

# Customers (CallCenter)

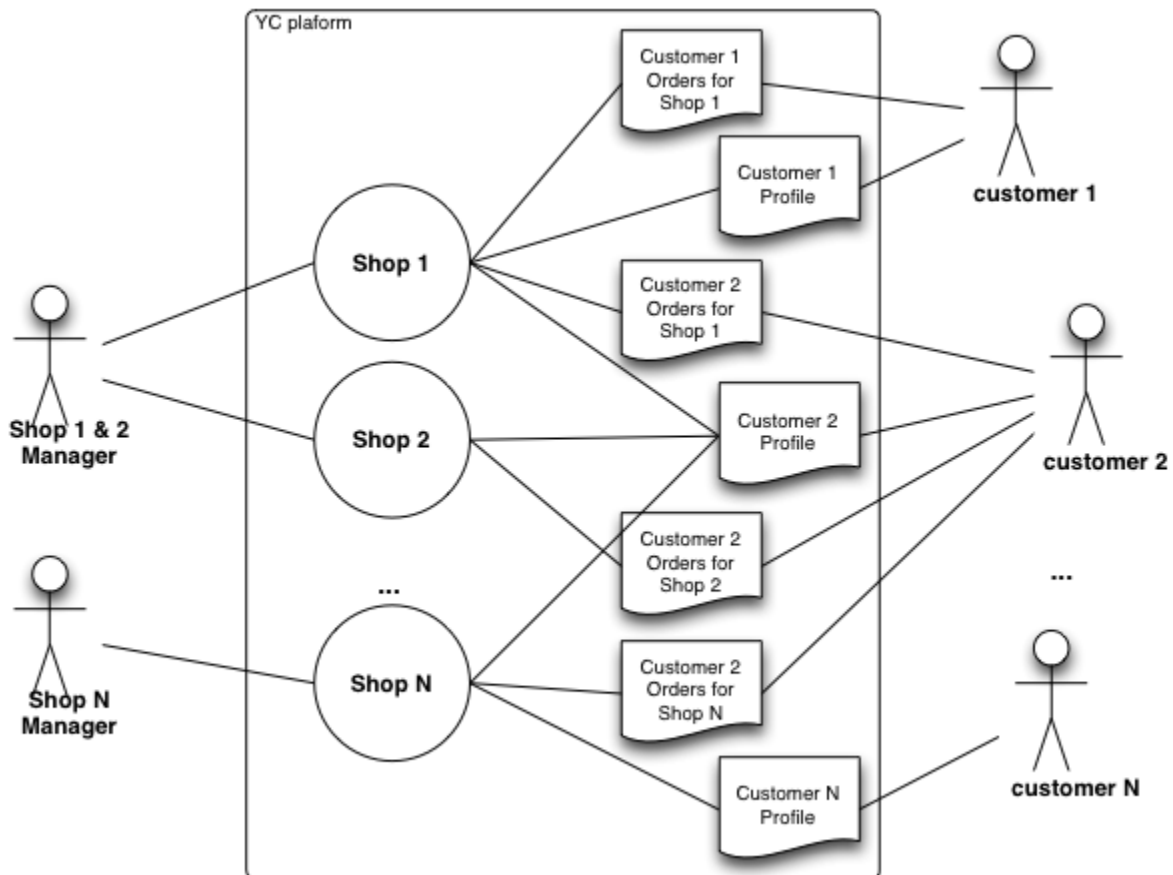
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## Overview

Admin app customer service section provides several tools in order to run a successful e-commerce operation. This section is dedicated to business as usual functions related to customer data management and order fulfilment processes.

Since the platform is designed to support multi store from the foundation up customer management is no different. **Customer accounts** created on a single instance **can be shared between collaborating shops**. However each order has a strong relationship to the shop where it was placed and thus not sharable. Only shop manager of the shop where order was placed can manage it (or master shop owner in case of B2B setup SaaS ). The customer profiles and orders that a call centre operative can see and manage is fully integrated into [data federation framework](#) and is **fully automatic making customer service quick and efficient**.

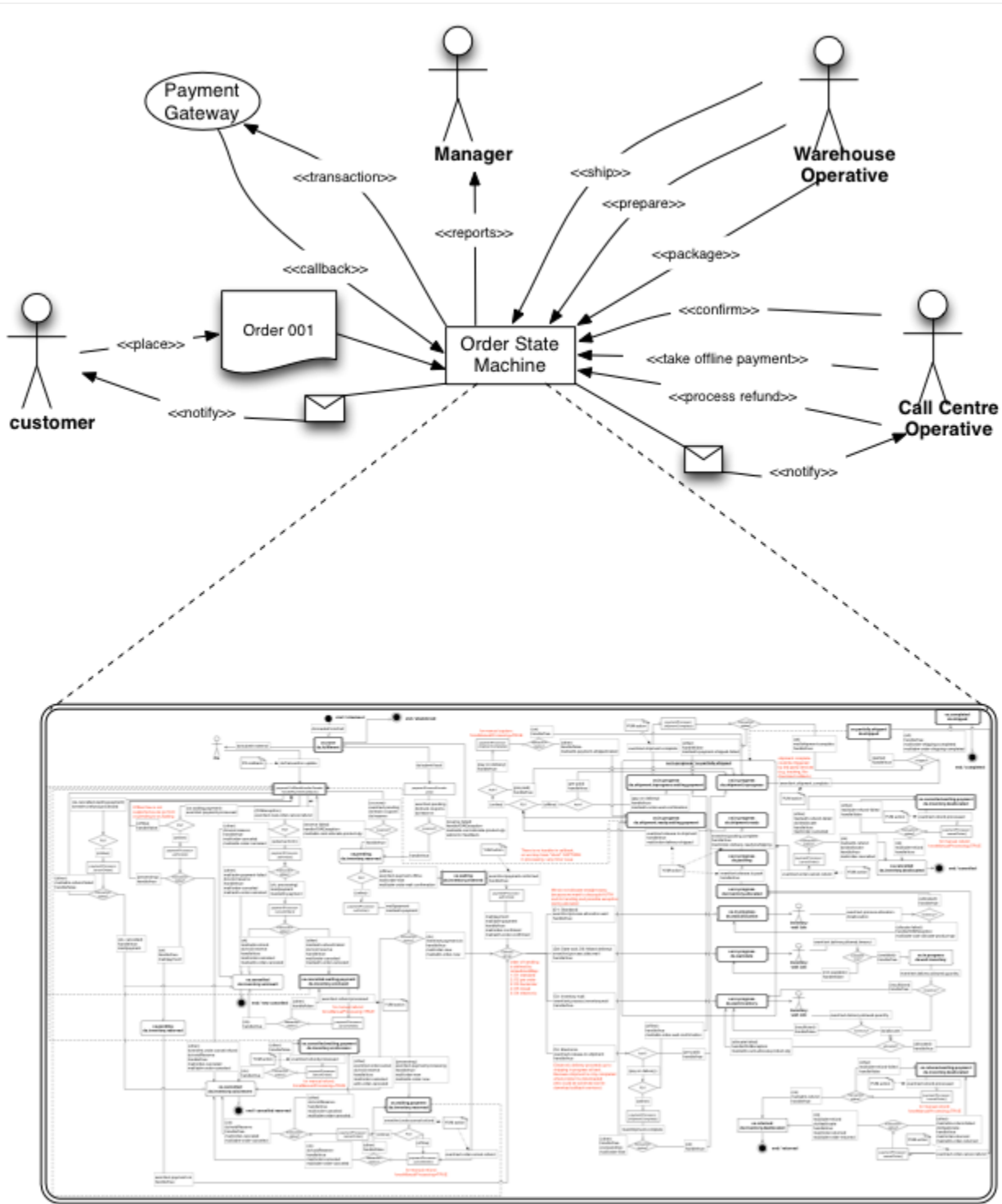
The overall depiction of order and customer data can be viewed in the figure below:



## Orders

[Order management](#) is **fully automatic providing best practice robust order flows** driven by the contents of the order and payment method

used. The platform **order state machine removes all complexity** related to order processing and **provides business users with easy to use interface** that allows to concentrate on business goals such as **confirming order** to notify warehouse to start preparing it, **notify that order is packed and ready**, **take offline payments** when necessary etc.



Here are **some examples of features supported by order state machine**, which are fully controlled via order management:

| Aspect | Supported Features |
|--------|--------------------|
|--------|--------------------|

|               |   |
|---------------|---|
| Deliveries    | <ul style="list-style-type: none"> <li>• <b>Standard deliveries</b> driven by inventory</li> <li>• <b>Back order deliveries</b> for businesses operating on just in time stock strategy</li> <li>• <b>Pre order deliveries</b> to support delayed availability (i.e. not yet released products)</li> <li>• <b>Digital deliveries</b> for downloadable purchases</li> <li>• <b>Automatic order splitting</b> for items with different delivery options</li> </ul>  |
| Inventory     | <ul style="list-style-type: none"> <li>• <b>Automatic reservation</b> to prevent over selling</li> <li>• <b>Automatic allocation</b> on payment confirmation or confirmation by call centre operative</li> <li>• <b>Automatic back order allocation</b> when stock becomes available</li> <li>• <b>Automatic preorder tracking</b> when items are released and stock becomes available</li> <li>• <b>Automatic de-allocation</b> when items are returned or payment fails</li> </ul>  |
| Payments      | <ul style="list-style-type: none"> <li>• <b>Offline payments</b> such as payment in store and payment via external systems such as bank transfers</li> <li>• <b>Online payments</b> via payment cards or other online fund processing systems</li> <li>• Support for both <b>internal card information capture</b> (i.e. card form provided by shop) and <b>external card information capture</b> (i.e. PayPal buttons and other similar payment gateways that redirect to own site)</li> <li>• Support for <b>payment gateway callbacks</b> to provide deterministic transaction state (e.g. when payment confirmation is delayed while fraud checks are performed)</li> <li>• Support for different payment flows: <b>Full prepayment</b>, <b>Payment upon delivery of whole order</b>, <b>Payment per shipment</b> and <b>External payments</b></li> </ul> |
| Notifications | <ul style="list-style-type: none"> <li>• Customer notification for <b>order placement</b>, <b>order shipping</b> and <b>payment confirmation</b></li> <li>• Shop administrator notifications for <b>order placement</b>, <b>allocation</b>, <b>order preparation</b>, <b>packing and shipping</b> and <b>payment failures and confirmations</b></li> <li>• Fulfilment centre notifications for confirmed orders to notify supplier (e.g. B2C reseller flow)</li> </ul>  |

These are **just a few features** that represent the platform order state machine.

Please refer to [order management](#) for detailed description of all functions available.

## Customer data

[Profile management](#) involves managing personal data entered by customers. The platform allows to manage various aspects of this data such as **configuring custom registration forms**, viewing **order history**, viewing **customer address book** and **profile tagging** to support [customer market segmentation for promotion](#).

### Customers

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| Code | Email            | Customer   | Company / Department | Type | Policy | Tags |
|------|------------------|------------|----------------------|------|--------|------|
| 4    | bob.doe@test.com | Mr Bob Doe |                      | B2C  |        |      |

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Please refer to [customer profile management](#) for detailed description of all functions available.

## Reports and Dashboard charts

The platform has a built in mechanism for generating reports. Several basic reports are provided with the core installation. Since reporting is in most cases very business sensitive (i.e. each business operates with its own format for reports and collects its own metrics for these reports) it is up to integrators to create report plug-ins to facilitate those.

## Reports

Inventory report ▾

1 Delivery report

2 Inventory report

▶

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**Fulfilment centre \***  

Main warehouse ▾

**SKU**

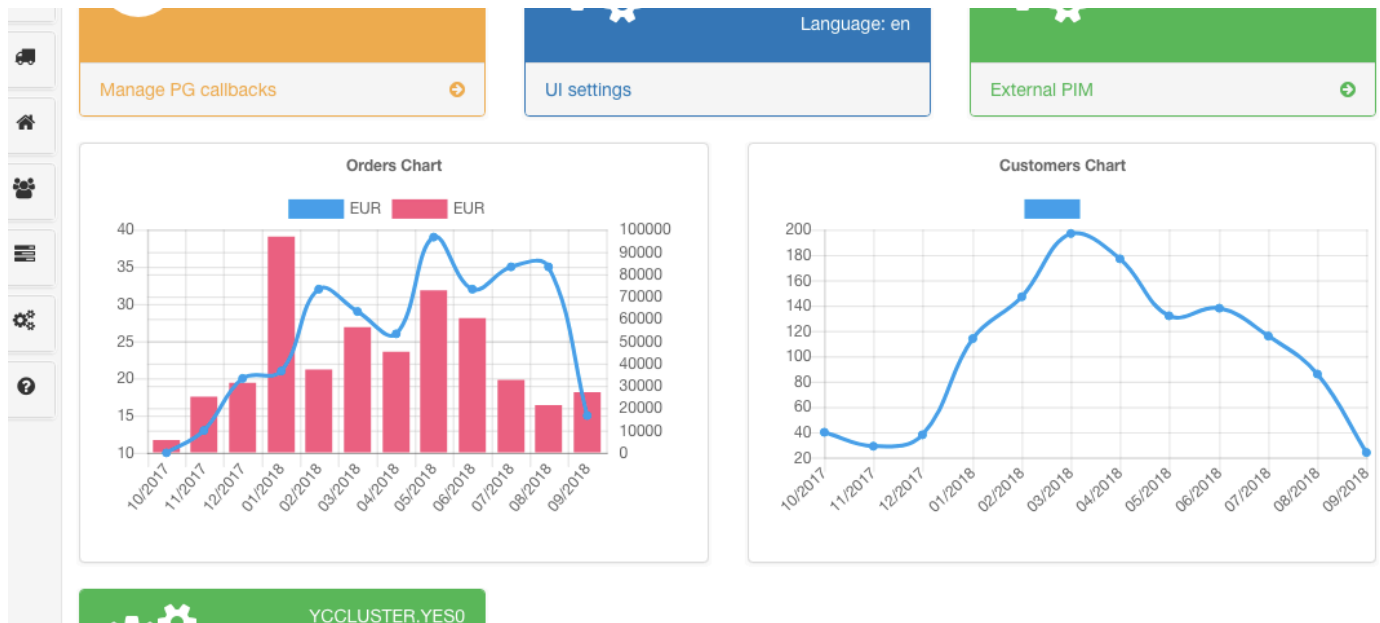
**Report filename**  

reportAvailableStock\_2018-09-11\_160838.pdf 

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Please refer to the [reports section](#) for detailed description of all functions available.

One of the exciting features of SaaS 3.5.0+ are the chart dashboard widgets that allow user to view essential information quickly and efficiently. Widget framework allows to create various chart widgets but two essential ones are provided out of the box: Order and Revenue chart and Customer chart.



## Customer assistance SaaS 3.7.0+

Sometimes call centre staff needs to assist the customers in placing the order or encouraging the sale.

In order to achieve this sales staff can operate in Admin app, however to improve the experience and allow sales staff to see it "through the eyes of customers" they also login into frontend.

In order to allow this feature the shop must have:

- **SHOP\_SF\_LOGIN\_MANAGER** attribute set to true
- All manager accounts that should be allowed to login must have **ROLE\_SMCALLCENTERLOGINSF** role.

More details on what a logged in manager can do can be found in [Customer assistance](#) section.

## Detailed documentation

- [Order management](#) is reliant on [data federation](#) to allow access to managers and is fully integrated with [import/export](#) and [inventory](#) management API to provide automatic fulfilment flow via **order state machine**
- [Customer assistance](#) SaaS details a number of facilities available to the manager to aid and support the ordering and fulfilment process.
- [Customer profile](#) management allows to fully configure registration and profile forms as well as gain essential insights into customer data to enable unparalleled customer support experience
- [Reporting and dashboard widgets](#) are great way to stay on top of the the business as usual activities, with further support of custom [import/export](#) extracts to access additional data for statistical analysis