Creatio

Service Creatio overview

Presented by

collier pickard
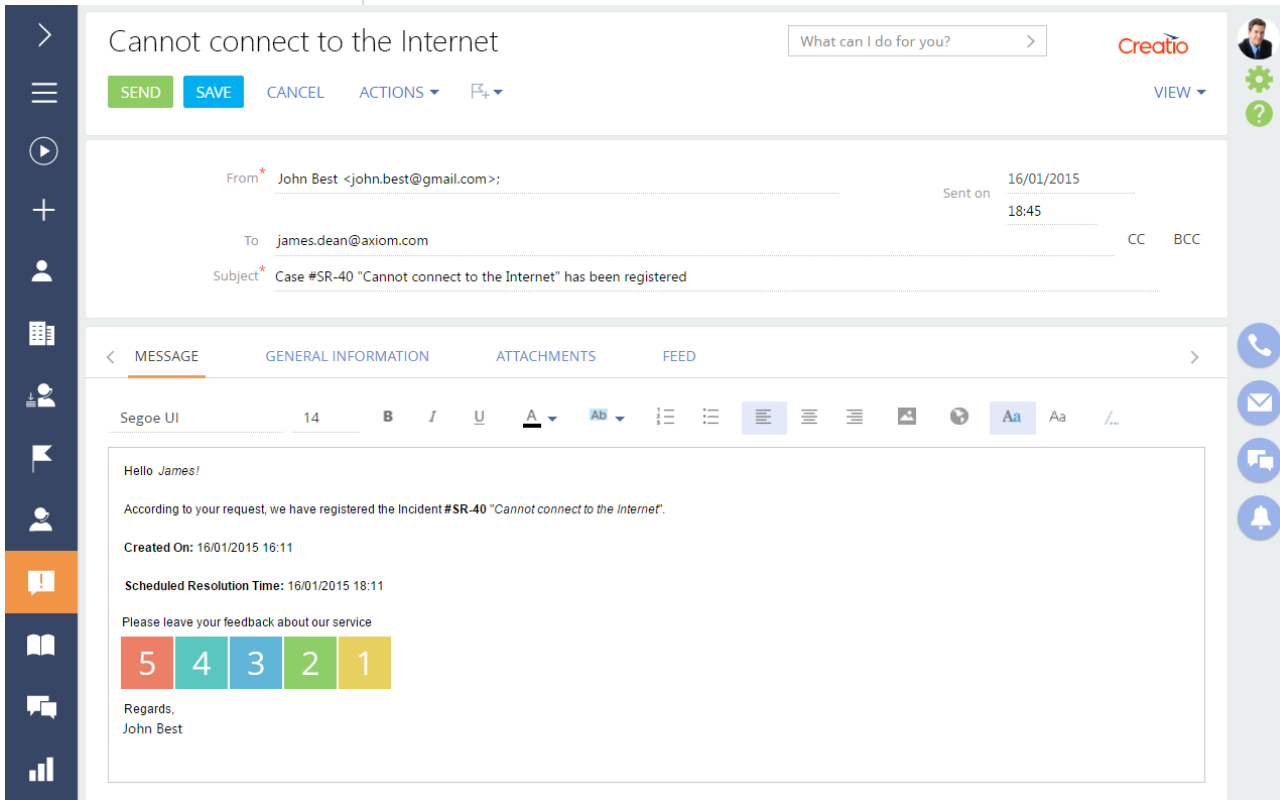### the CRM experts

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Service Creatio features overview

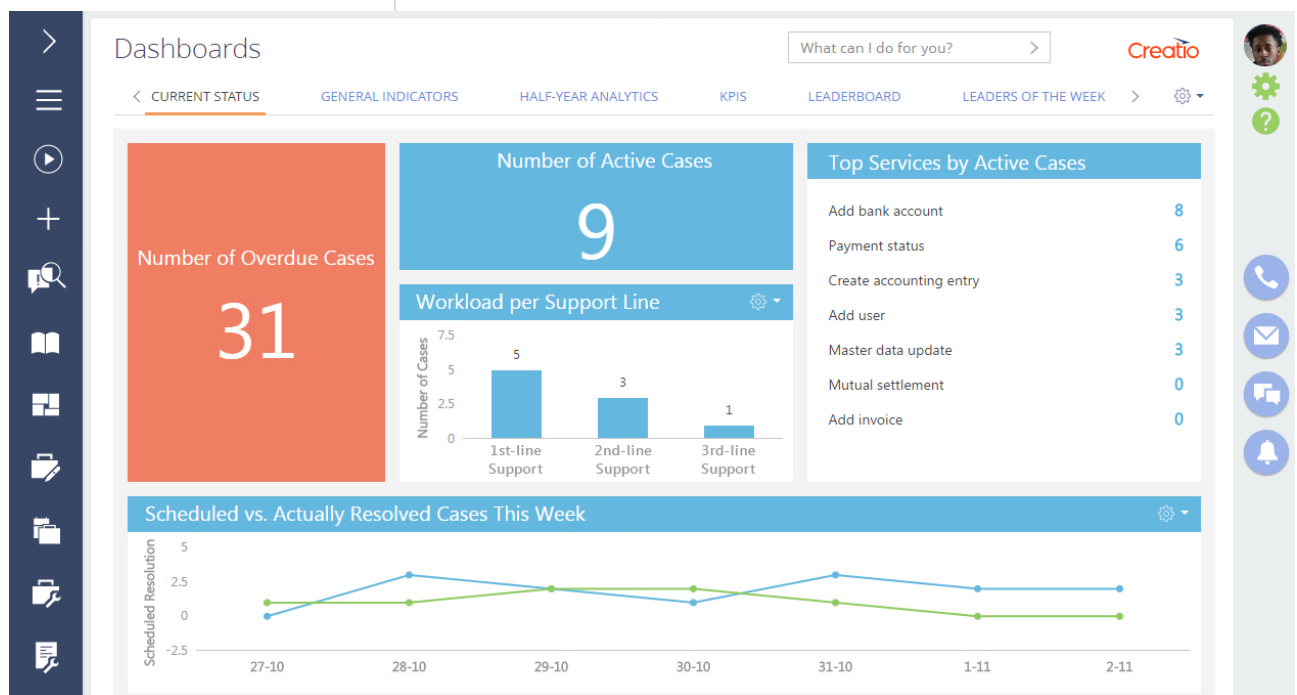## Omnichannel communications

Communication panel	Communicate with your team, employees and contacts directly from the system. Make calls, manage email, give approvals and collaborate in the enterprise social network using the Communication panel. All notifications are also here, so you will not miss any important event.
Email	Manage messages from all your email boxes in a single unified environment – Service Creatio. Each email can be linked to the relevant employee, case or other object. Integration with MS Exchange and Google enables you to merge all your email boxes and keep track of the correspondence in Service Creatio.

Calls	Make and receive calls directly in the system. Access complete call history in the communication panel, set up quick dial to call your favorite contacts. Keep track of your calls and link them to relevant system objects in order to obtain a complete history of interactions. Use these features to track key indicators on calls and evaluate performance of your service agents. To automate call management use out-of-the-box CTI connectors with Avaya, Cisco, CosmoCom, ZyXEL. What is more, the system enables free calls between all the users of the Creatio application. Leverage call recording capabilities to control the work of the employees. In addition, Creatio users can make calls and even video calls to other system users completely free of charge!

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Enterprise Social Network	Enterprise social network (ESN) enables employees to better engage, collaborate, and share information. Sign up for updates from different channels, projects, or contacts. ESN allows users in different departments, business units, and geographies to discuss cases and solutions, share best practices, get answers to questions, 'like' or comment on posts, thus increasing employee engagement and productivity. You can use the ESN in the Creatio mobile app as well.
Analytics	Analyze productivity of service staff based on their tasks, emails and phone calls and track the dynamics of customer communications. You can also analyze a number of consultations per request or compare the average duration of consultations depending on service type and category of request. All graphs and dashboards are easily configurable, which helps to control and improve the service quality and enhance agents' productivity.

Self-service portal	Creatio offers all the necessary tools for your self-service portal: capabilities to register cases, monitor the resolution process and provide instant feedback on the service quality. Creatio portal helps to keep up to date with company news and all services provided as well as find answers to their questions in the public knowledge base.
Feedback	Receive prompt feedback on the service quality. A special page, which can be customized in accordance with the corporate style, enables to leave comments on the service quality or suggestions for improvement of the support service.

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Contact center
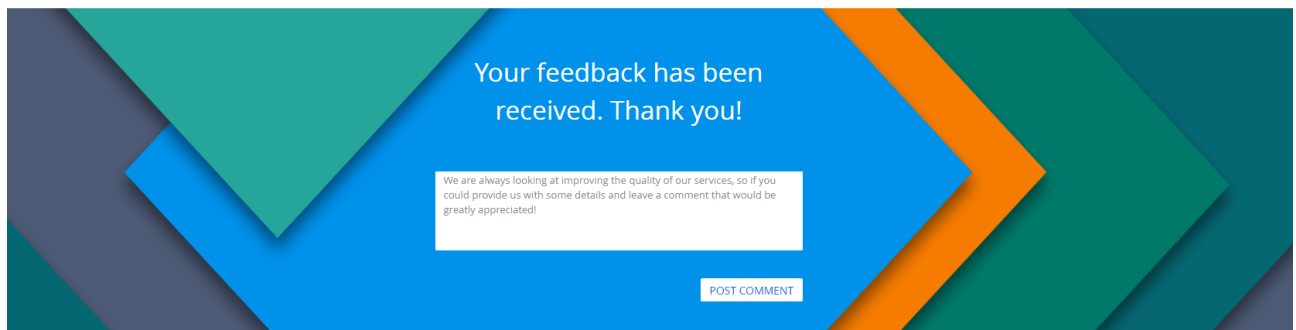
Agent home	Manage your daily tasks more effectively using a pre-configured single window interface. Agent home allows agents to easily manage request queues, perform bulk communications, share the information via ESN and monitor their own performance in a single window interface.
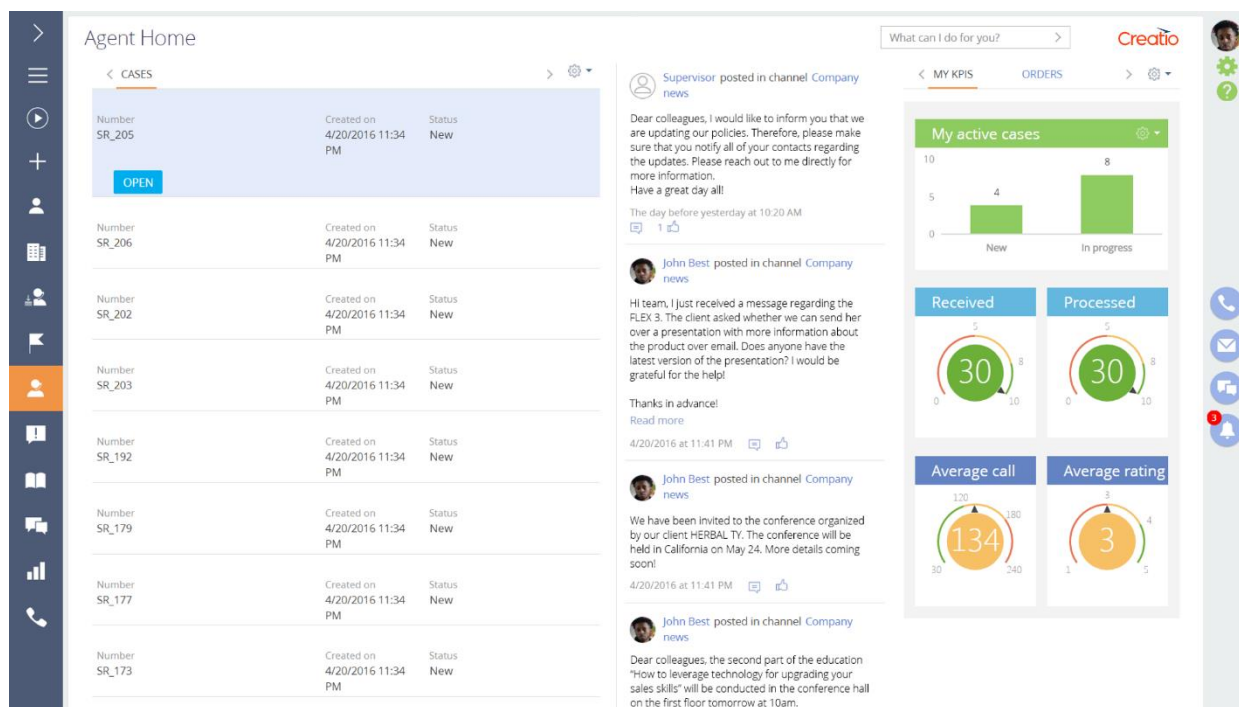
Supervisor's workplace	Leverage extended capabilities of the supervisor's workplace, which provides managers with full control over all inbound and outbound communications. Get a complete information on all agents' activities, monitor and manage their workload, and take part in the request processing, if necessary.
Queue management	Use queue management capabilities of Creatio contact center to organize case processing, taking into account priorities and other parameters. Create different types of queues: dynamic, which are based on filters or static, which highlight certain contacts requiring attention; open queues, in which agent can see the entire list or blind queues, in which an operator can see the next contact, only when he picks the contact up from the queue. You can also remove cases from the queue if they no longer need resolution, as well as assign agents to process specific elements of the queue.

5

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![Creatio logo](formerly bpm'online)

Service level management

Service agreements database	Register in Creatio all types of service agreements needed according to different service levels. You can formalize the terms of cooperation with both, customers (SLA) and Service Desk units (OLA).

Services — Creatio interface showing:

Technical problems
- Status: Active
- Response time: Working hours: 4
- Resolution time: Working days: 2

Errors in the equipment operation
- Status: Active
- Response time: Working hours: 2
- Resolution time: Working days: 2

Technical features
- Status: Active
- Response time: Working hours: 4
- Resolution time: Working days: 1

Lost data recovery
- Status: Active
- Response time: Working days: 1
- Resolution time: Working days: 3

Consultations on the software setting
- Status: Active
- Response time: Working hours: 4
- Resolution time: Working days: 2

Web-site usage
- Status: Active
- Response time: Working hours: 1
- Resolution time: Working hours: 5

Consultations on the equipment usage
- Status: Active
- Response time: Working days: 1
- Resolution time: Working days: 3

Information request
- Status: Active
- Response time: Working days: 2
- Resolution time: Working days: 4

User authentication
- Status: Active
- Response time: Working days: 1
- Resolution time: Working days: 2

Hardware replacement
- Status: Active
- Response time: Working days: 1
- Resolution time: Working days: 3

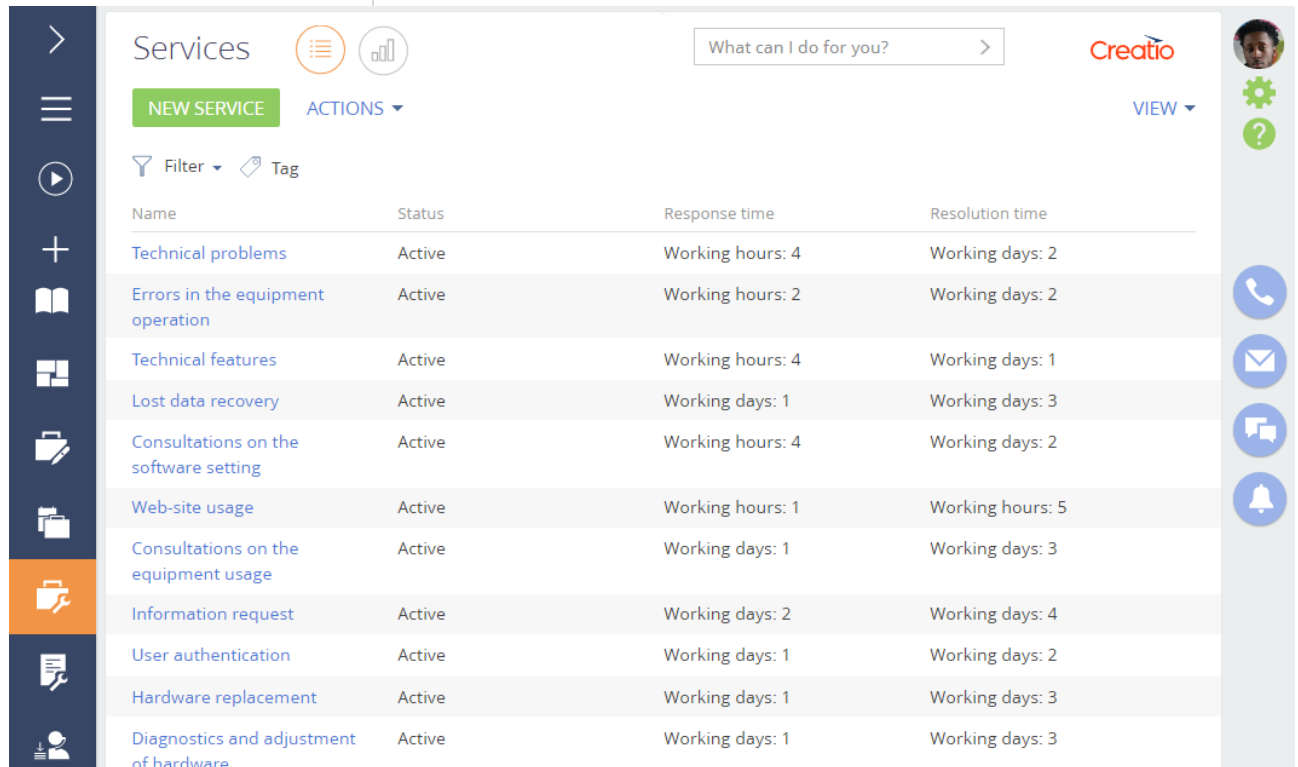|	
Service agreement activation	Define all the necessary service parameters while activating new service agreement. You can also set up a calendar and indicate actual duration of the agreement. The system allows the defining of key service objects and services. In order to organize the work with external service providers (UC) the user can simply fill in information about a provider.
History	Manage service history with regards to service agreements. Store copies of signed agreements and track addendums. The system provides information about cases and problems in the context of different types of agreements.
Analytics	Analyze service agreements to evaluate the overall quality of service provided. Track customer feedback and current satisfaction rate, monitor service agreements violations using statistics on overdue cases.

6

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Service catalogue

Unified service catalogue	Create a unified database of services to facilitate the work of your service agents. An up-to-date and complete service catalogue will help you regulate service processes and offer services relevant to them.

Services		
NEW SERVICE ACTIONS ▼		VIEW ▼
▽ Filter ▼ ⬚ Tag		

Name	Status	Response time	Resolution time
Technical problems	Active	Working hours: 4	Working days: 2
Errors in the equipment operation	Active	Working hours: 2	Working days: 2
Technical features	Active	Working hours: 4	Working days: 1
Lost data recovery	Active	Working days: 1	Working days: 3
Consultations on the software setting	Active	Working hours: 4	Working days: 2
Web-site usage	Active	Working hours: 1	Working hours: 5
Consultations on the equipment usage	Active	Working days: 1	Working days: 3
Information request	Active	Working days: 2	Working days: 4
User authentication	Active	Working days: 1	Working days: 2
Hardware replacement	Active	Working days: 1	Working days: 3
Diagnostics and adjustment of hardware	Active	Working days: 1	Working days: 3

Service categories and priority management	Manage service categories, setup service calendars and regulate resolution deadlines for each service. Identify the services with the highest priorities and track case histories for these services.
Service catalogue analytics	Constantly improve service quality based on deep analysis of your service catalogue. Keep track of new services added, identify the most popular services and monitor satisfaction level.

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Configuration management

Configuration management database (CMDB)	Run a single database of all company's configuration items (CI) and service assets. Service Creatio enterprise helps to keep records on hardware, software, licenses, network components and documentation necessary for the seamless service provision.

Configuration items registration	Create a single list of all CIs including detailed information about each item. In Service Creatio enterprise you can register inventory number, category and type, define model and indicate technical characteristics, run a list of colleagues that use this particular CI. The system can also configure dependencies on other configuration items and a list of components.
History	Manage a complete history of CI lifecycle. Track registered cases, location history, write-offs and removals from service.
Analytics	Take a snapshot of your CMDB, using the comprehensive analytics in Service Creatio enterprise. You can track the current status of the hardware and software, information updates on operational CIs, identify bottlenecks in infrastructure, etc.

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Request management

Unified case database	Accumulate all cases from your employees, customers or partners in one section of the system. You can classify the cases into different categories: incidents, service requests, advisory services. The system also allows you to assign agents and teams, regulate timelines for case resolution taking into account different time zones and manage communications during case resolution.

Service Desk organizational structure	Take advantage of the best practice model for the Service Desk organizational structure in Service Creatio enterprise. You can easily manage roles, define functions and authorities. Use pre-configured workplaces to improve agents' productivity and facilitate their daily activities.
Out-of-the-box process for incident management	Manage incidents using a pre-built best practice business process. The out-of-the-box process is fully compatible with ITIL recommendations and contains the right sequence of actions to help Service Desk agents resolve incidents most timely and with maximum efficiency. On each step of the process the system helps to control deadlines, prompts important notifications and useful tips. Advanced algorithms for calculating case resolution timeframes based on case priority, SLA / OLA or support package ensures flexibility and a personalized approach to handling every case.
Registration and classification	Instantly register new cases by recording key information about a customer and case details. The system allows for registering incidents automatically from incoming emails or messages received from the self-service portal. The first line agent will define incident priority, taking into account the urgency, impact level, service type and connected CIs.

Return to Top of Document

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Incident investigation and resolution	Run incident diagnostics, formalize resolution and provide information to requesters. Use system data to draw conclusions as to whether the incident was a recurring mass phenomenon. A service agent can also search for similar incidents, registered problems or documented known errors. If needed, you can escalate the incident to a higher support line or supervisor. Manage a complete history of case processing. Track case details, tasks, sent emails, phone calls, and knowledge base articles used to resolve the case.
Incident closure	Complete incident resolution process by formalizing its results. Service Creatio enterprise automatically sends a request for feedback in order to evaluate the level of satisfaction and service quality.
Analytics	Analyze the efficiency of case resolution and identify bottlenecks using the pre-configured dashboards. Take control over satisfaction rating, the percentage of overdue cases, work load of different service lines, etc.

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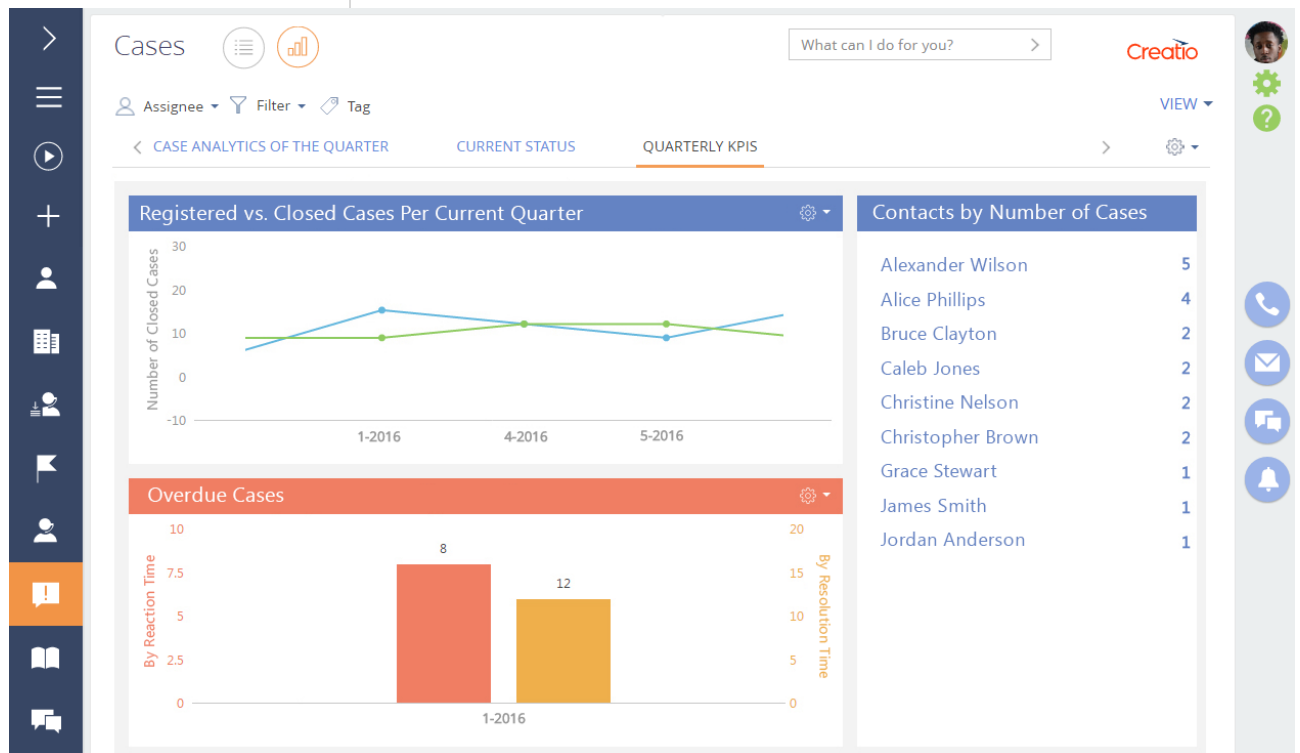
Problem management

Problems and known errors	Store all identified problems in the infrastructure and service processes in Creatio ITIL service. The system helps preventing recurring mass incidents and proactively informs about known errors.

Identification and classification	Take advantage of the capability to automatically register a new problem right from the incident management process. You can define problem priority, type of service and configuration item.
Problem diagnostics	Analyze problem reasons and find solutions. The system allows you to assign agents to resolve the problem, as well as document the progress of the resolution process and possible workarounds. Plan your work on problem elimination through initiating changes in the infrastructure.
Problem resolution and closure	Always keep full descriptions for problems and known errors resolutions. Close related incidents and inform about the elimination of bottlenecks.
Problem resolution history	Manage a complete history of problem resolutions and monitor agents' efficiency. The system provides timely information about resolution process, completed activities, communications and initiated changes.
Analytics	Make decisions about necessary changes in the infrastructure, based on advanced analysis of the problems and known errors database (KEDB). You can track services and CIs that triggered problems, as well as monitor frequency of detection of problems in the infrastructure.

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Change management

Change requests	Plan all changes in Creatio ITIL service in order to eliminate known errors in the infrastructure and improve overall quality of IT services. The system allows you to keep a single list of change requests, manage priorities and supervise quality.

Registration and classification	Register change request IDs, define categories and priority, and establish connections with incidents, problems and CIs. Store information about team assignment for change implementation, and plan deadlines.
Coordination and approval	Manage change approvals and a list of resources who are authorizes to approve different levels of change requests. Develop detailed change implementation plan, including stages and activities, assigned agents and estimated workload.
Implementation	Take control and ensure implementation of planned changes. Track factual workload, estimate quality of interim results, deadlines, potential risks and possible deviations from the plan.
Analytics	Analyze quantitative and qualitative process efficiency indicators. Track average workload per change, efficiency of change implementation and identified deviations. Setup the number of problems and incidents identified in the course of implementation of changes.

Release management

Releases	Store a complete information about planned and implemented releases in Service Creatio enterprise. The system helps to keep track of workloads, teams and deadlines associated with a release. You can specify the list of changes that should be included into a particular release and ensure their successful implementation.

Release history	Manage history of releases with Service Creatio enterprise. The system allows for the gathering of data on all changes and problems identified in the course of implementation, as well as tracking the history of completed activities.
Analytics	Use comprehensive analytics in Service Creatio enterprise to track releases and monitor their quality. Setup analytics by services, get stats on successful and unsuccessful releases and problems eliminated in the course of release implementation.

13

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Case management

Unified case database	Accumulate all cases from your employees, customers or partners in one section of the system. In Service Creatio you can classify the cases by type: incidents, service requests, advisory services (list is configurable and easily expandable). The system also allows you to assign agents and teams, regulate timelines for case resolution taking into account different time zones and manage communications during case resolution.

Best practice service processes	Manage various types of cases with the help of out-of-the-box best practice processes in Service Creatio. The processes guide agents though the most effective actions required to successfully resolve cases. The process triggers notifications and alerts, and enables control over case resolution deadlines.
Case registration	The system allows for registering cases automatically from incoming emails or message from self-service portal.
Tasks and calendar	Manage your activities, calls and tasks easily with Creatio intelligent time management tools. You can add personal or group tasks that are linked to a specific assignment, contact or case. You can also synchronize your tasks and calendar with Google Calendar and Microsoft Exchange. All notifications and reminders are displayed in the notification panel.
Case history	Manage the complete case history in Service Creatio. Track case resolution activities, emails, calls, and knowledge base articles used for resolution.

14

Analytics	Take advantage of comprehensive dashboards to analyze the effectiveness of case resolution and service process efficiency. With Service Creatio analytic tools, you can control satisfaction levels, percentage of overdue cases, and service staff efficiency.

Knowledge base	Combine knowledge about all services, CIs and known errors in a unified knowledge base in Service Creatio enterprise. By using knowledge base articles, you will be able to close cases in the most timely manner and efficiently train Service Desk agents.

Article search	When working on case resolution use advanced search capabilities of the knowledge base. Define article categories, keywords and tags, service types, most popular solutions and instructions.
Knowledge management	Keep the knowledge base up-to-date. Enable your agents and employees to rate articles, post comments and regularly update articles. Track all changes and updates, as well as the frequency of knowledge base usage.