



CUSTOMER SERVICE

CONTACT CENTER: CUSTOMER INTERACTION FORM

Provides guidance for the use of Facilities Connect Contact Center to navigate and organize customer interactions, and to log new NU Facilities Service Requests for completion around campus.

▼ GETTING STARTED

This job aid begins in the **Contact Center** section of the **Requests** section. For instructions on accessing the **Requests** screen, please refer to the **Access + Navigation: Requests Screen** job aid.

DIRECTIONS:

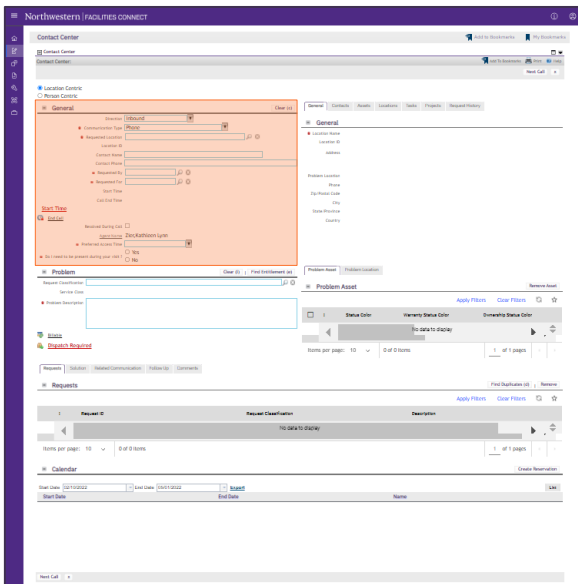
1

From **Contact Center**, in the **General** section:

- 1 Click the radio button to select whether the **Service Request** is **Location** or **Person** centric.

For the purpose of this guide, we will review the steps associated with a **Location Centric** approach in FC Contact Center.

Fullscreen Orientation



Location Centric

Location Centric ← 1
 Person Centric

General Clear (c)

Direction: Inbound

* Communication Type: Phone

* Requested Location: [Text Field]

Location ID: [Text Field]

Contact Name: [Text Field]

Contact Phone: [Text Field]

* Requested By: [Text Field]

* Requested For: [Text Field]

Start Time: [Text Field]

Call End Time: [Text Field]

Start Time

End Call

Resolved During Call:

Agent Name: CustomerServiceMgr, Training

* Preferred Access Time: [Text Field]

* Do I need to be present during your visit? Yes No

Person Centric

Location Centric
 Person Centric ← 1

General Clear (c)

Direction: Inbound

* Communication Type: Phone

Location ID: [Text Field]

* Requested By: [Text Field]

* Requested For: [Text Field]

Start Time: 11/18/2019 15:19:54

Call End Time: [Text Field]

Start Time

End Call

Resolved During Call:

Agent Name: CustomerServiceMgr, Training

* Preferred Access Time: [Text Field]

* Do I need to be present during your visit? Yes No



CUSTOMER SERVICE

CONTACT CENTER: CUSTOMER INTERACTION FORM

DIRECTIONS:

2 From the **Location Centric General** section:

2a Click the **Clear** button at the beginning of each customer interaction to ensure to form is clear and to engage the **Start Time** timer.

General [Clear (c) 2a]

Direction Inbound

* Communication Type Phone

* Requested Location []

Location ID 8844

Contact Name []

Contact Phone []

* Requested By []

* Requested For []

Start Time 11/19/2019 13:41:11 2a

Call End Time

2b Enter the **NetID** of the person who is making the request.

2c Enter the **NetID** of the person for whom the request is being made (i.e. either the same or different person).

General [Clear (c)]

Direction Inbound

* Communication Type Phone

* Requested Location []

Location ID 8844

Contact Name []

Contact Phone []

2b * Requested By trainingcsm1 CustomerServiceMgr, Training

2c * Requested For srr7551 Reiter, Scott Russell

Start Time 11/17/2019 13:41:11

Call End Time

2d If applicable, enter a **Third-Party Contact Name** for the **Service Request** and the best phone number to reach the contact.

[Clear (c)]

Direction Inbound

* Communication Type Phone

* Requested Location 2020 Ridge

Location ID 8844

2d Contact Name Scott Reiter

Contact Phone 3128675309

* Requested By []

* Requested For []

Start Time 11/18/2019 15:19:54

Call End Time

▼ INFORMATION

If the Customer(s) Requested By/For are Northwestern personnel, this step is not necessary, as contact information linked to NetID is captured in **Step 2c**.



CUSTOMER SERVICE

CONTACT CENTER: CUSTOMER INTERACTION FORM

DIRECTIONS:

2 From the **Location Centric General** section (continued):

2e Click the **Direction** dropdown list and select **Inbound** or **Outbound**.

Clear (c)

Direction **Inbound**

* Communication Type

* Requested Location **Inbound** **2d**

Location ID

Contact Name **Outbound**

Contact Phone 3126673309

* Requested By trainingcsm1 **CustomerServiceMgr, Training**

* Requested For srr7551 **Reiter, Scott Russell**

Start Time 11/18/2019 15:19:54

Call End Time

▼ INFORMATION

Inbound (Default): This direction is for incoming customer interactions e.g. by phone, through e-mail, walk-in, etc.

Outbound: This direction is meant to log communication coming from Customer Service to external users e.g. follow-up e-mails, phone calls, etc.

2f Click on the **Communication Type** dropdown list and select **Mail** or **Phone**.

Direction **Inbound**

* Communication Type **Phone** **2c**

* Requested Location

Location ID **Mail**

Contact Name **Phone**

Contact Phone

* Requested By

* Requested For

2g Enter the **Requested Location** or click the **Find** button to search.

Direction **Inbound**

* Communication Type **Phone**

* Requested Location **2020 Ridge** **2g**

Location ID 8844

Contact Name

Contact Phone

* Requested By

* Requested For

2g

▼ TIP & TRICKS

Start typing in the text field to begin searching by keyword. Searching by building name or address is the most effective way to find a location.

Using the **Find** button (magnifying glass) to search and select allows additional search options such as Building ID (Building Number) and Building Type (e.g. Parking Lot)



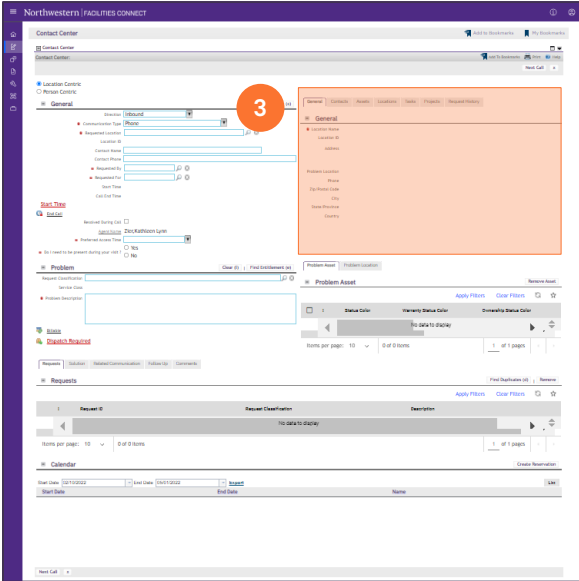
CUSTOMER SERVICE

CONTACT CENTER: CUSTOMER INTERACTION FORM

DIRECTIONS:

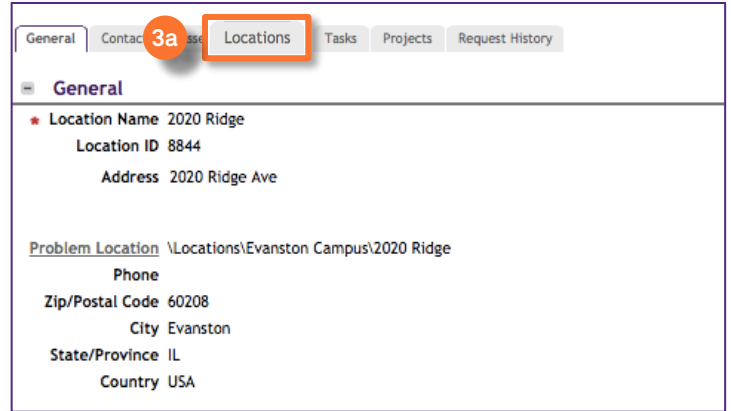
3 Moving to the righthand side of the **General** section:

Fullscreen Orientation



Location Centric

3a Click on the **Locations** tab. This table will already be sorted to the requested location selected in **Step 2g**.



3b Use the available search fields **Space** (Room #), Building, Floor, Space Class to locate the specific space(s) pertaining to the interaction request.

Locations						
<input type="checkbox"/>	ID	Space	Building	Floor	Space Class	
		Contains	Contai	Conta	Con	Contains
<input type="checkbox"/>	8844	2020 Ridge	2020 Ridge			
<input type="checkbox"/>	8844-01	01	2020 Ridge	01		
<input type="checkbox"/>	8844-01-00...	00100	2020 Ridge	01	000 - Define Roo...	

3b Check the box beside the desired **Space(s)** for this interaction. The selected **Space(s)** will appear below under the **Problem Location** tab.

Locations						
<input type="checkbox"/>	ID	Space	Building	Floor	Space Class	
		Contains	Contai	Conta	Con	Contains
<input type="checkbox"/>	8844	2020 Ridge	2020 Ridge			
<input type="checkbox"/>	8844-01	01	2020 Ridge	01		
<input type="checkbox"/>	8844-01-00...	00100	2020 Ridge	01	000 - Define Roo...	



CUSTOMER SERVICE

CONTACT CENTER: CUSTOMER INTERACTION FORM

DIRECTIONS:

4

Moving back to the left side of the screen, prompt the Customer for their **Preferences** regarding the work:

4a Click the **Preferred Access Time** dropdown list and select the most convenient time to complete work.

▼ TIP & TRICKS

Preferred access time is not a guarantee of when the work will be performed.

If the customer does not have preference, select **Anytime** from the list.

4b Click the **Yes** or **No** radio button to answer the question, **Do I need to be present during your visit?**

5

Next, complete the **Problem** section:

Fullscreen Orientation

Location Centric

5a First, add a **Request Classification**. Click the **Find** button to open the dropdown list of available options.



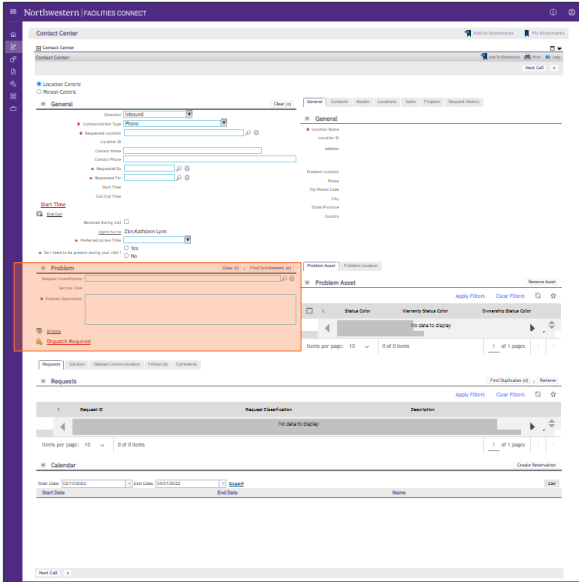
CUSTOMER SERVICE

CONTACT CENTER: CUSTOMER INTERACTION FORM

DIRECTIONS:

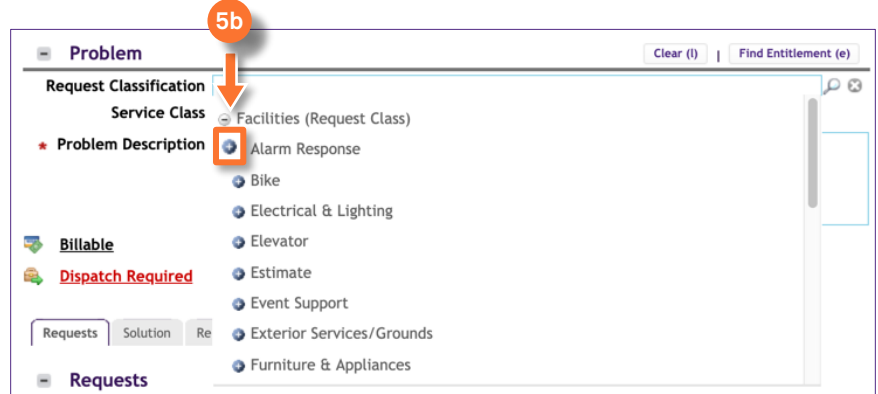
5 Complete the **Problem** section (continued):

Fullscreen Orientation

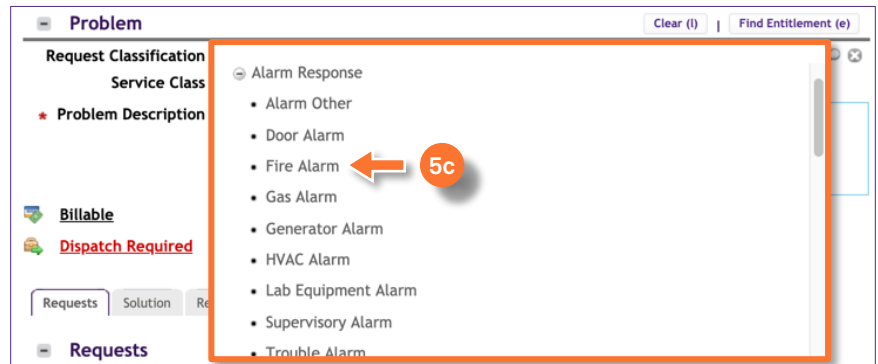


Location Centric

5b From the menu, click on the **Plus (+)** icon beside the desired **Request Classification Category** to expand and reveal available **Request Classification** sub-classes for selection.



5c Click to select the relevant **Request Classification Sub-Class**



INFORMATION

Request Classification Categories:

- ❖ Alarm Response
- ❖ Bike
- ❖ Electrical & Lighting
- ❖ Elevator
- ❖ Estimate
- ❖ Event Support
- ❖ Exterior Services/Grounds
- ❖ Furniture & Appliances
- ❖ General Repairs & Maintenance
- ❖ Health & Safety
- ❖ Housekeeping
- ❖ Key/Lock/Access
- ❖ Motor Pool Reservation
- ❖ Pest & Animal Control
- ❖ Plumbing & Leaks
- ❖ Predictive and Preventative Maintenance
- ❖ Preventative Maintenance – DO NOT USE
- ❖ Risk/Facilities
- ❖ Signage & Fixtures & Furniture
- ❖ Temperature
- ❖ University Vehicle Maintenance



CUSTOMER SERVICE

CONTACT CENTER: CUSTOMER INTERACTION FORM

DIRECTIONS:

5 Upon selecting a **Request Classification Sub-Class**, several fields in the **Problem** section will auto-populate with relevant information:

5d View the auto-populated **Service Class, Priority Level, Service Level Agreement (SLA) Respond By** and **Due Date**.

The screenshot shows the 'Problem' section of the form. The 'Request Classification' is 'Fire Alarm' and the 'Service Class' is 'Alarm Response'. The 'Priority' is set to '3'. The 'SLA Respond By' date is '11/20/2019 14:37:10' and the 'SLA Due By' date is '11/20/2019 16:07:10'. There are also 'Billable' and 'Dispatch Required' checkboxes. A red box highlights the 'Service Class Alarm Response' dropdown and the 'Priority', 'SLA Respond By', and 'SLA Due By' fields.

▼ INFORMATION

Priority Level, Service Level Agreement (SLA), Respond By, and Due Dates will default based on the Request Classification and Service Class selected.

Do not modify. These values should only be modified on the resulting Work Task.

5e Enter a **Description** of the problem.

The screenshot shows the 'Problem' section with the 'Problem Description' field filled with the text: 'Pull station activated on the 4th floor; reporting party observed a toaster fire in the break room.' The other fields (Priority, SLA, Due Date) remain the same as in the previous screenshot. A red box highlights the 'Problem Description' field.

▼ TIP & TRICKS

The Problem Description is among the most visible fields viewed by Technicians and Supervisors.

This is the best place to add additional details, contact information, instructions, etc. for the field to view.

6 If the issue is resolved during the course of the customer interaction and a **Service Request** is **NOT** needed:

6 Click the **Resolved During Call** check box.

The image shows a close-up of the 'Resolved During Call' checkbox, which is currently unchecked. A red arrow points to the checkbox, and a red circle with the number '6' is next to it.

▼ INFORMATION

If you are using the **Resolved During Call** option, you must complete all required fields in order to close the Customer Interaction Form and move to a new call.



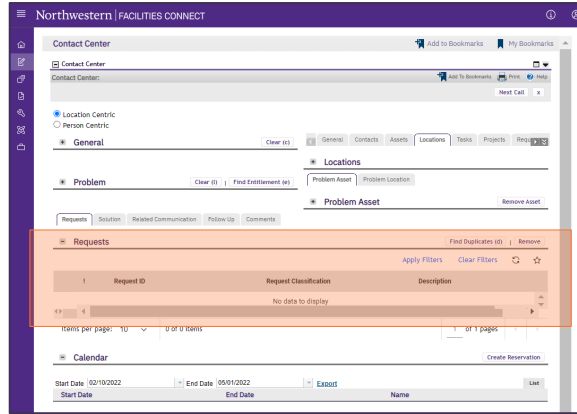
CUSTOMER SERVICE

CONTACT CENTER: CUSTOMER INTERACTION FORM

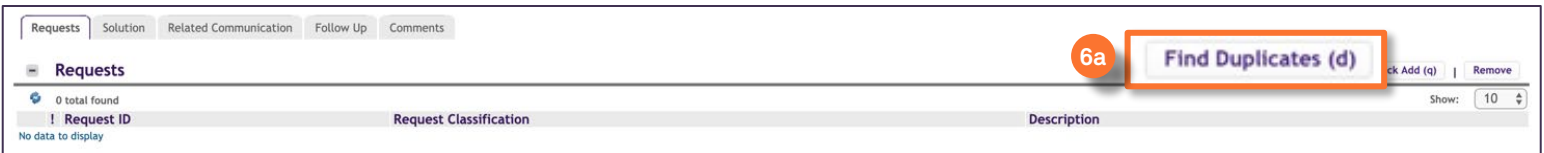
DIRECTIONS:

6 Next, complete the **Requests** section:

Fullscreen Orientation

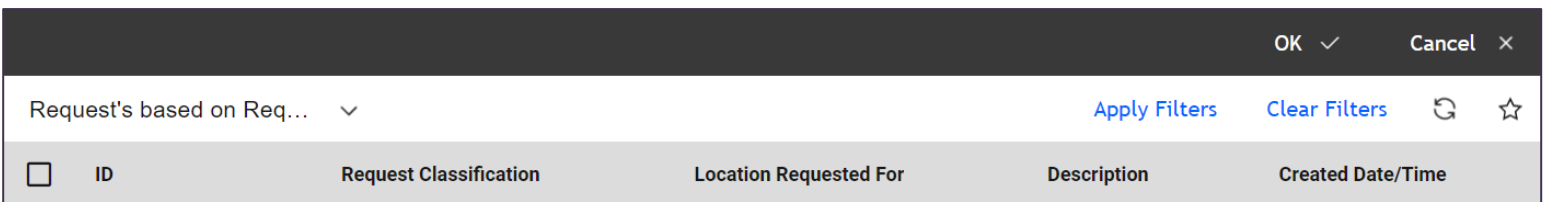


6a First, click the **Find Duplicates (d)** button to locate any potential duplicate **Service Requests** already logged into Facilities Connect.

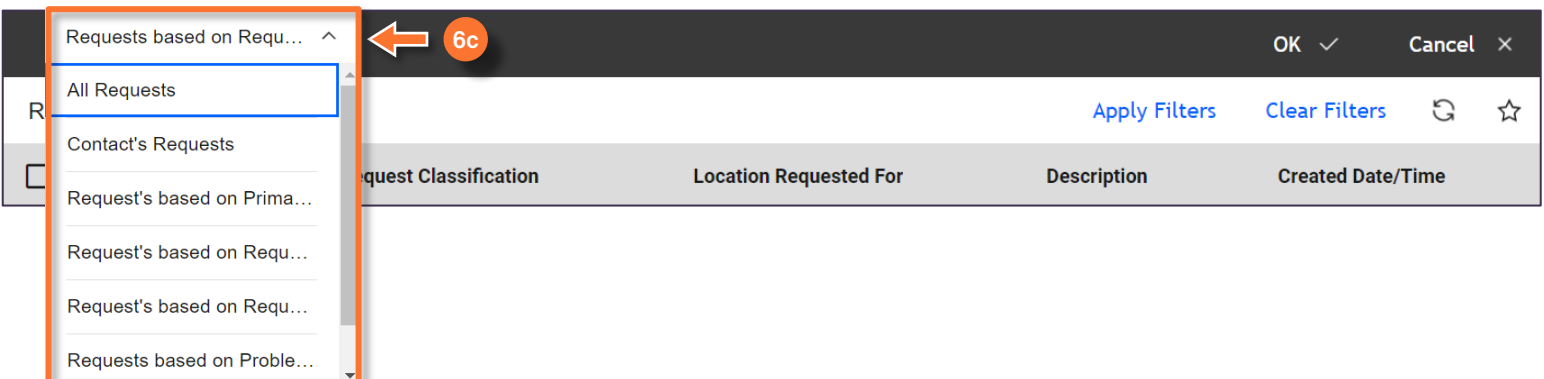


Upon clicking, the **Find Duplicates** pop-up window will appear:

6b Any potential duplicates related to the **Request Class and Primary Problem Location** will appear here.



6c Click the dropdown menu to adjust criteria for the duplicates search.





CUSTOMER SERVICE

CONTACT CENTER: CUSTOMER INTERACTION FORM

DIRECTIONS:

▼ TIP & TRICKS

In addition to the preset reports, use the search fields to enter keyword to narrow your search for duplicate Service Requests.

Request ID	Request Classification	Description	Created Date/Time
Contains	Contains	Contains	Contains
<input type="checkbox"/> CC-1000839	Fire Alarm	Pull station on the 4th floor activated; reporting party observed a toaster fire in the break room. Contact Center : Scott Reiter - 3128675309	11/20/2019 15:20:28
<input type="checkbox"/> SR-1000183	Fire Alarm	OPS.SYS.RQAALR.002	08/26/2019 13:42:10
<input type="checkbox"/> SR-1000322	Fire Alarm	OPS.SYS.RQAALR.002	09/11/2019 09:38:29
<input type="checkbox"/> SR-1000440	Fire Alarm	OPS.SYS.CC.ADD.003	09/11/2019 16:42:50
<input type="checkbox"/> SR-1000616	Fire Alarm	Fire alarm is going off.	09/26/2019 10:07:13

6

If no duplicates exist and you determine the issue is a new request, skip the remainder of Step #6 and proceed immediately to Step #7.

If you determine that the current is a match to a request already in Facilities Connect, join the two (2) items by performing the steps below.

6d Click the Checkbox beside the duplicate **Service Request**.

6e Click the **OK** button.

Request ID	Request Classification	Description	Created Date/Time
Contains	Contains	Contains	Contains
<input type="checkbox"/> CC-1000839	Fire Alarm	Pull station on the 4th floor activated; reporting party observed a toaster fire in the break room. Contact Center : Scott Reiter - 3128675309	11/20/2019 15:20:28
<input type="checkbox"/> SR-1000183	Fire Alarm	OPS.SYS.RQAALR.002	08/26/2019 13:42:10
<input type="checkbox"/> SR-1000322	Fire Alarm	OPS.SYS.RQAALR.002	09/11/2019 09:38:29
<input type="checkbox"/> SR-1000440	Fire Alarm	OPS.SYS.CC.ADD.003	09/11/2019 16:42:50
<input checked="" type="checkbox"/> SR-1000616	Fire Alarm	Fire alarm is going off.	09/26/2019 10:07:13
<input type="checkbox"/> SR-1000751	Fire Alarm	Fire alarm pull station has been activated. Fire alarm is going off.	10/16/2019 09:33:21
<input type="checkbox"/> SR-1000755	Fire Alarm	The fire alarm keeps going off but no fire, the alarm is dripping water onto the floor.	10/16/2019 09:37:59
<input type="checkbox"/> SR-1000838	Fire Alarm	test	11/20/2019 12:33:51



CUSTOMER SERVICE

CONTACT CENTER: CUSTOMER INTERACTION FORM

DIRECTIONS:

6

Upon clicking, you will return to the **Customer Interaction Form** view. The requests field is updated with the selected **Service Request ID** number.

6f

View the newly added duplicate **Service Request**.

Requests			
Request ID	Request Classification	Description	
SR-1000616	Fire Alarm	Fire alarm is going off.	

6f

INFORMATION

If there are no duplicate Service Requests, then a Service Request needs to be created. To create a new Service Request from this Customer Interaction see **Step 7**.

6g

Click **Next Call** to end the Customer Interaction.

Requests			
Request ID	Request Classification	Description	
SR-1000616	Fire Alarm	Fire alarm is going off.	

Calendar			
Start Date	End Date	Name	
11/21/2019	02/01/2020		

Next Call

6g



CUSTOMER SERVICE

CONTACT CENTER: CUSTOMER INTERACTION FORM

DIRECTIONS:

7 To create a new **Service Request** from the **Customer Interaction Form**:

7a Click on the **Quick Add (q)** button to add all the entered information to a new **Service Request Form**.



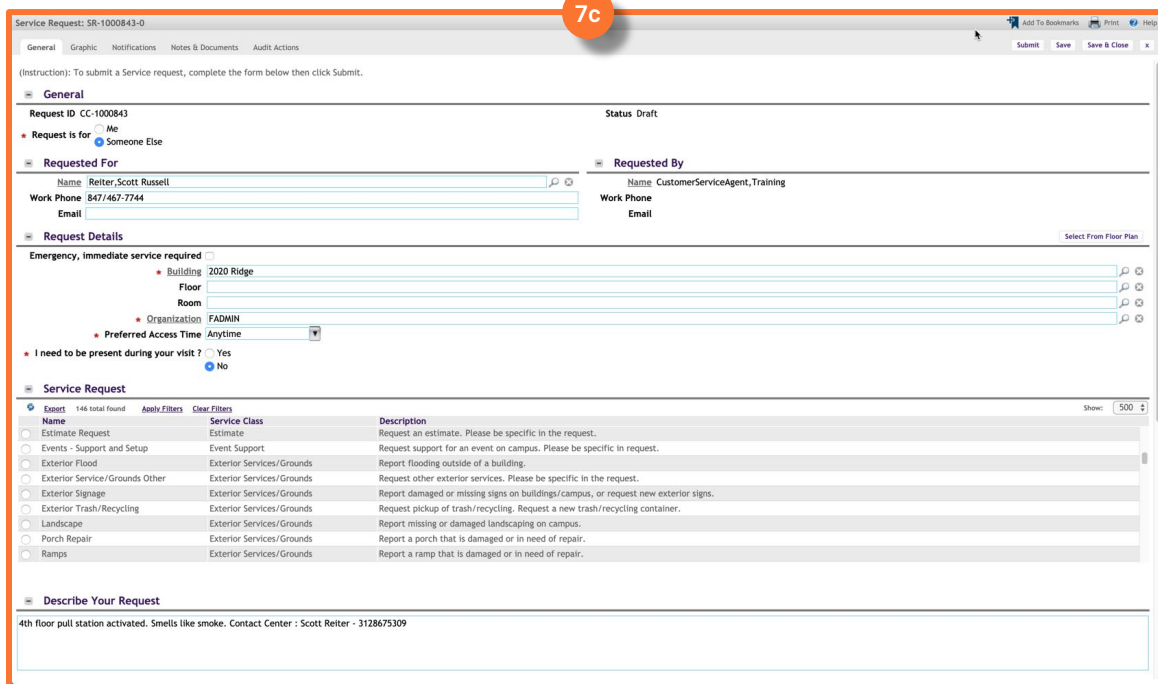
Upon clicking, a population, but unsubmitted **Service Request Form** will be created:

7b Click on the newly created **Service Request Form**.



Upon clicking the **Service Request Form** will open in a new window:

7c Review details and add any additional information needed.





CUSTOMER SERVICE

CONTACT CENTER: CUSTOMER INTERACTION FORM

DIRECTIONS:

7

From the **Service Request Form**:

7d

Click on the **Submit** button. At this point the Service Request is officially created and in process.

Service Request: SR-1000843-0

General | Graphic | Notifications | Notes & Documents | Audit Actions

(Instruction): To submit a Service request, complete the form below then click Submit.

General

Request ID CC-1000843 Status Draft

Request is for Me Someone Else

Requested For

Name Reiter, Scott Russell
Work Phone 847/467-7744
Email

Requested By

Name CustomerServiceAgent, Training
Work Phone
Email

Request Details

Emergency, immediate service required

Building 2020 Ridge
Floor
Room
Organization FADMIN
Preferred Access Time Anytime

I need to be present during your visit? Yes No

Submit

▼ INFORMATION

After clicking the **Submit** button, a **Work Task** will automatically be generated and dispatched to the appropriate Workgroup for all Building, Intra-FM, and No Charge billing types. For Non-Building charges, the **Service Request** is immediately routed to the appropriate Chartstring approver(s) for further action.

Work Task

Export 1 total found

Task ID	Task Name	Created Date Time	Description	Status	Total Time Log Hours
WT-1028692	WT-1028692 - Emergency... Fire Alarm	11/21/2019 16:45:48	4th floor pull station activated. Smells like smoke. Contact Center : Scott Reiter - 3128675309	Draft	0

Upon clicking, you will be returned to **Customer Interaction Form**:

7e

To complete the Interaction and reset the form, click on **Next Call** to end the Customer Interaction.

Requests | Solution | Related Communication | Follow Up | Comments

Requests

Export 1 total found

Request ID	Request Classification	Description
SR-1000616	Fire Alarm	Fire alarm is going off.

Calendar

Start Date 11/21/2019 End Date 02/01/2020 Export

Start Date	End Date	Name
------------	----------	------

Next Call