Portrait
Foundation

Case Management - Add-in Functional Overview

Edition 2.1

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Pitney Bowes
Software

Portrait Foundation
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Acknowledgement of trademarks

About Portrait Software

Portrait Software is now part of Pitney Bowes Software Inc.

Portrait Software enables organizations to engage with each of their customers as individuals, resulting in improved customer profitability, increased retention, reduced risk, and outstanding customer experiences. This is achieved through a suite of innovative, insight-driven applications which empower organizations to create enduring one-to-one relationships with their customers.

Portrait Software was acquired in July 2010 by Pitney Bowes to build on the broad range of capabilities at Pitney Bowes Software for helping organizations acquire, serve and grow their customer relationships more effectively. The Portrait Customer Interaction Suite combines world leading customer analytics, powerful inbound and outbound campaign management, and best-in-class business process integration to deliver real-time customer interactions that communicate precisely the right message through the right channel, at the right time.

Our 300 + customers include industry-leading organizations in customer-intensive sectors. They include 3, AAA, Bank of Tokyo Mitsubishi, Dell, Fiserv Bank Solutions, Lloyds Banking Group, Merrill Lynch, Nationwide Building Society, RACQ, RAC WA, Telenor, Tesco Bank, T-Mobile, Tryg and US Bank.

Pitney Bowes Software Inc. is a division of Pitney Bowes Inc. (NYSE: PBI).

For more information please visit: http://www.pitneybowes.co.uk/software/

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About this document

Purpose of document

The purpose of the document is to provide a functional description of Portrait Foundation case management.

Intended audience

The intended audience is those concerned with the planning and initial studies for a project using Portrait Foundation.

Related documents

Contact Centre Functional Overview

Software release

Portrait Foundation 3.1 or later.

Contents

1 Introduction

1.1 Case concepts

Cases are used to hold information that is not customer-centric. In the financial services domain cases are typically used for multi-activity processes such as product applications. In these scenarios it is necessary to be able to give the agent a view onto all the contacts and activities which relate to the process. In other domains such as utilities customer service desks and in the public service domain, processes are often required which are not attached to a customer, or the identity of the customer may be uncertain. In all these scenarios case is the vehicle for giving the agent a view onto the activities in the process.

The Case Management package adds new information pages into the contact centre folders, to give the agent the case view. There are a number of functions to enable the agent to manage the case.

The case information pages are displayed both in the customer information folder, and in the task information folder.

Refer to the *Case Management Package Guide* for further information on how to build processes using case management. The set of information pages is complete, but note that not all of these need to be used in every implementation.

1.2 Case information pages

The case folder pages are listed in the following table.

Name	Description
Customer cases	The Customer Cases list appears in the Customer information pages, and lists the cases in which the customer is a participant.
Summary	The Summary page is an "at a glance" summary of the most important information about the case.
Progress	The Progress page displays the current state of progress of the case, based on the milestones that have been defined for it.
History	The History page is a chronological list of the actions that have been performed on the case.
Details	The Details page displays detailed information about the case, for example the type of loan, the amount of loan, and so forth. The contents of this page are configurable depending on the case type.
Associations	The Associations page lists business entities which are associated to the case.
Workflow	The Workflow page lists workflow which forms part of the case.
Documents	The Documents page lists documents which are part of the case.

Engagement history	The Engagement History lists all the engagements which have been part of the case.
Notes	The Notes page lists, in chronological order, all the notes which have been attached to the case.

1.3 Function summary

The case management functions which are available in the Engagement Desktop are as follows.

Name	Description
Reach milestone	Reach Milestone enables the user to record manually that a milestone has been reached.
Close	Close enables the user to close the case manually.
Re-open	Re-open enables the user to re-open the case, if it is necessary to add notes or other processing after the case was closed. Re-open forces an entry in the case history, so as to ensure an audit trail of what has happened.
Add notes	Add Notes enables the user to make notes during the processing of the case.

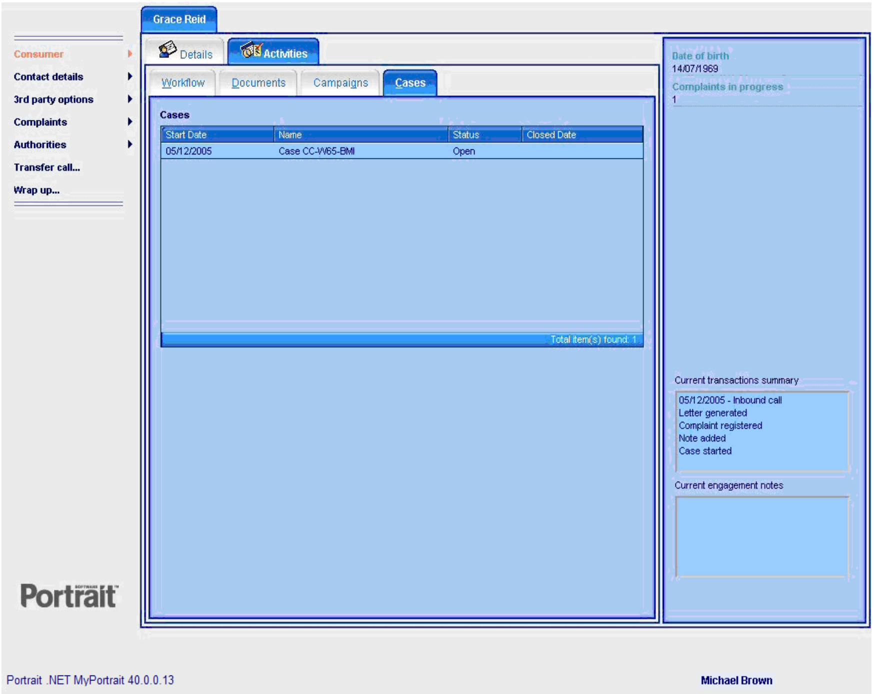
Any of these functions can be made available in the Workflow Desktop when a task which is part of a case is checked out. The functions available are configured in the task definition.

2 Case information pages

2.1.1 Customer cases

The Cases page is added to the Customer Information Folder under the **Activities** subject. It lists all the cases which are associated to the current customer.

Figure 1 – Customer cases page

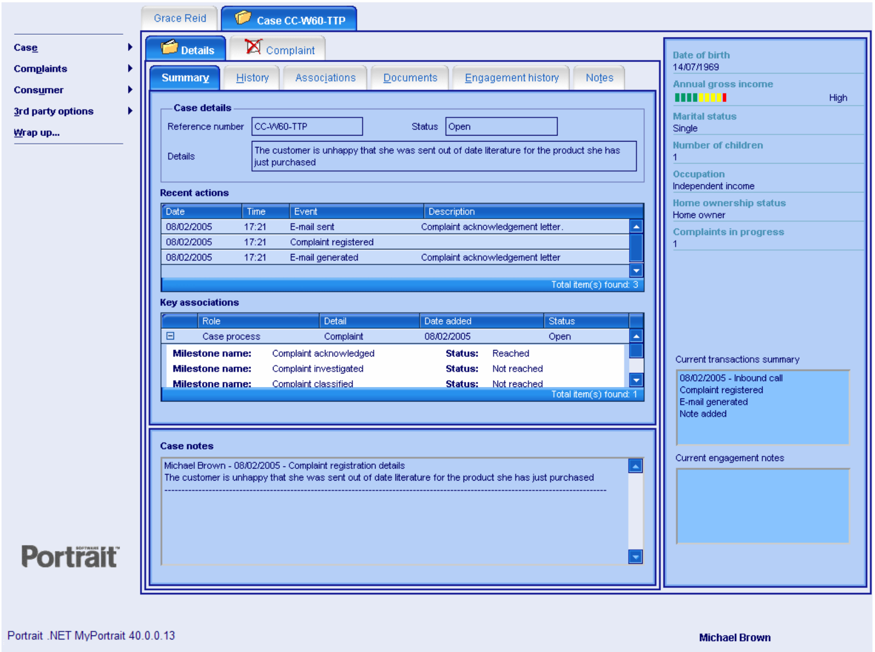


The user can open a case from the **Cases** list. This is done by selecting the case in the list, and selecting the action **Case View** from the **Action menu**. This adds a new tab on the top row of tabs. The tab gives access to the case information pages which are described in the following sections.

2.1.2 Summary

This page is an 'at a glance' summary of the most important information relating to the case. It shows the last milestone reached, the three most recent actions that have been taken with the case and the key associations for the case.

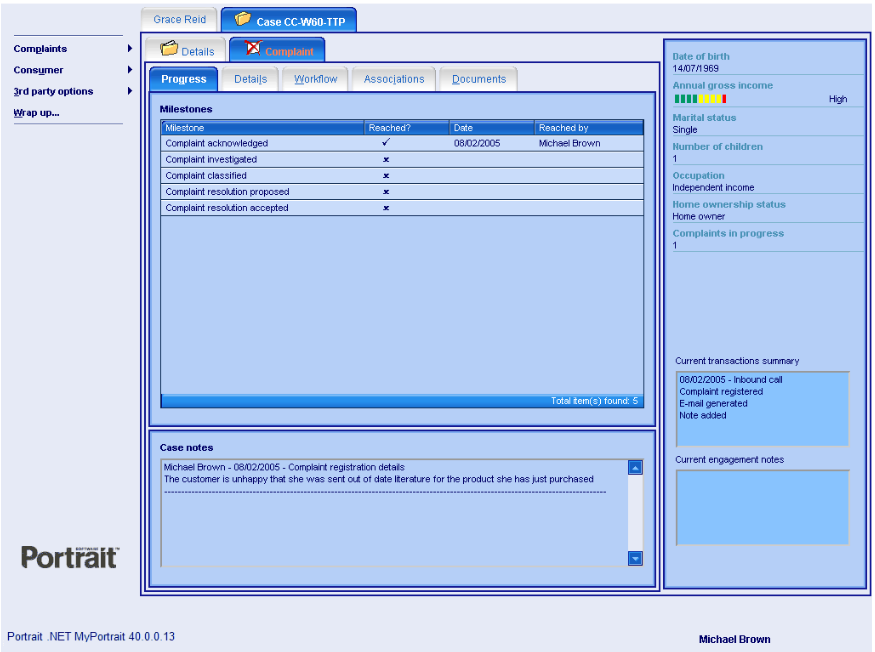
Figure 2 – Case summary



2.1.3 Progress

This page provides a complete list of the milestones for the case and their current status.

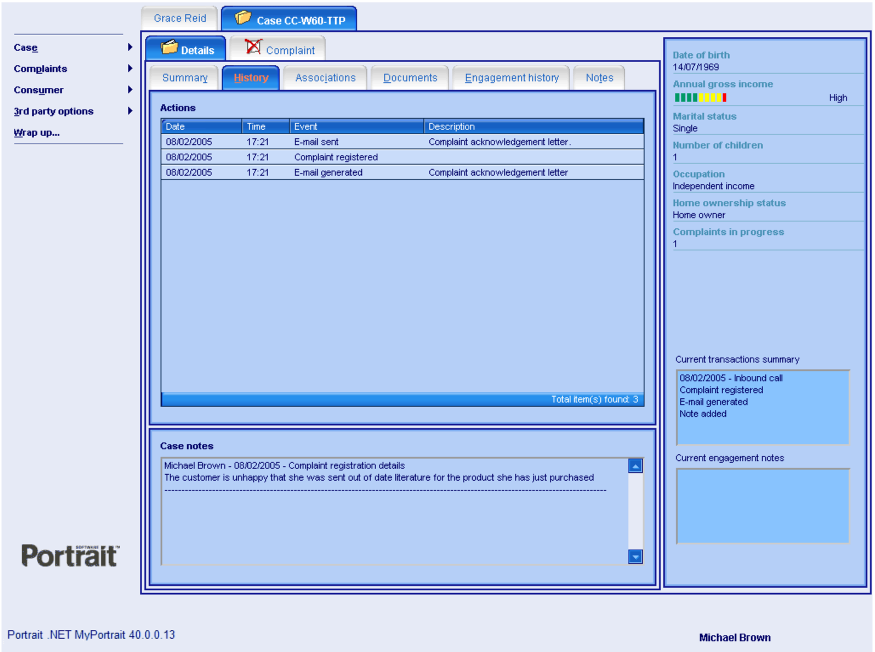
Figure 3 – Progress page



2.1.4 History

This page shows the engagement actions that have been carried out on this case.

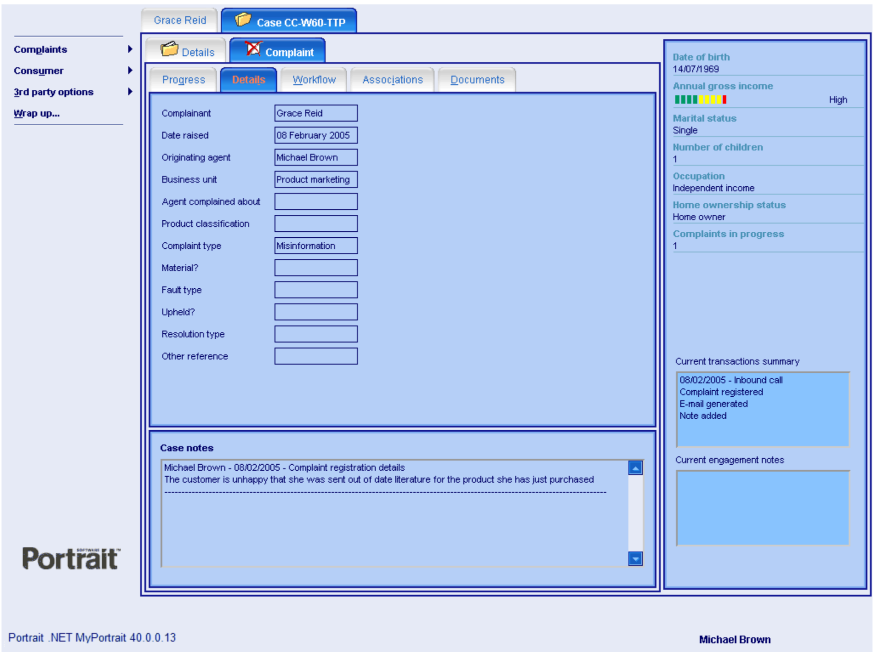
Figure 4 – History page



2.1.5 Details

This page shows further details captured for this particular type of case. For example, for cases dealing with complaints, it shows details relating to the complaint.

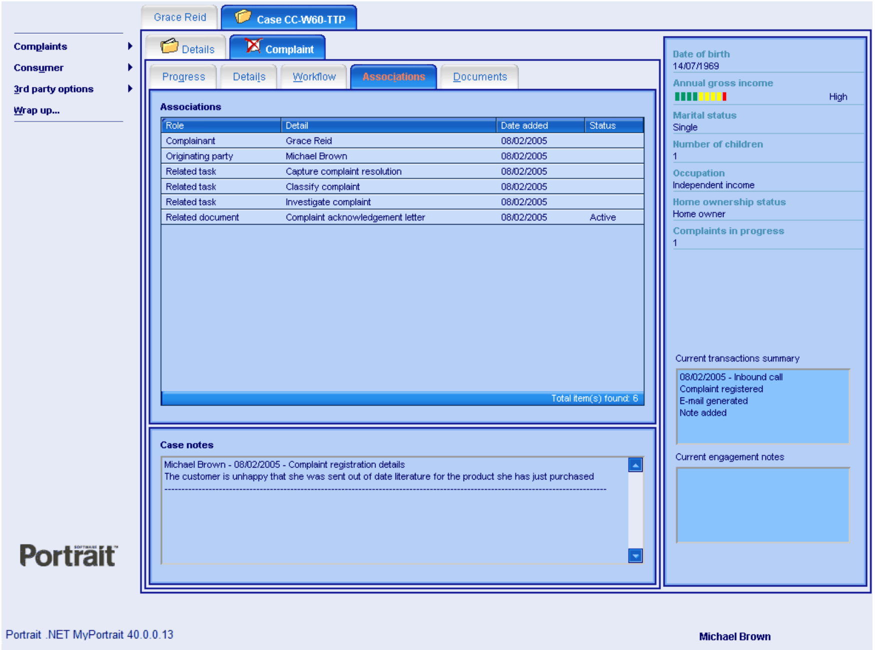
Figure 5 – Details tab



2.1.6 Associations

This page lists the entities that are associated with the case alongside the role in which the play in the case, for example a party may be complainant within a case dealing with complaints. When an association is selected, details of the associated entity are shown.

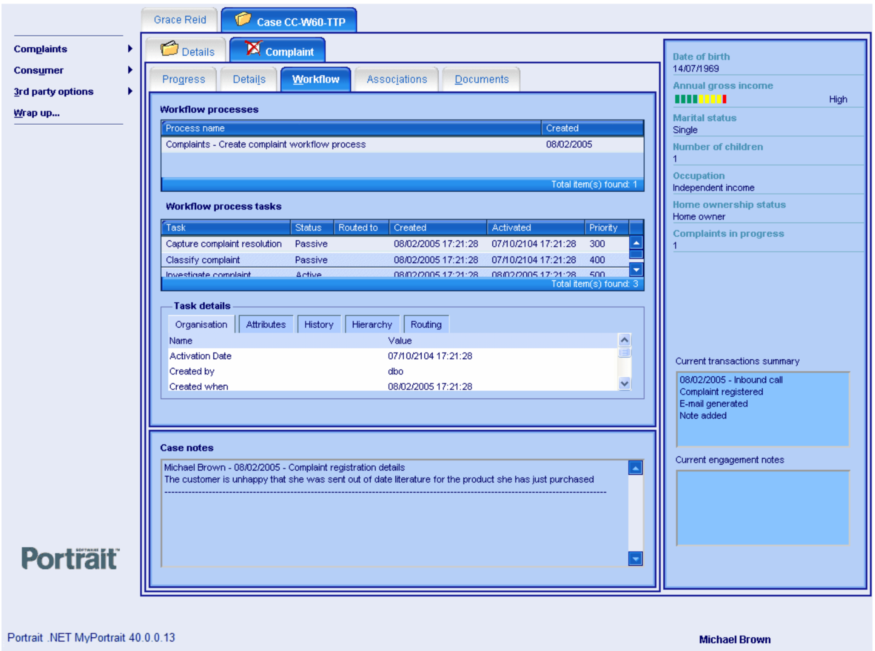
Figure 6 – Associations page



2.1.7 Workflow

This page shows details on any workflow processes that are being used to progress the case, the tasks that reside within each process, plus the task details.

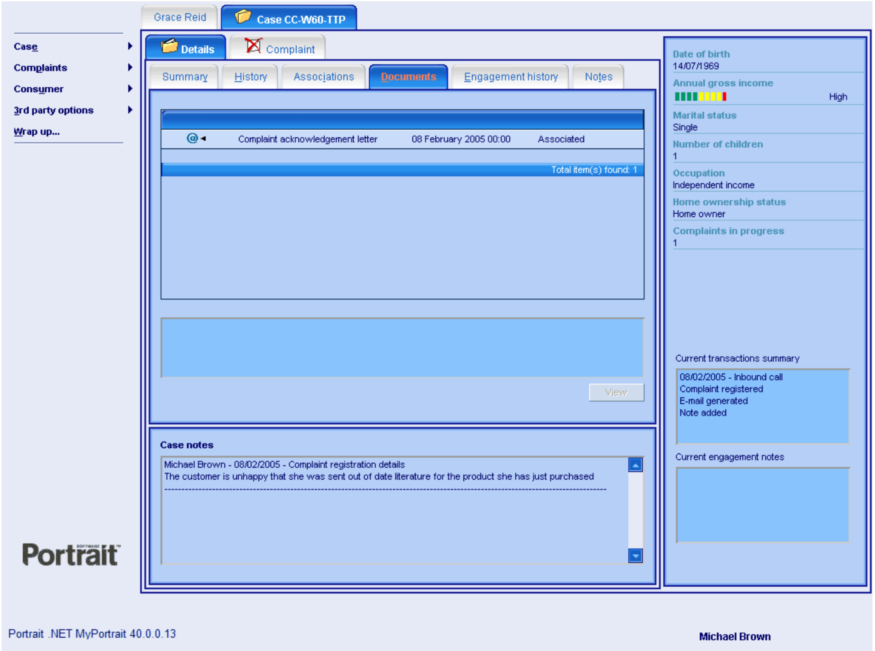
Figure 7 – Workflow page



2.1.8 Documents

This page list all documents or e-mails that are associated with the case. It allows the user to view the selected document.

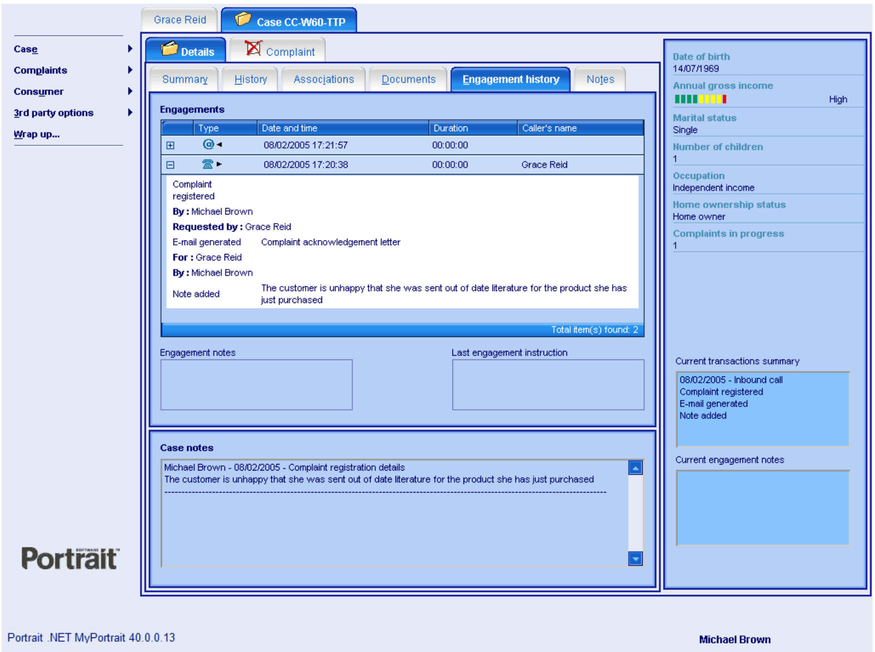
Figure 8 – Documents page



2.1.9 Engagement history

The page shows that portion of the engagement history that has occurred in relation to the case.

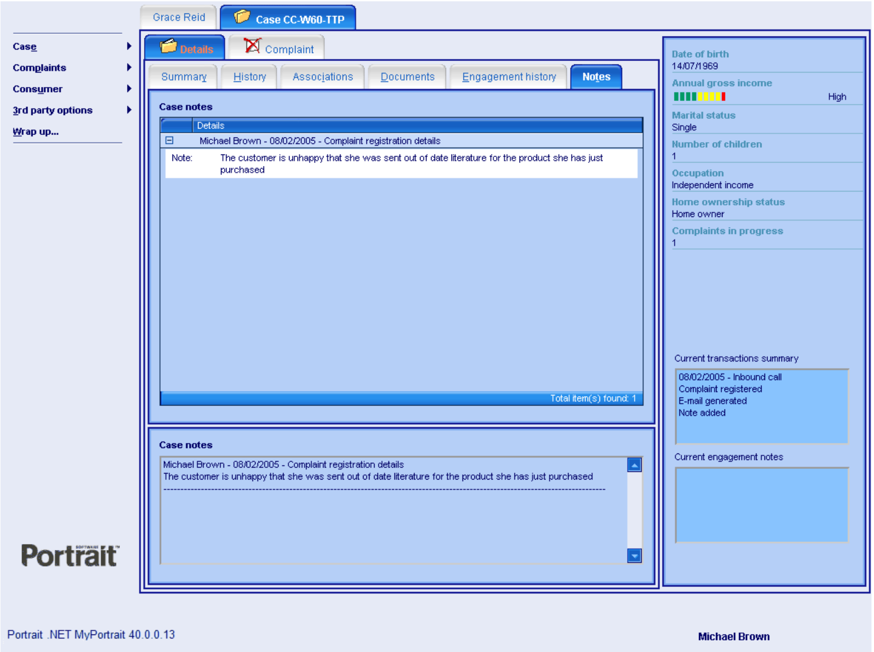
Figure 9 – Engagement history page



2.1.10 Notes

This page shows the notes that have been recorded whilst processing the case.

Figure 10 – Notes page

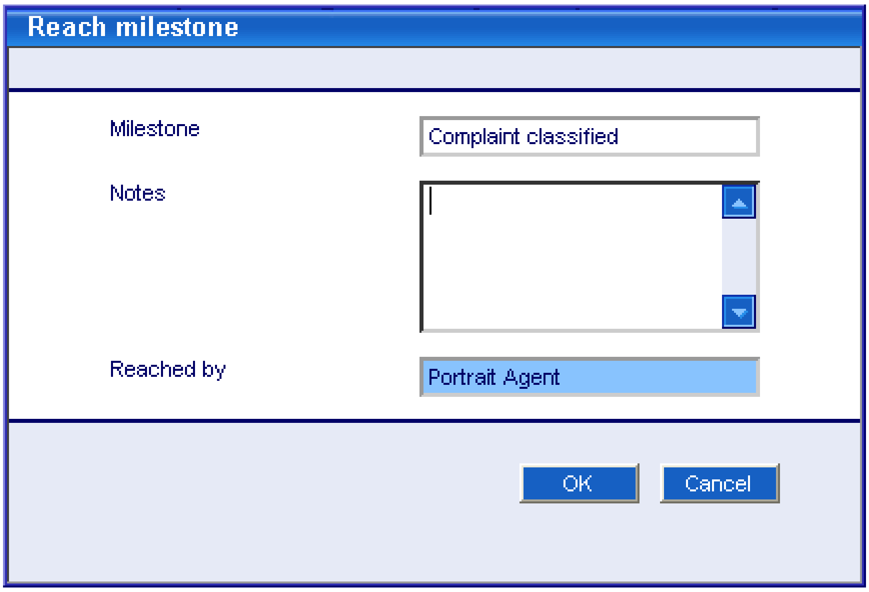


3 Case functions

3.1 Reach milestone

Reach Milestone enables the user to record that a milestone in the case progress has been reached. Normally, completion of milestones is recorded automatically as part of the processing for the case. Reach Milestone provides a manual fall-back for the user to record that a milestone has been reached. This will be used in heavily manual processes, where it is often not appropriate to record milestone completion automatically.

Figure 11 – Reach a milestone



3.2 Re-open case

Figure 12 – Re-open case