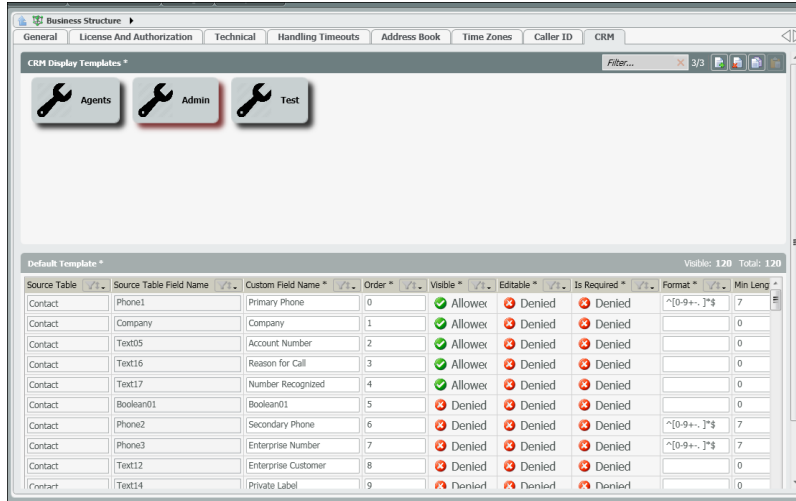


ECS Setup: Business Structure - CRM

Business Structure: CRM

The ECS CRM is a contact management system that allows agents and supervisors to add and manage new and existing contacts.



Default Template

The default template is used for a contact search or contact upload. Ensure specific Custom Field Names are not editable in the default template if agents should not have the ability to edit certain contact information.

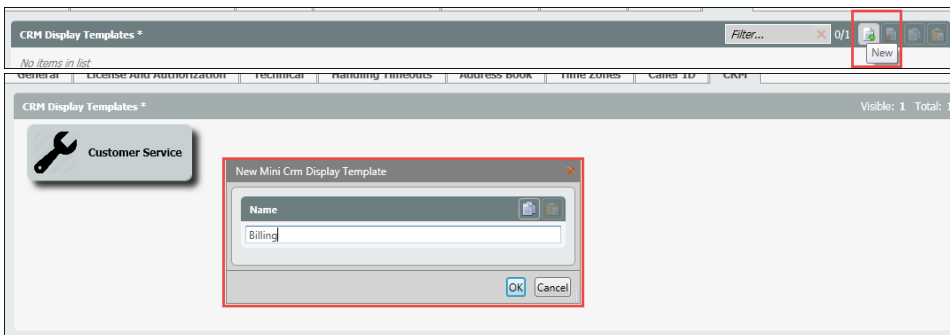
1. **Source Table** – not an editable field
2. **Source Table Field Name** – not an editable field
3. **Custom Field Names** – editable field. This field name will appear to the agent with the appropriate contact information to follow. Each custom field can be adjusted to suit the needs of an organization.
4. **Order** – order number the custom field name will appear to the agent
5. **Visible** – determines whether the field name is visible to the agent (Allowed – Visible / Denied – Not Visible)
6. **Editable** – determines whether the field is editable by the agent (Allowed – Editable / Denied – Not Editable)
7. **Is Required** – determines whether the field is required to have information. Not recommended in case some information is not known.
8. **Format** – not recommended to change the default settings
9. **Min Length** – not recommended to change default settings

CRM Display Templates

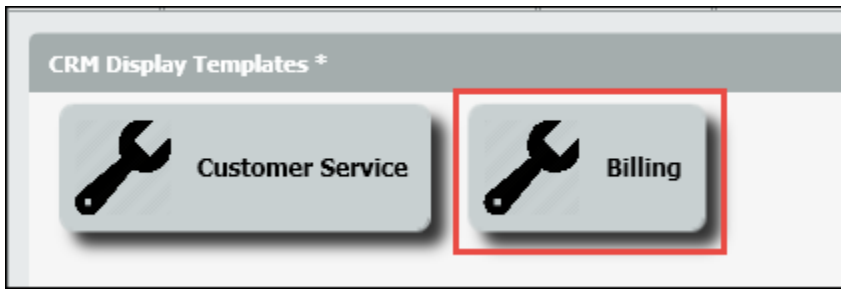
CRM display templates determine what contact information is exposed and can be edited by the agent. Each Business Process can have a unique display template.

Adding a New Template:

1. Select the icon to add a new template. Provide the template with a name.



2. Click on the new template to drill down and edit



3. Edit the Custom Field Name, Order, Visible, Editable and Is Required field for the template.

Name *									
Billing									
Display Template Fields *									
Source Table	Source Table Field Name	Custom Field Name *	Order *	Visible *	Editable *	Is Required *	Format *	Min Le	
Contact	Phone1	Main Phone	0	✓ Allowed	✗ Denied	✗ Denied	^[0-9+-.]*\$	7	
Contact	Company	Company	1	✓ Allowed	✗ Denied	✗ Denied		0	
Contact	Text01	Account Number	2	✓ Allowed	✗ Denied	✗ Denied		0	
Contact	Text02	UCaaS	3	✓ Allowed	✓ Allowed	✗ Denied		0	
Contact	Text03	Compute	4	✓ Allowed	✓ Allowed	✗ Denied		0	
Contact	Text04	ITaaS	5	✓ Allowed	✓ Allowed	✗ Denied		0	
Contact	Text05	Vetanium	6	✓ Allowed	✓ Allowed	✗ Denied		0	
Contact	Text06	Enterprise	7	✓ Allowed	✓ Allowed	✗ Denied		0	
Contact	Text07	VIP	8	✓ Allowed	✗ Denied	✗ Denied		0	
Contact	Text08	Gold Member	9	✓ Allowed	✓ Allowed	✗ Denied		0	
Contact	Phone2	Mobile Phone	10	✓ Allowed	✓ Allowed	✗ Denied	^[0-9+-.]*\$	7	
Contact	Phone3	Home Phone	11	✓ Allowed	✓ Allowed	✗ Denied	^[0-9+-.]*\$	7	

4. Once a template has been created, drill down into the Business Process under Handling Defaults to apply.

The image shows a configuration window for a Business Process. The "Handling Defaults" tab is selected. In the "CRM Display Template" dropdown menu, the options "Billing" and "Customer Service" are visible. The dropdown menu is highlighted with a red rectangular border.

5. Save and Deploy changes

6. When an agent accepts an interaction they will see either the default CRM template or the Custom CRM display template assigned to the Business Process the interaction came through.

7172018677

00:01:19

State

Handling

Type

Incoming Telephony

Customer

Entry Time

9:38 AM

Origin

7172018677

Destination

4845882513

Business Process

Technical Support

Demands

Waiting Time

00:00:00

Remarks

0

Links

Previous Attempts

0 previous attempts

Disposition Code

Completion Status

Handled

Add To DNC List

No

123

Telephony Sessions

Contact

Search

History

Notes

Phone 1

7172018677

Company

EvolveIP

Account Number

UCaaS

Yes

Compute

Yes

ITaaS

Vetanium

Enterprise

Private Label

Nagios