

## Customer Briefing Note 016

### Edge Customer Relationship Management (CRM) Module

#### Edge Background

Edge is our flag-ship web-based software solution for retail water and waste services suppliers in the UK.

Edge has been designed and built from first principles to provide a complete “Business in a Box” for both established and new entrant Licensed Providers.

The Edge system allows seamless operations across the UK – in both the Scottish and English markets.

Edge runs on the Microsoft “Azure” cloud platform, and provides unrivalled flexibility, security and availability.

Deployment of Edge is quick and easy, whether you are a new start or the largest water company in the country.

#### Edge CRM Principles

The existing Edge system already provides many features of a basic CRM system, such as Account data capture and storage.

The Edge CRM Module supplements the Edge Account Management functionality by adding Case management. This allows customer communications to be captured and tracked in Edge.

Note that the Edge CRM module does NOT aim to provide Lead Generation and Sales functionality. It is an Account Management / Customer Communication tool.

Note that we do plan to add Lead Generation and Sales functionality in a future Edge Module.

#### Edge CRM Module Functionality

The Edge CRM Module provides the following functionality:

- Create Case
- Track and Update Case
  - Change Target Date
  - Change Priority
  - Change Assignee
  - Change Case Stage
- Case Reporting
- Case Links
- Close Case

These new features are described in more detail on the following sections:

### Create Case

CRM Cases are normally created from within the Edge Account.

Within the Accounts screen there is a new button called “CRM”. Note that there is a counter within the button that displays the total number of CRM cases (Open and Closed) for that Account.

To create a new CRM Case for the Account, select the CRM button. A new “Account CRM” screen is displayed.

The CRM Case data entry screen provides fields to capture the following CRM Case details:

- Contact Salutation (drop down selection):
  - Mr
  - Mrs
  - etc
- Contact First Name
- Contact Last Name
- Priority (drop down selection):
  - Minor
  - Moderate
  - Serious
  - Critical
- Source Type (drop down selection):
  - Email
  - Letter
  - Inbound Telephone
  - Outbound Telephone
  - Other
- Target Date (Calendar): Default to Today
- Category (drop down selection defined in the Maintenance screen). For example:
  - Customer Complaint
  - Campaign
  - General Enquiry
  - etc
- Assigned To (drop down selection of systems users with “Account” role)
- Case Stage (drop down selection defined in the Maintenance screen). For example:
  - LP (the Default)
  - Customer
  - Wholesaler
  - etc

- Short Description / Case Name (Free Text)
- Short Description (Formatted Text)

### Track and Update Cases

Once a CRM case has been created, it can be viewed in one of two ways:

- Account screen provides a view of CRM cases for that Account
- CRM List screen provides a list view of all CRM cases for all Accounts within the Edge system

Note that it is possible to link directly to the individual Account from the CRM Case List screen.

To “Update” a CRM Case, the user should select the “...” button that is adjacent to the Case, and then select “Update”. An Update Dialogue Box is shown.

The upper section of the dialogue box provides two bullets that allow the Case to be kept with the current “Assigned User” or to be “Assigned To” a different user. Note that the new “Assigned User” can be selected from a drop-down selection of system users with the “Account” user role. If a Case is assigned to a new user, the Edge system will create an email to notify the new user that the case has been assigned to them.

Alongside the “Assign To” section is the “Case Stage” selector. This allows the user to define the Stage that the Case is at, for example, if the Case is being worked on by the LP, then we would select “LP” (the default Stage). If the Case was being worked on by the Wholesaler then we would select “Wholesaler”. Note that “Case Stages” are configurable (add/amend/delete) from within the Maintenance List Edit screen.

A dialogue box is provided in the lower part of the dialogue box to allow the entry of formatted text updates, using the text editor features. Updates are saved by selecting the “Save” button.

Note that a view of all Case Updates can be viewed by selecting the Case Reference Number (Ref) toggle at the left-hand side of the Case row.

### Case Reporting

The CRM Case List screen provides an overview of all CRM cases within the Edge system. The screen provides the following data columns in a tabular format:

- Case Ref ID
- Priority
- Account Name
- Entered By
- Date Created
- Target Date with Active Tracking (how many days left of days overdue)

- Source
- Category
- Assigned To
- Case Stage
- Short Description
- Long Description
- Status (Open or Closed)

On screen reporting is facilitated with a “Show Filters” feature. This allows the user to report on specific Case data items, for example, “all Cases entered by x”, or “all Serious priority cases”.

Filtered Case reports can then be exported to Excel (.xlsx) by using the “Export” button

### Case Links

It is possible to provide a “Link” to a url from a CRM case. This can be used to provide on-line linking to a document management system such as Microsoft SharePoint.

To add a “Link” to a CRM Case, the user should select the “Options” button that is adjacent to the Case, and then select “Links”. A dialogue box is provided which shows existing links and enables the addition of a “New Link”. To add a Link, select the “New Link” button and enter the Link Description and Link URL. Updates are saved by selecting the “Save” button.

### Close Case

To “Close” a CRM Case, the user should select the “Options” button that is adjacent to the Case, and then select “Complete”. A dialogue box is provided to allow the entry of formatted text closing updates, using the text editor features. Closing updates are saved by selecting the “Save” button and the Case is then marked as “Closed”

## Future CRM Module Development Plans

The Edge CRM module is a new development and will be continually enhanced following feedback from users.

We also have plans to enhance the Edge CRM module with the addition of two new features as follows:

- Integration with email (Microsoft Outlook integration) for incoming and outgoing Customer emails
- Document Management integration will allow on-line capture and storage of Account level documents such as Customer Contracts, scanned letters etc.

## Related Customer Briefing Notes (CBN’s)

You may also be interested in these related CBN's

- CBN001: "Edge Overview"
- CBN002: "ADC Billing"
- CBN003: "Volumetric Adjustment"
- CBN004: "Metered Billing"
- CBN005: "Block Tariffs"
- CBN006: "Consolidated Billing"
- CBN007: "Published Tariffs"
- CBN008: "Manual and Automated Billing"
- CBN009: "Bill Output Formats"
- CBN010: "Market Transactions and Data Items"
- CBN011: "Integrated Transaction Management"
- CBN012: "Bitemporal Updates"
- CBN013: "Market Data Set"
- CBN014: "Market Pricing"
- CBN015: "SPID Transfers"
- CBN016: "CRM Module"
- CBN017: "Data Quality"
- CBN018: "Meter Reading Management"
- CBN019: "Sub Meters and Complex Metering"
- CBN020: "Meter Exchange Management"
- CBN021: "Trade Effluent"

### Further Information

If you require further information on any aspect of the Edge solution, please contact us at:

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