

JD Edwards EnterpriseOne CRM Foundation



Your customer service representatives (CSRs) need quick and easy access to key information about customers, such as sales, service and financial information. Additionally, information readily available needs to extend to customer, contact and partner information as well. JD Edwards EnterpriseOne CRM Foundation provides the basis for all customer relationship management business processes that the organizations uses.

KEY BUSINESS BENEFITS

- Reduce the time needed to resolve issues
- Improve customer service
- Offer customers self-service troubleshooting tools
- Improve call center efficiency
- Streamline data capture
- Simplify the diagnosis of complex issues

KEY FEATURES

- Sales / Product Catalog information
 - Item entry, maintenance and inquiry
 - Item cataloging
- Customer information
 - Contact entry and maintenance.
 - Customer entry and maintenance
- Other information
 - Employee entry and maintenance
 - Email and email merge functionality
 - Call plan creation and maintenance
 - Partner entry and maintenance
- Multiple solution libraries
- Basic and advanced searches
- Relevance ranking
- Media object search

Quick and Easy Access to “All Things Customer”

Customers expect a timely response when they contact you for help. Being able to access the needed information quickly while the customer is waiting is essential to providing effective customer service. Typically that information may be scattered throughout a system. The customer does not want to wait while the CSR ‘goes hunting.’ To be truly effective, customer relationship management must be quick, responsive and comprehensive, as well as easy to use. Providing great customer service can make all of the difference when it comes to happy repeat customers or lost customers.

Resolving Customers’ Issues Quickly and Cost-Effectively

Your customers want you to resolve their issues as quickly as possible. However, while your customer service representatives are often the first point of contact for customers calling your company about a problem, they may not have the knowledge or experience necessary to solve complicated problems. But, it’s not always possible—or cost-effective—to have trained engineers fielding each customer call.

Expensive and Time-Consuming Customer Support

Every call made to your call center by a customer looking for support is an expense for your organization. If you want to minimize costs and maximize customer goodwill, you need to be able to answer your customers’ questions and solve their problems as quickly and efficiently as possible. To do so, you must be able to provide your customer service representatives with the information they need to give a knowledgeable response to customers—without extensive training.

Customer Service for Responsiveness and Effectiveness

Oracle’s JD Edwards EnterpriseOne CRM products are integrated with the rest of JD Edwards EnterpriseOne. No need to look any further. At the heart of these solutions is CRM Foundation. CRM Foundation allows you to set up, maintain and easily access

- Solved count and usage count metrics
- Item association
- Permanent case and work history association
- Branch and linear scripts
- Multilingual support
- Automatic capture of data
- Script-authoring tool
- Script validation
- Scoring
- On-screen script prompter
- Item association
- Script cloning
- Script personalization

information about your customers, employees, partners and contacts. You can setup and maintain product item and item catalogs, which can be used in sales, service and support business processes. You can set up email lists and use email merge functionality to communicate similar information to large groups of people. And you can create call plans to assist sales and service employees.

Easy-to-Use, Searchable Repository of Issues and Fixes

With Oracle's JD Edwards EnterpriseOne Solution Advisor, you can provide your customer service reps with a searchable repository of known issues and associated fixes. Information is no longer kept in silos. Instead, it can be shared with your entire organization. As a result, reps are better able to resolve issues when they are first contacted, eliminating the expense of scheduling follow-up calls or sending technicians to customers' sites.

Speed Issue Resolution

Solution Advisor is designed to reduce the time it takes for your customer service reps to resolve issues by giving them the information they need to solve even the most technical problems. The job is made easier with intelligent searching functionality that speeds the return of only the most relevant information.

Reps can use keywords to search across multiple object types, including cases, work orders, scripts, and solutions. Solution Advisor enables reps to choose the number of records being returned, so they are able to widen or narrow their search as needed.

To save additional time, Solution Advisor returns results in the order of their relevance to the search. It determines relevance by calculating a score for each returned element based on how well it matches the search criteria and how often the solution is used. Rather than searching through a list of results that are ranked indiscriminately, your reps can quickly focus on only the most likely solutions to your customers' issues.

Intelligent Scripts Help You Quickly Resolve Issues

With Oracle's JD Edwards EnterpriseOne Branch Scripting, you can create intelligent scripts that walk your customer service reps through the information-gathering process so that they are able to resolve problems as quickly as possible. The scripts simplify the diagnosis of complex issues, so your less experienced reps can provide the same level of service as those with more experience. With the support of scripts, your reps are more likely to be able to resolve customers' issues over the phone, which reduces the number of times service technicians must be sent out to solve customers' problems.

Branch Scripting also lets you do much more than just resolve issues. You can create scripts that support your reps as they capture information, fulfill customer requests, or support sales. But no matter what type of script you create, Branch Scripting helps your organization streamline and standardize how you collect customer information which ensures greater accuracy and consistency of data.

Getting the Most from Your Organization's Information Assets

Knowledge of your company's products, faults, and associated fixes is a key asset. It's important to have a tool that can organize this information and help you quickly find what you are looking for. Solution Advisor makes this easy to do. Each solution can be

associated with an item, such as a product you manufacture, so that when a rep creates a case to record an issue a customer is having with a particular product, the system automatically displays a list of solutions that have resolved previous cases for that same product.

And, as each case or work order becomes associated with a solution, Solution Advisor updates the solution record with the relationship information. Each solution record includes all cases and work orders to which the solution has been applied, regardless of whether the solution solved the case or work order. With this information, you can track the number of cases and work orders associated with particular solutions or determine if other solutions have been associated with a specific case or work order.

Enabling Your Customers to Help Themselves

Solution Advisor doesn't just give your reps the information they need to resolve problems—it also lets you speed customer service by helping your customers help themselves. You can use Solution Advisor with JD Edwards EnterpriseOne Customer Self Service to extend your knowledgebase of known issues and fixes directly to your customers through a web-based portal so that they can perform their own searches. In addition to enabling your customers to resolve their problems more quickly and efficiently, this self-service functionality can dramatically cut down on the number of calls made to your call center.

Creating Effective Scripts with Ease

Branch Scripting makes it easy for you to create both linear and branch scripts. Linear scripts lead your reps through a fixed set of questions in a fixed order, and branch scripts use conditional logic to determine the sequence of questions being asked based on the customer's response. For example, once a customer responds to a question about the product model, the script then leads the rep to questions specific to that model number. This intelligent scripting technology makes branch scripts ideal for situations where your customer service reps are trying to work through complex issues. They can ask the right questions without wasting time gathering unnecessary information.

During a call, the system displays each question and calculates the score as each answer is provided. This information is then used to determine the next logical question. In addition, the scores calculated by the system can be used to automatically rate the importance of customers or their issues so that they can be assigned to the appropriate queue for follow-up or escalation.

Ensuring Your Reps Can Help Your Customers

With Branch Scripting, your reps are automatically led to the questions they need to ask to resolve customer issues, up-sell or cross-sell products, qualify leads, or process new sales orders. As they go through the script, the information they enter in the system not only triggers new questions to ask but also is saved for future reference. Depending on the information being gathered, this data can be used for marketing and sales efforts, or it can be attached to work orders for use by technicians who are following up on issues, so they can troubleshoot problems before they even arrive at a customer's site.

Branch Scripting lets you create scripts that lead your reps to potential resolutions for issues customers are having. Or, by using Branch Scripting with the knowledge

database provided by JD Edwards EnterpriseOne Solution Advisor, your reps are able to look up commonly occurring faults, failures, and associated fixes and then run scripts to find a solution. They can then provide this information to customers either over the phone or by email to help resolve problems— all without having to involve an expensive service technician.

Solution Integration

This module is designed to be integrated with these JD Edwards EnterpriseOne products and families across your operations using common tools and a Pure Internet Architecture:

- JD Edwards EnterpriseOne Financial Management
 - Address Book
- JD Edwards EnterpriseOne Order Management
 - Sales Order Management
- JD Edwards EnterpriseOne Customer Relationship Management
 - Service Management
 - Sales Force Automation
 - Case Management

This module is designed to be integrated with these JD Edwards EnterpriseOne products across your operations using common tools and a Pure Internet Architecture:

- JD Edwards EnterpriseOne Customer Relationship Management
 - Customer Self Service
 - Case Management
 - Service Management

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- JD Edwards EnterpriseOne Financial Management
- JD Edwards EnterpriseOne Customer Relationship Management
 - Case Management
 - Customer Self Service
 - Service Management
- JD Edwards EnterpriseOne Supply Chain Execution (Logistics)

Contact us

For more information about JD Edwards EnterpriseOne CRM Foundation, visit oracle.com or call +1.800.ORACLE1 to speak to an Oracle representative.



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