

- Helpdesk Operators
- Contacts
- Companies
- Support Tickets
- Helpdesk Elements
- CRM Elements
- Knowledge Base
- Support Contracts (SLA)
- Statistics
- Advanced
- System

BIZSUITE DASHBOARD

Welcome to the Administration Dashboard for BizSuite module. Use the left to access the area you want to configure or review.



Last 3 support tickets:

- 0011700 5 DAY MARKET RISK COURSE IN JOHANNESBURG 5...
- 0011699 MY ACCOUNT MANAGEMENT Good afternoon Mr. ...
- 0011698 Error in corresp ondence-Thank u for the i...

Pending Ticket by Assignment



Current Tickets Counts

Unassigned Tickets:	100
Pending Tickets (within SLA):	105
Pending Tickets (out of SLA):	0
Pending Tasks (within SLA):	0

Quick Search

Use this tool to quickly search in Tickets, Contacts, Companies and KB items!

SPACIO|CRM

A Customer Relationship Management System



Customers
satisfying

enabling Business

Keeping Customers

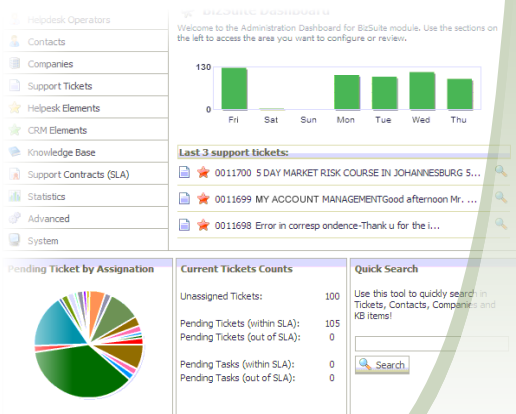
- Win new customers
- Drive business growth

spacioCRM software provides organizations with what it takes to help keep existing customers, win new ones, and drive business growth. This web-based Customer Relationship Management (CRM) and Ticket Management solution, improves upon service desk processes, and empowers staff to manage crucial service desk elements such as service desk operators, customers (companies and contacts), e-mails and notifications, Service Level Agreement (SLA) contracts, support teams, support categories, tasks and activities, support level statistics and record data of your customers for numerous other applications including sales and marketing.

Customers will be able to create new Support Requests (Tickets), have ready-access to a published Knowledge Base of common support solutions, track the support steps and know the current status of their requests thus enforcing a level of transparency within your organization. From an administrative point of view, the solution will help to give credence to the decision making process, act as a guide to ongoing activities or tactics and help predict future states with respect

to your customers and even the market.

The decision to adopt spacioCRM will help reduce the strain on your organization's human resources, provide more time to channel efforts towards other organizational responsibilities, maintain customer satisfaction and loyalty and consequently ensure positive Returns on Investment for your organization.



Problem contains		Contact	(Show All...) Select
Status	(Show All...)	Company	(Show All...) Select
Priority (Operator)	(Show All...)	Priority (Customer)	(Show All...)
Assigned Operator	(Show All...)	Assigned Team	(Show All...)
Category	(Show All...)	Date range	 Calendar Calendar

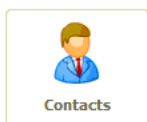
Search Tickets

Order Tickets by: Ticket Number, first on top

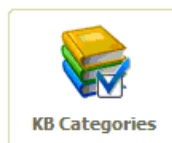
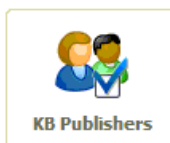
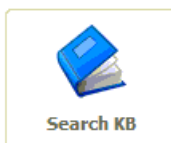
Results per page: 50

SpacioCRM Features

- DASHBOARD:** spacioCRM has a well organized dashboard which immediately presents users with access to all the features of the application. With a maximum of three clicks, users are able to complete tasks on the platform.
- LEAD MANAGEMENT / OPPORTUNITY MANAGEMENT:** SpacioCRM software provides the necessary features to keep track of leads until these leads are fully converted into customers.
- ADVANCED SEARCH:** This feature makes it easy to accurately and quickly search for contacts, leads, tasks and activities with minimal parameters.

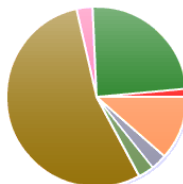


- CONTACTS AND COMPANIES:** This feature allows for easy management of company contacts and clearly reveals the relationship between the contact and your company.
- KNOWLEDGE BASE:** The knowledge base feature provides a rich history of issues raised and their resolutions from the experience of an organization. The knowledge base is always unique to an organization and dependent on the use to which the system is put.



Win New Customers

- Drive business growth
- Keeping customers



Team Name	Pending Tickets	Percentage %
 Admin/Corp services	2	3 %
 Benefits Administration	17	24 %
 Client Services	38	54 %
 ICT	0	0 %
 Investments	8	11 %
 Operations (Contributions and Collections)	1	1 %
 Reconciliation	2	3 %
 Sales	2	3 %

6. **REPORTING:** Management will have access to reports generated from the spacioCRM to better inform decision making activities. Advanced reporting features are also available to allow for custom report generation.
7. **CHARTING:** This feature provides the visual means of data assessment and assists to instantly measure performance and discover naturally elusive patterns within the organization.
8. **EMAIL MARKETING AND MAILING LISTS:** This feature complements marketing functions by making it easy to manage contacts via mailing lists. This enhances marketing communication activities as automated email campaigns can be created, stored, edited and sent through the spacioCRM software at specified times.

9. **TASKS / ACTIVITY MANAGEMENT:** This feature makes it unproblematic to view all tasks and related activities and monitor the progress of the same.
10. **NOTES:** This feature allows for the connection of notes to customer tickets.
11. **MESSAGES:** The messaging feature provides a central means of communication between operators and contacts within the system.
12. **MOBILE ACCESS:** This brings the spacioCRM functionalities to your mobile device making it accessible anywhere.

13.TROUBLE TICKET MANAGEMENT

This feature easily manages issues raised within the context of the application. The raised tickets are closely followed until resolved. The preview screen gives a summary of all ticket details and allows for further action.



#0002340

MR. JOHN AFAM DOE - SPACIO FUNDSMANAGERS LIMITED
9/27/2013 4:03 PM

SPACIO INTERNATIONAL SECONDARY & PRIMARY - PRIMARY:MAY- SEPT. 2013 AMOUNT: 119,410.00
 CHEQUE NO: THEBANK 00000398 - SECONDARY: MARCH-SEPT. 2013. AMOUNT:346,150 CHEQUE: SPBNO: 0000000000

Category:  Email / Schedules
 Assigned To:  Amy The Operator

Status:  Closed
 SLA/Deadline:  (Ticket is closed)

14.ALERTS

The spacioCRM software sends alerts each time you receive an email or have a task on your calendar that is due.

15.FORECASTING

The availability of the charting and advanced reporting capabilities makes the discovery of customer relationship patterns which are helpful in forecasting. This empowers management to make smarter decisions.



Templates



Contacts Contr.



Companies Contr.

16.SERVICE-LEVEL AGREEMENTS

Template contracts can be created for companies and contacts captured within the system. Issue tickets raised by companies and contacts are responded to and resolved, within hours, according to the associated contract.

Drive Business Growth

- Keeping Customers
- Win New Customers



- **LOCATION INTELLIGENCE:** This on-demand feature allows the organization to instantly view the location of all their customers off a map and also perform location-based analysis which will assist to better focus marketing efforts to get new customers and also modify services, based on demographics and market coverage analysis, to better serve existing customers.

Optional Features

Related Services

SYSTEM INTEGRATION: The modular nature of spacioCRM facilitates easy extension of the system and with adequate consultation and advisory, our team is able to work with you to customize the system to suit your business needs and integrate with already existing work systems and processes.

TRAINING: Training and education constitute a very essential aspect of project implementation for reasons of knowledge and technology transfer. We provide training for Operators, IT administrators and Customer Services Administrators within your organization.

SUPPORT: As our client, you enjoy top-class support in resolving any problems related to system administration - keeping the impact on daily operations to a minimum. Some of our support activities include system updates, migration exercises, consultation on how to maximize the use of spacioCRM and its integration with other existing systems in your organization.

Testimonial

The implementation of spacioCRM effectively controlled the chaos that would usually exist on a normal day at the service desk and allowed staff to focus more on the important stuff.

- Mr. Kufoniya O. Deputy IT Manager, APML

smarter solutions for effective business Intelligent managerial decisions

We specialize in the design and implementation of enterprise Information Technology (IT) systems that transform the way organizations and individuals make critical decisions. Our business focus is on organizations seeking to leverage the power of IT to increase returns on investment (ROI) and make management more effective and efficient without compromising any managerial functions.

We believe that systems automation plays a huge role in organizational success. As a result, we invest heavily in the idea generation and design process. As our client, you are not left out in this process as your input is every bit as important to ensuring a successful implementation of a solution. Our team of consultants work with you to identify and design bespoke services that best meet the needs of your organization .

