



CARES™ CRM

Centurion CARES™ Contact Record Management (CRM) is a browser-based database utilized by customer service centers to track customer contact through voice calls and multimedia communications (web chat, email, fax, voice message left while in queue).

CRM Record Features

- Date & Time Stamp
- Dialog Tracking Numbers
- Primary and Alternate Contact Info
- Agent Tracking and Notes
- Agent Notes Summary
- Contact Channel Identification
- Open / Closed Status
- Follow-Up Reminder
- Call Type Tracking
- Resolution Tracking
- Multiple Search Criteria
- CRM Reports

CUSTOMER ACCOUNT RECORD EXAMPLE

CARES CRM

Logged in as: CRM Agent Two Admin
[Logout](#)

Main

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Search

List All Accounts

New Account

Account

New Dialog

Custom Data

Account Home

Account John Q. Public (1234567890)

Contacts

John Q. Public

Name: John Q. Public

Email: alpha@isp.net

Phone: 999-888-7777

Primary: yes

[Update Contact](#) [New Contact](#) [collapse \[-\]](#)

987 Main Street

Anywhere AK 97888

[Update](#) [collapse \[-\]](#)

Dialog List Closed Overdue Open

By Date

By Dialog

Dialog	Activity	Opened [.]	Summary	Opener	Contact
87	0	Aug-25-2009 14:28	Mr. Public claims that he is not receiving the discount level he deserves.	CRM Agent Two Admin	John Q. Public
86	0	Aug-25-2009 14:25	Reports that his August statement is incorrect.	CRM Agent Two Admin	John Q. Public
85	0	Aug-25-2009 14:19	Having a problem accessing his on-line account.	CRM Agent Two Admin	John Q. Public



TECHNICAL INFORMATION

The Centurion CARES™ CRM is a database application which resides on the Centurion IVR/ACD server. CRM may be used with Centurion Dialer / Predictive Dialer to assist agents with outbound call tracking and for tracking inbound calls. The Centurion ACD supports screen pop of the CRM record, as well as, screen pop of the back office IT application caller account record.

Operator Controlled Parameters

- Secure Access
- Call Types
- Resolution Types
- Agent Names
- Group Names
- Custom Data Fields
- Simple Search
- Advanced Search
- Scheduled Reports

CRM Report Example

Dialogs by Account

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Target Account: abrealty

Agent Assigned	Dialog ID	CRM Type	Contact	Target Date	Closed Date	Media	Resolution
OPEN							
10/03/2007							
7860	8	Account inquiry	Hans Reuter	07/17/2007	7/18/2007 12:00:00AM	Direct In Calls	2
7875	8	Maintenance inquiry	Hans Reuter	07/20/2007	7/18/2007 12:00:00AM	Voice over IP Calls	2
7860	1	Account inquiry	Hans Reuter	05/21/2007		Voice over IP Calls	2
jasong	1	Maintenance inquiry	Hans Reuter	05/30/2007	7/30/2007 12:00:00AM	Dialog Followup	2
7850	8	General Inquiry	Hans Reuter	07/18/2007		Direct In Calls	2
09/26/2007							
tw	3	Account inquiry	Hans Reuter	05/29/2007		Dialog Followup	2
07/31/2007							
	2	General Inquiry	Hans Reuter	06/28/2007	7/28/2007 12:00:00AM	Dialog Followup	2
06/29/2007							
support	14	Account inquiry	Hans Reuter	06/29/2007	7/29/2007 12:00:00AM	Voice Calls	1
06/20/2007							
support	10	Make payment	Hans Reuter	06/20/2007		Dialog Followup	3
05/23/2007							
support	1	Account inquiry	Hans Reuter	05/22/2007	7/23/2007 12:00:00AM	Dialog Followup	2
support	4	Account inquiry	Hans Reuter	05/25/2007		Dialog Followup	2
05/16/2007							
	2	Account inquiry	Hans Reuter	05/29/2007		Voice Calls	2
CLOSED							
10/03/2007							
jasong	15	Maintenance inquiry	Hans Reuter	08/15/2007		Faxes	3
7860	5	Account inquiry	Hans Reuter	05/31/2007		Dialog Followup	2
jasong	15	General Inquiry	Hans Reuter	07/10/2007		Voice Calls	3
09/26/2007							
7904	18	Maintenance inquiry	Jan Peters	09/27/2007		Faxes	2
08/28/2007							
jasong	15	Unknown	Hans Reuter	08/28/2007		Faxes	3