Parature, from Microsoft Spring '15 Release Preview Guide

Detailing:

- Knowledge Management
- Support Ticketing
- Self-Service Portal
- Mobile
- Social
- Chat
- Packaged Integrations

NOTE:
The guidance included in this document reflects current release objectives as of December 2014. This document is not intended to be a detailed specification, and individual scenarios or features may be added, amended or deprioritized based on market dynamics and customer demand. Please contact your salesperson for more information on the pricing and licensing of features contained in this Release Preview Guide.

■■ Microsoft

Release Preview Guide
Spring 2015

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Introduction

Technology has fundamentally changed customer care, empowering the customer with as much or more information, devices and channels of engagement as the average customer service agent has to deliver service. Growing expectations have presented brands and organizations with the need to become "customer obsessed" and more deeply invest in the technology that will allow them to productively, proactively, personally and consistently respond to and engage with customers at the time and on the channel of their convenience.

Microsoft, the productivity and platform company for the mobile-first, cloud-first world, stands in a unique position to provide a complete solution that engages the customer from brand promise to post-sales service and support. In tandem with our large installed base of customers, Microsoft is reinventing productivity to empower every person and organization on the planet to do more and achieve more. Parature, from Microsoft leads this charge in the customer care space to empower employees, drive consistency, engage and serve customers, and analyze the impact to make every customer experience better.

This document highlights more than 30 new features and capabilities in Parature's upcoming release that will further enhance productivity and allow employees to consistently deliver amazing customer experiences. These include the ability to now fully provision and configure a complete Parature environment using the Microsoft Online Commerce platform; notable social, mobile and chat customer engagement enhancements; Parature's highly-anticipated omni-portal capabilities, and new across-the-board service desk innovations to increase Parature user productivity, service personalization, multichannel and multilingual engagement, and ultimately, each customer's satisfaction.

Spring '15 Release Preview

Knowledge Management

Knowledge Web

Knowledge and knowledge management serve as the foundation for productive, proactive and consistent assisted and self-service customer care. When both employees and customers can find the right answers and information at the right time, delivered on the channel of their choice or convenience, satisfaction is sure to rise.

Agents and employees will now be able to define associated knowledgebase article content in order to provide both agents and customers with related articles that may further assist in providing answers or information to increase the customer's understanding of related products and services. Agents can now also create guided self-service content that takes the customer step-by-step through complicated processes.

Through these and other upcoming features, Parature users will be empowered to create, manage and utilize a "web of knowledge" where information can be graphed together to create a new realm of answers and solutions.

Related Articles

📝 Edit Article   📥 Alternate Questions(0)   📄 Attachments(0)   📄 Subscribers(4)   ☑ Feedback(3)   🔗 Discussions(0)   🔗 Related Articles

Related Content   🔗 Associate Existing Article(s)   📋 Associate New Article   📝 Delete Association(s)   📝 Edit/Move Article(s)

☐	ID ▽	📥	📄	Status	Name	Modified

There are no article with this association type.

Deflection Reporting

Knowing which knowledgebase content is useful and most-used, as well as which content is not, is vital to organizations looking to improve their self-service offering and self-service deflection of frequently-asked-questions from higher cost, higher touch channels such as phone or email. Parature users will now be able to report on how many views and deflections each knowledgebase article has on a daily basis to improve content, to make the most-viewed answers and information even more accessible, and to report on the success of self-service knowledgebase deflection.

Knowledgebase API Enhancements

Parature users will also have the ability to manage related articles through the Parature API. Through this process, knowledgebase authors can use automated processes and third-party tools to create lists of related articles. These processes can also add knowledgebase articles to or remove articles from lists of related articles when creating or updating knowledgebase content.

In addition, Parature users will be able to retrieve, add and edit knowledgebase article keywords via automated processes using the Parature API. Agents will now be able to use background processes, integrated content, and third-party applications, for example, to create and edit keywords that will assist both employees and customers as they perform searches (both on support portals and the search engines) for the correct answers and information.

Support Ticketing

Comprehensive Service Desk Configuration

Parature administrators will now be empowered with a host of new abilities to customize and configure every aspect of their brand or organization's Parature instance, leading to greater productivity, as Parature is more seamlessly integrated with unique business processes. Parature's release notes will provide details on how to access these new configuration options which include managing how customers create new accounts, what service channel offerings appear on the Parature support portal home page, customizing details of the support ticket flow and more.

Above the Queue InSight

One of the keys to increased productivity, personalization and customer satisfaction is providing agents with information about who the customer is and their recent support interactions prior to engaging with them for assisted service.

With a new portal activity widget, agents will have "above the queue" visibility into what a customer has searched for, viewed and interacted with on your brand or organization's support portal, allowing the agent to be more productive and proactive in delivering assisted support, and reducing the need for the customer to recount the actions they took prior to requesting assisted service.

Social Conversation History

With this widget enabled, agents will be able to view the complete conversation history related to a support ticket created from a customer's Facebook post, social comment or Tweet. Agents will not only be able to view the customer's social conversation, but can also gain insight into what other fans and customers have said in relation, gaining greater context related to the question or issue and its escalation.

Customer InSight on Ticket Creation

For various reasons, including additional follow-up needed or research and subject matter expertise required, agents may need to submit a support ticket on behalf of their customer. Custom ticket widgets can now be configured to display on the service desk when creating a ticket for a customer, providing easier access to customer information, integration content, and other necessary data that will proactively speed and enable issue resolution, and save agents time from previously having to go between tabs to retrieve customer data.

Criteria Editor Enhancements

Using in-list criteria, agents can create specific lists of options, dates or text to compare against a field in Ticket Business rules, reducing an agent's time to implement and manage set ticket rules.

All Criteria Editors will also be able to use the following new operators: Customer and Account-related Product Fields; Related Account Fields; In List and Not In List; Product and Asset Module Fields. This enhanced functionality will allow agents to build more specific business rules and alerts to proactively increase individual and team productivity.
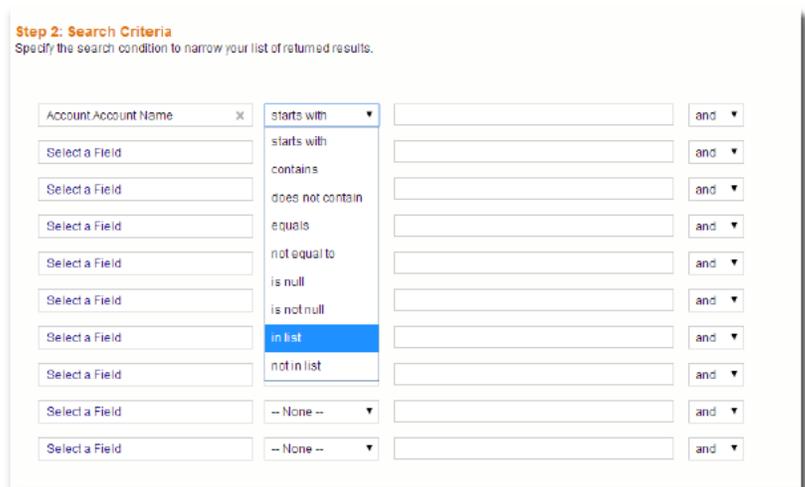
Easy Ticket Cleanup

A Trash Ticket option will be available for agents with the appropriate role/permissions, giving them the ability to delete tickets without having to return to the Ticket List View, increasing agent productivity.

Consistent Agent Assignment

To increase productivity, personalization and consistency when it comes to complex, subject matter specific, ongoing or repetitive issues and questions, agents can now use the "Assign Ticket to a CSR Assigned to a Queue" option for Business Rules and TSAs (Time Sensitive Alerts) to assign agents to a ticket that they had worked on previously. Now, agents with subject matter expertise or specific experience or skills can be assigned to both tickets and customers that would benefit from this expertise.

Email Template Automation

To enhance personalization of service, as well as agent productivity, Parature users can automatically associate specific email notification/correspondence templates to a particular ticket actions. Uniquely formatted or customized templates based on the type of issue, reply or proactive outreach provide a high-touch, customer-focused feel to support, thank you or other types of correspondence.

Advanced Service Notifications

Agents will be able to define the default preferences for email notifications for Primary Customers on a ticket, as well as configure the customer's ability to edit support notifications associated with a submitted ticket. This will help to ensure that the customer receives the necessary communications associated with their support issue.

An option will also be added to remove the ability for customers to "cc" other customers when creating or performing actions on tickets. This feature will help protect customer and information privacy, as well as drive more focused and productive issue resolution.

Service Auditing

An Audit Log will capture the rule name, agent name, details, and date of the changes made to all Ticket Business Rules TSAs to gain better visibility into what changes were made and by whom, as well as to revert back to previous rules if needed.
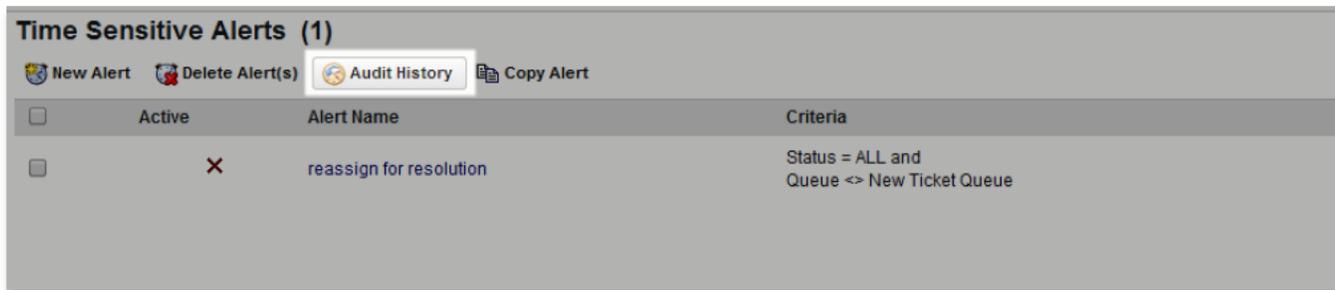
Time Sensitive Alerts (1)			
🛡 New Alert 🗑 Delete Alert(s) 🔄 Audit History 📋 Copy Alert			
☐	Active	Alert Name	Criteria
☐	✕	reassign for resolution	Status = ALL and Queue <> New Ticket Queue

SLA Inheritance

Service Level Agreements (SLAs) are critical business components, providing specific rules around customer issue management and response times that must be met. In addition to the valuable SLA features Parature already has in place, tickets can now also be configured to inherit the SLA of the new Customer when the Primary Customer is changed, generating more effective KPIs and reports.

TSA Process Orchestration

Time Sensitive Alerts (TSAs) work to ensure that service and support requests are answered in a timely manner or within parameters set by the organization. With this release, the Required Status for TSAs will be updated to an In-List operator. Agents can now create a single TSA for multiple tickets and/or multiple ticket statuses, improving productivity by decreasing system load and maintenance required by agents.

Additional Productivity Features

Agents will now have the ability to perform mass edits to products in the product catalog, saving time and ensuring consistent changes to all associated products.

An edit link will also be added to view pages of the Parature Account, Customer, Product, and Ticket modules. This will reduce the number of clicks needed to perform the critical task of editing entities.

A productivity enhancement for Parature administrators is also among these added features. Now, Parature administrators can edit an agent/CSR's Ticket Queue Permissions from the Edit CSR page. Parature administrators will also have the ability to perform mass edits, increasing both efficiency and real-time consistency across the department or team.

Advanced File Management

Parature users will now be able to add files to tickets through Ticket Actions using the action schema of a new Parature API. Agents can make use of the robust Parature API to enable background processes, third-party applications, and scripts to automate the attachment of files to tickets, giving service and support agents and employees added documentation, photos, videos, etc. in order to gain more context around, view or better understand a customer issue or question.

Self-service

Omni-portal

For enterprise brands and organizations with a single and unified public-facing brand presence, but that operate with various and unique departments or divisions, Parature will offer its highly anticipated omni-portal capability.
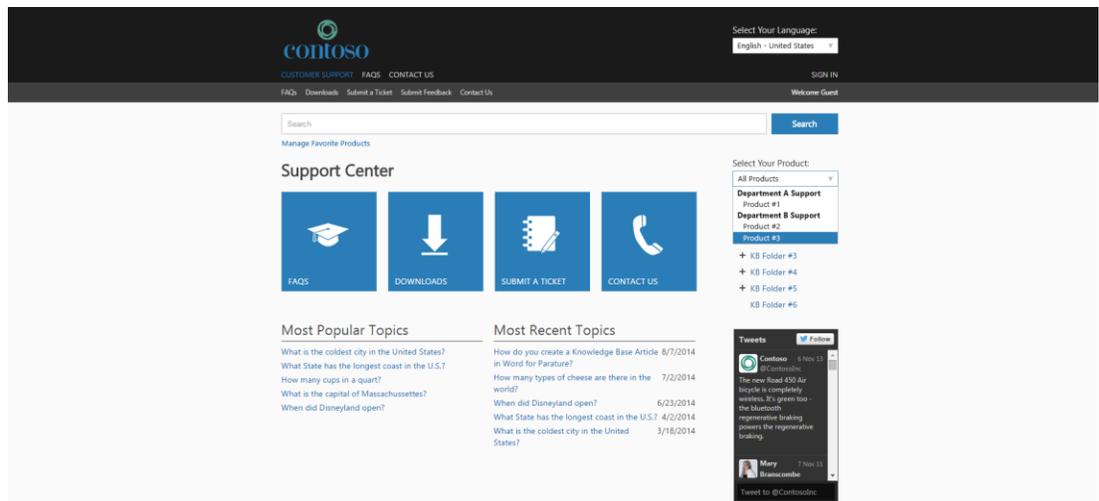
Customers will be able to view specific content for and submit support requests to one or many departments empowered with unique field dependencies for specific requests. This product or service-based approach will give customers an enhanced ability to find the answers and information they're looking for, reducing their effort, saving them time and increasing satisfaction.

On the service desk side, agents will have the ability to more productively customize content and route service and support requests to the correct department and teams for a more personalized and efficient response. The omni-portal product will provide multilingual support for more than 40 languages, including right to left.

Customer InSight

A historical view of the customer's support portal activity, including articles viewed and files downloaded, will be added to the customer record in the Parature service desk. This "above the queue" visibility will allow agents to be more productive in knowing what resources and information the customer has already viewed so that they can save the customer time, and more effectively provide assisted service.

Customer InSight Reporting

Parature users will be empowered with added self-service support portal metrics, showing the actions the customer took on the support portal, in order to provide more productive and proactive assisted service. Agents can also use this same visibility to gain insights into what the customer was searching for and viewing prior to submitting a support ticket. This historical view will enable agents to improve self-service content, portal offerings and portal information organization for future interactions.

Mobile

Mobile Service Desk

Customers are increasingly empowered by their mobile devices, and their expectations for anytime, anywhere service have only grown because of this. Parature empowers agents and employees with the same anytime, anywhere access to deliver real-time service and support.

Enhancements to the mobile service desk include greater visibility of contact/customer records, so that agents have more context when replying to support tickets via a mobile device.

In addition, an updated User Interface (UI) gives greater emphasis to important data including contact information and statuses to improve productivity and personalization of service via a mobile device.
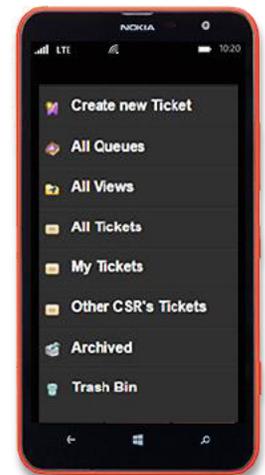
Social

New Social Channels

Personalized and consistent social customer service and engagement has become a key differentiator for brands and organizations. Parature's Social Monitor, which brings social customer care

Parature Social Suite Setup

Social Channels		
Title	Default Actions	
@SocialSonar2014	🖥	Facebook Channel
ParaWagen	🖥	Twitter Channel
uy 🚫	🖥	YouTube Channel
Parature KB	🖥	LinkedIn Channel
		Instagram Channel

Tagging Criteria
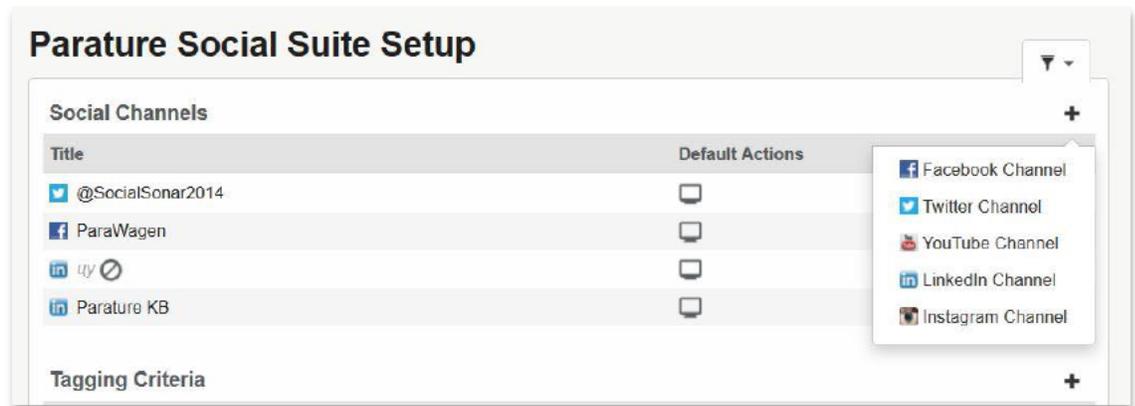
together as part of Parature's multichannel service desk, will now be even more comprehensive with the ability to read, manage, filter and respond to posts on branded or associated LinkedIn, YouTube and Instagram properties, just as Parature users do now on Facebook and Twitter.

Social Influence InSight

Parature users can now prioritize, capture and respond to the activity of their brand or organization's most important social media influencers by utilizing user names, actual names or social reach to tag and ticket social media posts, comments and tweets across your brand or organization's Twitter, Facebook, LinkedIn, YouTube and Instagram properties. Easily create lists of social customer VIPs and rules to automatically identify your brand or organization's social influencers.

Hide from Timeline Capability

Especially on social media, personalized and proactive efforts to serve and engage the customer while protecting private information have proved challenging. CSRs can now set social events to not display on their brand's Facebook timelines (without deleting them from the social channel). Parature enables employees to provide more personalized care on social media by allowing certain posts to be hidden from other customers' view, protecting potentially sensitive or personally-identifying information while still allowing agents and social customers to engage on the customer's channel of choice.

Chat

Real Time Chat Translation

Parature's live chat product will feature greater global service capabilities, utilizing real-time machine translation to provide chat support in more than 40 languages. Chat messages sent by customers will be automatically translated into the customer service agent's or employee's preferred or default language, and both the original text and the translated text will be displayed in the Parature service desk. The delivery of proactive and personalized service to customers around the globe will become even easier with these upcoming enhancements.

Advanced Chat Management

Whether used proactively or reactively, live chat has proven to be one of the most satisfying customer service channels due to its real-time and personalized response.

Parature users will be able to add one or many chat widgets to their Chat Toolkit to proactively improve the overall customer experience, chat handle times and agent productivity by making third-party tools such as screen and file sharing, or internal tools such as an RMA system available within the Parature chat console.

The Chat Toolkit will also remember individual resizing and expand or collapse preferences for each section of the Toolkit, further increasing productivity.

Packaged Integrations

Microsoft Online Commerce Integration

Current and new Parature customers will now be able to fully provision, configure and manage a Parature environment using the Microsoft Online Commerce platform.

This will make integrated purchasing and billing capabilities with Microsoft Dynamics CRM and other Office 365 applications even easier, and will be done through the Microsoft Online Portal (MOP), an online management portal which allows customers and administrators to configure and manage products within Microsoft Dynamics and Microsoft Office 365, and to configure user access.
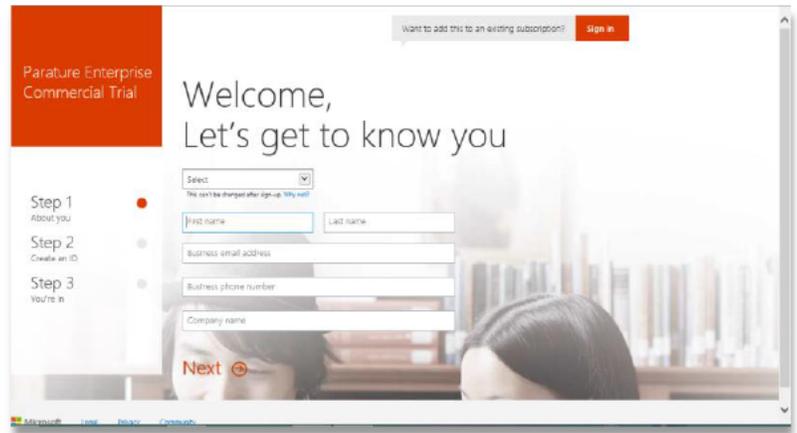

This integration will also enhance the Parature delivery experience with free trials and a better onboarding experience for new customers. Increased ease and accessibility will now give Parature customers even more Microsoft features to create and deliver amazing customer experiences.

Look for new licensing upgrades, as well, with live chat, social customer service, additional multichannel features and extended support hours for international markets included.

Knowledge Integrations

Knowledge on every desktop will be the foundation for Parature and Microsoft Dynamics CRM's powerful future together, as Parature's award-winning knowledge management capabilities become out-of-the box functionality in Microsoft Dynamics CRM.

And this is just the start of Parature's powerful integration with Microsoft Dynamics CRM. Upcoming releases will
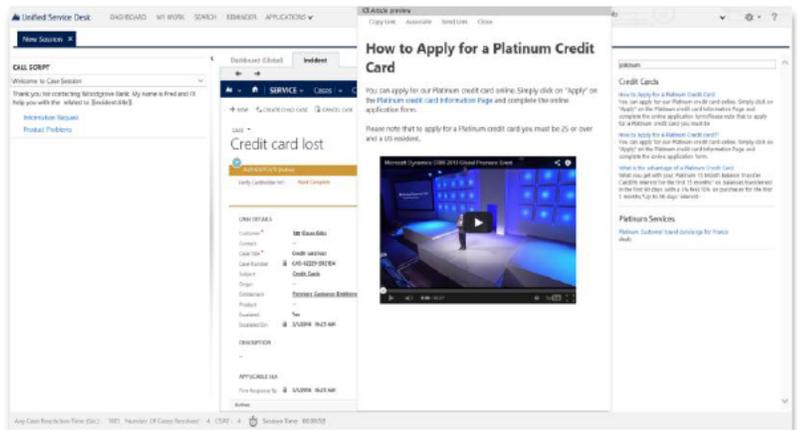
present even more out-of-the-box features to empower every employee with the ability to deliver amazing customer experiences.

The same knowledge integration for Microsoft Dynamics CRM will also be available for other solutions such as Salesforce. Please contact Parature for more information on its continuing innovation in knowledge and other integrations.

Conclusion

Fueled by the power, technology and innovation of Microsoft, Parature will continue to raise the bar on powering amazing customer experiences with its unified knowledge, self-service and multi-channel customer care solutions. In addition, we will deliver enhanced customer care capabilities to users of Microsoft Dynamics CRM and assist in driving the next-generation of innovation in customer care.

This Release Preview Guide shows Parature's continued commitment to being a leader in customer-driven innovation. Our goal is to empower Parature users with even more tools, features and knowledge to deliver productive, proactive, personalized and consistent customer service. We look forward to keeping you informed as we deliver on the items in this Release Preview Guide.

For further information on Parature, visit www.parature.com.

For additional information around this and other current Microsoft Dynamics CRM releases, please visit the Get Ready page.

The Parature, from Microsoft Team

Parature, from Microsoft
Release Preview Guide '15

Individual Features Listing

Detailed release notes describing each feature will be made available to Parature customers as release waves are introduced.

Knowledge Management

- Add Edit Link to List Views
- Added Functionality for Criteria Editors
- Article Deflection Reporting
- Associate Related Knowledgebase Articles
- Enhanced Search for Knowledgebase and Download Modules
- Exclude Knowledgebase Articles from Search Results
- Manage Related Articles through the API
- Retrieve and Edit Knowledgebase Keywords through the API
- Tagging for Articles
- Upload and Insert Images Using the WYSIWYG Editor

Mobile Service Desk

- Contact Records
- Refreshed UI

Self-Service/Support Portal

- Customer Portal Activity
- Omni-Portal
- Portal Activity Reporting

Support Ticketing/Service Desk

- Allow CSRs to Define Default Ticket Email Notification Settings
- Apply Ticket Email Templates to Ticket Actions
- Attach Files to Ticket Actions through the API
- Audit Logs for Ticket Business Rules and TSAs
- Comprehensive Service Desk Configuration
- Configure Customer Ability to Edit Ticket Notification Settings
- Display Portal Content Viewed by Customer on Tickets
- Enhanced WYSIWYG Editor
- In-list Criteria
- In-List Status Requirement for TSAs
- Inherit New Customer SLA for Tickets
- Mass Edit Products
- Option to Remove Ability to CC Other Customers on Tickets

- Portal Activity Widget
- Reset Search Results for In-List Pickers
- Social Context Widget
- Ticket Widgets on the Ticket Creation Page
- Trash Ticket Action
- TSAs and Business Rules Can Reassign CSRs Previously Assigned to a Ticket

Social Media

- Hide From Timeline Feature in Social Monitor
- LinkedIn, YouTube and Instagram Support for Parature Social Monitor
- Social Profile Tagging

Chat

- Chat Translation
- Chat Widgets
- Sticky Resize and Expand/Collapse Settings in the Chat Toolkit

Globalization/Multilingual

- Auto-Detect Guest Customer's Locale
- Chat Transcript Contains Original Text and Translated Text
- CSR Live Chat Translation
- Customer Language Setting for CSRs
- Customer Localization Preferences at the Department Level
- Export Portal Translations
- Ignore Chat Auto Translation for CSRs
- Import Portal Translations
- Multilingual Support Portal
- Profile Language Setting for Customers
- Ticket Language Identifier
- Translation Settings for Portal Users

Packaged Integrations

- Knowledge Integrations
- Microsoft Online Commerce Integration

Parature, from Microsoft, is the leading provider of cloud-based customer service software for more than 100 million end users worldwide, focusing on delivering amazing customer experiences through a powerful foundation of enhanced employee productivity through knowledge management, consumer empowerment through self-service and consistent engagement through multi-channel interactions.

U.S. and Canada Toll-Free 1-877-GOPARATURE
www.parature.com

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