



Service Creatio overview

Presented by

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the CRM experts 

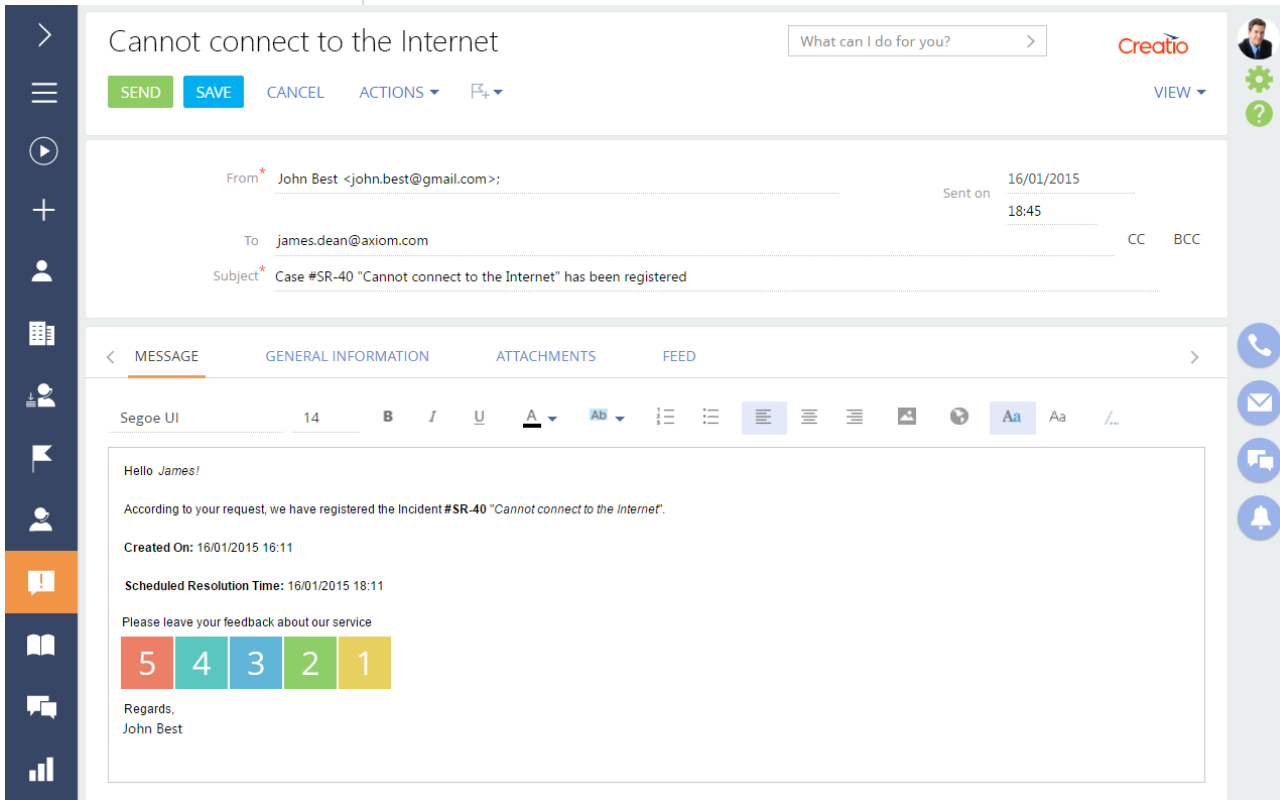
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Service Creatio features overview

Omnichannel communications

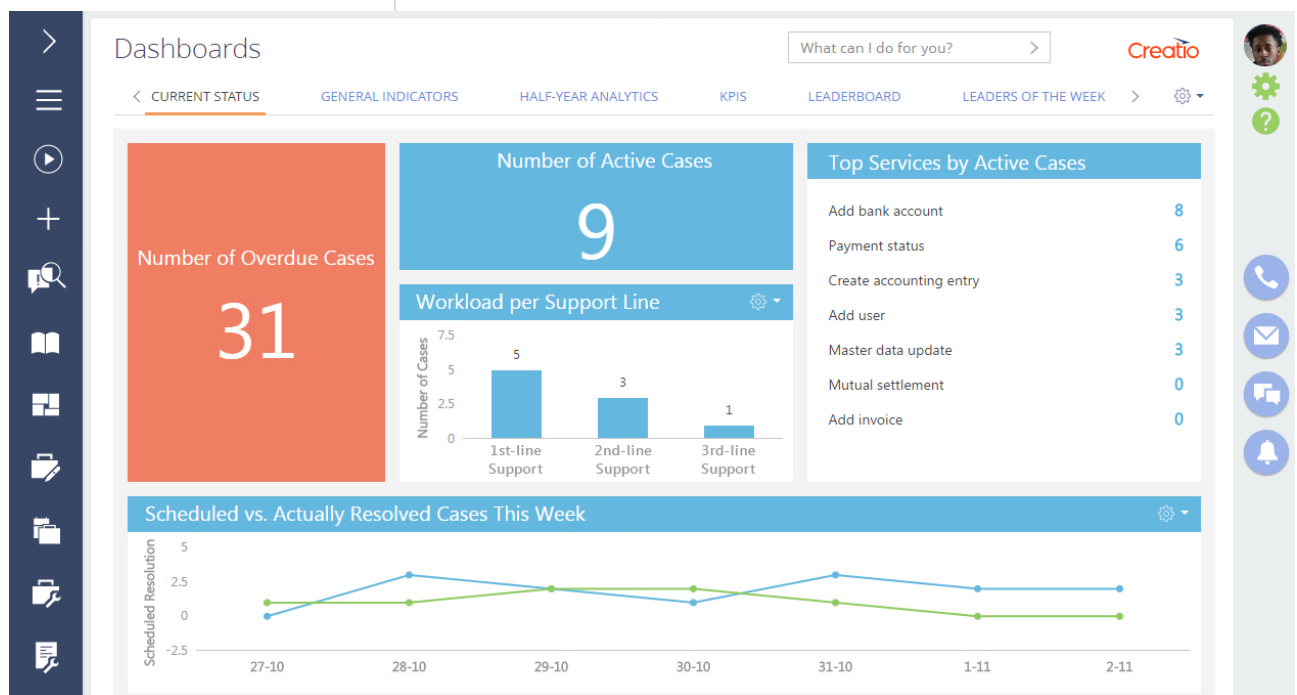
Communication panel	Communicate with your team, employees and contacts directly from the system. Make calls, manage email, give approvals and collaborate in the enterprise social network using the Communication panel. All notifications are also here, so you will not miss any important event.
Email	Manage 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!

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.

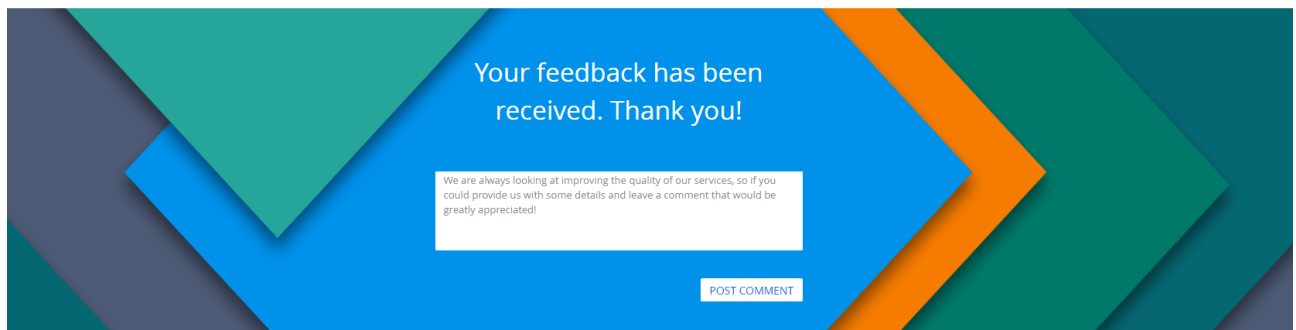
Analytics

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.



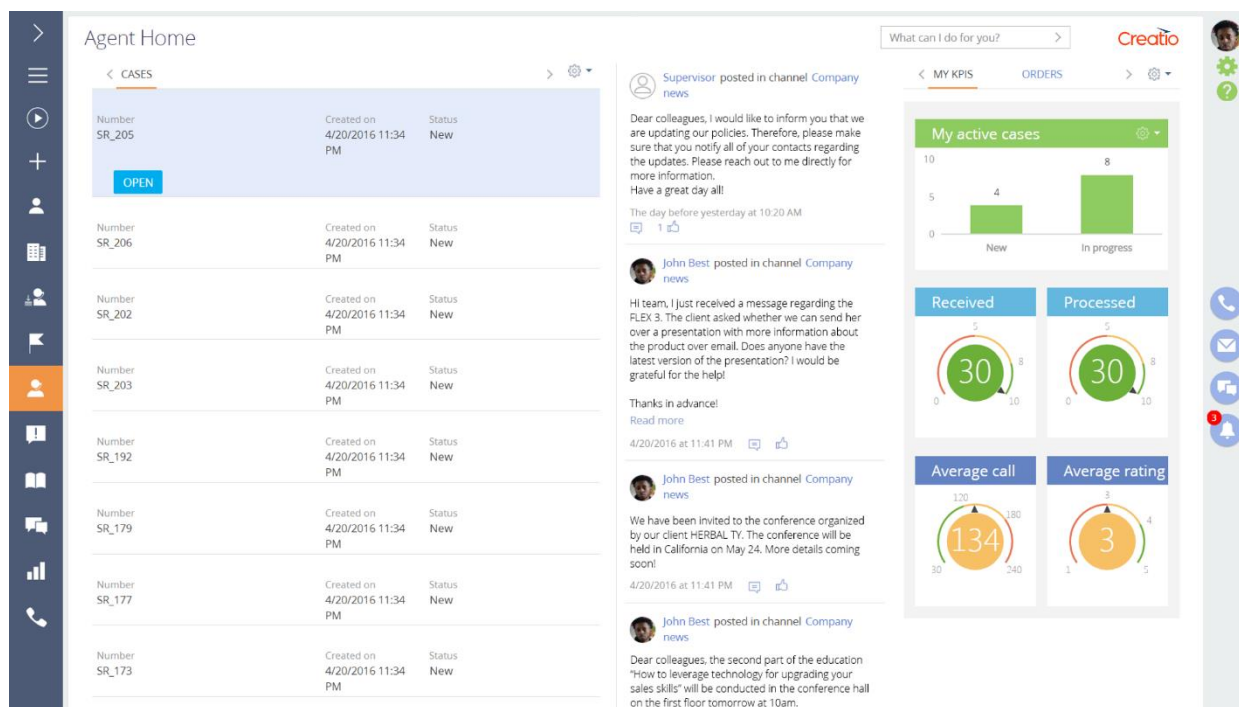
Self-service portal

Self-service portal	<p>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.</p>
Feedback	<p>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.</p>



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.

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).

Service	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

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.

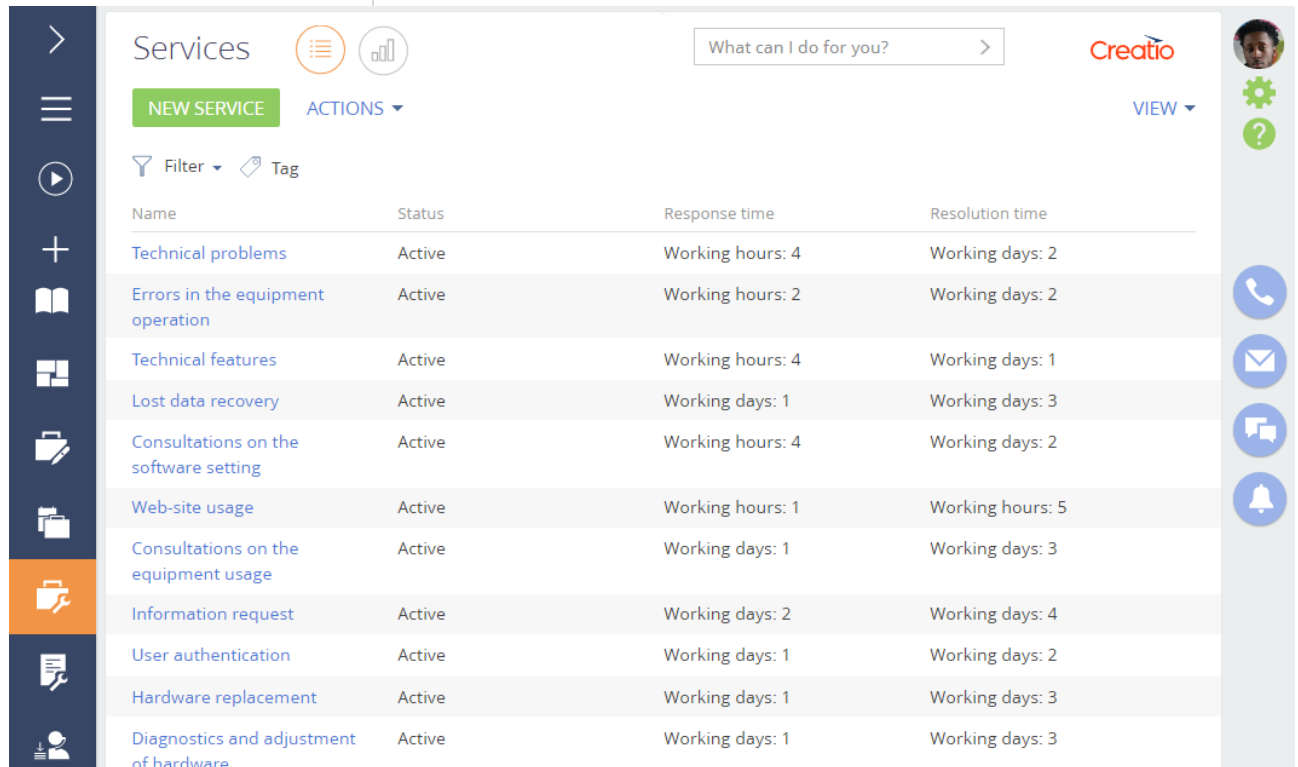
Analytics

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.

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.



The screenshot displays the 'Services' section of the Creatio interface. It features a sidebar with navigation icons, a top navigation bar with a search box and user profile, and a main content area with a table of services. The table includes columns for Name, Status, Response time, and Resolution time. A 'NEW SERVICE' button and an 'ACTIONS' dropdown are located above the table. A 'Filter' and 'Tag' section is also present. The right sidebar contains a vertical stack of communication icons (phone, email, chat, etc.).

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.

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.

Name	Type	Serial number	Inventory number	Status
Switchboard Cisco SB SF100D-16-EU	Switchboard		1000202	Active
Personal computer Everest Home & Office 1030	Personal computer	QEMU4RUSMR	1000648	Active
Projector Acer X113	Projector	YYDC3NXBH	1000465	Active
Personal computer Asus K5130-UA002S	Personal computer	3XFVIDLS5W	1000679	Active
Switchboard Zyxel GS1100-16	Switchboard	DPTYSPFZV6		Under maintenance
Kaspersky Antivirus Small Office Security 2	Antivirus		1000231	Active
Headset Sennheiser HD 201	Headset	N740-1SDV-E5CWX	1000873	Under maintenance
CPU Intel Core i3-2120 3.3GHz/5GT/s/3MB	CPU	30MOYVG3NKQJ	1000151	Retired
Laptop Lenovo ThinkPad E540	Laptop	20C6A03800	1000709	Under maintenance
Keyboard Logitech Wireless Keyboard K360	Keyboard		1000899	In stock

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.

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.

The screenshot displays the 'Cases' management interface in Creatio. It features a sidebar with navigation icons, a top header with search and filter options, and a main table of cases. The table includes columns for case ID, assignee, category, response time, and status. The cases listed are SR_233 (New), SR_206 (In progress), SR_205 (In progress), SR_204 (In progress), SR_203 (In progress), and SR_202 (In progress).

Case ID	Assignee	Category	Response time	Status
SR_233	John Best	Incident		New
SR_206	John Best	Service request	10/11/2015 1:14 PM	In progress
SR_205	John Best	Service request	10/10/2015 5:00 PM	In progress
SR_204	Megan Lewis	Incident	10/13/2015 8:00 PM	In progress
SR_203	John Best	Service request	10/10/2015 8:00 AM	In progress
SR_202				In progress

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.

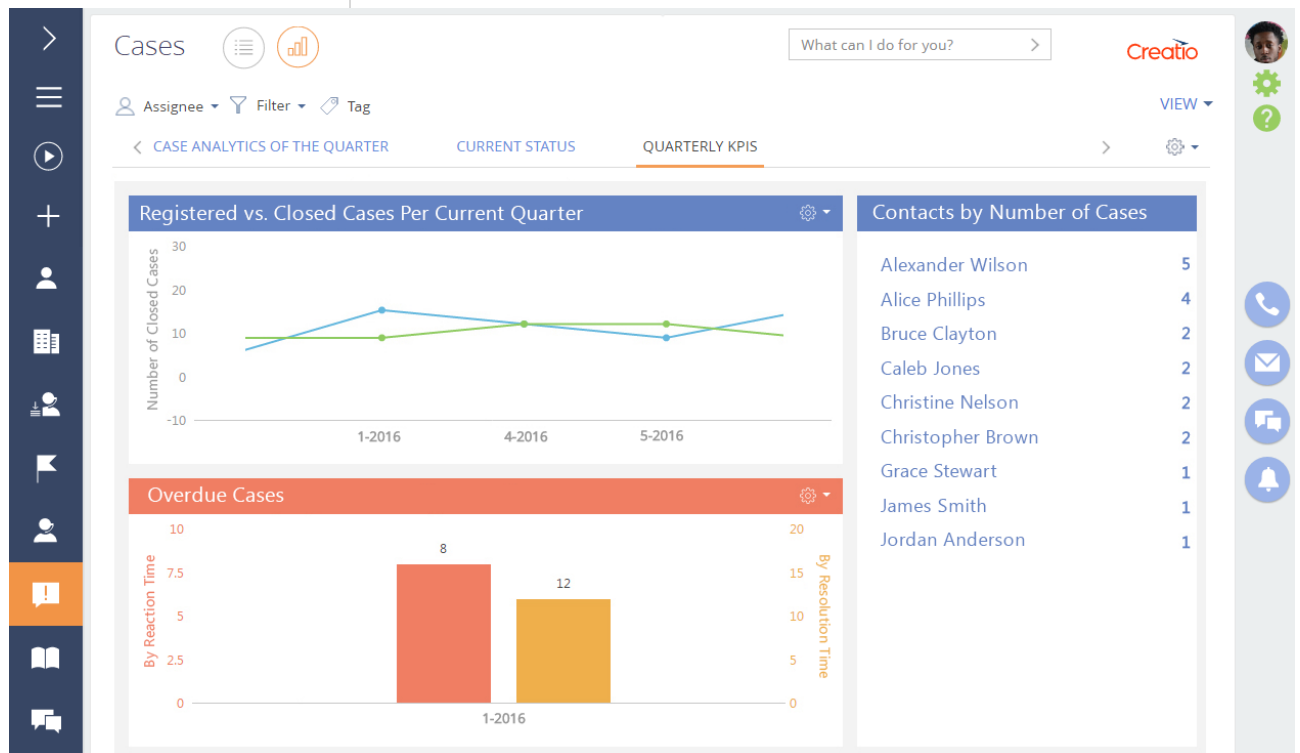
Out-of-the-box process for incident management

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.

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.



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.

The screenshot shows the Creatio 'Problems' management interface. On the left is a sidebar with navigation icons and a 'Problems' section. The main area features a table of open problems. The table has columns for 'Number', 'Subject', 'Status', and 'Assignee'. The problems listed are:

Number	Subject	Status	Assignee
PR_177	Unexpected restarts of virtual machines	In progress	Symon Clarke
PR_183	Internet connection intermittently disappears	Resolved	Symon Clarke
PR_172	Data disappears from the hard drive	Resolved	Symon Clarke
PR_175	Messages sent to the addresses of other domains don't reach the recipients	New detail	Mary King
PR_184	Power supplies from the last delivery blow up	In progress	Mary King
PR_186	An error in the report generation process.	Resolved	John Best
PR_178	Regular print failures	Resolved	Mary King

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.

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.

Number	Subject	Category	Assignee	Status	Actual end date
CR-111	Reflash the motherboards	Normal	Caleb Jones	Closed	4/14/2016 12:27 PM
CR-121	Test the printer	Normal	Symon Clarke	Completed	
CR-116	Update the login form	Normal	Megan Lewis	Being tested	
CR-118	Install operating system	Pre-authorized	Megan Lewis	Postponed	
CR-112	Fix the device	Urgent	Caleb Jones	Closed	4/12/2016 12:33 PM
CR-119	Fix the telephony	Urgent	Megan Lewis	Closed	5/6/2016 9:07 AM
CR-113	Adjust the login page	Urgent	John Best	Closed	4/19/2016 5:12 PM
CR-129	Fix website errors	Normal	John Best	New	
CR-128	Reinstall operating system	Urgent	John Best	New	
CR-104	Optimize the web-form	Normal	Caleb Jones	Closed	5/15/2016 2:27 PM
CR-117	Implement cross-browser compatibility	Normal	John Best	Being tested	
CR-124	Customize access rights	Normal	Symon Clarke	Completed	
CR-101	Implement automatic authorization	Normal	John Best	Closed	5/12/2016 12:01 PM
CR-125	Replace USB port	Pre-authorized	Symon Clarke	New	

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.

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.

The screenshot displays the Creatio Release Management interface. On the left, a sidebar contains navigation icons. The main area is divided into two sections. The top section shows a list of releases with columns for 'Заголовок' (Header) and 'Состояние' (Status). The bottom section shows a detailed view of release 18, including its title, description, status, priority, and a list of changes.

Заголовок	Состояние
14 bpm'online community	Testing
18 Server Patriot Tower E3-1220V3	Development
15 bpm'online ITIL service o...	Released
13 Employees PCs update	Released
16 bpm'online ITIL service tr...	Released
12 Asus VivoBook S550CA 3...	Released
17 Lenovo ThinkPad E540 la...	Deployment
10 Server System Patriot To...	Released
11 Server System Patriot To...	Released

Release 18 Details:

- Title: Server Patriot Tower E3-1220V3
- Number: 18
- Description:
 - Improved performance due to RAM increase;
 - Operating system update;
 - Network capacity improved;
 - Power increased due to power supply unit upgrade.
- Status: Development
- Type: Minor
- Priority: Medium

Case Profile: PLANNING AND IMPLEMENTATION

Scheduled release date: 2/26/2016 Estimated working time (hours): 0

Scheduling

Stage	Start	End
Testing	2/20/2016	2/25/2016
Deployment	2/13/2016	2/18/2016

Activities

Email

Changes

Number	Subject	Category	Assignee	Status	Estimated ...
CR-118	Install operating system	Pre-authorized	Megan Lewis	Postponed	6
CR-123	Install new power supply unit on the server	Normal	John Best	Completed	2
CR-126	Reflash the BIOS	Normal	Caleb Jones	In progress	3

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.

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.

The screenshot displays the 'Cases' section of the Creatio interface. It features a sidebar with navigation icons, a top navigation bar with 'NEW CASE' and 'ACTIONS' buttons, and a search bar. The main area shows a list of cases with columns for Assignee, Category, Response time, and Resolution time. The cases listed are:

Case ID	Assignee	Category	Response time	Resolution time
SR_233	John Best	Incident	-	7/2/2015 1:00 AM
SR_206	John Best	Service request	10/11/2015 1:14 PM	10/11/2015 5:14 PM
SR_205	John Best	Service request	10/13/2015 5:00 PM	10/14/2015 2:00 AM
SR_204	Megan Lewis	Incident	10/13/2015 8:00 PM	10/14/2015 2:00 AM
SR_203	John Best	Service request	10/10/2015 8:00 AM	10/12/2015 4:00 PM
SR_202	John Best	Service request	10/16/2015 8:00 PM	10/12/2015 8:00 PM
SR_200	Peter Moore	Service request	10/9/2015 8:00 AM	10/10/2015 4:00 PM

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 through 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.

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.

The screenshot displays the Creatio Knowledge Base interface. At the top, there's a search bar with the text 'What can I do for you?'. Below it, the article title 'What to do when your laptop's touchpad stops working' is visible, along with buttons for 'SAVE', 'CANCEL', and 'ACTIONS'. The article details include: Name: 'What to do when your laptop's touchpad stops working', Type: 'FAQ', Modified by: 'Supervisor', and Modified on: '5/6/2016 8:49 AM'. The article content is displayed in a rich text editor format, showing the text: 'User 1 First, make sure you haven't accidentally disabled the touchpad. In all likelihood, there's a key combination that will toggle the touchpad on and off. It usually involves holding down the **Fn** key (which is probably near the lower-left corner of the keyboard) while pressing another key. But what other key should you press? It's probably one of the function keys (F1 through F12), although it might be something else. Examine the keyboard, paying particular attention to the little icons (usually blue) on some of the keys. Look for an icon that might suggest the touchpad. If that doesn't fix the problem, check the touchpad settings. Go to the Start menu or the Windows 8 search charm and type **mouse settings**. Select **Change mouse settings** (there are other options that are very similar, so pick the one with that exact wording).' Below the text is a screenshot of the 'Mouse Properties' dialog box in Windows, showing the 'TouchPad' tab with 'Enable TouchPad' checked. At the bottom, there's a comment from 'Jason Robinson' posted on '5/5/2016 at 10:24 AM' with options for 'Comments' and 'Like'.

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.