

# Eccentex AppBase Platform

Enterprise Low-Code Platform

Digital transformation powered by  
**Western Integrated Systems**

[westint.com](https://westint.com)

# AppBase unites all the capabilities required to deliver seamless, end-to-end digital transformation across your organization

Western Integrated Systems brings over 35 years of consulting, implementation, and support experience to the government market in advanced content management, workflow automation and robotics.



# Solution Summary

AppBase allows business users to design, configure and adapt applications with no-code, drag-and-drop ease, as well as provides advanced features for technical users. Hosted on Microsoft Azure, AppBase delivers enterprise-grade performance, reliability, and security.

## Features

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- Dynamic Case Management
- Business Process Management
- Operational CRM
- Master Data Management
- Self-Service & Portal
- Employee Management
- Robotics & Automation
- Tracking & Audit
- Advanced Content Management
- Email Capture & Automation
- Dashboard & Reporting
- Collaboration & Teams
- Omnichannel with Genesys
- Proactive Engagement
- Knowledge Base
- Calendar & Appointments

## Under the Hood

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- No-Code Features
- Low-Code Features
- Deep-Code Features
- Security & Trust

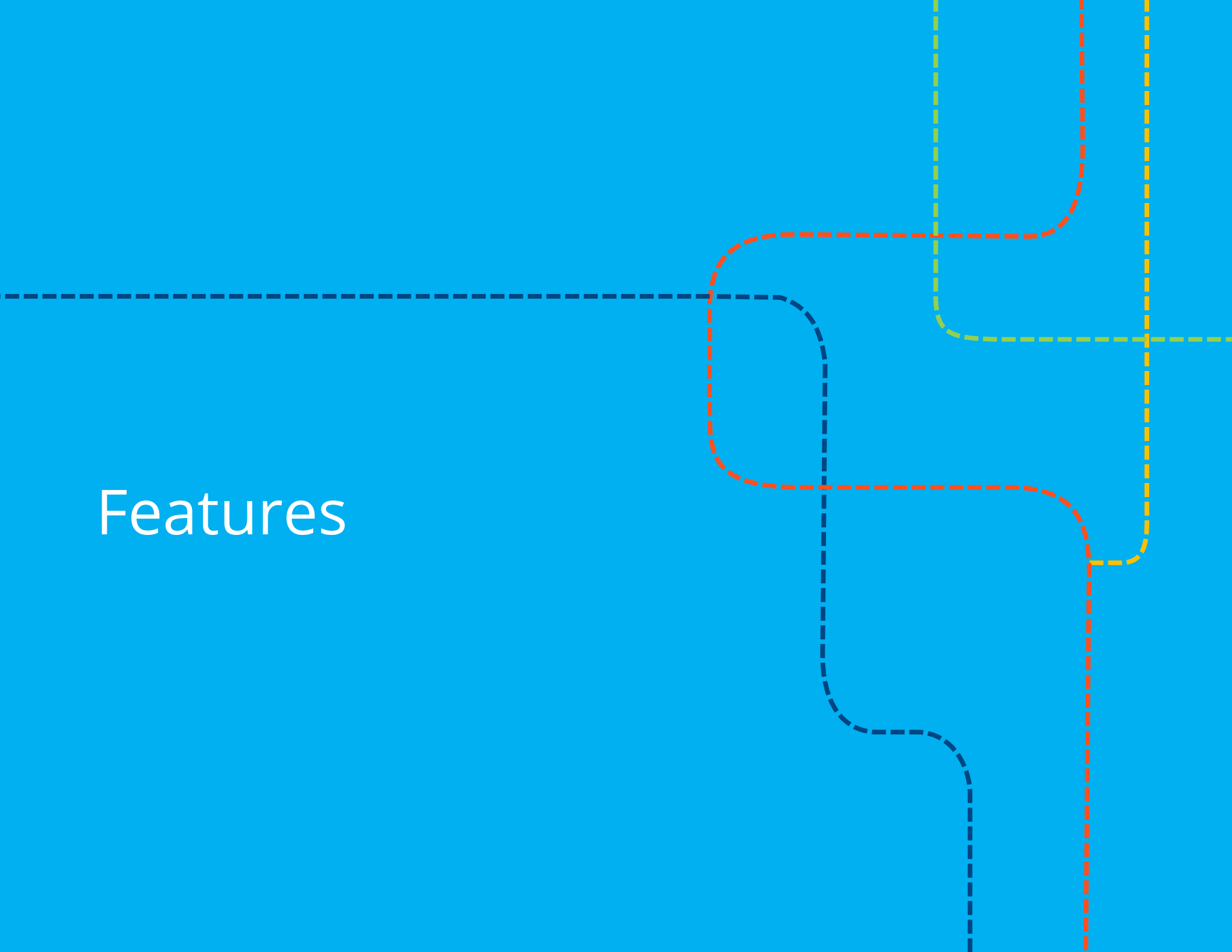
## Cloud & Delivery

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- Deployment & Hosting
- Professional Services

*Note: some features may require additional licenses or services.*

Features



# Dynamic Case Management

Orchestrate consistent and accurate resolutions every time with cases that can adapt to diverse and unpredictable situations.



## Case Types

Create any number of case types that have their own workflows, fields, SLAs, and business rules.



## Customer Context

Surface the most relevant and actionable information to employees based on the interaction or work at hand.



## Custom Milestones

Track simple and complex cases with custom milestones tailored to how each case type should be resolved.



## Flexible Forms

Add and modify forms that are important for each case type; add validations, field guides, and help messages.



## Sub-Cases & Linked Cases

Split complex, multi-stage issues into smaller pieces. Keep track of related issues to provide consistent responses.



## Ad-hoc Tasks

Create unplanned tasks such as requesting a review or approval and easily assign them to individual people or teams.

# Case 360 Detail Page

eccentex

Case Management

Home

Case Inbox

Task Inbox

Customers

Search Cases

External Parties

Work Activity Report

Email Indexing

My Profile

My Dashboards

Report Viewer

More

Search Cases

Generic Searches

Home Search Cases CASE-2020-465

€ Retail Refund Order #1028064427 - 1,146.00 EUR - Pat Thompson

Assign Case Issue Refund Escalate to Manager Deny Refund More

Case ID: CASE-2020-465 Milestone: In Review Priority: Normal Total: € 1,146.00 EUR

Case Owner: Morgan Smithson (Agent) Case SLA: 1d 16h 47m Resolution:

Refund Articles Refund Details Tasks (4) Documents (6) Discussions (1)

==Search Order== Advanced Search Total Refund: € 1,146.00 EUR

Order & Articles	# Qty.	Wished Resol...	Return Amount
#1028064427 for Molle Mocker Thursday, 7 November 2019 13:55			
#60204645 / UTRUSTA - charnières	7 of 7	Full Refund	€ 42.00 EUR 35.00 + 7.00 VAT
#70213569 / METOD - élément bas pr four/évier encastré	2 of 2	Full Refund	€ 74.40 EUR 62.00 + 12.40 VAT
#80335117 / LYSEKIL - baguette pour revêtement mural	4 of 4	Full Refund	€ 72.00 EUR 60.00 + 12.00 VAT
#40204651 / UTRUSTA - face de tiroir, bas	1 of 1	Full Refund	€ 6.00 EUR 5.00 + 1.00 VAT
#50213570 / METOD - caisson arm réfrig/four	2 of 2	Full Refund	€ 192.00 EUR 160.00 + 32.00 VAT
#40241823 / UTRUSTA - amortisseur de porte pour charnière	4 of 4	Full Refund	€ 24.00 EUR 20.00 + 4.00 VAT
#455161 / ÅLMAREN - mitigeur	2 of 2	Full Refund	€ 141.60 EUR 118.00 + 23.60 VAT
#90337620 / EKBACKEN - plan de travail	2 of 2	Full Refund	€ 117.60 EUR 98.00 + 19.60 VAT
#30263245 / KOMPLEMENT - rail coulissant pour corbeilles	4 of 4	Partial Refund	€ 19.20 EUR 16.00 + 3.20 VAT
#90202126 / FYNDIG - évier à encastrer 1 bac	2 of 2	Full Refund	€ 50.40 EUR 42.00 + 8.40 VAT
#60285038 / MAXIMERA - tiroir, moyen	1 of 1	Full Refund	€ 38.40 EUR 32.00 + 6.40 VAT
#30322773 / KALLARP - porte	1 of 1	Full Refund	€ 43.20 EUR 36.00 + 7.20 VAT
#90322708 / KALLARP - panneau latéral de finition	1 of 1	Full Refund	€ 85.20 EUR 71.00 + 14.20 VAT
#60205664 / METOD - rail de suspension	3 of 3	Partial Refund	€ 39.60 EUR 33.00 + 6.60 VAT
#90285032 / MAXIMERA - tiroir, bas	1 of 1	Compensation	€ 31.20 EUR 26.00 + 5.20 VAT
#20322815 / KALLARP - face de tiroir	2 of 2	Partial Refund	€ 50.40 EUR 42.00 + 8.40 VAT

Order Details Customer Profile

Order Status: Completed

Order #: 1028064427 Order Status: COMPLETED  
Sales Total: € 2,188.09 EUR Order Type: ISOM  
VAT Total: € 436.02 EUR Business Unit Code: 241  
Total: € 2,616.11 EUR Case & Carry: No  
Order # Source: A01

Billing Details  
First Name Last Name Order # Customer ID  
Pat Thompson 1028064427 008FR133-3193-1200-0000-000000000000

Payment Info  
Amount Tax Due Date Timing  
€ 2,279.09 EUR € 379.85 EUR Thursday, 7 November 2019 13:55 ON\_DATE

Transactions  
Amount Transaction Date Gateway System Type  
€ 2,279.09 EUR Thursday, 7 November 2019 13:55 RED IRH MASTERCARD

Deliveries  
Delivery Time Service Type Status  
Monday, 18 November 2019 07:00 HOME\_DELIVERY Delivered  
to STANDARD CUSTOMER\_ADDRESS  
Monday, 18 November 2019 19:00  
Timezone: Europe/Paris

Contact Address Cost  
Pat Thompson Address line 1 Delivery Charge: € 82.50 EUR  
Email: pthompson@gmail.com LIMOGES, FR VAT Charge: € 16.50 EUR  
Mobile: 1234567890 Open in Google Maps Total Delivery: 16.50 99

People (4) Notes (14) KB

Add to Case

MG Morgan Smithson  
Case Creator  
Case Worker

M Managers  
Managers Work Basket  
Team

PT Pat Thompson  
Customer  
External Party

TL Team Leaders  
Team Leaders Work Basket  
Team

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# Business Process Management

Boost efficiency and transparency across multiple channels and organization silos by automating work when possible, deferring to human judgment when required.



## End-to-end Workflows

Visually model your business workflow with manual and automatic steps that can have their own actions, SLAs, and validations.



## Team Inboxes

Track tickets coming from multiple channels and assign them to individuals, teams, departments, or specialized queues.



## Integration & APIs

Send case data to other systems or allow other systems to push, create, update, route, and close work.



## Business Rules

Automate assignment & routing, decisions, field calculations and communication with other systems or people.



## Smart Assignment

Assign cases and tasks to employees or teams based on their workload, skill set or allow them to pick their own assignments.



## SLA Management

Set deadlines for when a case or specific task needs to be resolved and automatically escalate at-risk items or notify stakeholders.



# Tasks in a Case + Task Workflow

The screenshot displays the 'eccentex' ACME Customer Service App interface. The top navigation bar includes 'Home', 'Search Cases', and the case ID 'CASE-2020-465'. The main header shows 'Retail Refund Order #1028064427 - 1,146.00 EUR - Pat Thompson'. Below this, there are buttons for 'Assign Case', 'Issue Refund', 'Escalate to Manager', 'Deny Refund', and 'More'. The case details section shows 'Case ID: CASE-2020-465', 'Milestone: In Review', 'Priority: Normal', 'Case Owner: Morgan Smithson (Agent)', 'Case SLA: 1d 20h 55m', and 'Resolution:'. The 'Tasks (5)' tab is active, showing a list of tasks with their status, deadline, and owner. A large diagonal line separates the task list from the workflow diagram on the right.

**Case Details:**

- Case ID: CASE-2020-465
- Milestone: In Review
- Priority: Normal
- Case Owner: Morgan Smithson (Agent)
- Case SLA: 1d 20h 55m
- Resolution:

**Task List:**

Name	Deadline SLA	State	Resolution	Task Owner
All Tasks				
AutoValidate Refund Request		Closed	Refund Approved	Nob...
2nd Eyes Review Calculator		Closed	Need Review by Man...	N...
Any Team Leader Review		Not Started		
Different Team Leader Review		Not Started		
Manager Review		Closed	Approved	
3rd Eyes Review Calculator		Closed	Need Review by Man...	
Manager Review	+ 00d 03h 53m	In Process		
Denied Review		Not Started		
Refund Money Out Exception		Not Started		
Submit Refund Payment		Not Started		
Refund Money Out Complete		Not Started		

**Workflow Diagram:**

The workflow diagram illustrates the process flow for a refund request. It starts with the '2nd Eyes Review Calculator' task, which leads to a decision point. If 'No Review Needed', the process moves to '3rd Eyes Review Calculator'. If 'Need Review by Manager', it goes to 'Manager Review'. If 'Need Review by Any Team Leader', it goes to 'Any Team Leader Review'. If 'Need Review by Another Team Leader', it goes to 'Different Team Leader Review'. All review tasks lead to 'Validate Review Results', which then leads to another decision point. If 'Approved', it goes to '3rd Eyes Review Calculator'. If 'Denied', it goes to a final decision point.

**Footer:**

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# Operational CRM

Capture all data, journeys, processes, and events about your customer and use them to drive positive outcomes with exceptional customer experience.



## Customer 360

Create a unified view of your customer that shows all their cases, interactions, appointments and internal or external data.



## Custom Data Models

Extend or create data models specific to your business, such as products, assets, vendors, accounts, and so on.



## Two-Way Data Sync

Maintain up-to-date information for use by all your software and offer company-wide, cross-channel customer experiences.



## Account Hierarchy

Organize customers, departments, accounts, and contacts into parent-child views and link them to cases.



## Connect to Data Sources

Show and use data from other sources such as point-of-sale systems, product databases, mainframes, or marketing platforms.



## System of Record

Use the operational CRM as the single-source-of-truth that other systems can reference, update, and query.

# Customer 360 Detail Page + Customer Data Model

The screenshot displays the ACME Customer Service App interface, divided into two main sections: the Customer 360 Detail Page and the Customer Data Model.

**Customer 360 Detail Page:**

- Header:** eccentex logo, Home, Customer Pat Thompson, Search Cases.
- Customer Profile:** Mr. Pat Thompson, pthompson@email.com, (123)456-7890, (310)555-1234. Gold Member status. Created: 4 years ago - George Amasor. Modified: 1 year ago - Salesforce Sync.
- Score:** 687 GOOD.
- Navigation Tabs:** Customer Info, Cases (6), Emails (7), Documents (2), Interactions (11), Recordings (3), Orders (9), Related Customers.
- Cases Table:**

Case Type	Case ID	Summary	Milestone	Resolution
Retail Refund	CASE-2020-465	Order #1028064427 - 1,1460.00 EUR	In Review	
Complaint	CASE-2020-312	Complaint on Employee Behavior	New	
Credit Services	CASE-2019-1483	ACME Retail Credit Increase Request	Closed	
Warranty Claim	CASE-2019-1482	Order #98745778 - Request warranty replacement	Closed	
Account Verification	CASE-2019-341	Contact information change	Closed	
Services Request	CASE-2017-1954	Order #98745778 - Delivery and installation services	Closed	

**Customer Data Model:**

A diagram illustrating the relationships between various data entities. The central entity is **Customer**, which is connected to several other entities:

- Party** (External Party)
- AccountOwner** (External Party)
- Country** (Dictionary Word)
- AccountExecutive** (Case Worker)
- Addresses**
- Interactions**
- Alerts**
- SocialMediaInsights**
- CustomerOrders**
- ProductCustomerOrder** (ProductCustomerOrder)
- DeliveryDetails**
- OrderPaymentMethods**
- Result** (Resolution Code)
- ContactMethod** (Dictionary Word)
- Agent** (Case Worker)
- Type** (Dictionary Word)

The diagram shows a complex network of relationships, with **Customer** at the center, connected to various entities that represent different aspects of the customer's profile, interactions, and orders.

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# Master Data Management

Remove data silos by easily configuring data models that provide accurate and complete information about your customers, products, assets, core data and more.



## Multi-level Data

Create true-to-life data models with tables, parent-child relationships, many-to-many linking and drill down views.



## Data Change Actions

Automatically notify employees or other systems when data changes and prevent actions that can lead to data corruption.



## Open Data Model

Data models deploy as real tables, columns, and foreign keys in the database, making them transparent to other systems.



## Data Model Builder

Visually define your tables, columns, and relationships; then automatically generate configurable forms, pages, search screens.



## Form & Page Builders

Drag-and-drop simple textboxes, complex formula fields, editable grids for child data, tabs, and conditional logic.



## Search Builder

Create pre-built filters by drag-and-dropping columns and search fields that query across case types, people, and related data objects.

# Data Model Builder

The screenshot displays the **Data Model Builder** interface for the **Retail Refund** data model. The interface is divided into several sections:

- Header:** Includes the **eccentex** logo, the application name **ACME Customer Service App**, and a **Close Window** button.
- Left Sidebar:** Contains navigation options such as **Setup**, **Home**, **About**, **Internal People**, **External Parties**, **Case Setup**, **Document Management**, **Master Data Management**, **Data Models** (selected), **Reference Objects**, **Reusable Objects**, **Forms and Pages**, **Security**, **Integration**, **Localization**, **Templates**, **Monitoring**, **System Info and Logs**, and **Advanced Setup**.
- Top Bar:** Shows the current data model **Data Model - Retail Refund** and a **Data Model Builder - Retail Refund** tab.
- Central Diagram:** A visual representation of the data model showing relationships between various objects. The central object is **Retail Refund** (green box). It is connected to **Customer Detail** (Customer Detail), **Links** (Links), **Delivery**, **Articles** (Articles), **Article Links** (Links), **Selected Refund Items**, **Reason Resolution**, **Amounts**, **Payment**, **Products**, **Product Links**, **Resolution** (Dictionary Word), **Reason Codes** (Dictionary Word), **Billing**, **Transactions**, **Order Reason Resolution** (Return Reason), and **Article Return Reason** (Return Reason). The **CASE** object is also connected to **Retail Refund**.
- Right Sidebar:** Contains settings for the data model.
  - Attributes (20):** A list of attributes with their types. The list includes: **Refund Request Type** (Text), **Selling Unit** (Text), **Action Unit** (Text), **Refund Amount Reques...** (Text), **Refund Eligibility** (Text), **Refund Details** (Text Area), **Refund Amount** (Text), **Tax Adjustment** (Text), **Total Refund Amount** (Text), **SELARTICLES** (Text Area), **SELRESCODES** (Text Area), **SELREASONCODES** (Text Area), **SELQUANTITY** (Text), **TEMPCREATEDFROM** (Text), and **Currency Code** (Text).
  - Forms and Searches:** Includes sections for **Associated Search Grid \*** (set to **Money Out**), **Associated Form \*** (set to **Money Out Refund (NEW CASE)**), **Reference Settings**, and **Reusability Settings**.

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# Advanced Content Management

Give case workers easy access to all the emails, paper documents, and digital files necessary to make decisions and resolve cases.



## Document Management

Feature-rich file management with file versioning, indexing, conversion, and online viewing.



## Full Text Search (FTS)

Search for all mentions of a specific phrase or customer involvement across all cases, people, records, documents, and emails.



## Scanning and Barcoding

Scan multi-page documents right into a case or leverage high-volume scanning by separating packets with barcodes.



## Optical Character Recognition (OCR)

Convert hand-filled forms or images into searchable documents that can recognize forms, read hand-writing and auto-index.



## Document Generation

Generate Word documents, emails, PDFs, and other content using internal and external data.



## Document Annotations

Online support for annotating, redacting, commenting and stamping PDFs as well as converting files to PDFs.

# Documents in Case

The screenshot displays the 'eccentex' ACME Customer Service App interface. The main case view for 'CASE-2020-465' (Retail Refund) shows a total of €1,146.00 EUR. The case owner is Morgan Smithson (Agent). The 'Documents' tab is active, showing a list of files: 'Sample Movie File.mpg', 'CS Call Recording.mp3', 'Order 1028064427 PDF Version.pdf', and 'BrokenChair - Customer Email.jpeg'. A modal window titled 'Index Document Customer Files' is open, showing details for the selected file 'BrokenChair - Customer Email.jpeg'. The modal includes fields for Name, Document Type (Customer Sent), Remarks, Source (Email), and Email (pat@someemail.com). A large image of a broken wooden chair is displayed on the right side of the modal. The interface also includes a sidebar with navigation options like 'Case Management', 'Home', 'Case Inbox', 'Task Inbox', 'Customers', 'Search Cases', 'External Parties', 'Work Activity Report', 'Email Indexing', 'My Profile', 'My Dashboards', 'Report Viewer', 'More', 'Search Cases', and 'Generic Searches'. The footer contains copyright information and version details.

**eccentex** ACME Customer Service App

Home Search Cases **CASE-2020-465** Close Window

€ Retail Refund Order #1028064427 - 1,146.00 EUR - Pat Thompson

Assign Case Issue Refund Escalate to Manager Deny Refund More

Case ID: CASE-2020-465 Milestone: In Review Priority: Normal Total: € 1,146.00 EUR

Case Owner: Morgan Smithson (Agent) Case SLA: 1d 16h 47m Resolution:

Refund Articles Refund Details Tasks (8) Documents (5) Discussions (1)

Upload Scan Drag-and-drop files into this grid

Files (0) Shipping Files (0) Customer Files (5)

Sample Movie File.mpg MPG

CS Call Recording.mp3 MP3

Order 1028064427 PDF Version.pdf PDF

BrokenChair - Customer Email.jpeg JPEG

clean-contemporary-279719.jpg JPG

Quick Modify View Download Open with indexing viewer Open with Windows viewer Send by email Upload new version View versions Open with WebDAV Delete Restore Convert to PDF Reload Permanently delete

Order Details Customer Profile

Order Status: Completed

Order #: 1028064427 Order Status: COMPLETED  
Sales Total: € 2,188.09 EUR Order Type: ISOM  
VAT Total: € 436.02 EUR Business Unit Code: 241

Index Document Customer Files

Save & Close Cancel

Name \*: BrokenChair - Customer Email.jpeg

Document Type: Customer Sent

Remarks:

Source: Email

Email: pat@someemail.com

Save & Prev Save & Next

Undo

Download Popup

Page 1 of 1 Displaying 1 - 5 of 5

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# Email Capture & Automation

Capture emails from multiple addresses and automatically acknowledge, prioritize, and assign them to the right people.



## Email-to-Case

Convert your emails into new cases or attach to existing cases, bringing all attachments with them.



## Context-Aware Conversations

Email customers back-and-forth from different cases, their replies automatically attach to the correct threads.



## Trigger Emails & SMS

Automatically email customers about their cases, notify employees of changes and schedule periodic reminders.



## Auto Indexing & Tagging

Automatically link emails to correct customer, react to content and notify employees of important events.



## Email Template Builder

Design context-aware email templates that can consume data from the case, customer, employee, and external systems.



## Secure Connectors

Capture from and reply using your existing email boxes by utilizing secure standards such as IMAP, or Microsoft 365 Graph API.



# Email Inbox and Indexing

The screenshot displays the ACME Customer Service App interface, specifically the Email Indexing section. The sidebar on the left contains navigation options: Case Management, Home, Case Inbox, Task Inbox, Search Cases, External Parties, Work Activity Report, Email Indexing (selected), My Profile, My Dashboards, Report Viewer, More, Search Cases, Search Parties, and Generic Searches.

The main content area is titled "Email Indexing" and features a "Support Email" section. Below this, there are two tabs: "Home" and "Emails". The "Emails" tab is active, showing a list of emails. The list includes columns for "Assign To Me", "Assign", "Create Case", "Attach to existing Case", "Duplicate", "Trash", "Send Email", and "More". The emails listed are:

- Pat Thompson (8:32 PM) - Ordered wrong color but already ...
- Paula Sheridan (8:29 PM) - Complaint - Order #876213
- Janae Schofield (8:29 PM) - Overcharged at store
- Maksim Gill (8:28 PM) - Chair doesn't have proper screws
- Edan Reeve (8:28 PM) - Employee was rude
- Maksim Gill (8:28 PM) - Complaint - Order #878213
- Maksim Gill (8:27 PM) - General question about chair
- Maksim Gill (8:27 PM) - How to return item that I already as...
- Trixie Ballard (8:27 PM) - Ordered wrong color but alre...
- Евгений Петров (Apr 3) - test
- Евгений Петров (Apr 3) - test
- Евгений Петров (Apr 3) - test
- Евгений Петров (Apr 3) - test

The detailed view of the selected email (Pat Thompson) shows the following information:

- From: pthompson@email.com
- To: support@acmeretail.com
- Sender Name: Pat Thompson
- Owner: Support Email
- Customer: Pat Thompson (customer)
- State: Waiting for Review
- Attachments: Order\_876213.pdf (702 KB), ShippingLabel.pdf (4.001 MB)

The email body contains the following text:

Hi,

I ordered the chair for order #876213 a few weeks ago and finally put it together. But I realized that it was the wrong color after I already put it together. What do I do?

I want <https://www.acmeretail.com/HomeElegance-Lucille-Fabric-Upholstered-Barrel/dp/B01N4609R0>

The email also includes an image of a blue upholstered chair with a metal frame, set against a wooden wall.

The footer of the app shows the copyright notice: Copyright © 2007-2020 Eccentex, Inc. All rights reserved. The version is 6.7 R2 Update 2(6.7.20.24). The footer also includes links for Privacy, Security, and Terms of Use.

# Dashboards & Reporting

Maintain situational awareness and discover ways to improve customer satisfaction and employee performance.



## Real-time Dashboards

Configure role-based, visually appealing dashboards or create custom ones with internal or external data.



## AppBase Business Intelligence (BI)

Use advanced reporting and dashboarding with powerful predictive, AI-driven analytics to gain better business insights.



## Open Data Model

Easily analyze solution data with your in-house reporting tools by traversing real tables, columns, foreign keys and views.



## Curated & Custom Reports

Leverage built-in reports to help you track important data, visually design your own PDF reports or export data sets to Excel.



## Scheduled Reports

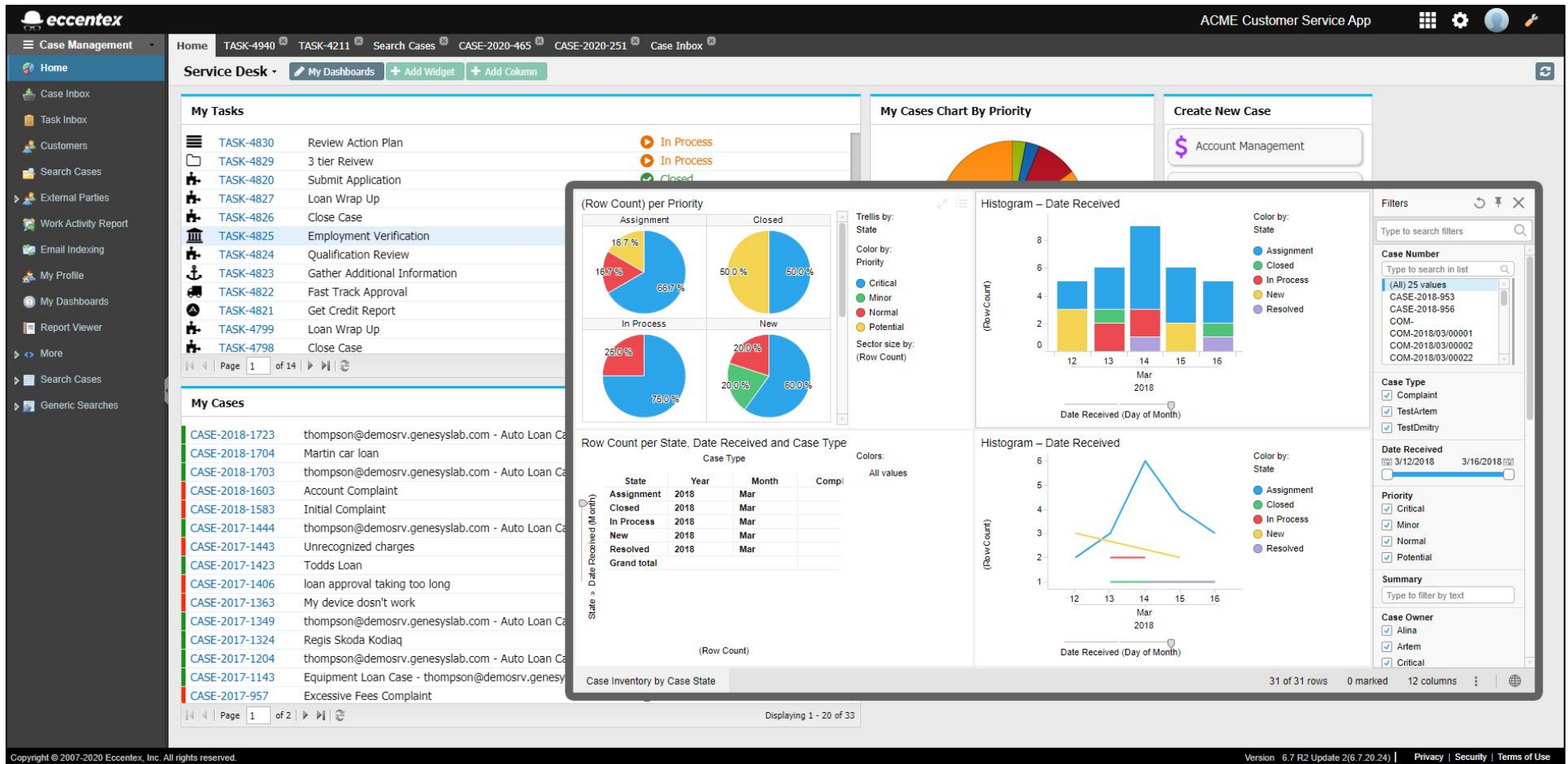
Schedule reports to generate periodically and sent to your inbox and move complicated analysis to off-peak times.



## KPI Tracking

Track important metrics for how well cases are resolved, how productive employees are and how effective new initiatives are.

# User Dashboard + AppBase BI



# Collaboration & Teams

Provide quick and accurate resolutions by enabling your employees to work together on resolving the more complex cases.



## Case Discussions

Ask peers for expertise resolving a case by posting questions or ideas; inviting people to participate in forum-like discussions.



## Automatic Notifications

Automatically notify employees of changes to their cases by email or SMS, or assign follow-up tasks into their inboxes.



## Case Notes

Take notes while working on a case to communicate internally with others and notify them of updates to cases.



## Case Parties

Clearly see all employees and external parties involved in a resolving a case, invite others to participate in different capacities.



## Ad-hoc Tasks

Create unplanned tasks such as requesting a review or approval and easily assign them to individual people or teams.

# Case Discussion and Notes

The screenshot displays the 'eccentex' ACME Customer Service App interface. The top navigation bar includes 'Home', 'Search Cases', and the active case 'CASE-2020-465'. The case details show a 'Retail Refund' for Order #1028064427, valued at 1,146.00 EUR, assigned to Pat Thompson. The case is currently 'In Review' with a priority of 'Normal' and a total value of € 1,146.00 EUR. The case owner is Morgan Smithson (Agent), and the SLA is 1d 1h 47m. The interface features a sidebar with navigation options like 'Case Management', 'Home', 'Case Inbox', 'Task Inbox', 'Customers', 'Search Cases', 'External Parties', 'Work Activity Report', 'Email Indexing', 'My Profile', 'My Dashboards', and 'Report Viewer'. The main content area shows a 'Thread' of discussions. The first message is from Emma Lindblad (CW) dated 12 Apr 2020 12:26 PM, asking about home pick-up. The second message is from Liam Sparv (TL) dated 12 Apr 2020 1:38 PM, providing an updated list of locations. The third message is from Morgan Smithson (Agent) dated 11 Apr 2020 8:46 AM, mentioning a missing leg on a chair. The fourth message is from Lisette Afzelius (CW) dated 11 Apr 2020 11:41 AM, stating that the customer's first time complaining about this. The fifth message is from Morgan Smithson (Agent) dated 12 Apr 2020 9:01 AM, thanking the customer. The right sidebar shows a list of people and notes related to the case, including Emma Lindblad (CW) and Morgan Smithson (Agent). The bottom of the screen shows the app's version (6.7 R2 Update 2(6.7.20.24)) and links for Privacy, Security, and Terms of Use.

**eccentex** ACME Customer Service App

Home Search Cases **CASE-2020-465** Close Window

€ **Retail Refund** Order #1028064427 - 1,146.00 EUR - Pat Thompson

Assign Case Issue Refund Escalate to Manager Deny Refund More

Case ID: **CASE-2020-465** Milestone: **In Review** Priority: **Normal** Total: **€ 1,146.00 EUR**

Case Owner: **Morgan Smithson (Agent)** Case SLA: **1d 1h 47m** Resolution:

Refund Articles Refund Details Tasks (8) Documents (6) Case Emails (6) Related (2) **Discussions (5)** History Interactions

**Thread** Discussion People Invite Join Discussion

**EL Emma Lindblad (CW)** 12 Apr 2020 12:26 PM  
The customer wants to know about home pick-up because he intends to move in 2 weeks. Where do we check where this is allowed?

"As our stores are closed to customers, we are suspending all returns and exchanges at this time. ACME offers a 365-day return policy, however, if your receipt is expiring soon, we will take our closing period into consideration. In addition, we have suspended all removal services. Pick-up of exchanges at customers' homes vary by market. Any returns and exchanges shipped back to ACME prior to March 16, 2020 are currently being processed and issued as quickly as possible. We will resume normal returns and exchanges as soon as practical."

**LS Liam Sparv (TL)** 12 Apr 2020 1:38 PM  
The updated list in the KB, just search for "COVID at-home" and it will find it. As of right now, it's only in London, Paris and all of Sweden.

**Thread** Discussion People Invite Leave Discussion

**MS Morgan Smithson (Agent)** 11 Apr 2020 8:46 AM - **EDITED** edit • remove entire thread  
Customer is saying one of the chairs he wants to return is missing a leg but is pretty sure it was never included. Are we allowed to do a partial refund?

**LA Lisette Afzelius (CW)** 11 Apr 2020 11:41 AM  
Unlikely that this happened but it looks like the customer's first time complaining about this so just give him the full refund.

**MS Morgan Smithson (Agent)** 12 Apr 2020 9:01 AM edit • remove message  
Thanks!

Respond

**People (4) Notes (4) KB**

**Emma Lindblad (CW)** - 3 days ago  
edit delete  
=CALL LOG AG4134998-13-APR-2020 @12:34PM=  
- Customer was called back and notified of pick-up policy in his region. Email request ignored due to policy.  
- Customer will call back to arrange pickup

**Morgan Smithson (Agent)** - 4 days ago  
edit delete  
=CALL LOG AG134124-12-APR-2020 @7:32 AM=  
- Customer identified with IVR  
- Customer wants refund for order #1028064427  
- Customer requested pick-up of purchases. Will follow-up on this matter with him.  
- Created task to follow-up with customer in 1 day with email

**Morgan Smithson (Agent)** - 4 days ago  
edit delete  
Customer indicated this has happened before and that he is rethinking purchasing from ACME again. I provided him a 20% discount code as well for the next purchase. Coupon Code 2323HD to expire on April 20, 2021.

**Morgan Smithson (Agent)** - 4 days ago  
edit delete  
Customer is complaining about the chair is missing a leg. I suspect he broke the leg because he changed his story when he was called.

Comment here...

+ Post

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# Self-Service & Portal

Reduce cost and provide convenience by giving customers access to the information and actions they seek.



## Portal Forms

Embed forms inside your portal for customers to create or update cases and update or see status of existing ones.



## Public Knowledge Base

Embed your knowledge base into your website, making it completely open or only open to customers who are logged in.



## External Users

Give limited access to partners and consultants to upload additional documents or update their cases.



## Integration & APIs

Connect your mobile app and existing portal with comprehensive APIs and the ability to create new APIs.

# Customer Portal + Cases Reports

ACME Customer Service App

Search over 10,000 products

Shop By Category

Home > My Account

## Return Order

Continue with Return

**Order #38148477**

Was placed on April 2, 2020 and is currently Delivered.

**TENKO Lounge Chair - Steel**  
Color: Blue  
\$178.48

Why are you returning this?  
Bought by mistake

What is the condition of this item?  
Package has damage

**Modern Designs London Coffee Table**  
Color: Dark Cherry  
\$199.99

Why are you returning this?  
Item is defective or doesn't work

Comments (Optional)

Total \$556.95

Case Owner	Milestone	Resolution	Goal
George Chapelle	In Review		- 1d 11h 15m
Sarah Pincker	In Review		- 1d 05h 41m
Todd Stein	In Review		- 0d 23h 54m
Team Leaders	In Review		- 0d 18h 09m
Managers	In Review		+ 1d 17h 06m
Kristin Stanley	In Review		+ 31d 15h 43m
Joy Williamson	Closed	Completed	
Manager Team	Closed	Completed	
Team Leaders	New		
Tanya Boyd	Closed	Completed	
Garrett Hawkins	Closed	Completed	
Garrett Hawkins	Closed	Completed	
Nobody	Closed	Completed	
IKEA Admin	Closed	Completed	
IKEA Admin	Closed	Not Eligible	
Tanya Boyd	Closed	Completed	
Tanya Boyd	Closed	Completed	
Tanya Boyd	Closed	Completed	
Nobody	Closed	Completed	
IKEA Admin	Closed	Completed	
Molle Mocker	Closed	Completed	
Nobody	Closed	Completed	
Molle Mocker	Closed	Completed	

Displaying 1 - 33 of 33

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# Employee Management

Make sure the right people are equipped for the job by getting a complete view of your work force and their performance.



## Employee 360

Create a unified view of your employees to show all their cases, interactions, appointments, and data from other systems.



## Organizational Chart

Generate org charts for your organization that can be used for HR purposes, case assignment, or to manage escalation paths.



## Employee APIs & Integration

Enrich the employee profile with data from other systems and automate onboarding & offboarding requests to related systems.



## Teams, Skills & Roles

Assign employees to various teams, skills and roles that automatically give them access to team inboxes and drive auto-assignment.



## HR Workflows & Data Models

Model employee onboarding, complaints, and reviews with the same flexibility as you would for customers.



## HR Knowledge Bases

Create knowledge spaces for your employees about HR policies or job-specific knowledge that departments can own.

# Organization Chart

**eccentex** ACME Customer Service App

Home Users **Organizational Chart** Agneta Magnusson (CW)

**Organizational Diagram** 18 items

83% [Search] [Print] [Close Window] [Save] [Reset]

**Available Case Workers (13)**

- AM** Agneta Magnusson (CW)  
Agent - Level 2  
agneta@acmeretail.com
- CT** Christin Tornquist (CW)  
Agent - Level 2  
christin@acmeretail.com
- EL** Emma Lindblad (CW)  
Agent - Level 3  
lindblad@acmeretail.com
- FO** Fiona Olander (CW)  
Case Worker  
fiona@acmeretail.com
- GL** Gjur Lund (CW)  
Case Worker  
lund@acmeretail.com
- HF** Hakan Forslund (CW)  
Agent - Trainee  
hakan@acmeretail.com
- HS** Hindrik Strom (CW)  
Case Worker  
hstrom@acmeretail.com
- GK** George Korte  
VP of Customer Success  
gkorte@acmeretail.com
- JP** Jesca Palmcrantz (CW)  
Case Worker  
jesca@acmeretail.com
- SL** Sture Lindroth (CW)  
Case Worker  
sture@acmeretail.com
- SU** Nikolay Popov  
CMO  
npopov@email.com

**Organizational Chart Structure:**

- SM** Sam Malmkvist (Mgr)  
General Manager
  - LE** Lars Ekstrom (Mgr)  
Retail Regional Manager
    - MG** Maksim Gill  
Team Lead
    - TA** Tyra Akerstrom (CW)  
Team Lead
      - LS** Liam Sparv (TL)  
Agent - Level 1
        - JS** Johan Sherman  
Agent - Level 2
      - KL** Kent Lagerfelt (CW)  
Agent - Level 1
        - SH** Sture Holgersson (CW)  
Agent - Level 2
    - TS** Tage Svensson (CW)  
Team Lead
      - SS** Sone Simonsson (CW)  
Case Worker Lead
        - SK** Serge Kazakov  
Case Worker
  - PM** Pamela Martinez  
Online Regional Manager
    - ND** Nadia Dahl (TL)  
Manager - Level 2
      - MM** Molle Mockler  
Agent - Level 3
        - LJ** Laura Jones  
Case Worker
          - JE** Joen Englund (TL)  
Trainee
          - JH** Jason Harris  
Trainee
    - LA** Lisette Afzelius (CW)  
QA Analyst

**Legend:**

- Drag-and-drop a Case Worker from the left onto this canvas
- Doubleclick on a Case Worker to edit
- Leftclick and drag for panning
- Move the mouse over a cell to see a tooltip or a delete icon
- View Properties Panel (Ctrl+Shift+P)
- View Outline (Ctrl+Shift+O)
- Print (Ctrl+P)
- Zoom In/Out (Ctrl+Alt+MouseWheel)

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# Robotics & Automation

Reduce manual labor and mistakes by automating routine tasks, optimizing complex decisions, and bridging systems.



## Form Pre-Fill

Automatically pre-fill new case forms with customer info, data from other systems and interaction details.



## Folder Monitoring

Monitor folders on shared network drives and react when new files are uploaded, such as parsing and importing new data.



## Custom REST APIs

Expose existing APIs or create new APIs that execute practically any functionality from auto-creating a case to merging documents.



## Scheduled Jobs

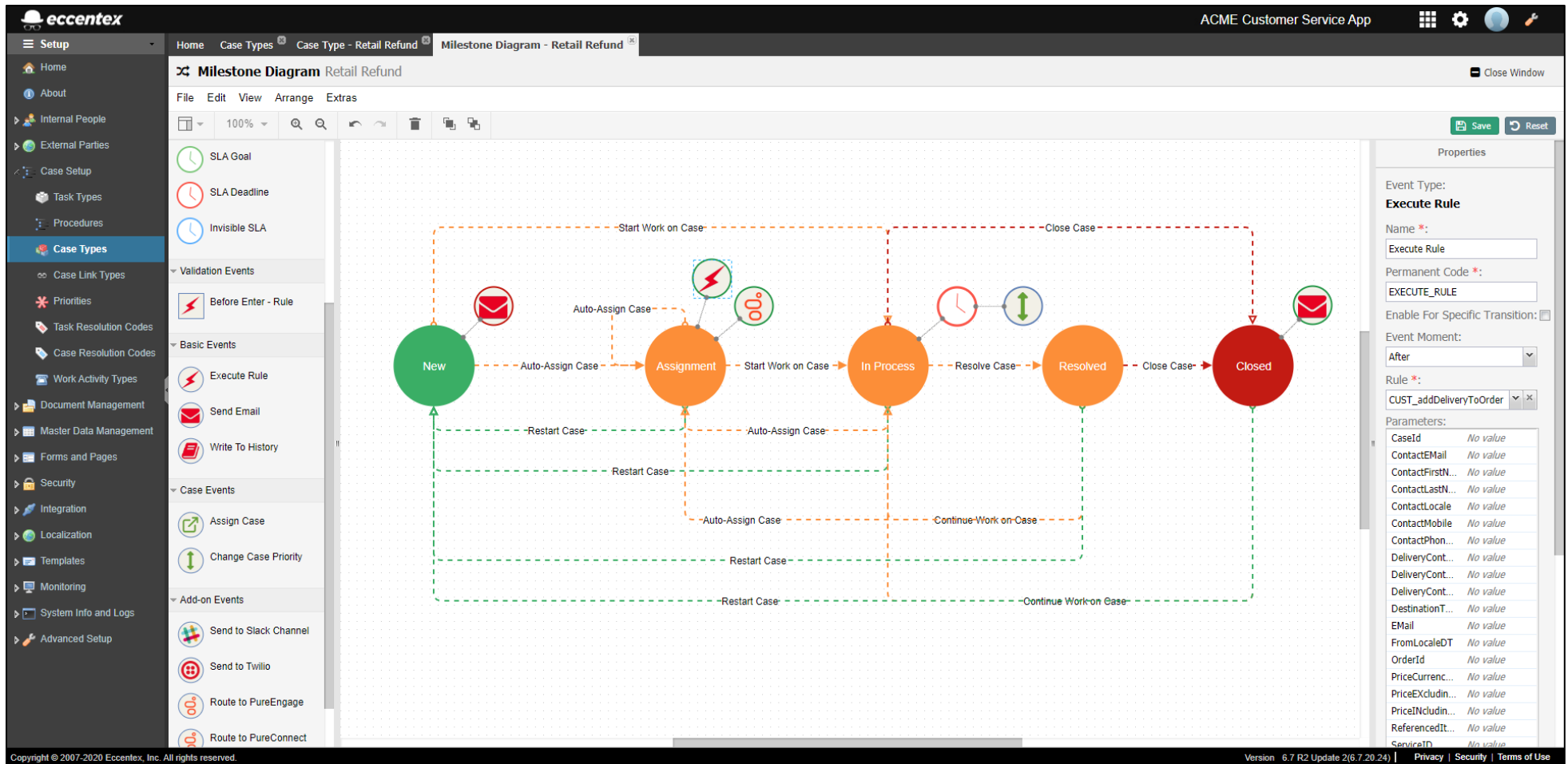
Schedule resource-heavy scripts to execute during off-peak times for data sync, mass emails, archival and custom business logic.



## Events & Triggers

Attach automation rules practically anywhere including CRM data changes, case updates and employee events.

# Workflow Builder with events



# Tracking & Audit

Stay compliant with internal and regulatory bodies, discover ways to improve case resolution and get the complete picture if you ever want to review how a case was processed.



## Full History

Track every detail of how a case was resolved, who was involved, when how long everything took and what went wrong.



## Aggregated Notes

See an aggregated view of notes, comments and forums, discussions from the case and any involved tasks.



## Security & System Events

Track every action a user has taken including logins, searches, documents they've viewed or touched data in anyway.



## Time Tracking

Log time employees spent on handling cases and related work; get better insight into employee performance.



## Automation Transparency

Keep a clear track of every automated decision that the system made by seeing inputs, outputs and actions taken.

# Case and Tasks History

The screenshot displays the 'eccentex' Case Management application interface. The top navigation bar includes 'Home', 'Search Cases', and the current case 'CASE-2020-521'. The main header shows 'Retail Refund Order #1138077937 - \$250.00 - Pat Thompson' with buttons for 'Restart' and 'Send to Fraud Prevention Team'. The case details section shows 'Case ID: CASE-2020-521', 'Case Owner: Morgan Smithson (Agent)', 'Milestone: Closed', 'Priority: Normal (51)', and 'Total: \$250.00'. The 'Resolution: Completed' status is also shown. The left sidebar lists various navigation options like 'Case Management', 'Home', 'Case Inbox', 'Task Inbox', 'Customers', 'Search Cases', 'External Parties', 'Work Activity Report', 'Email Indexing', 'My Profile', 'My Dashboards', 'Report Viewer', 'More', 'Search Cases', and 'Generic Searches'. The main content area features a 'History' tab with a 'Timeline View' showing a sequence of tasks and their statuses over time. The tasks include 'AutoValidate Refund Request', '2nd Eyes Review', '3rd Eyes Review', 'Denied Review', 'Validate Review Results', 'Refund Money Out Exception', 'Submit Refund Payment', and 'Refund Money Out Complete'. The right sidebar shows a list of people involved in the case, including Emma Lindblad (CW) and Morgan Smithson (Agent), along with their notes and a 'Post' button. The bottom of the screen shows the copyright notice 'Copyright © 2007-2020 Eccentex, Inc. All rights reserved.' and the version 'Version 6.7 R2 Update 2(6.7.20.24)'.

**Case Management Interface**

**Case Details:**

- Case ID: CASE-2020-521
- Case Owner: Morgan Smithson (Agent)
- Milestone: Closed
- Priority: Normal (51)
- Total: \$250.00
- Resolution: Completed

**Task History Timeline:**

Task	Status	Created On
CASE-2020-465	Started, In Process, In Review, Closed, Completed	Created on 11 Apr 2020 7:25 AM
Sub-tasks (8)		
AutoValidate Refund Request	Started, In Process, Closed, Refund Approved	Created on 11 Apr 2020 7:26 AM
2nd Eyes Review	Not Started, In Process, Closed, Refund Approved	Created on 11 Apr 2020 7:26 AM
3rd Eyes Review	Not Started, Started, In Process, Closed, Refund Approved	Created on 11 Apr 2020 7:26 AM
Denied Review	Not Started	Created on 13 Apr 2020 16:25
Validate Review Results	Not Started, In Process, Closed, Approved	Created on 11 Apr 2020 7:26 AM
Refund Money Out Exception	Not Started	Created on 11 Apr 2020 7:26 AM
Submit Refund Payment	Not Started, Closed, Refund Payment Confirmed	Created on 11 Apr 2020 7:26 AM
Refund Money Out Complete	Not Started, Closed, Completed	Created on 11 Apr 2020 7:26 AM

**Right Sidebar - People & Notes:**

- Emma Lindblad (CW)** - 3 days ago  
=CALL LOG AG4134998-13-APR-2020 @12:34PM=  
- Customer was called back and notified of pick-up policy in his region. Email request ignored due to policy.  
- Customer will call back to arrange pickup
- Morgan Smithson (Agent)** - 4 days ago  
=CALL LOG AG134124-12-APR-2020 @7:32 AM=  
- Customer identified with IVR  
- Customer wants refund for order #1028064427  
- Customer requested pick-up of purchases. Will follow-up on this matter with him.  
- Created task to follow-up with customer in 1 day with email
- Morgan Smithson (Agent)** - 4 days ago  
Customer indicated this has happened before and that he is rethinking purchasing from ACME again. I provided him a 20% discount code as well for the next purchase. Coupon Code 2323HD to expire on April 20, 2021.
- Morgan Smithson (Agent)** - 4 days ago  
Customer is complaining about the chair is missing a leg. I suspect he broke the leg because he changed his story when he was called.

**Footer:**

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# Omnichannel with Genesys

Deliver a unified customer experience with award-winning engagement, predictive AI, intelligent workforce management and more.



## Interaction Screen-Pop

Show an agent the complete customer view, highlight their open cases and next-best-actions related to the interaction context.



## Smart “Caller” Recognition

Organize all contact info in the Operational CRM and use it to automatically identify who an agent is working with, across all channels.



## Single-Screen Workspace

Unified UI allows agents to create cases, follow-up on existing ones, wrap-up and more without leaving the Genesys desktop.



## Genesys Cloud, Engage & Connect

Seamless integration with the entire Genesys product line in cloud and on-premise, including Engage iWD.



## True Omni-Channel

Provide consistent, context-aware service even as customers switch between phone, email, SMS, chat and social.



## AI Bots

Train Genesys AI to help customers on their open issues, let them create new cases or update existing ones using Voice.Chat and SMS Bots.



# Genesys Cloud with Customer 360 embedded

Genesys Cloud Demo

https://apps.mypurecloud.com/directory/#/person/347cc434-b499-42f0-bcfd-704b990acc48


Activity Directory Documents Performance Reports Apps Admin

Interactions Service Request

Service Reque... 3:34  
DCM Queue 3:34

Wrap Up Add Task

**Customer Detail**

 **Mr. Pat Thompson** **Gold Member**  
pat@email.com  
+1 (949) 235-9009  
+1 (310) 499-7060  
3640 Sepulveda Blvd.  
Los Angeles, CA 90230  
USA

687 GOOD

**Suggestions**

- OFFER: Fee protection service
- OFFER: Auto loan (new credit score)
- Add a family member to the account
- Eligible for a balance transfer
- Order new checks

**Customer Info** All Cases (11) Work Activity (0 hours) Documents (3) Tasks (2) **Journeys** Notes (3) All References

Search

**Excessive Fees Complaint**  
CASE-2019-850

- Initial Assessment of Complaint In Progress Investigation Closed Fees reduced

**Excessive Fees Complaint**  
CASE-2019-604

- Initial Assessment of Complaint Called agent Closed No action

**Account Complaint**  
CASE-2019-603

- Initial Assessment of Complaint Credit check Closed No action

**BMW Auto Loan**  
CASE-2019-546

- Document Collection & Verification Credit check Closed Loan denied - low credit score

**Auto Loan for Wife**  
CASE-2019-025

- Document Collection & Verification Closed Customer Abandoned

Dec 23, 2019 - 09:31 AM

**Genesys Predictive Engagement**

Customer Service  
New Service  
Contact Us  
Call Customer Service

Personas matched  
**WARNING | Potential Complaint** **SALES | Credit Score Increased**

Outcomes achieved  
**Closed - Customer Satisfied**

**Case Journey**

**SYS: Routing Engine** Customer personas identified (WARNING | Potential Complaint)  
**SYS: Engagement Center** Routed Agent Jeremy Piven (AGN-7919)  
**Milestone: Initial Assessment of Complaint** Completed Agent accepted COMPLAINT CASE  
**Milestone: Send Acknowledgement** Completed Auto-sent SMS to (555) 234-1283.  
**Milestone: In Progress** Completed Task routed from Auto Assigning to In Process  
**SYS: Collect Investigation Data** Completed Data collected from Salesforce and ACME BillAudit  
**Milestone: Investigation** Completed Agent started investigation with resolution NO RED FLAGS  
**SYS: Engagement Center** Routed Agent escalated COMPLAINT CASE to Tier 2 Support  
**Task: Ad-hoc Task** Created Created Critical Task for COMPLIANCE TEAM "Review customer contract"

**ALERT:** holidays may impact store hours

Create Case Knowledge Base

Type  
Account Management

Sub-Type  
Credit Line Increase

Requested Amount  
\$5,000.00

Current Income  
\$100,000.00

Account  
061315-00003

Submit

**Overview**

Account Balance	Credit Limit	Last Payment
\$8,433.29	\$20,000.00	\$256.89
Oct 21, 2019	Payment	\$256.89
Sep 21, 2019	Payment	\$256.89
Aug 21, 2019	Payment	\$256.89

**Current Products**

Accounts	Products
061315-00003	MasterCard Credit Card
061515-00003	Checking
063423-00001	Equipment Loan
071216-00024	Visa Credit Card
071217-00005	Savings Account

# Proactive Engagement

Enable proactive engagement and communications from both the front-office and back-office, engaging the customer at every step of the journey on their preferred channel.



## Case Management Conversations

Engage customers throughout their entire case management journey, across all channels and case types.



## Proactive Engagement

Increase online sales and improve loyalty by proactively engaging customers with suggestions or reminders.



## Modernize Communications

Expand how you engage with customers whether it's through new channels, new self-service options or cultural trends.



## Agent Assisted AI

Engage with customers using AI and hand off parts of the conversation to a live agent when needed.



## Hyper-Personalization

Fold all conversations with a customer across all channels and cases into a single dialogue.



## Expanded Self-Service

Let customers schedule call backs and appointments, complete tasks, sign document, and engage along their journey.

# Knowledge Base

Help employees and customers help themselves by making sure content is organized, accessible and easy to manage.



## Knowledge Spaces

Separate knowledge into different product lines, departments, customer segments and roles.



## Public or Internal Spaces

Create knowledge spaces for your internal staff, external partners, logged-in customers or completely open it to the public.



## Rich Content

Include YouTube, videos, documents and pictures in your articles or go further with HTML, CSS and business rules.



## Article Recommendations

Suggest articles that may help an employee resolve a case based on content, people involved and historical data.



## Bot Assisted Self-Service

Knowledge can be presented using Genesys Chat and SMS Bots to help customers help themselves, with an agent always ready to assist.



## Article Lifecycle Management

Instantly publish articles or go through a formal lifecycle process with drafts, publishing and expirations.

# Knowledge Portal + KB Recommendations in Case

The screenshot displays the 'Internal Knowledge Base App' interface. The top navigation bar includes the 'eccentex' logo, the app name, and the 'ACME Customer Service App' label. A search bar is present with the placeholder text 'Start typing to search'. Below the search bar, there are four main categories: 'ACME Retail Policies' (246 Articles), 'Employee FAQ' (14 Articles), 'ACME Retail Policies' (246 Articles), and 'Refund & Return Policies' (23 Articles). The left sidebar features 'Featured Content' and 'Most Viewed' sections. The main content area shows a table of articles with columns for 'Wished Resolution', 'Price/Article', and 'Return Amount'. A large diagonal line is drawn across the center of the screen, likely indicating a transition or a specific feature being highlighted. The right sidebar contains 'Suggested Articles' and 'Shipping Policies' sections.

**Internal Knowledge Base App**

Home

KB Start typing to search

ACME Retail Policies 246 Articles

Employee FAQ 14 Articles

ACME Retail Policies 246 Articles

Refund & Return Policies 23 Articles

**Featured Content**

- kb 13 Articles
- userGuide 12 Articles
- article 3 Articles
- evidence 1 Articles
- photo 1 Articles
- photograph 1 Articles
- proof 1 Articles

**Most Viewed**

- Photos or Videos 5
- How to integrate portal widget into an external HTML page 1
- Accessing Knowledge Base 0
- Article Management 0
- Article Review 0
- Article Search 0
- How to use search function 0

**Most Useful**

- Accessing Knowledge Base 23
- Article Management 5
- Article Review 65
- Article Search 25
- How to integrate portal widget into an external HTML page 67
- How to use search function 99
- How to view notifications 48

**Total: € 1,146.00 EUR**

**Total Refund: € 1,146.00 EUR**

Wished Resolution	Price/Article	Return Amount
Full Refund	€ 6.00 EUR 5.00 + 1.00 VAT	€ 42.00 EUR 35.00 + 7.00 VAT
Full Refund	€ 6.00 EUR 5.00 + 1.00 VAT	€ 24.00 EUR 20.00 + 4.00 VAT
Partial Refund	€ 4.80 EUR 4.00 + 0.80 VAT	€ 19.20 EUR 16.00 + 3.20 VAT
Full Refund	€ 18.00 EUR 15.00 + 3.00 VAT	€ 72.00 EUR 60.00 + 12.00 VAT
Partial Refund	€ 13.20 EUR 11.00 + 2.20 VAT	€ 39.60 EUR 33.00 + 6.60 VAT
Partial Refund	€ 25.20 EUR 21.00 + 4.20 VAT	€ 50.40 EUR 42.00 + 8.40 VAT
Partial Refund	€ 37.20 EUR 31.00 + 6.20 VAT	€ 74.40 EUR 62.00 + 12.40 VAT
Full Refund	€ 70.80 EUR 59.00 + 11.80 VAT	€ 141.60 EUR 118.00 + 23.60 VAT
Full Refund	€ 58.80 EUR 49.00 + 9.80 VAT	€ 117.60 EUR 98.00 + 19.60 VAT
Full Refund	€ 25.20 EUR 21.00 + 4.20 VAT	€ 50.40 EUR 42.00 + 8.40 VAT
Full Refund	€ 96.00 EUR 80.00 + 16.00 VAT	€ 192.00 EUR 160.00 + 32.00 VAT
Full Refund	€ 38.40 EUR 32.00 + 6.40 VAT	€ 38.40 EUR 32.00 + 6.40 VAT
Full Refund	€ 118.80 EUR 99.00 + 19.80 VAT	€ 118.80 EUR 99.00 + 19.80 VAT
Compensation	€ 31.20 EUR 26.00 + 5.20 VAT	€ 31.20 EUR 26.00 + 5.20 VAT
Full Refund	€ 43.20 EUR 36.00 + 7.20 VAT	€ 43.20 EUR 36.00 + 7.20 VAT
Full Refund	€ 6.00 EUR 5.00 + 1.00 VAT	€ 6.00 EUR 5.00 + 1.00 VAT

**Suggested Articles**

**Refunds and Returns**

- Photo Evidence
- Documentation Evidence

**Shipping Policies**

- DHL large package guide
- FedEx return policies and late notice
- Complaints against delivery companies
- Extra large shipping and associate costs

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# Calendar & Appointments

Easily organize events and meetings with colleagues, customers, and teams in relation to specific cases.



## Scheduling Dashboard

See a bird's eye view of a team or person's calendar and schedule appointments, follow-ups, and case deadlines.



## Team Calendars

Manage calendars for individual people or entire teams, each can manage their own availability and holidays.



## Calendar APIs & Integration

Let other systems manage appointments or send scheduling information to other booking systems.



## Sync with Office 365

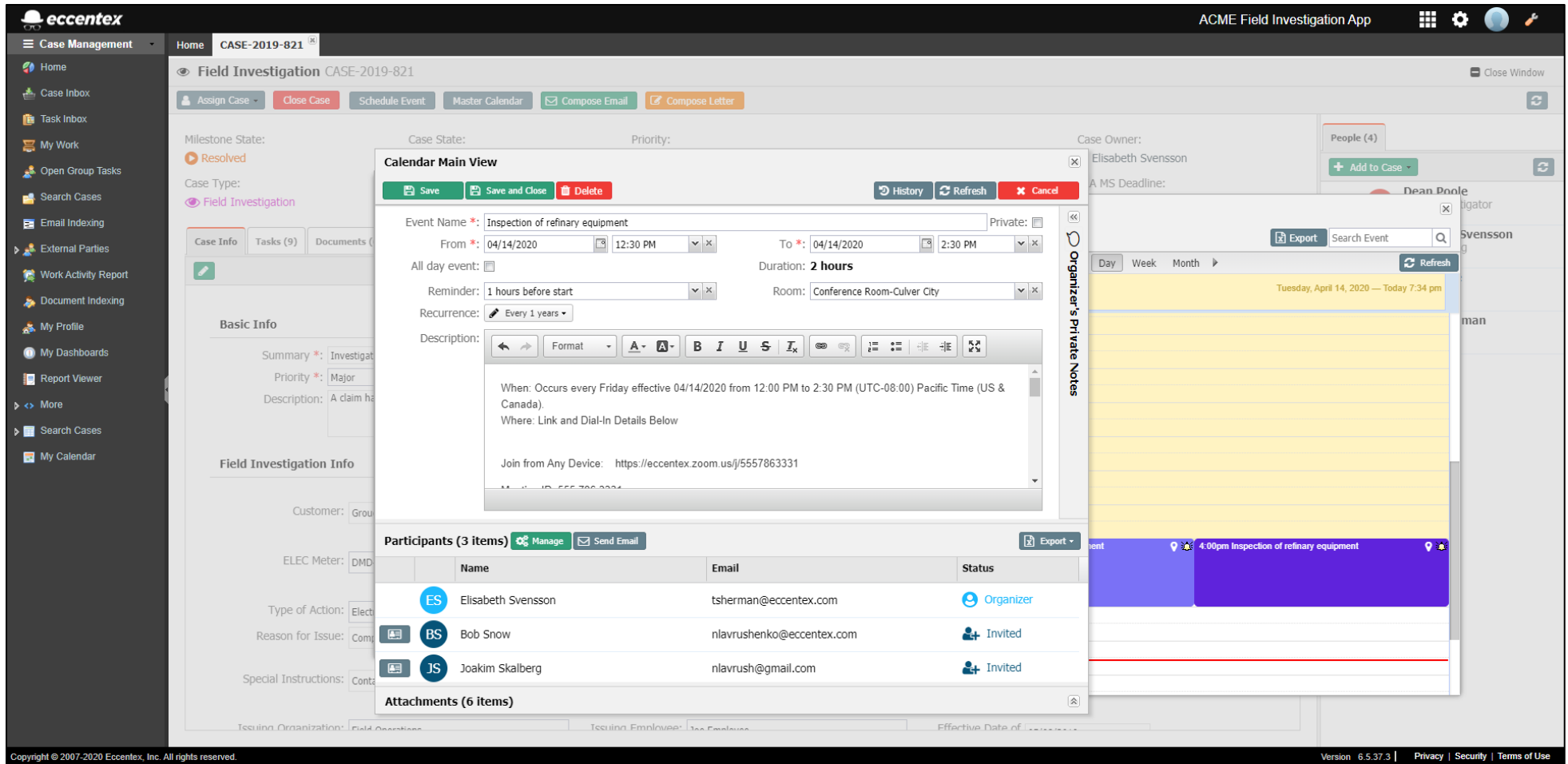
Connect to personal or group calendars in Office 365 and sync appointments to avoid overbooking or double-booking.



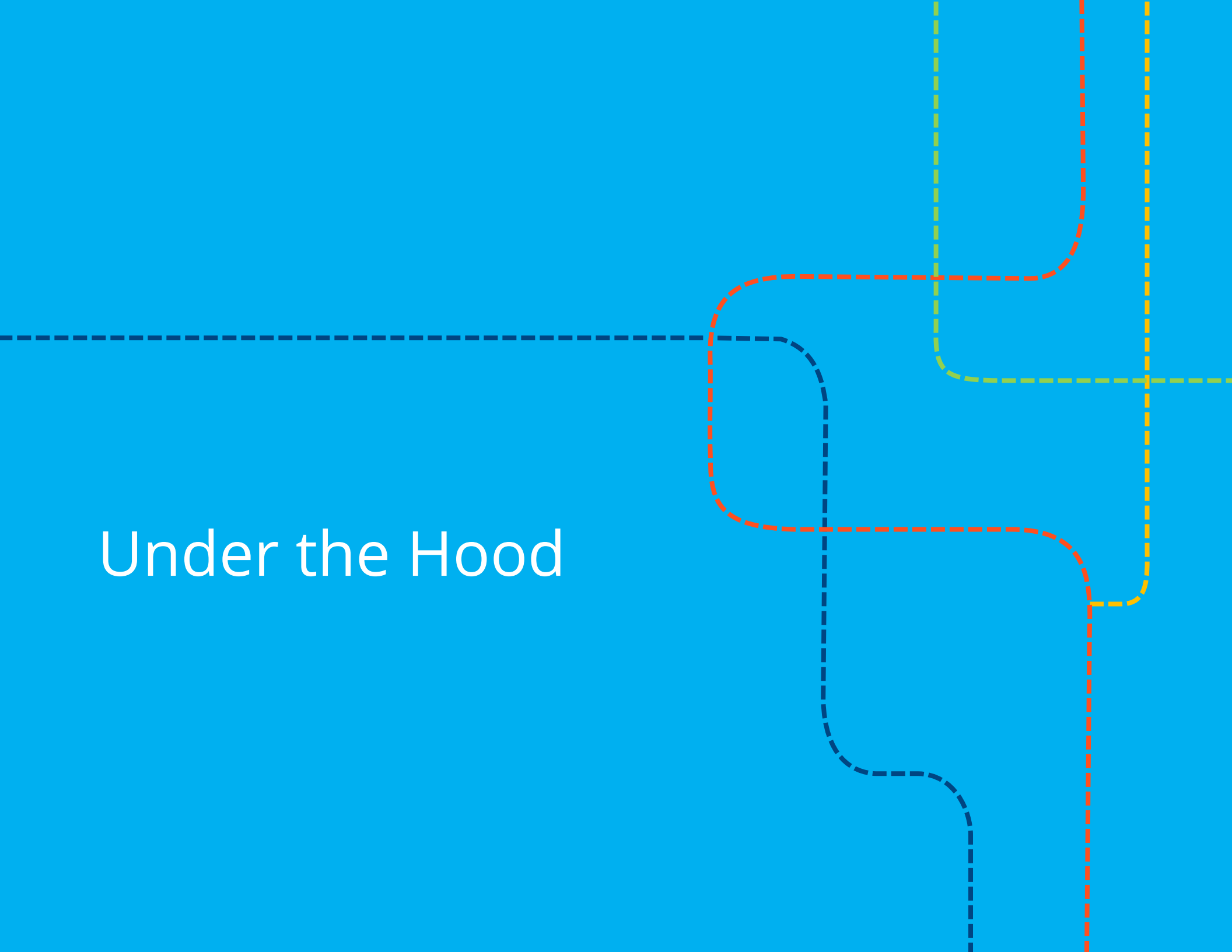
## Appointments Reminders

Set up SMS or email alerts of upcoming appointments and notify people if something is rescheduled or cancelled.

# Appointments Management for Case



Under the Hood





# No-Code Features

Empower your front-line, business professionals to continuously improve the system without relying on IT departments.



## Citizen Developer

Allow non-technical business users to configure applications with visual drag-and-drop tools and guard rails.



## Hybrid Development

Custom components created by professional developers can be used by citizen developers in most builders.



## Multilingual Support

Scale your solution across multiple languages, time zones, and employee and customer preferences.



## Workflow Builders

Visually design sequential or state machine workflows, define your own transition rules and use them to track or automate work.



## UI Builders

Build information-rich pages from feature-rich blocks, custom fields, actions, security profiles and custom widgets.



## Single-click Deployment

Deploy changes to workflows, logic, pages, and email templates immediately; deploy data model changes with a single-click.

# Detail Page Builder + Milestone Builder

The screenshot displays the eccentex Case Detail Page Builder and Milestone Builder interface. The top navigation bar includes the eccentex logo, the application name "ACME Customer Service App", and user profile icons. The main header shows the current page path: Home > Case Types > Case Type - Retail Refund > Milestone Diagram - Retail Refund > Detail Pages > Detail Page - Retail Refund. The interface is divided into three main sections: a left sidebar, a central workspace, and a right sidebar.

**Left Sidebar:** Contains a "Setup" menu with options like Home, About, Internal People, External Parties, Case Setup, Document Management, Master Data Management, Forms and Pages, Dictionaries, and Legacy Forms. Below this is a "Detail Pages" section with options for Coded Pages, Dashboards, Dashboard Settings, Dashboard Widgets, Discussion Settings, Indexing Settings, Grid Settings, Form Settings, Security, Integration, Localization, Templates, Monitoring, System Info and Logs, and Advanced Setup. A "Toolbox" section lists various widgets and buttons, including Assignment, Milestone Routing, Action Button, Custom Widget, Summary Fields, MDM Summary Fields, Refund Details, Refund Amount Request, Refund Request Type, Selling Unit, Action Unit, Refund Eligibility, Refund Amount, Total Refund Amount, Tax Adjustment, SELARTICLES, SELREASONCODES, SELREASONCODES, SELQUANTITY, TEMPREATEDFROM, Currency Code, and Tabs.

**Central Workspace:** The main area for building the case detail page. It features a "Case Detail Page Builder" header with "Preview", "Set test data", and "Set as Default" buttons. Below this is a "Milestone Diagram" section with a "Refund Articles" tab and a "Tasks" tab. The "Tasks" tab is active, showing a "Standard Widget - Tasks" section. The "Milestone Diagram" section displays a flowchart with nodes for New, Assignment, In Process, In Review, and Closed, connected by arrows representing transitions. The flowchart includes labels for transitions such as "Auto-Assign Case", "Start Work on Case", "Send to In Review", "Send to In Process", "Send to Assignment", "Send to New", "Restart Case", "Continue Work on Case", and "Close Case".

**Right Sidebar:** Contains a "People" section with "Notes" and "KB" tabs, and a "Properties" section for the "Change Case Priority" event type. The "Properties" section includes fields for Name, Change Case Priority, Permanent Code, CHANGE\_CASE\_PRIORITY, Priority, and Critical.

The bottom of the screen shows the copyright notice: "Copyright © 2007-2020 Eccentex, Inc. All rights reserved." and the version information: "Version 6.7 R2 Update 2(6.7.20.24) | Privacy | Security | Terms of Use".

# Low-Code Features

Let technical business users or IT customize even more with simple scripts and advanced configuration options without getting into the weeds.



## Form Rules & Snippets

Use a simple logic builder for form validations and field dependencies or write a few lines of JavaScript for more flexibility.



## UI Overrides

Decide what data or actions to highlight or present in a more business-friendly way using simple CSS and JavaScript overrides.



## Widget Extensions

Extend existing widgets such as document management to include additional buttons or to auto-create folders for new cases.



## Custom Rules

Customize backend logic with a few lines of code, such as where to reassign an overdue case based on the customer's issue and city.



## Synchronous & Async Rules

Decide which rules have to be run before the user is allowed to do anything else or execute them in the background.



## Rule Debugging

Debug business rules by simulating conditions such as different input data, or different user profiles.

# Form Builder with JavaScript snippets

The screenshot displays the eccentex Form Builder interface for the 'ACME Customer Service App'. The main workspace shows a form titled 'Form - Retail Refund' with sections like 'Order Refund Details Diag', 'Return Reason', 'Selected Refund Item', 'Order', and 'Customer Detail'. A modal window titled 'Action Button' is open, showing configuration options for a button.

**Action Button Modal Configuration:**

- Basic Settings:**
  - Action: ☒ NONE
  - Button Icon: ☒ GREEN
  - Button Text: Fill in Missing Order Information
- Rule Settings:**
  - Rule code: CUST\_LookupOrder
- Table:**

Name	Type	Value
OrderNumber	Bind To	CDM_MONEY_OUT_REFUND_DETA...

**Rule callback:**

```
1 function (isSuccess, response, options, srd, execOpts) {  
2   var p = execOpts.win.down('MDM_FormViewer'),  
3   var vm = p.lookupViewModel();  
4  
5   vm.set('Entity.CDM_CUSTOMER_PHONE', srd.parsedData['CUSTOMER_PHONE']);  
6   vm.set('Entity.CDM_ORDER_STORENUMBER', srd.parsedData['ORDER_STORENUM']);  
7 }  
8
```

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# Deep-Code Features

Unleash the innovators with true developer-level tools using industry-standard programming languages and paradigms.



## SQL Rules

Create custom triggers, functions, queries, views, and CRUD operations using low-level SQL code.



## DLL Extensions

Import custom or vendor-supplied DLLs into the solution that contain advanced logic that can be used in your C# rules.



## .NET SDK

Import the platform's SDKs into Visual Studio to make it easier build, test and publish application components and logic.



## C# Rules

Build advanced integrations and code custom complex actions using the industry-standard, open-source C# language.



## HTML, CSS, JS and ASPX

Design or customize pages and widgets using existing UI libraries or import UI frameworks of your choice.



## Automated Testing-Ready

Flexible APIs allow you to build automated testing tools for the front-end and back-end with tools like Selenium and JMeter.

# Custom Widget Editor + Widget inside Case

The screenshot displays the ACME Customer Service App interface, divided into two main sections: a Custom Widget Editor on the left and a Case Detail view on the right.

**Custom Widget Editor (Left Panel):**

- Header:** "Add Coded Page - Credit Report" with buttons "Save & Close" and "Save & Keep Open".
- Form Fields:**
  - Name \*: Credit Report
  - Permanent Code \*: CREDIT\_REPORT
  - Description: Sample of a custom widget with custom logic
  - Is Menu Item: ☐
- JavaScript Code:**

```
26 } catch(err){
27   creditScore = 700;
28 }
29
30 Ext.define('SMPL.view.CreditReport.Controller', {
31   extend : ExtUtils5.BaseClass.CrudController,
32   alias : 'controller.CreditReport'
33 });
34
35 Ext.define('SMPL.view.CreditReport.Panel', {
36   extend : 'ExtUtils5.BaseClass.DetailEdit',
37   alias : 'widget.CreditReport',
38   controller : 'CreditReport',
39   border : false,
40   dockedItems : [{
41     xtype : 'ecx-topheader',
42     dock : 'top',
43     mainText : 'Credit Report',
44     subText : 'Pat Thompson -', + moment().format('MMMM D, YYYY')
45     iconCls : ExtUtils5.Awsome.getIconCls('money'),
46     hidden: true
47   }],
48 },
49
50 scrollable : true,
51 items : [{
52   xtype : 'ecx-summary',
53   height : 175,
54   scrollable: false,
55   items : [
56     //column 1
57     {
58       defaults : {
59         labelAlign : 'top',
60         width : 100
61       },
62       items : [{
63         xtype : 'displayfield',
64         fieldLabel : 'Post Name'
```

**Case Detail View (Right Panel):**

- Header:** "ACME Customer Service App" with navigation icons.
- Actions:** Compose Email, Compose Email From Template, Compose Document, Schedule Event, Global Calendar.
- Case Information:**
  - Case State: In Process
  - Case Type: Auto Loan
  - Case Owner: Sarah Jones (Comptroller)
  - SLA MS Goal: + 12d 13h 32m
  - Priority: Normal (50)
  - Created: 4 days ago - George Smith
- Other Employer:** Acme Supplies Co.
- Score Display:** 700. Calculated with GScore 4.0 that has a range of 300-850. A progress bar shows the score is in the "Good" range (between Fair and Excellent).
- History:**
  - Print Mortgage:**

Open Date:	Original Amount:	Past Due:	Scheduled Payment:	Current Balance:
Feb. 15, 2002	\$157,500		\$2,659	\$10,336
Account Condition:	Account Type:	Account Terms:		
Open	Real Estate Loan	20 Year		
  - PD International Bank:**

Open Date:	Original Amount:	Past Due:	Scheduled Payment:	Current Balance:
Feb. 25, 2010	\$13,523	\$300	\$300	\$6,622
Account Condition:	Account Type:	Account Terms:		
Open	Secured Loan	60 Month		

# Security & Trust

Rest assured that data, employees and customers are always safe with comprehensive permission management, full auditing and a highly-resilient security architecture.



## Identity Management & SSO

Easily integrate your applications with SAML, OAuth, Active Directory, LDAP, or most third-party identity management system.



## Role-Based Access

Manage what users can see and do based on their roles and responsibilities solution-wide or for specific types of cases.



## Secure System Integration

Connect to other systems securely with HTTPS, Direct Connect, Virtual Private Network, SFTP and whitelisted IPs.



## Encryption & Data Isolation

By default, AppBase Cloud uses AES 256-bit encryption for data at rest and FIPS 140-2 compliant TLS 1.2 for data in transit.



## Perimeter Security

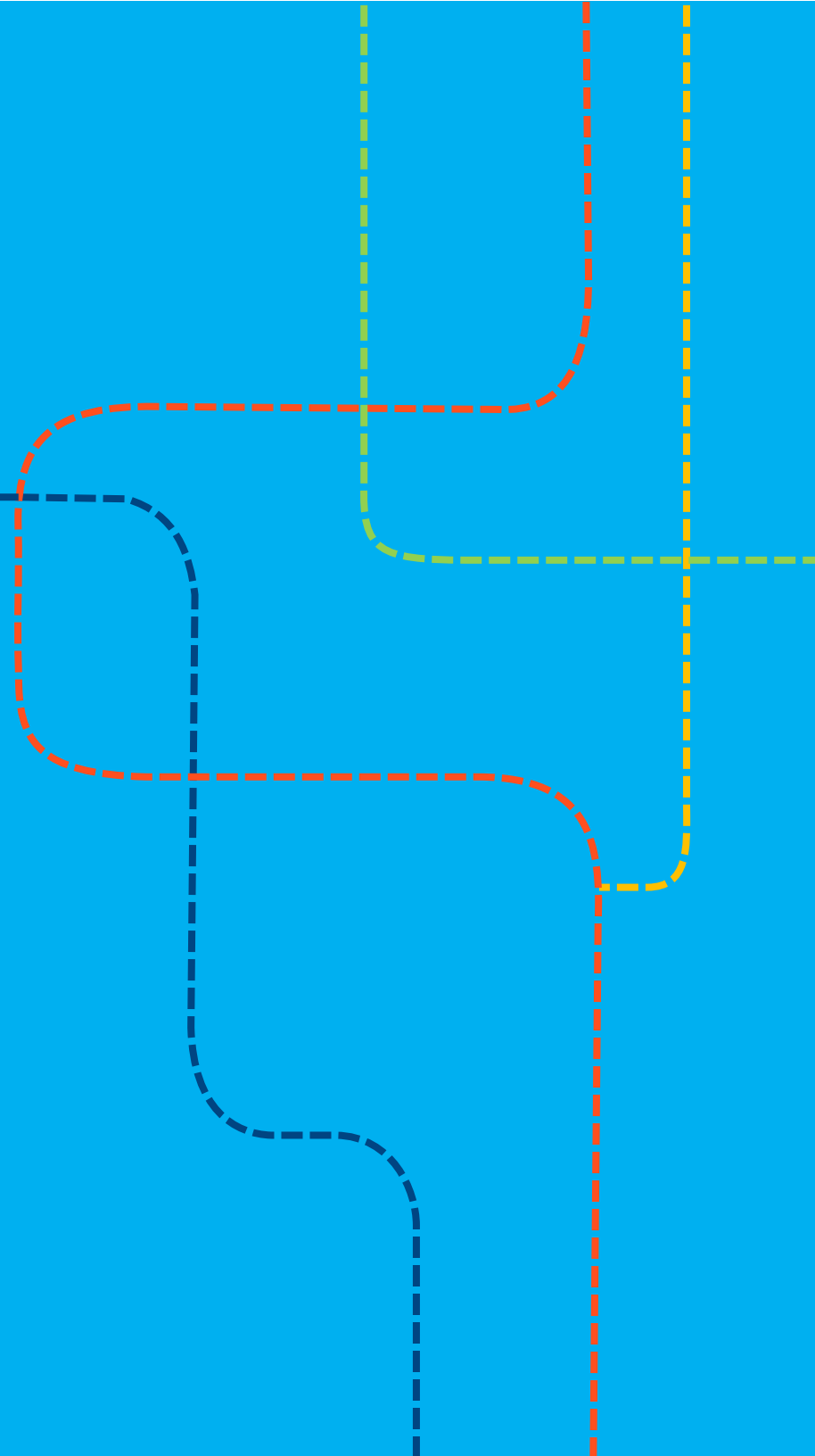
Comprehensive intrusion protection with hardened rules for how services and resources communicate with each other.



## Independent Security Audits

In addition to comprehensive internal audits, AppBase undergoes 3<sup>rd</sup>-party front-end to back-end penetration tests.

Cloud & Delivery





# Deployment & Hosting

Run the solution where you want; our cloud, your cloud or even on-premise if it's best for your organization.



## AppBase Cloud

Managed cloud platform built on Microsoft Azure and architected for both private and shared offerings.



## Partner Managed Cloud

Business partner owned and controlled environments that hosts the solution or a purpose-built application service provider.



## Agnostic Hosting

Solutions are easy to migrate; start configuring your solution on the AppBase Cloud and move it later if needed.



## Customer Managed Cloud

Customer owned and controlled environments that run within their private clouds or running on IaaS.



## On-Premise & Hybrid

Full installation on the customer's hardware or hybrid installation such as everything in the cloud but an on-premise database.



## Cloud Options

Many available options such as higher-levels of disaster recovery, hot-standby, extensive storage options, and industry-specific security options.

# Professional Services

We help you spearhead your digital transformation journey from requirements to implementation, from quick-wins to complex initiatives.



## Business Consulting

Leverage our tailored, strategic direction and best practices to help you take charge of your digital transformation initiatives.



## Implementation Services

Get it done fast and right the first time with our expert team that delivers everything from requirements to go-live.



## Managed Hosting Services

Focus on streamlining your business and let us manage the infrastructure, backups, performance, and availability.



## Remote & On-Site Training

Accelerate your expertise with a wide range of remote and in-classroom offerings.



## Dedicated Teams

Reserve a dedicated team of AppBase experts to deliver a full project and continuously improve your solutions.



## Partner Ecosystem

Work with our worldwide certified partners who can bring additional subject matter expertise, local resources, and additional services.



Eccentex delivers software for customer service, customer journey automation and back-office automation. Eccentex's flexible, cloud-architected software – built on its unified AppBase Platform – empowers people to rapidly deploy and easily extend and change applications to meet strategic business needs.

Over its history, Eccentex has delivered award-winning capabilities in case management and business process automation (BPM) powered by robotic automation and advanced document management, to help the world's leading brands and governments achieve breakthrough results.

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