About *CustomerFirst*

CustomerFirst contains the support, help desk, and defect tracking functionalities of the *CustomerFirst CRM Suite*. The RTI suite was specifically engineered to empower each department within your organization to maintain customer information and to view it in the context of their particular function.   All information fundamental to services, marketing, development and sales is organized using a well-defined repository structure that is accessed by the entire suite of products, and your entire organization including remote personnel. This suite allows your employees to work smarter, act faster, and respond effectively to customer and prospect demands. *CustomerFirst* manages the flow of work through the organization from the time a request or issue is reported, until it is completed or resolved. The resolution may simply be an answer to a question, a software fix, or work that needs to be performed for the customer.

CustomerFirst complements *SalesFirst*, a product that focuses on the sales and marketing automation of an organization. Both products have access to the same central repository of customer/prospect information.   The *CustomerFirst CRM Suite* is fully compatible with Microsoft SQL Server, Oracle, and IBM DB2 database platforms. It has both Windows and Java interfaces which provide compatibility with PCs, MACs, Linux, and Unix.

WebFirst provides access for customers and partners.

CustomerFirst can:

- Manage processes for tracking specific types of service requests and product related issues. It creates an incident work list that an agent can work from and that can be prioritized based upon severity and status rules that you determine.
- Provide a central repository for all information about your customer.
- Enhance internal and external communication.
- Help manage your responsiveness to the customer. It tracks and manages the initial response time as well as the time to resolution (SLA time).
- Provide defect tracking for managing new development as well as fixes and modifications.
- Provide a knowledgebase to enable support reps to have instant access to past resolutions.

CustomerFirst *General Features*

- Work Flow Management Tool
  - o Automated Rules-based tool that allows users to define escalation rules and work flow by pointing and clicking to criteria and notifications. . Business rules can be set based upon any combination of criteria.
  - o The automated rules process allows for a series of actions to take place including the sending of an e-mail, the creation of an alert, the transfer of the incident responsibility, a change of status, or the sending of a message to a pager or hand-held device.

- Telephone interface using TAPI2.

- Spell Checker.

- Attach files to any record in the system.

- In-coming e-mail server which automatically creates incidents from e-mail and sends the customer an acknowledgement that their incident is in the queue along with the assignment of their new incident number.

- Send outgoing e-mail from all screens and functions within the system. E-mail can also be broadcasted from query screens (e.g., customers having specified interest in a product, or the result of a specific targeted search).

- Ability to break incidents, problems, and/or sales opportunities down into multiple tasks. Tasks can be assigned to other individuals along with an estimated number of hours for the task duration, expected completion date, and a full description of the task. The owner of each task can record their activities within the task. A project manager can review the history of the task or problem including the history for each of the tasks. Service or development projects can be easily managed.

- Time recorded in the system can be displayed in a timesheet for each individual. A hierarchy of time can be displayed by department or by individual

- The Tools menu allows for definition of external applications that can be launched from within CustomerFirst. Arguments can be passed to the application.

- Alerts allow the user to set an alarm that is associated with a specific incident, problem, task, or as general alerts. Managers can set alerts for anyone in their

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department. When an alert is set, the date and time and message is entered. An alert can be set for the user setting it or for another individual.

- MS Outlook Interface with ability to add Ticklers, Alerts, and Tasks to your calendar.

- Every Screen (i.e. customer, incident, task, etc.) contains a Miscellaneous Tab which has date fields, edit controls, and dropdowns. These fields can be relabeled, values defined for them, and they can be moved to other places. This allows users to easily "add" other fields for their specific purposes.

- Customization

  o Customization of list boxes is provided at the user level to select the fields to be displayed and to define the sort sequence for multiple items. The user can also define fields to use for "group by" and define calculations to be performed within the list box.
  o Panel customization can be performed, by authorized users, with a simple click of the right mouse button to remove fields, change labels, move fields, make a field required, or set defaults. Screen customization is done at the "User Group" level which is user-defined.

- *CustomerFirst* and *SalesFirst* provide a "Forms" feature that allows the definition of forms or templates to be used when sending e-mail. A Form may contain text or data fields from related tables in the database. Forms are also used for defining the layout for printing query results.

- Queries and Reporting.
  o Standard pre-defined reports included with system.
  o Ad-hoc queries allow for the definition of search criteria and the layout of the printed report.
  o Excel Pivot table Interface that allows for dragging and dropping of criteria for reports, charts and graphs.
  o Additionally, RTI provides a Data Definition Manual that enables the utilization of a third-party reporting tool.

RTI provides Windows and Java interfaces.

Customer Data

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- Complete customer data with the ability to attach files at all levels. Maintains different addresses for shipping, billing, etc.

- Relationships between customers (parent/child) and between resellers/partners and end users.

- Customer Alias Names allow retrieval of customer by multiple names.

- User-defined Contact Types to specify specific roles and to use in queries to select contacts for mailings or e-mail broadcasts.

- Track Licenses to see which products were purchased, quantities, and other information related to the license.

- Contracts with user-defined contract types for maintenance or services. Contract Types can be for unlimited support/services with an expiration date, prepaid hours, prepaid incidents, pay as used hours, or pay as used incidents. With pre-purchased time or incidents, time logged in incidents covered by that contract, will decrement from the prepaid time or prepaid incidents.
  - Record renewals to contracts.
  - Track the contacts that are authorized to call for support.
  - Notification to support if a contract has expired or is not valid.

- Inventory hardware within your organization or at customer sites.

- User-defined customer notes which provides entry of free-formed text and/or attachment of files.

- User-defined Relationship Types that track relationships between customers and specific people within your organization.

Customer Support/Help Desk Functions

- Track every call with your customer.

- Knowledgebase search allows for rapid answers to questions or to determine the resolution status of a problem

- o By user-defined defined characteristic types (e.g., panel name, field name, keywords, error codes, etc.).
  - o Free text search option (using Fulcrum Text Search) that allows you to build your own Boolean searches and search the CustomerFirst database as well as external documents.

- Time Tracking
  - o Time can be tracked against incidents, problems, and tasks. An automated timer tracks the time while you have an incident/problem displayed. Time may be recorded in activity records against the incident, problem, or task.
  - o If the Incident is covered by a prepaid hourly contract, the time will be decremented from the time available on the contract.

- Calculation of Elapsed Work Hours may be used in Escalation Rules to ensure that Service Level Agreements are met. Automatic notification is communicated to the support representative if the customers support contract has expired.

- Inventory Management Module to track equipment at the user or customer sites, maintain a history over the life of the equipment, generate RMA numbers for equipment being returned for repair, and tracking of vendors and warranty expiration dates.

Development and Defect Tracking

- Comprehensive defect tracking.

- Tracks versions, platforms, and releases of your product.

- Tracks temporary fixes associated with one or more incidents. Used for patches or when one or more files are sent to the customer rather than a complete new release. The "fix" files can be attached to the Temporary Fix and e-mailed with instructions to the customer.

- Permanent Fixes to track the actual source code modification to be made. The Permanent Fix records the one or multiple versions and platforms of the product in which the fix will be made. Interfaces to several Source Code Management (SCM) products are available.

- The ability to link duplicate incidents to one problem ensures that the owners of all incidents related to the problem will be notified when a temporary fix or production release is available.

- Produces a Release Notes report showing all changes in each build of your software.

- Report showing the number of bugs by program to allow you to see if any modules have a QA problem.

- Reports showing the number of bugs by release to see if new releases are improving in quality.

- Queries to search for all fixes in a specified date range, made to specified modules, products, and many other criteria.