Quick Start Guide

Using the Customer View Application

Spark

Quick-start Guide:
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Introduction

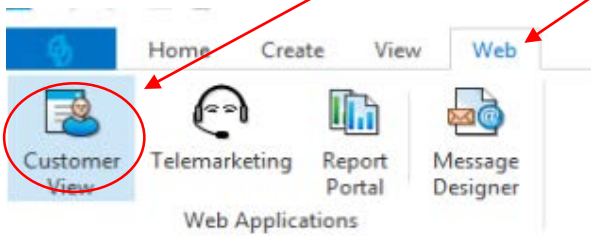
Customer View allows you to register, view and update Customer information. It enables you to send email, SMS, register new documents and responses to questionnaires. You can also view customer history on documents, activities, messages, and responses to questionnaires.

The following is a step-by-step guide for completing several common actions using the Customer View (CV) application. The Guide is intended for beginners with little to no experience with using the CV application.

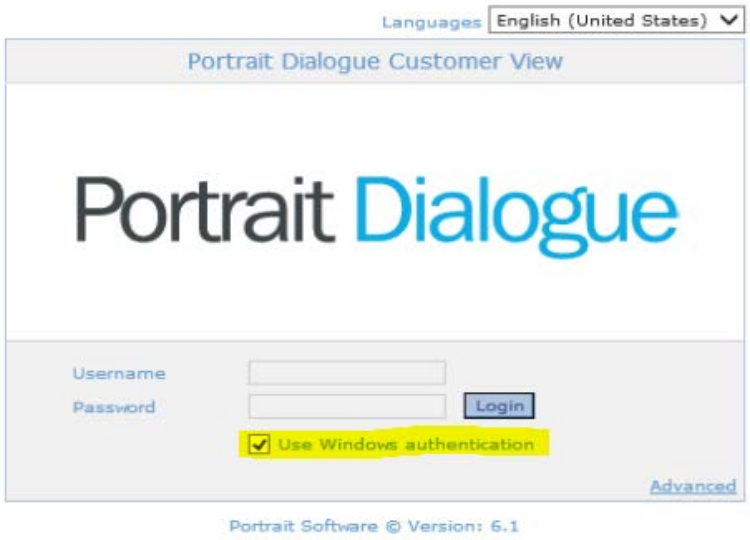
Good luck, explore and have fun with it! Remember if you get stuck or have any questions you can email Sarah at Spark – sjfowler@spark.com.au or register a request via the Spark Service Desk.

ACCESS THE CUSTOMER VIEW APPLICATION

1. Go to your Windows desktop and double-click on the CV icon, pictured right. Alternatively, click on the Customer View icon in the Web tab within Visual Dialogue.



2. You may already be logged in automatically, if not you will be presented with a login screen. Check the 'Use Windows authentication' box then click Login.

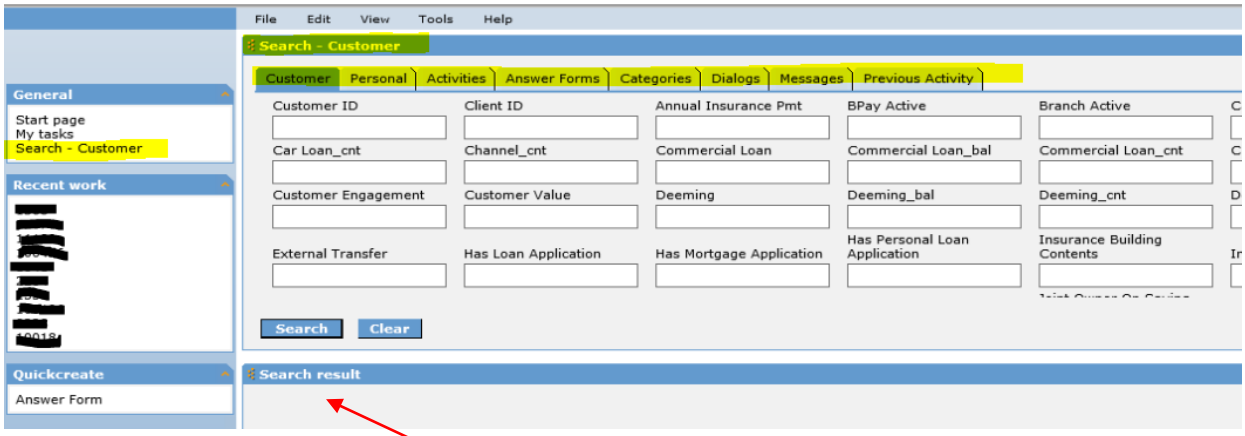


SEARCH, EDIT AND COMPLETE

Now you are ready to search for and edit Questionnaires and customer details, as well as register and complete Tasks! The following section details several common activities you will be using the Customer View application to complete.

1. Search for a Customer

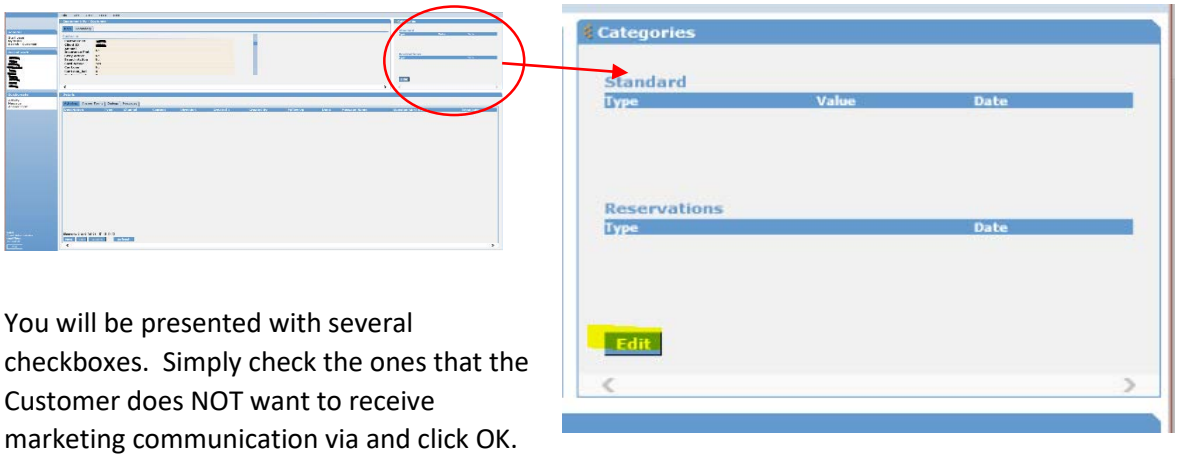
Customer View offers a multitude of ways for you to search for a particular customer (or group of customers), such as whether they were part of a particular Dialogue, answered a Questionnaire, which branch they are tied to – the list is *large* and the fields are accessible via several tabs in the "Search – Customer' screen, pictured below.



However, if know the Customer's ID number then this is the fastest and simplest way to view their details. Simply enter their number in the Customer ID field and hit Enter on the keyboard or click the Search button. The Customer will appear in the 'Search result' window. Double-click on the member to open up the Customer page.

2. Edit Customer Communication Preferences

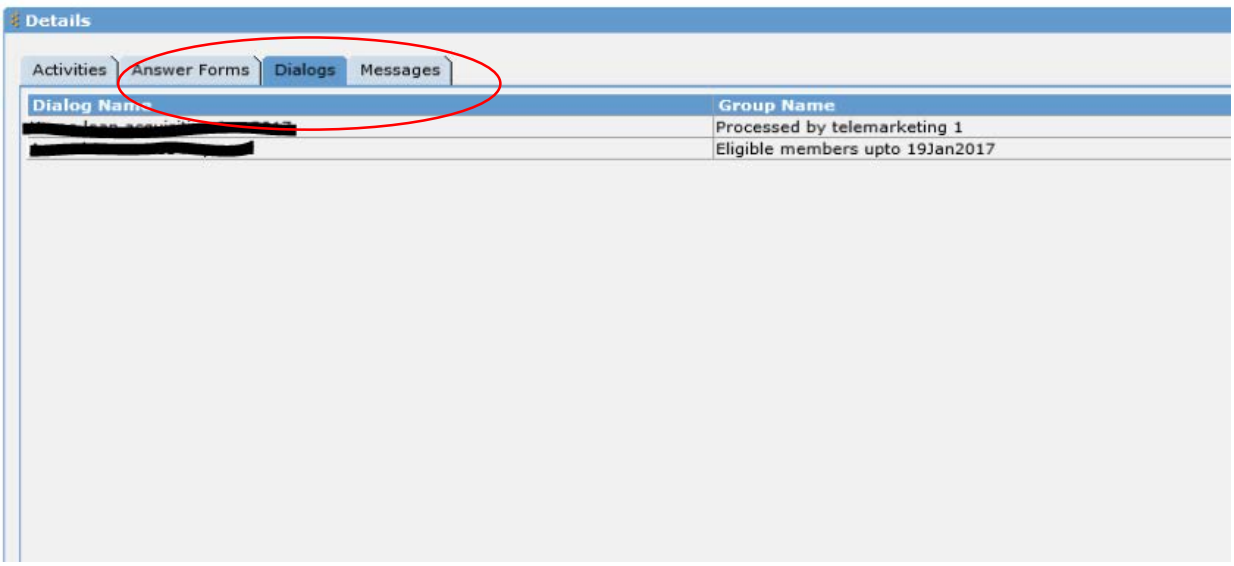
If a Customer indicates they no longer wish to receive marketing communications via a particular channel, you can update these details by clicking on the Edit button in the Categories window. You will find this on the right-hand side of the Customer page.



You will be presented with several checkboxes. Simply check the ones that the Customer does NOT want to receive marketing communication via and click OK.

3. Review Questionnaires, Dialogues & Messages Received

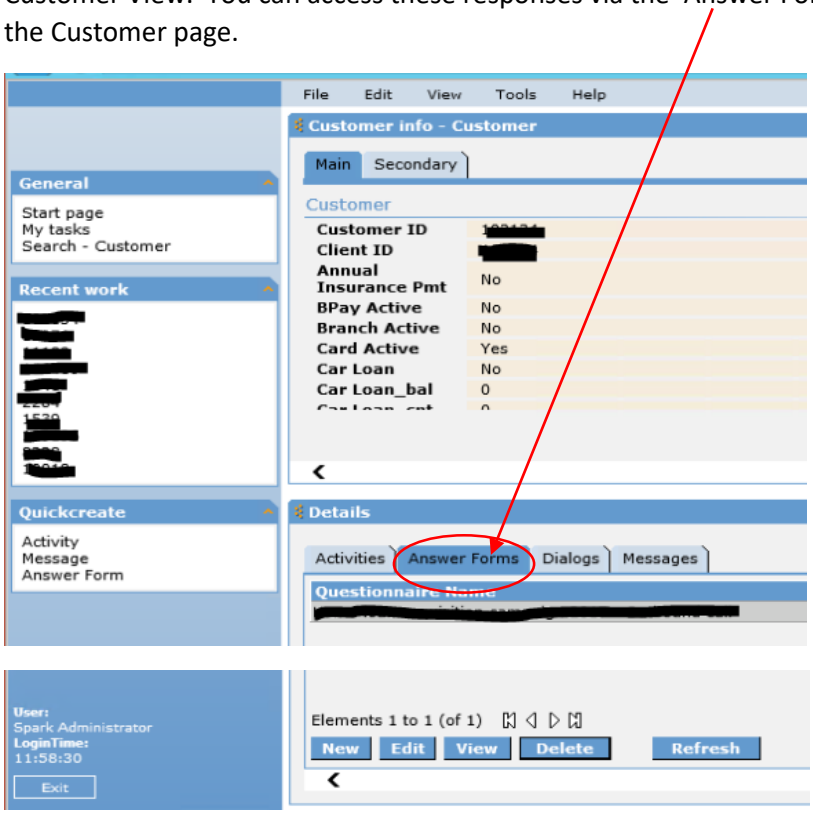
Customer View enables you to see all of the current and previous Dialogues a Customer is or has been in, along with any Questionnaires and Messages they have received. You can review this information in the bottom half of the Customer page in the Details window. Simply click on the Answer Forms, Dialogs or Messages tab to review them.



4. Create, Review & Edit Responses to Questionnaires

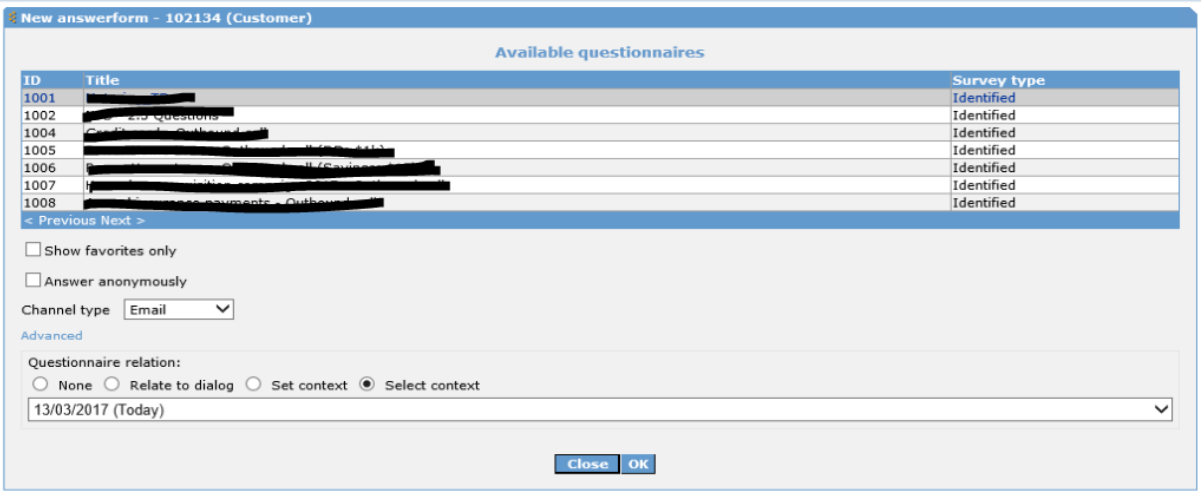
Customer View allows you to fill a new set of responses to a Questionnaire for a Customer. For example, a Customer Experience survey that is registered in Visual Dialogue can be easily accessed via Customer View and filled out by a staff member whilst they are on the phone with them.

When a Customer or staff member answers a Questionnaire, the responses are registered in Customer View. You can access these responses via the 'Answer Forms' tab in the Details window of the Customer page.



A) CREATE A NEW SET OF RESPONSES TO A QUESTIONNAIRE:

- Click the 'New' button. You will be presented with the screen pictured below.



- Select the Questionnaire you would like to create responses for and click OK.
- Fill the responses and submit.

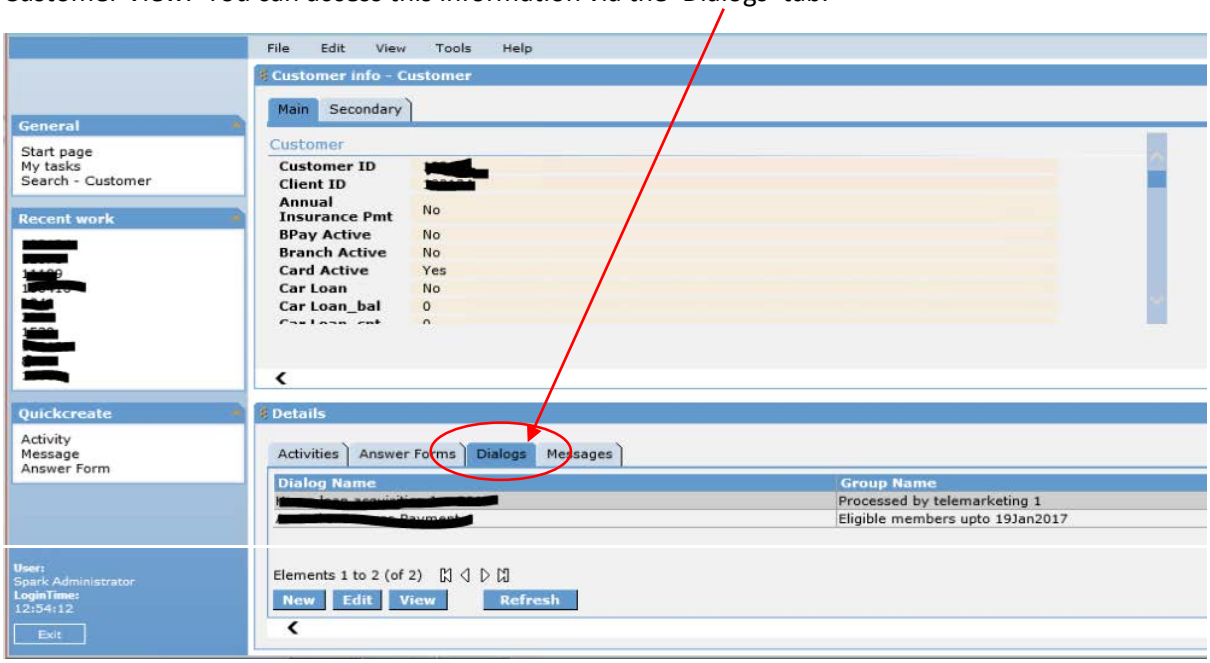
B) REVIEW OR EDIT RESPONSES TO A QUESTIONNAIRE:

In the Details window of the Customer page, click once on the Questionnaire you are after. Then,

- Click the 'View' button to review the responses only, or
- Click the 'Delete' button to remove any registered response to that Questionnaire, or
- Click the 'Edit' button to review *and* edit the responses
    - o You will then be presented with a page displaying the Questionnaire in full, with completed responses. You can simply edit any response and submit to save.

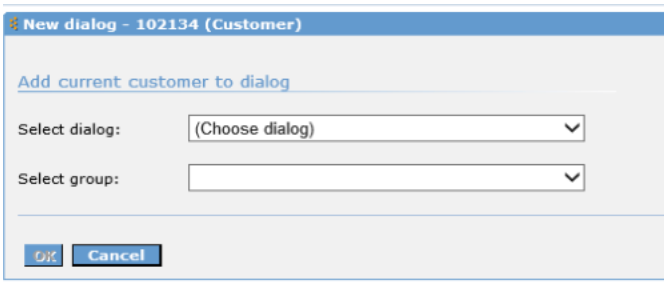
5. Review, Add or Delete a Customer from a Dialogue

When a Customer enters a Dialogue or moves groups within it, this information is registered in Customer View. You can access this information via the 'Dialogs' tab.



A) ADD A CUSTOMER TO A DIALOGUE:

- Click the 'New' button. You will be presented with the screen pictured below.



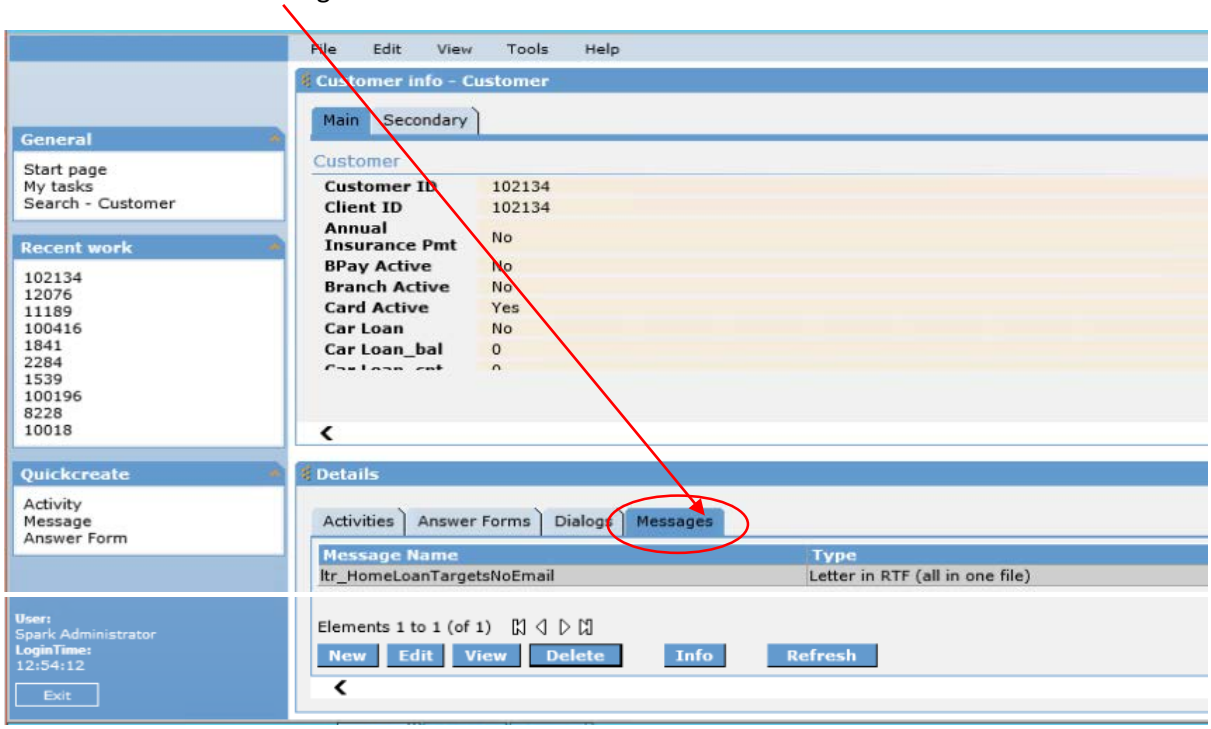
- Select the Dialogue you want the Customer to be part of and the Group that you would like them to enter in, then click OK.

B) REVIEW OR DELETE A CUSTOMER FROM A DIALOGUE:

- In the Details window of the Customer page, click once on the Dialogue you are after. Then,
  - Click the 'View' button to review the Dialogue details only, or
  - Click on the 'Edit' button to review with option to delete the Customer from the Dialogue.

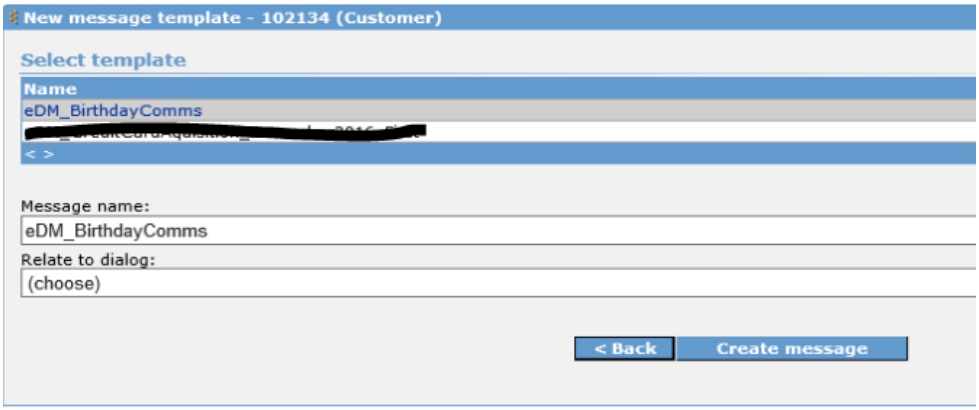
6. Create & Send New Messages or Review Old Messages

When a letter has been generated for a Customer, or they have been sent an email, sms or other electronic communication, this information is registered in Customer View. You can access this information via the Messages tab.



A) CREATE AND SEND A NEW MESSAGE:

- Click the 'New' button.
- Select either email, sms, letter or Import document then click Next. You will then be presented with the screen below. **the example shown below is for an email message template, however the same process is applicable when sending all other template types.*



- Select the name of the Message you would like to create and send. You have the option to rename the message if you like. Then choose from the dropdown box a Dialogue you may like to relate the message to. Click 'Create message'.
- A new window will open that displays the Message. You will notice that all variable fields (i.e. information specific to that Customer) are populated. You now have the option to:
    - Edit any part as needed
    - Click send
- This information will now be registered in Customer View.

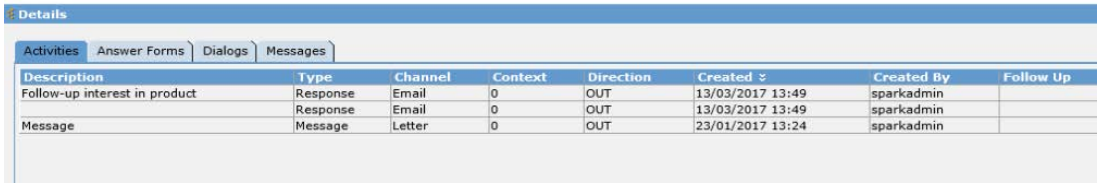
B) REVIEW A PREVIOUS MESSAGE

- In the Details window of the Customer page, click once on the Message you are after. Then,
    - Click the 'View' button to review the Message only. A new window will pop up displaying the same Message that was sent to the Customer or
    - Click 'Delete' to remove the message registered against that Customer.

7. Review & Create New Tasks

You have the ability to create several different types of Activities and register these against the Customer – for example, if the Customer has shared information that should be logged for future reference. The Customer View application also automatically creates and logs Activities when you update information directly.

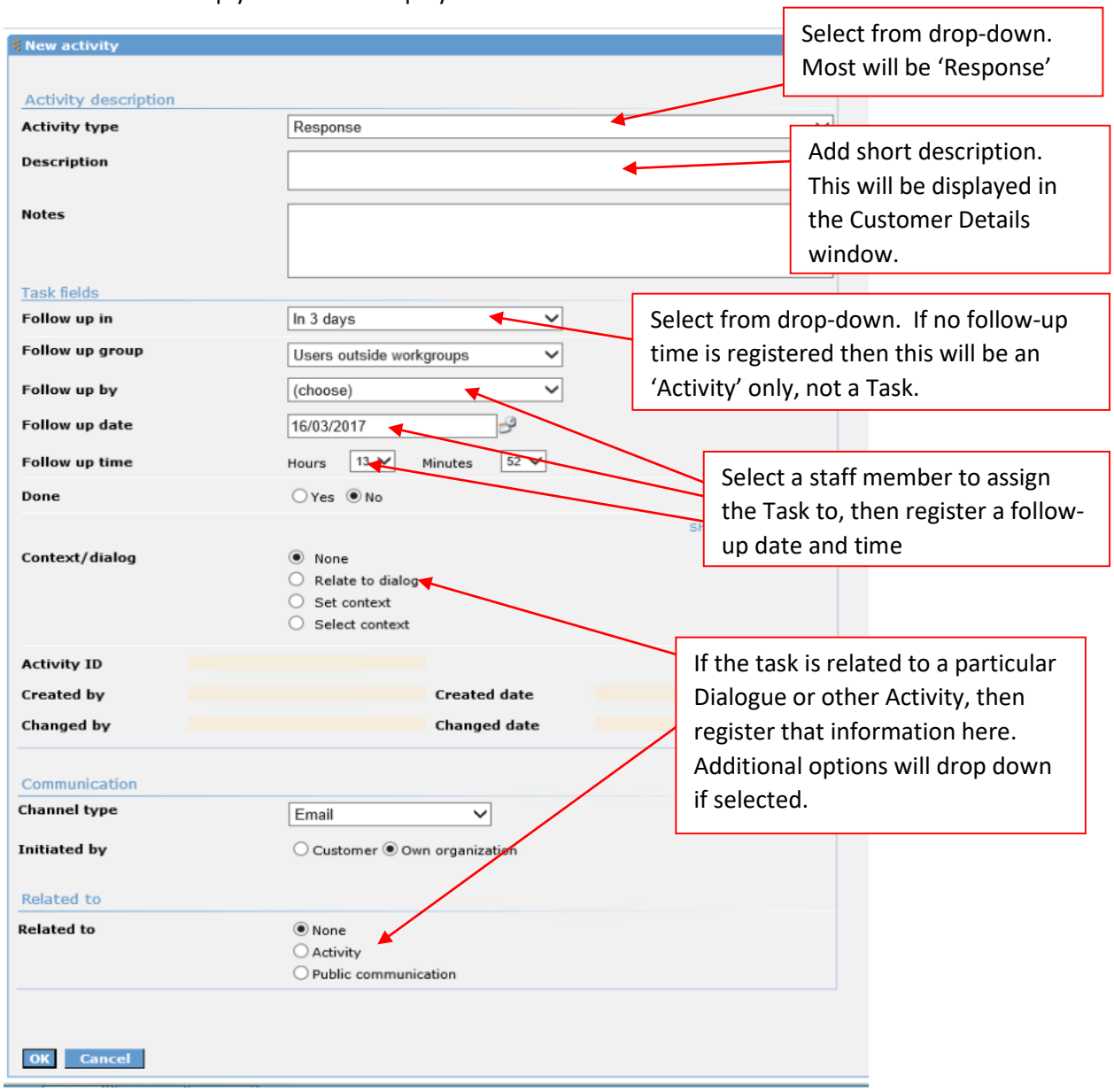
You can view a list of Activities in the Display window on the Customer page, pictured below.



When an Activity is assigned to a staff member and given a follow up time, that Activity will then be labelled as a TASK.

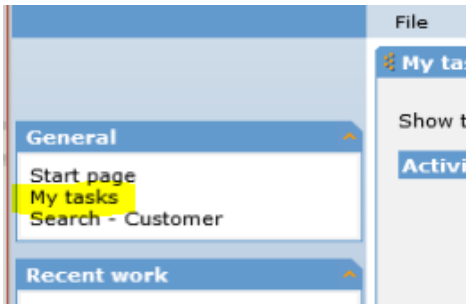
A) CREATE A NEW TASK

- Click the 'New' button in the 'Activities' tab. You will be presented with the following screen. Simply fill it out as displayed below and click OK.



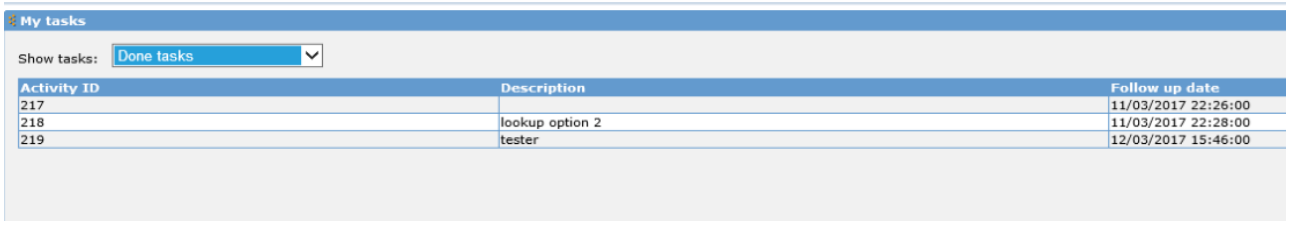
B) REVIEW TASKS

- Access a Task by either:
  i. Double-clicking on it within the Customer page, or
  ii. Selecting it from a list of your own tasks – the 'My Tasks' page. You can find a link to this page on the left-hand side menu on any page – pictured right



C) COMPLETE TASK

- Very easy! Simply click on the radio button 'Done' to indicate you have completed a given task. You will be able to view all Done tasks in the My Tasks menu, along with any new and overdue tasks.



CONGRATULATIONS! You should now have a good understanding of the most common activities that Customer View is used for. When you have time you can explore further menu options and general settings to customise your Customer View experience.