



Work Flow

(Contact Management)

Contact us for an on-site demo.

Surreal Workflow is a contact management tool which allows users to log calls\incidents for clients. It allows managers to keep track of the time in which your customers get attended to and how long a solution is given to them. Incidents can be created and posted to other users or groups. An escalation utility can be added to escalate incidents when the time elapses to an escalation group where a manager can deal with the problem. One can view incidents open by other users. All this aids in customer satisfaction.

Question: Ever had an employee sick and no one knows which customers he/she was dealing with?
Ever had a customer call with regards to a previous issue you have no idea about?

Solution: Surreal WorkFlow

Main Screen:

The screenshot shows the Surreal iT - WorkFlow application interface. At the top, there are five main action buttons: 'New Action', 'New Incident', 'View Incidents', 'Refresh', and 'View Contact Details'. Below these buttons is a table with the following data:

Ref	Escalate	Customer	Desc	Category	Group
SREF000046	14/09/2009 04:20:20 AM	ACK001	Ackeman Mr R	000	<input type="checkbox"/>

Below the table, there is a status bar indicating 'Created by 000 - User 0 , Posted to 000 - User 0 , Posted at 14/09/2009 04:20:57 PM' and a text area with 'Please call client back.'.

Callout boxes provide the following descriptions:

- New Action :** Modify Event on a specific Incident. Refer to PG 3
- New Incident :** Creates a new Incident. Refer to PG 2
- View Contact :** Details – Displays Contact details of selected Incident. Refer to PG 4
- View Incidents :** allows one to view any incident filter by Date, Category, User, and Status. Refer to PG 5
- Detail of Incident Logged**
- User Logs In using Pastel Password.**

New Incident:

Post New Incident (points to Post Incident button)

System Generates New Reference Number (points to Ref: SREF000047)

Select Category for the Incident (points to Category: 000 - None)

Enter Detail for Incident (points to description text area)

Time to Escalate to Different Group (points to Escalation Time: 14/09/2009 04:35:04 PM)

Sends email to Client indicating the opened Incident (points to Send Email checkbox)

Post to Yourself \ another Pastel User or Group (Multiple Uses) (points to Post To... dropdown)

Select Pastel Customer (points to Customer: ABB029)

When posting it returns to the Main screen where your incidents are viewed. (points to the incident list table)

Ref	Escalate	Customer	Desc	Category	Group	Description
ref10022	02/10/2009 02:04:53 AM	ABB029	Albott Limited	000 - None	<input type="checkbox"/>	
ref10023	02/10/2009 02:07:46 AM	ACK001	Ackerman Mr R	000 - None	<input type="checkbox"/>	

Created by 000 - User 0 , Posted to 000 - John , Posted at 01/10/2009 02:06:43 PM
 Client has issues with printing - call to assist

New Action:

The screenshot shows a software interface titled "Action" with several components and callout boxes:

- Buttons:** "Post Incident" (with a green arrow icon), "Close Incident" (with a blue key icon), and "Return" (with a circular arrow icon).
- Escalation Time:** A dropdown menu showing "14/09/2009" and a time selector showing "04:25:55 PM".
- Send Email:** A checkbox that is currently unchecked.
- Header Details:** A section containing:
 - Ref:** A text field with "SREF000046".
 - Category:** A dropdown menu with "000 - None".
 - Link To Pastel Customer:** A checked checkbox.
 - Post To...:** A dropdown menu with "000 - User 0".
 - Group:** An unchecked checkbox.
 - ACK001:** A text field with a search icon to its right.
 - Ackeman Mr R:** A text field below the ACK001 field.
- Main Text Area:** A large text area containing the text "Called Client Need to make an on site appointment".
- Footer:** A section containing:
 - Metadata: "Created by 000 - User 0 , Posted to 000 - User 0 , Posted at 14/09/2009 04:20:57 PM".
 - Message: "Please call client back." followed by a horizontal line.

Callout boxes with arrows point to the following elements:

- "Post Changed Incident" points to the "Post Incident" button.
- "Close Incident" points to the "Close Incident" button.
- "Enter New Log to add to this incident" points to the main text area.
- "Previous Detail" points to the footer section.
- "Time to Escalate to Different Group" points to the "Escalation Time" dropdown.
- "Post to Yourself or another Pastel User or Group." points to the "Post To..." dropdown.
- "Select Pastel Customer" points to the "ACK001" text field.

View Contacts:

Shows contact details of Pastel Customer



The screenshot shows a window titled "Contact Details" with a close button in the top right corner. The main heading is "ABB029 - Albott Limited". Below this, there are two columns of address information: "Postal Address" and "Delivery Address". The "Postal Address" column contains: "P O Box 30498586", "Germiston", "2340", and "South Africa". The "Delivery Address" column contains: "2 Kudu Rd", "Germiston", "2340", and "South Africa". Below the addresses, there is a "Contact Details" section with the following information: "Contact: Gerald", "Tel: +2711 856 4895", "Fax: +2711 856 4895", "Mobile: 082 111 1222", and "Email: info@surrealit.co.za". To the right of this section is a button with a globe icon and the word "Email" below it.

Allows you to send email to the Customer.

View Incidents:

Filter:

1. By Reference
2. Pastel Customer
3. Time To Escalate\Close
4. User
5. Incident Status
6. Category

View Other Incidents

Header Details

Ref:

Pastel Customer: ACK001

Post To...: 000 - User 0

Time to Escalate\Closed

Filter by Category

Date From: 14/09/2009

Date to: 14/09/2009

000 - None

All Incidents

Open Incidents

Closed Incidents

New Action

Search

Ref	Escalate	Customer	Category
SREF000046	14/09/2009 04:20:20 AM	ACK001 - Ackerman Mr R	000

Created by 000 - User 0 , Posted to 000 - User 0 , Posted at 14/09/2009 04:20:57 PM

Please call client back.

Posted by 000 - User 0 , Posted to 000 - User 0 , Posted at 14/09/2009 04:35:00 PM

Called Client Need to make an on site appointment

New Action on Incident Found

Setup

Allows user to add function to the sever to escalation overdue incidents to another group i.e. Administrator

Escalation Time: Allows administrator to set the default time that an Incident should be actioned again

Add Users to a group

Add Categories to refine the Incident type

Select which Pastel database Workflow uses

Enter email details for email notification

Please email us with any queries. Surreal Workflow can be customized to cater for you specific industry needs.

Coming Soon:

1. Allow user to attached documents to a specific incident
2. Allow user to post an email from outlook and link it to an incident.

