

In This Chapter

About the Service Center

Templates

Customize

A Process

KnowledgeBase

About the Service Center

First and foremost, let me make it perfectly clear that the Service Center module in GoldMine Premium is no Heat equivalent. The Service Center was added to the GoldMine Premium product, in my opinion, to have a new feature for the marketing team to utilize in their push to get everyone to upgrade to GoldMine Premium before FrontRange discontinues the rest of the GoldMine product line. As we all know, GoldMine 6.7 and prior have already been formally discontinued, and as you may or may not know, so too has the GoldMine 7 new license sales. As of this writing, FrontRange is still permitting upgrade sales to GoldMine 7, however, this writer expects even that to cease soon.

Additionally, FrontRange is attempting to pull the GoldMine main focus away from Sales by giving it a feature that is not at all Sales related. The Service Center does make GoldMine more of a corporate CRM solution, then strictly a Sales CRM solution as people had tended to pigeon hole the GoldMine product in days of yore.

So let's take a look at what FrontRange is saying about the Service Center. From the GoldMine Premium Help file:

Case management functionality in GoldMine® Premium Edition provides customer service agents the ability to capture service requests, then filter and access the details of each case. The customer service center enables your entire service division to pursue, arrange and filter all service requests and optimize work flow throughout the day.

GoldMine Premium Edition case management features allow your service professionals to assign, escalate and resolve customer service requests quickly and efficiently. Quickly access customer service issues, route them to the service agent who can best solve the problem, and keep clients informed of their service request progress, all within your customized GoldMine environment.

Your GoldMine users can now accept incoming customer service requests from multiple sources, be alerted to upcoming and urgent cases, and get details for any open or closed service request. Individual agents and customer service managers can filter their daily case activities, improving work efficiency and enabling optimal customer care.

The **Service Center**, which we just learned is also frequently referred to as **Case Management** functionality, can be accessed easily from the Outlook style toolbar to the lower left of the GoldMine Premium main screen. Simply click upon the **Service** button. As always, you could access the Service Center from the GoldMine menu:

[GoTo
Service Center](#)

Figure 17-2, next page, shows you the result of either action, the **Service Center** dialog form. This dialog form, and the Service module in total, utilizes the **Cases** tables that I had previously discussed in **The Tables** chapter of this book. You may want to familiarize yourself with that chapter, and those tables, again before continuing on with this chapter.

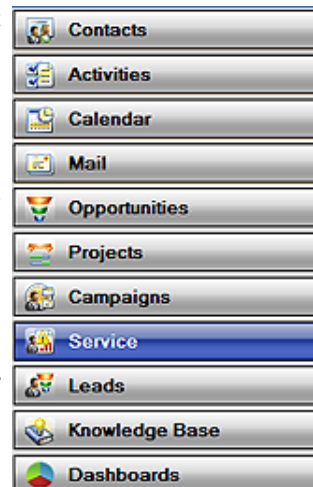


Figure 17-1

Note

Unlike previous editions of GoldMine Premium, the **Customize** button is no longer hidden and exposed with a Case creation. Although I have squeezed the image to fit the page, I think that you see part of the **Customize** button to the far right in Figure 17-2 along the button bar.

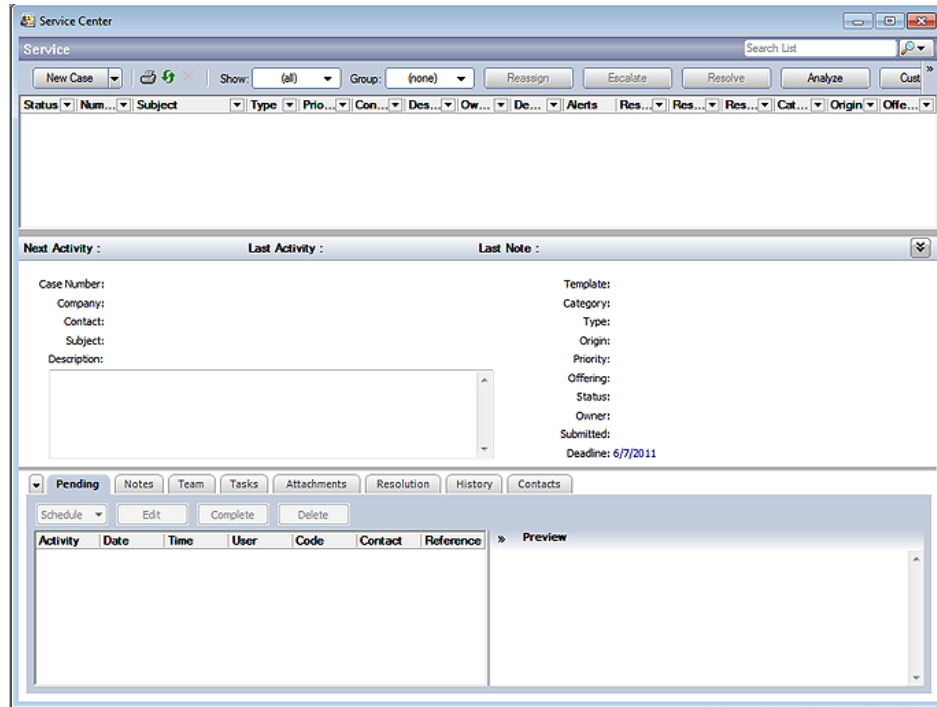


Figure 17-2

Templates

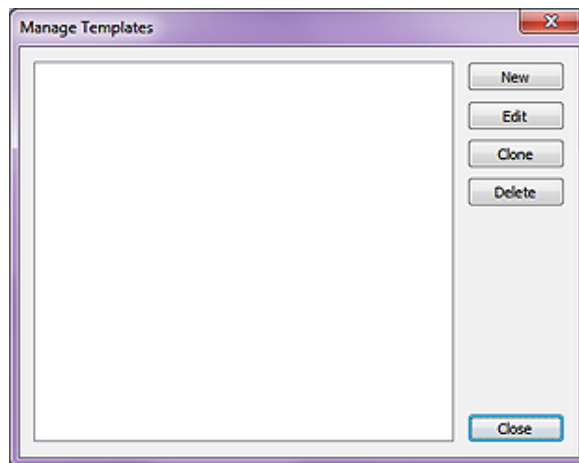


Figure 17-3

Why don't we begin by creating a template. Simply right-click anywhere in the top grid area of the **Service Center** to bring up the Local Menu, and select **Manage Templates** from there. This brings up the **Manage Templates** dialog form as shown here in Figure 17-3.

You will notice that we have the standard buttons of **New, Edit, Clone, Delete & Close**, and not a one of them has a hot key associated with it. I am only interested in the **New** button for this writing as the other actions are, by now, clearly understood by you or at least they should be. However, clicking on the **New** button will produce the dialog form known as **Edit Template**, and is displayed for you below in Figure 17-4.

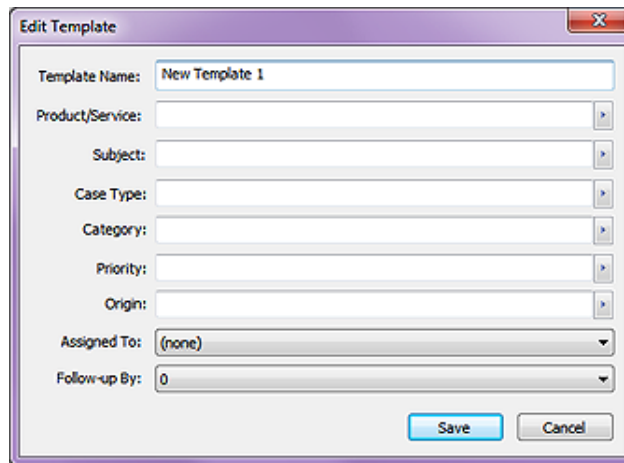


Figure 17-4

Let's briefly talk about what templates you may or may not be wanting to use, and why you may need them. Templates are just that, a starting point for your **Case** record creation. So, do you provide service for one product, or one company where you will probably only need one template? No, most likely not. Most companies will provide service for more than one product and/or more than one company, hence, they will probably have a need for more than one template. You should

pre plan your templates with the information that I am about to give you such that when you get to this point in your customization you will be able to create your first run of templates.

Tip

Should you decide not to utilize one or two of the fields, then I would suggest that you enter a value of **Do Not Use** into the template for that field.

You see, the field will be displayed when the **Case** is displayed. If you give any user an empty field, they will enter something into it, relevant or not, corporate standard or not.

Note

As of this writing, the **Product/Service** field will allow you to enter an unlimited number of characters, however, when you **Save** the template, only **20** of your characters will be saved as part of this template.

Note

As the **Product/Service:** utilizes the same F2 Lookup List of your **Forecast Sales Products**, your Support Team could utilize this one template for any item in your **Forecast Sales Product** F2 Lookup List.

Populate that list carefully, and it'll be useful in many locations within GoldMine Premium.

For this example, I am only going to create one template, however, I am going to create it as if I were going to be supplying service for multiple GoldMine products. Hence, the first template will be for service for the GoldMine Premium product. Can you figure out what the **Template Name:** will be? Yes, that's right, **GoldMine Premium Issue Ticket**, and as the prefilled in **Template Name: New Template 1** should indicate to you, this is a required field. Hence, if you don't enter a **Template Name:** the default **New Template x** will be entered for you.

In the next field of our template, **Product/Service:**, we will want to enter the product and/or service name for which we will be supplying service support. In this case, I have chosen **GoldMine Premium Edition**. You should notice that the F2 Lookup List for this value is the same list that is used in your **Forecast Sales Products** list. In the **Subject:**, I you are following along, I have chosen to enter **GoldMine Premium Issue**.

Now we come to the **Case Type:** value which also has an F2 Lookup List. I suggest that you think about this, and create your F2 Lookup List at this point. I further suggest that you select from the list, a value be used here. This same suggestion will hold true for any of the other fields that have an F2 Lookup List. So what might a **Case Type:** be? I'm not really sure as I always get this confused and intermingled with the **Category:** field value. Therefore, I'm going to talk about them as if they were one and the same, and it will be up to you to decide as to how you, specifically, wish to use them.

To me, I might consider a **Case Type:** to be **Sales, Support**, etc. Of course, I might think the same thing of the **Category:** field. Maybe we should consider using the **Category** field as a placeholder for the **Billable** versus **Non Billable** service. Yes, I'm kind of liking that option so that is what I'm going to enter. For my template value for my **Case Type:**, I am going to enter **Support**, and for the template value for the **Category:**, I'm going to enter **Billable** while putting **Billable** and **Non Billable** on the F2 Lookup List. You can work this around whatever best fits your corporate needs. The best way to determine what has to go in to the fields will be to determine first, what you want out of the Service Center information in your reports, and/or your SQL queries. Always use the output as a guideline for your input.

The next field of our Template will be the **Priority:** field. Again, I suggest that you create and utilize your F2 Lookup List. In this list individuals tend to use word association for priorities. Some examples of this might be:

Cold	Bronze	Red
Warm	Gold	Yellow
Hot	Platinum	Green

Anything that works for your organization is great. For my template I'm setting my **Priority:** field to **Green**.

And now we come to the **Origin:** field of our template. I have set my F2 Lookup list to **E-mail, Postal, Telephone, WebImport & Word of Mouth**, and I have selected **Telephone** as the default value for this template.

The next field that we can populate for our template is the **Assigned To:** field. For this field I will usually leave the default value of **(none)**, and this way the **Owner** is automatically assigned the creators **UserID**.

Finally, we encounter the **Follow-up By:** field of our template, and this is nothing but a drop list of days which are automatically applied to the origination date for the default **Deadline:** date of the issue. I have chosen seven days by the way. So our final **Edit Template** dialog form would be as shown here in Figure 17-5. Let's click on the **Save** button to save this as our template. You could create more templates at this time, however, for this exercise I am going to proceed right on to the customizations so go ahead and close down the **Manage Templates** dialog form by clicking on the **Close** button.

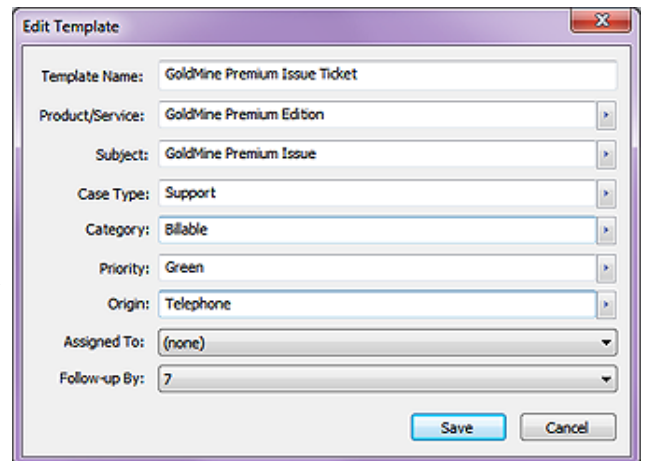


Figure 17-5

Customize

Note

My company, Computerese Inc, does Support for many other GoldMine Dealers Clients on their behalf. To differentiate these different support tasks, we frequently will change this mask so that the **Case Number Suffix** will reflect the organization to whom the **Case** belongs.

Changing the **Suffix** mid-stream will not affect previously created **Case Numbers**.

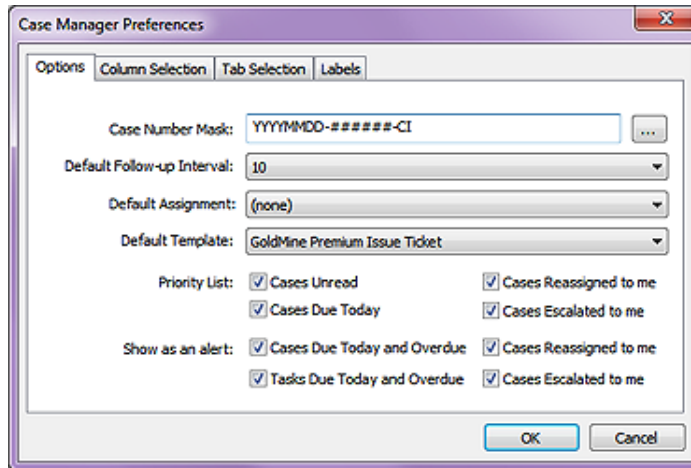


Figure 17-6a

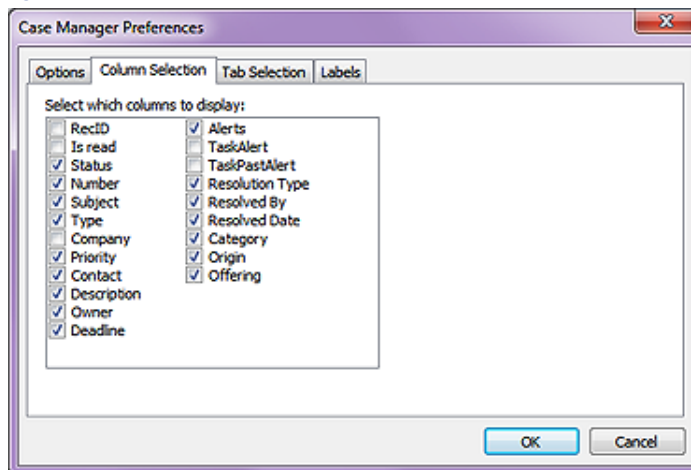


Figure 17-6b

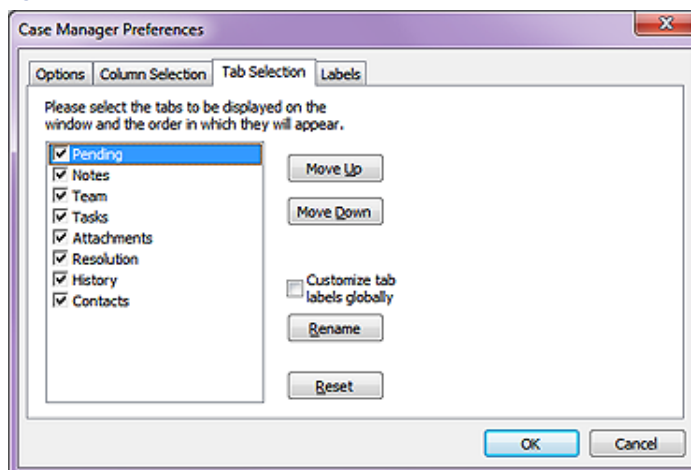


Figure 17-6c

Why don't you next click on the **Customize** button to produce the dialog forms similar to those shown here and on the next page in Figures 17-6a, 6b, 6c & 6d.

I have already done some minor customization under my **Options** tab, hence, these figures may not appear exactly the same as yours will appear. For instance, the **Case Number Mask**: is a derived number mask. Click on the ellipses button to the right of this field to produce the **Set Case Number Mask** dialog form as shown in Figure 17-7 on the next page. This dialog form has a finite set of possible solutions so it is customizable within those constraints.

From the **Set Case Number Mask** dialog form, you can derive a case number mask that you wish to utilize within your company. The **Preview**: field is a non-editable field that will display your mask real-time as you change the **Settings** in the frame below the **Preview**: display.

So let's look and see how that mask is derived by taking a look at the **Settings** frame in Figure 17-7 or on your system. The first field that we encounter is the **Prefix**: field, and even though it says that it is the prefix, it is not if one checks the first **Use Timestamp** option. You will notice that I have left this field empty, but the choice is yours. Notice

to the right of this field that there is an option selection to **Use Timestamp**. Should you choose this, a timestamp in the designated format, will be utilized as the prefix in lieu of any value that you may have entered into the **Prefix**: field, and not in addition to your entered value. Watch the **Preview**: area to see the results of each action as you tab out of each field.

The next field that we have is the first of two **Separator**: fields from which you may only select predefined values to separate the prefix from the identity. As you can see I have selected to use the hyphen (-) as the first separator.

As my **Identity Seed**:, I have chosen to accept the default number of **100**. This is a counter value, and this seed is the value at which the counter will begin its incrementing. I don't expect to have

more than 999,999 cases in my organization, hence, I have set the accompanying **Identity Format**: to the number **6**. Most organizations will probably want to boost the number to a much higher value, but that is a corporate decision that will have to be made at the time of the customization. You can always change this mask property at a later date.

For my **Suffix**: field, I have decided to use **CI** (Computerese Inc) along with the hyphen (-) **Separator**: which is used to separate the **Identity** from the **Suffix** this time.

I liked this mask as displayed in the **Preview**: field, and so I simply click on the **OK** button to accept this mask.

I'm sorry to have you shuffle back and forth like this, but let's finish our discussion of the customizations as depicted in Figure 17-6a on the previous page. The next property is the **Default Follow-up Interval**: in days. This, again, is a drop list, and you may only select a value from the predefined list. In my example, I arbitrarily chose **10** days.

The **Default Assignment**:, as shown in my example, is set to (**none**). I decided to select (**none**) so that a newly created **Case** will be assigned to the creator of said **Case**.

You can see that I selected my previously created **GoldMine Premium Issue Ticket** as my **Default Template**:. Hence, the logic behind my creating the template prior to configuring my customizations. See, sometimes I know what I'm doing.

And, lastly, we have a bunch of checkbox options that are all selected in the default state of the **Options** tab of the **Case Manager Preferences** dialog form. I list them here for you, and hope that they are self-explanatory:

Note

So you're thinking as the Administrator, that you are customizing the Service Center for everyone. Well, yes you are, but your customizations may not be maintained. You see, everyone that has access to the Service Center also has access to the Customize button, even those without Master rights.

- | | | |
|--------------------------|---|--|
| Priority List: | <input checked="" type="checkbox"/> Cases Unread | <input checked="" type="checkbox"/> Cases Reassigned to me |
| | <input checked="" type="checkbox"/> Cases Due Today | <input checked="" type="checkbox"/> Cases Escalated to me |
| Show as an alert: | <input checked="" type="checkbox"/> Cases Due Today and Overdue | <input checked="" type="checkbox"/> Cases Reassigned to me |
| | <input checked="" type="checkbox"/> Tasks Due Today and Overdue | <input checked="" type="checkbox"/> Cases Escalated to me |

In Figure 17-6b on the previous page, you can see that you may select those columns that you want to appear when you display a list of Cases in the Service Center. Remember my rule of not trying to put 50 pounds of manure into that 5 pound bag. You choose the columns on the **Column Selection** tab to display, but your screen size, and GoldMine layout determine the number and size of usable columns that you can display. Since everyone using GoldMine may have a different screen size, hence resolution, you may want to keep this to a minimal number of essential columns.

Figure 17-6c on the previous page, represents the **Tab Selection** tan, and is where you determine the tabs that would be available in the Service Center when your user is in the record display mode. I don't understand why you would not display all of the tabs, but that is strictly your decision. Perhaps, for instance, that you don't have any Competitors, hence, you may not.

Figure 17-6d above, represents the **Label** tab, and, as the text states: "*GoldMine allows you to change the labels for the fields used in the Cases properties dialog box.*". To change a label, double-click under the **Label Column** in the row for the **Default Label** that you wish to change, and then enter your desired label.

Go ahead. Make your customizations, and save them.

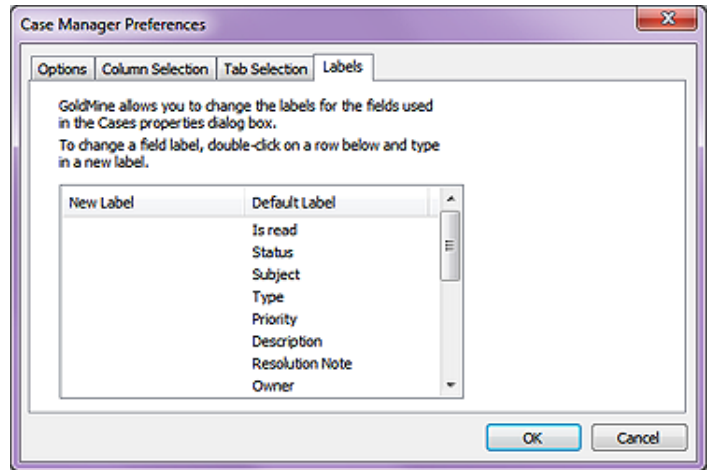


Figure 17-6d

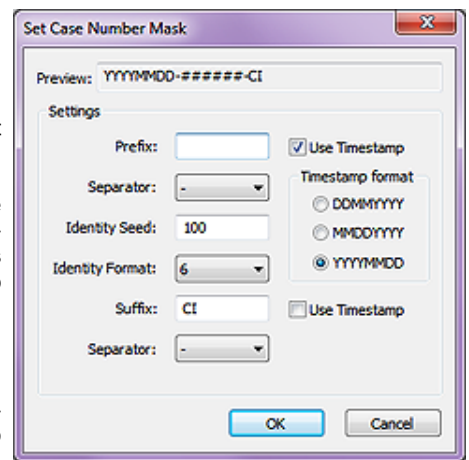


Figure 17-7

A Process

WARNING

As of this writing, GoldMine Premium 9.0.2.36, one doesn't appear to be able to create cases for **Additional Contacts** in GoldMine Premium unless you first convert the **Additional Contact** to a full GoldMine Contact record which supports my philosophy of one record per Contact linked via the **Relationship Tree**.

Note

In the default GoldMine configuration, the Service Center highlighted record does not sync the Contact record. When in the list mode of the Service Center, you may want to have your individuals right-click in the list area, and select **Sync to Contact** from the local menu.

Note

Although the **Description:** field is a Memo type field, it is not capable of Rich Text or HTML formatting, hence, an SOP for textual formatting using indents and headers will have to suffice.

Recommendation

It has always been my recommendation that a limited number of individuals, who are adequately trained in your SOP's, be allowed to enter new information into your **Knowledge Base**. It is important that the information contained in the Knowledge Base is accurate, and entered in a consistent and organized manner.

The better your Knowledge Base, the better your **First Level Support** staff. That is a true enough axiom.

Okay, we don't need that Case any more. You may right-click on it, and select **Delete** from the local menu. So now, are we ready to begin with your first real Case? Absolutely, let's go for it. For practice, put yourself in the position of a Support Representative, and I'll do the same. We'll walk through a process together. This is not the process, but it is a process that you may or may not wish to use in your organization.

A telephone call comes in to your support line:

Step 01: Click on the **New Case** button, and, while doing that, find out who is on the telephone as the **Contact Search Center** has just popped up for you to enter the information.

Step 02: Locate the record for this contact in the **Contact Search Center**. If you are unable to locate the Contact, then try via Company, or Telephone, or any other of the many ways of relating a record to a Case. A New Case is created for you utilizing the previous customizations.

Step 03: If you work for me that is, you immediately go out of the Service Center, and over to that Contacts record. In my organization, you would first need to validate that this Contact had sufficient Support Time on account to allow you to proceed with support or to collect funds if there was a negative account balance.

Step 04: If they do not have Support Time remaining on their Contract, and they do not want to replenish their account, then you politely explain the situation, hang up the telephone, and **Resolve** the Case. For this exercise, however, we will assume that this Contact had sufficient Support Time to proceed with the incident.

Step 05: Validate and change, if necessary, all Case information displayed. Specifically, make sure that you acquire a complete **Description:** of the issue. It is important that your organization establish **Standard Operating Procedures (SOPs)** for Technical Support. For instance: If the caller has received an error message try to get the error message exactly as it is displayed on their screen, and place this information into the **Description:** field. You see, this will assist you when you attempt to **Resolve** the issue.

Step 06: Although I won't go into each tab specifically, during the entire support process it is important to take copious notes, and the technician should use the resources available when working on a Case. For instance: you may have noticed the **Pending, Notes, Team, Tasks, Attachments, Resolution, History & Contacts** tabs (not necessarily in that order). Use them. If you must research something, or have something researched for you, **Schedule an Activity** or a **Task**. If you require assistance to get to the resolution, then add to your **Team**. If you are sending the Case caller any documents, then **Attach** them. I can't emphasize enough how important it is to have historical information in the Support Center when it comes to working with future Cases.

Step 07: Click on the **Resolution** tab, and then click on **Search Knowledge Base** button to search for an immediate solution. This is why it is important, if an error message is thrown, that you capture that information. It is certainly more precise to search for **Error 104**, for instance, than **GoldMine not working**. If you don't find a resolution in your **Knowledge Base**, then you would probably want to click the **Add Note** button on this tab to add a comment as to what you have done so far.

Step 08a: If you have Resolved the issue to the callers satisfaction through the use of the Knowledge Base, then you would want to click on the **Resolve** button which will bring up the

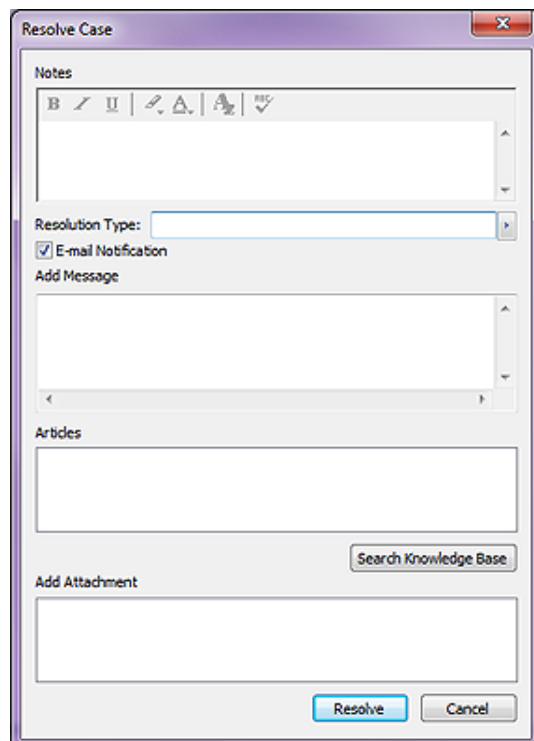


Figure 17-8

Resolve Case dialog form as shown in Figure 17-8 on the previous page. You will notice many fields that must be completed, and it is important that you have a **Standard Operating Procedure** established for the use of this dialog form, and that your Service individuals have been fully educated in your Corporate **Standard Operating Procedures**. Having this **SOP**, with regards to the resolution, will assist the GoldMine Administrator, yes you, in your building of the Knowledge Base. The better your Knowledge Base, the more effective your First Level Support team will be.

So here is how I envision using this dialog form. The **Notes** that you enter here will be displayed under the **Resolution** tab in the **Notes** area of that tab.

The **Resolution Type**: is an F2 Lookup List that is, by default empty, so FrontRange has really not given us any clue as to the purpose of this field value. When you enter a value into this field, and resolve the case, the value is stored in the **Cases.Resolution_Type** field. Yet, I can find no hint of this value associated with the case in the Service Center. Possibly this information is being stored for later Reports or SQL Queries. The 3 options that I have in my F2 Lookup List for the **Resolution Type**: field are:

- Abandoned
- Client Hung Up
- Resolved

Next, in this dialog form, we have a simple checkbox option, **E-mail Notification**. This option is selected by default, and it's probably an option that you would not want to unselect. This will automatically create an E-mail message for the contact with information about the resolution if the related Contact has an E-mail Address. **Standard Operating Procedures** again should be to capture the proper information before beginning the interview.

In the next memo field, **Add Message**, you are permitted to put information here to be included in the body of the E-mail message that is being sent to the caller. This could be hand typed information or it could be information that you have gathered by cutting and pasting from your Knowledge Base. Whatever this information is, it will be brought over to the body of the E-mail message as Plain Text.

Next, we have what appears to be a memo field, however, you may not type into the **Articles** area. You may search your Knowledge Base, and the title of any article that you select from the Knowledge Base will be entered into this field. This information will not, repeat not, be placed into the E-mail message. Instead, upon resolution, this item will go into the **Notes** section of the **Resolution** tab with a hotlink to the selected document in the Knowledge Base which, as you will see, is totally different than the next section.

In the **Add Attachment** area of this dialog form, if you have any attachments attached to this Case under the **Attachments** tab, all of these attachments will be displayed as unselected checkbox items. In the **Add Attachment** area, you may check those attachments that you wish to have attached to the callers E-mail message, and, upon resolution and creation of the E-mail message, you will see the selected attachments attached to the E-mail. This is quite a different action from the previous section wouldn't you say.

At this point you would simply click on the **Resolve** button to accept the resolution, and to send the E-mail if so selected.

Step 08b: The alternative to the **Resolve** is that the first level technician cannot resolve the issue. As an alternative to resolving the issue the first level technician may **Reassign**, **Escalate** or even **Abandon** this support call. For this step, we will assume that this first level technician cannot resolve the issue, and instead of escalating it at this time, that they wish to send it to another first level technician for their analysis. In this case they would select the **Reassign** button which will produce a dialog form similar to that shown here in Figure 17-9.

You will notice that the **Case List** has automatically been populated with the case number that is being reassigned.

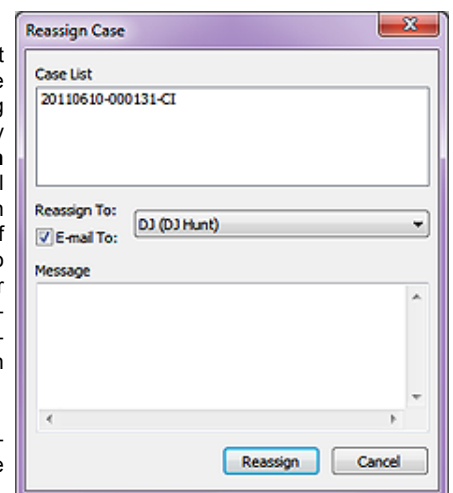


Figure 17-9

Note

*When using GoldMines Internal E-mail, you would be wise to have your users turn on the alarms for messages. As stated in Chapter 3, this feature only works for GoldMine Internal Messages. Alternatively, you could do a **GM.ini** override to cover everybody on the network.*

[GMAIarm]
 OnByDefault=ACTSOMDL

Note

*With respect to User Friendliness, I would have expected all of the **Resolution** tab items to be clustered (framed) together, and all that pertained to the E-mail message to be clustered (framed) together separately.*

Note

As a matter of protocol, I would tend to pass the Case through two first level support technicians before I would consider escalating this to the next level of technicians. This, however, is solely dependent upon your technician structure.

The **Reassign To:** option is a drop list from which you may select a GoldMine **UserID**. Additionally, and by default selected, you have the **E-mail To:**. This will send a E-mail message to the user selected as defined by the Administrator in their **User Settings**. To reassign a case without notifying the person to whom you are a reassigning this case would be an unconscionable act. Hence, you may want to include a small Plain Text **Message** in the body of your E-mail. At this point you would simply click on the **Reassign** button, and wipe your hands of the responsibility for this Case.

Step 08c: As was previously stated, you always have the alternative option of Escalating this Case to the next level of technicians. There is no difference between the **Reassign Case** dialog form, as shown in Figure 17-9, and the **Escalate Case** dialog form other than the title. Hence, I will not repeat the item by item explanation which is stated above.

Step 08d: At any point in the Case process, it is always possible to **Abandon** the Case. Possibly, the caller has to leave for a meeting after having waited on the telephone for a support technician already for an hour, and they say to "Forget It". Simple enough, you **Abandon** the Case by right-clicking on the Case in question, and selecting **Abandon Case** from the Local Menu. Then complete the **Abandon Case** dialog form as shown her in Figure 17-10.

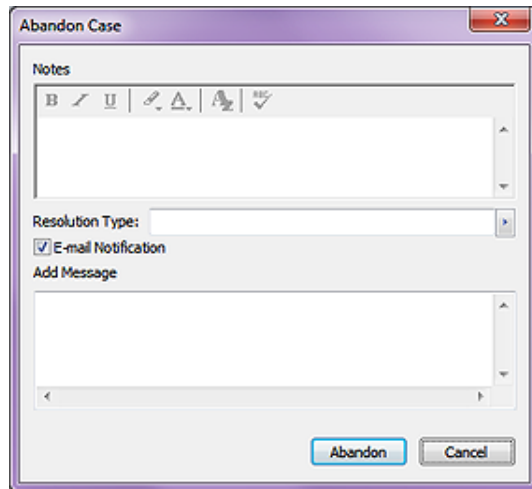


Figure 17-10

This means that you will need to enter some **Notes** as to what happened while you were responsible for this

Case. As well, you will need to select or type in a **Resolution Type:** which may be nothing more than **Abandoned**. I always recommend that you set up your F2 Lookup List, and Force a valid input from that list. Remember the old **Garbage In/Garbage Out (GIGO)** principle. Don't let that happen to your database information.

And, lastly, we have the **E-mail Notification** to the Case Contact. Along with that you may want to include a small message in the E-mail via the **Add Message** Plain Text memo field of this dialog form. At this point you would click on the **Abandon** button, and be done with this Case.

Before leaving the Support Center, I did want to mention, for your Support Team Managers, that there is an **Analyze** button available that will produce some valuable information about your team efforts. You may do an analysis against any UserID, User Group or even for everyone in GoldMine in a given date range. Once you have entered your parameters, it is a simple matter of clicking upon the **Refresh** button to perform the analysis on the **Case Management Analysis** screen. You may **Export** the resulting information to Microsoft Word or Excel, or you may go directly to the printer with the **Print...** button.

So you think that we are at the end of The Service Center chapter do you? If that is what you thought then you would be wrong. You see, earlier I stated that your first level support team is only as good as your **Knowledge Base**, and I wanted to expound on that just a bit.

Most organizations will not dedicate their technicians to a Support Center, not at the price they are paying their technicians any way. Most will hire people people to man their Support Center, and who know absolutely nothing about the product for which they are rendering support. Sure, a conscientious person might review your product manuals, yet, for the most part, they must rely on the information within the Knowledge Base. Hence, the importance of a corporate standard for developing and maintaining your Knowledge Base on a regular basis, and one or two individuals dedicated to this task and this task alone. Well, at least in the first few weeks of implementation.

You can see an example that I created for you in Figure 17-11 on the next page. Remember this is only one option for configuration of many possible options, but make use of the Rich Text formatting capabilities for greater readability. The only thing that really matters is that you standardize on a good format, and that you force everyone to adhere to that standard. This is why it is better to limit the number of individuals actually involved in populating your organizations Knowledge Base or at least have a team of editors review what has been added new each week.

Knowledge Base

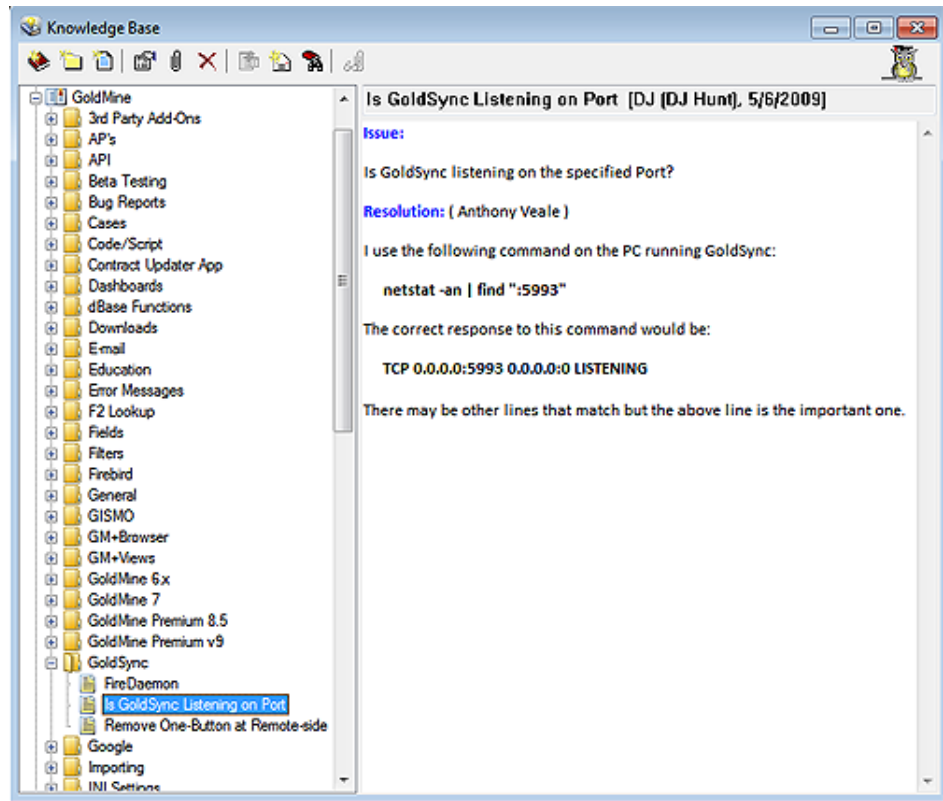


Figure 17-11

Either way, I want to conclude this chapter by reiterating that: Your first level support team can only be as good as is your Knowledge Base. It is incumbent upon you to hire the most personable people that you can for your first level support team, and that you have a well developed Knowledge Base for them to employ in their daily activity. The Service Center is only as good as your corporate standards, and the enforcement of the adherence to those standards.

