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:**

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

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

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).

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

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

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

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

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

**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).
Moving to the righthand side of the General section:

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

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

3b Check the box beside the desired Space(s) for this interaction. The selected Space(s) will appear below under the Problem Location tab.
Moving back to the left side of the screen, prompt the Customer for their Preferences regarding the work:

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

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

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.

Next, complete the Problem section:

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

Click to select the relevant Request Classification Sub-Class.
Upon selecting a Request Classification Sub-Class, several fields in the Problem section will auto-populate with relevant information:

- View the auto-populated Service Class, Priority Level, Service Level Agreement (SLA) Respond By and Due Date.
- Enter a Description of the problem.

**DIRECTIONS:**

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

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

5. Enter a Description of the problem.

**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.

5. Enter a Description of the problem.

**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.

**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.
DIRECTIONS:

6 Next, complete the Requests section:

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.
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.
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.

   View the newly added duplicate Service Request.

   ▼ 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.
1. 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.
1. DIRECTIONS:

From the Service Request Form:

7d Click on the Submit button. At this point the Service Request is officially created and in process.

7d 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.

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.