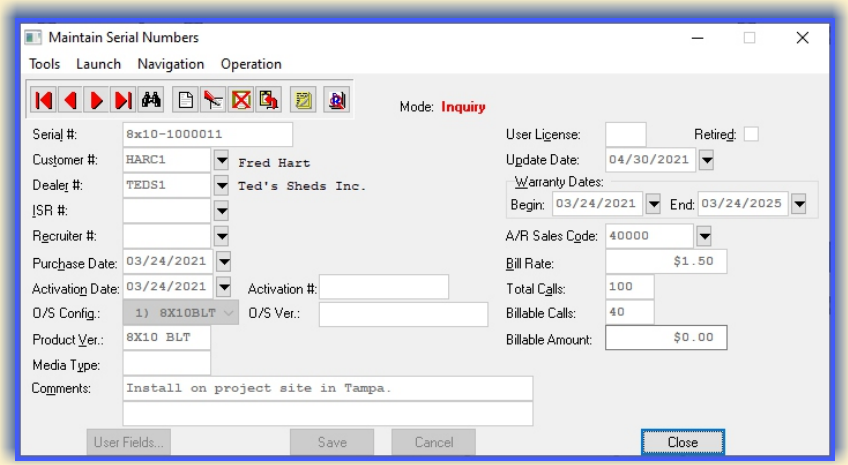
The **Customer Support Management** system is fully integrated with complete credit card processing capabilities. Customers are able to pay their support service bills on-line in real time or over the phone with the most up to date capabilities. The system supports the **Payment Innovator's** credit card processing network. This integration with **Infinity POWER** ***(Version 7.5 or higher)*** allows merchants to become **PCI-DSS** compliant with the **DP/CHARGE Advanced Payment Server** and Internet access.

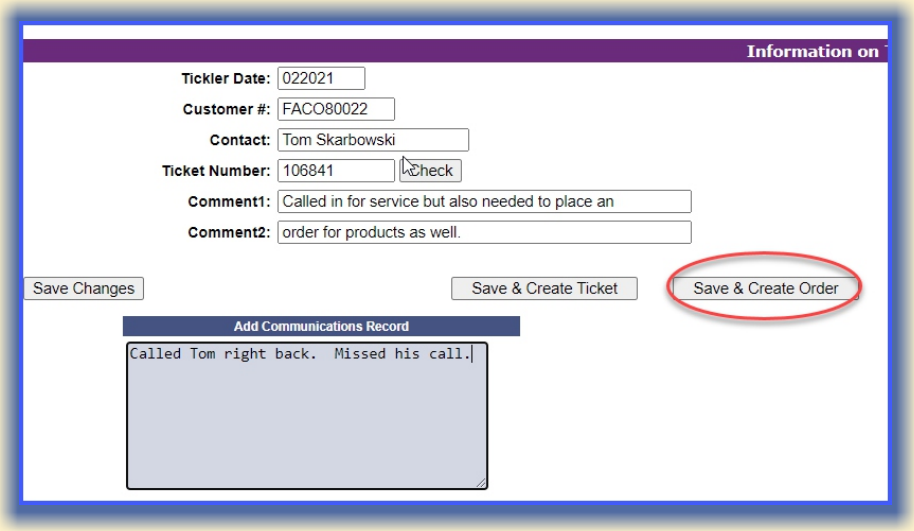
Module Features

MODULE OVERVIEW

- Advanced **"Warranty Tracking"** and **"Call Center"** Billing System.
- Able to track and bill customers for support calls made each day.
- Allows management to:
  - define twenty **(20)** types of **"billing or call activities."**
  - define three **(3)** types of **"billing status"** with user defined descriptions.
  - define twenty **(20)** types of **"follow-up descriptions"** to track customer issues.
  - keep track of employee productivity as they use the system.
  - determine how many calls or problems are being handled by each staff member.
  - view employee productivity in either volume of activities or actual dollar based billings.
  - assign a **"tickler"** ***(reminder system)*** to a specific support representative to handle.
- Direct integration with the **Accounts Receivable** module, which allows for:
  - immediate and real time access to the latest customer information.
  - billing to occur in this module which will directly update the customer's account in the **Accounts Receivable** module.
  - performing a Customer Inquiry that will provide up to the minute billing and payment status on the customer's account.
- Keeps a detailed log of each call or event performed by your internal staff by the entering of what is called a **"support ticket."**
- Allows for the management of support contracts by Customer.
- Supports fifteen **(15)** variations of **"Support Contracts"** with unique pricing and length of terms.
- Keeps track of each type of Support Contract assigned to each customer and the number of times renewed by each customer.
- Print on demand detail of each support ticket.
- Automatic sequencing of Ticket Numbers and Contract numbers by system.
- Allows assignment of default billing rate per Serial Number.
- Print on demand listing of all of the serial numbers assigned or tracked to a specific customer for comprehensive **"Warranty Tracking"** capabilities.
- Tracks Initial Purchase Date of Product.
- Tracks Beginning and Ending Warranty Dates.
- The **"Customer Quick Add"** feature allows for immediate creation and modification.
- A full set of **"inquiry"** options also allows Customer Service Representatives the ease of instant look-ups while on the phone and dealing with customers.
- Ability to add **"User-Defined Fields and Indexes."**
- Real time Credit Card Processing capabilities during invoicing.
- Flexibility to require a Salesman login or not.
- Allows for user definition of the titles of the Status Field, Billing Field, and Follow-up Field.
- Users may define the number of days before a contract notice should prompt before renewal.
- Users may define the number of minutes before a warning should occur based on the amount of minutes remaining on the contract.
- Convert **"Ticklers"** in **DP/DashBoard/CRM** to a full blown **Sales Order** with Inventory Items!







Data Pro Accounting Software, Inc.
111 Second Avenue NE, Suite 1200
St. Petersburg, FL 33701 US | **www.dataproaccounting.com**
Corporate: **(727) 803-1500** | FAX: **(727) 803-1535**