



**RuleDesigner<sup>®</sup>**

Collaborative Portal for Service



## Involve stakeholders with custom informative portals

### Customers, Suppliers and sales Partners

RuleDesigner is provided with tools aimed at configuring informative panels consultable by different typologies of stakeholders, such as customers, suppliers and sales partners.

As regards after-sales service and spare-parts management, RuleDesigner is able to offer value-added services to customers by giving the possibility to share detailed information about purchased products, commissioned projects, offers and job orders.

Thanks to RuleDesigner, it is even possible to publish CAD projects and PDM data, sharing all information with part-number providers, tracking every single access to the system and monitoring when files are consulted.

Suppliers and sales partners can have access to pricelists, to documents linked to marketing department, to sales forecasting tools, to assigned leads and to tools for offers management.

RuleDesigner technology is a really advantageous solution both for companies and customers because it helps reducing errors and relational problems within the company by supporting the correct information exchange.

## Offer value-added services through account-basis web portals

### Aftersales services

RuleDesigner offers an integrated environment for managing relationships with customers during after-sales services, thus adding value to this kind of services. RuleDesigner platform is provided with tools for tracking customers requests and for configuring customer portals in order to give them a complete set of services, making it also possible to manage both maintenance warranties and interventions in a simple way. Thanks to RuleDesigner, monitoring and improving the efficiency of internal management processes, of product quality and of after-sales service profitability becomes much easier.

### Companies informative panels

The company informative panel contains structured and easy-to-consult data and information about the company, including contacts and company-related activities. For each company it is possible to track both classification and relational data. As a matter of fact, users can define specific relationship networks between companies (group leader, suppliers, partners, customers, business groups) and can specify for each contact the position held inside the company. Through this panel other information can be consulted, such as scheduled and performed activities, documents, purchased products, offers and orders, help-desk tickets.

### Advanced searches

Information can be easily retrieved through advanced searches in the contact databases by applying filters and dynamic attributes and by saving then all outputs obtained. Information can be also acquired thanks to cross-sectional searches using tools such as company or contact panel or with specific myhome gadgets. Searches can be saved, bookmarks can be defined

and certain operations can be run on the outputs obtained.

### Requests Management

Customer service department manages customers' requests by putting them in a specific Help-Desk portal and in the right intervention workflow.

Configurable rules and workflows allow to efficiently manage cases and requests, thus simplifying intervention activities and reducing the time spent to give efficient answers to customers.

Customer service department can access the informative panel of each company having an overview of current relationships, products in use and ongoing job orders. This way it is possible to choose the best intervention procedure and to assign certain tasks to specific resources.

Furthermore, requests have to be approved according to configurable workflows. They can also be refused but in case of approval they are automatically turned into resolution tasks associated to notifications sent at each process phase.

### Value-added customer service

The portal is provided with integrated tools for the management of requests workflows like tickets, contracts, warranties, repository with all current and past requests and knowledge base of interventions. These tools are able to give an efficient and productive support to customers. Thanks to RuleDesigner, the customer service department can offer a coherent customer experience through a service structured in phases and configurable workflows.

# Manage service activities

## tracking customer requests

### Planning and coordinating tasks

RuleDesigner is able to create an organized and productive work environment for customer service operators thanks to a single Help-Desk access point. This access point enables to assign tasks, also structured in phases, to specific resources on the basis of maintenance interventions or evaluation and execution of change requests.

### Supporting change management workflows

RuleDesigner supports change management processes from the change request (ECR) to the change order (ECO). ECR can be opened because of several reasons, for example to eliminate non-conformities, to reduce direct costs, to improve both performances and reliability, to implement an idea for functional solutions and so on.

The department submitting ECR specifies the object of the change request, involved items (parts, components or documents), reasons and priority levels. Change requests are then registered in the system and specific approval workflows are carried out according to objects and reasons linked to the change request. This way only company departments in charge of evaluating the situation are involved (R&D, Engineering, Quality, Customer Service on the basis of the chosen workflow model).

Approval processes of a ECR can be structured in different phases: feasibility evaluation (during this phase more information can be collected and it is possible to generate technical reports), costs evaluation and analysis of economic impact, approval processes and time scheduling with all measures to be adopted. When a ECR is approved a change order is opened so that approved changes can be made and a new product BOM can be generated.

### Service automation

Tickets are assigned and managed according to workflows configured on the basis of specific needs. Workflows can involve several company departments and different partners or suppliers.

### Scheduling tasks and resources

With RuleDesigner it is possible to schedule tasks on-site and to check if technical operators or other resources are available by consulting shared and integrated planner and agenda.

### Managing contracts and warranties

Through specific tools it is possible to create and store warranties and contracts related to the different typologies of Service Level Agreement (SLA) signed by customers with classification rules and all details about contractual aspects and included services.

This way it is possible to monitor both services already carried out by customer service department and the ones than can be provided by it. Managing all tasks linked to contract renewals becomes extremely easy thanks to specific tools for automatically generating and sending them.

### Automatically converting emails in tickets

All emails for technical support received to a preset account can be automatically converted to tickets with their own content and attachments. This way customers can keep on using usual tools, like emails, and customer service department does not need to convert requests to tickets.

# Publish spare catalogues automatically

## Configurable internal reports

Service reports can be generated in a few seconds. Some examples of reports that can be configured with RuleDesigner tools are the following: identification of the most common request typologies and analysis of performances.

## Customer portal

RuleDesigner is provided with tools for configuring informative panels useful to offer value-added after-sales and spare-parts services and to keep customers always up-to-date thanks to content and document dashboards. The history of customer accesses to the system and of the pages visited are automatically stored in customer informative panels.

## Self-service Help-Desk

Using self service help desk tools enables to easily and quickly send requests or to report problems linked to purchased products. Customers can be updated on tickets' progress status thanks to automatic notifications. Self-service portal makes it possible to communicate with customer service operators through integrated messaging tools.

## Publishing spare-parts catalogs

It is possible to import and publish drawings and part numbers from CAD and PDM systems to spare-parts portals specifically thought for customers and to create interactive spare-parts catalogs. The publishing process can also interact with ERP systems and RuleDesigner Enterprise environment in order to enrich catalogs with additional information, interactive

contents, technical sheets, installation guides, product documents and linked customers.

## Consulting catalogs

Spare-parts catalogs can be consulted by customers by using a graphic mode or by browsing the product structure through a customized web access.

Spare-parts portals provide users with a multilingual graphic interface with possibility of visualizing parts directly from the drawing. Parts can be also searched in graphic or hierarchic mode or by setting filters.

## Submitting purchasing orders via web

Thanks to integrated E-commerce tools, users can fill in and submit purchasing orders. Sales back-office can manage the approval workflow until its fulfillment. Moreover, purchasing orders are always notified to the specific salesmen and automatically tracked in the right company report.

## Informative dashboards

Administration tools allow to create informative dashboards containing contents and documents linked to after-sales services (such as FAQ, videos, tutorial and handbooks). These contents can be organized and grouped on the basis of thematic areas. It is also possible to publish data coming from Web Services (News, Feed, Reader..) and to manage logs by tracking pages visited by users. Moreover, the performance of own portals can be analyzed by creating statistics and reports about contents access.



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