Why Solastis?

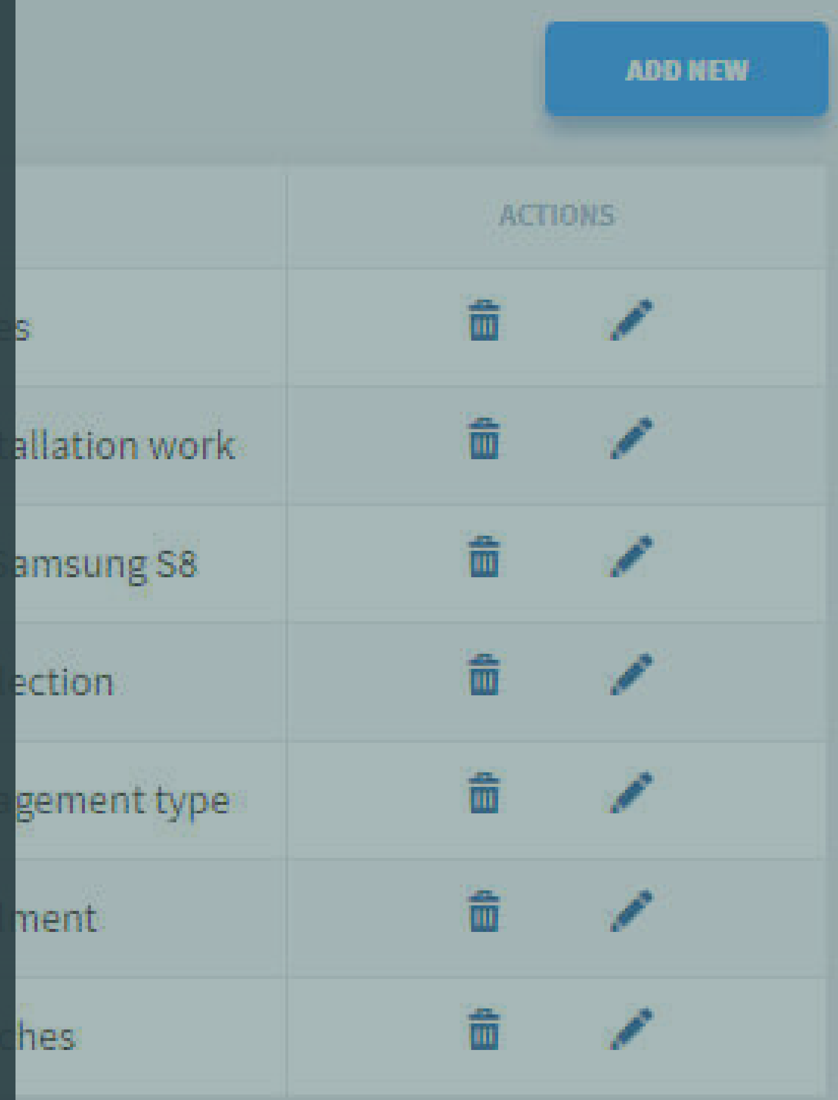
CREATE MULTIPLE CASE TYPES (OR TICKET TYPES)

In any business, having multiple business processes of a similar type is normal. For example, you can have separate business processes for ;

- Sale of laptops
- Sale of software development
- Sale of mobile app developments
- Sale of iOS app development

It is often not possible and logical to club all opportunities in one opportunity type (Or case type). Many CRMs fall short on this. They offer only one opportunity type (Or service case type, deal type, case type) for this.

Solastis identifies this needs and provides a feature to create different case types. Ability to create separate case types to represent different business processes is fundamental to any good CRM / Case Management platform.



SOLASTIS OFFERS A BASIC SEQUENTIAL PROJECT MANAGEMENT FOR EACH CASE TYPE

In most of the CRMs, the case (or ticket, opportunity, deal, a requestby whatever name it is called) is considered as a single piece of work. But in reality, it is rarely so. The case can be further be subdivided into various sequential steps.

For example, a sales process may be divided into 6 logical steps as follows ;

- Gather initial information
- Submit proposal
- Call /Meeting with client
- Further adjustment discount
- Final conclusion of the case

Solastis offers a feature to create a step template and attach it to each case type. Then every case created under that case type has to follow the sequent of steps defined.

For example, in Solastis different processes (Case types) and its task template may appear as shown in the diagram.

This approach has the following benefits.

1. It brings a consistency and a repeatable structure to how you manage your business processes, as all the cases pass through the predefined steps.

2. You know exactly at which stage a case is stuck.

3. Deploying new processes becomes easy. As you can easily add new steps and employees will understand it with limited training and knowledge transition.

ANY OTHER BUSINESS PROCESSES

Solastis CRM is not restricted only to sales and support cases. Since you can create any number of case types and for each case type, you can have step template, it becomes a powerful case management platform. Any process that needs systematic steps execution, Recording of details/communication, keeping it as a proof of something was done, and recording conclusion can be implemented in Solastis CRM.Some example of such processes are,

- AR Collection process
- HR Internal process
- Employee onboarding process
- Month end closing process
- Incidence investigation process
- Complaints
- Fraud investigation

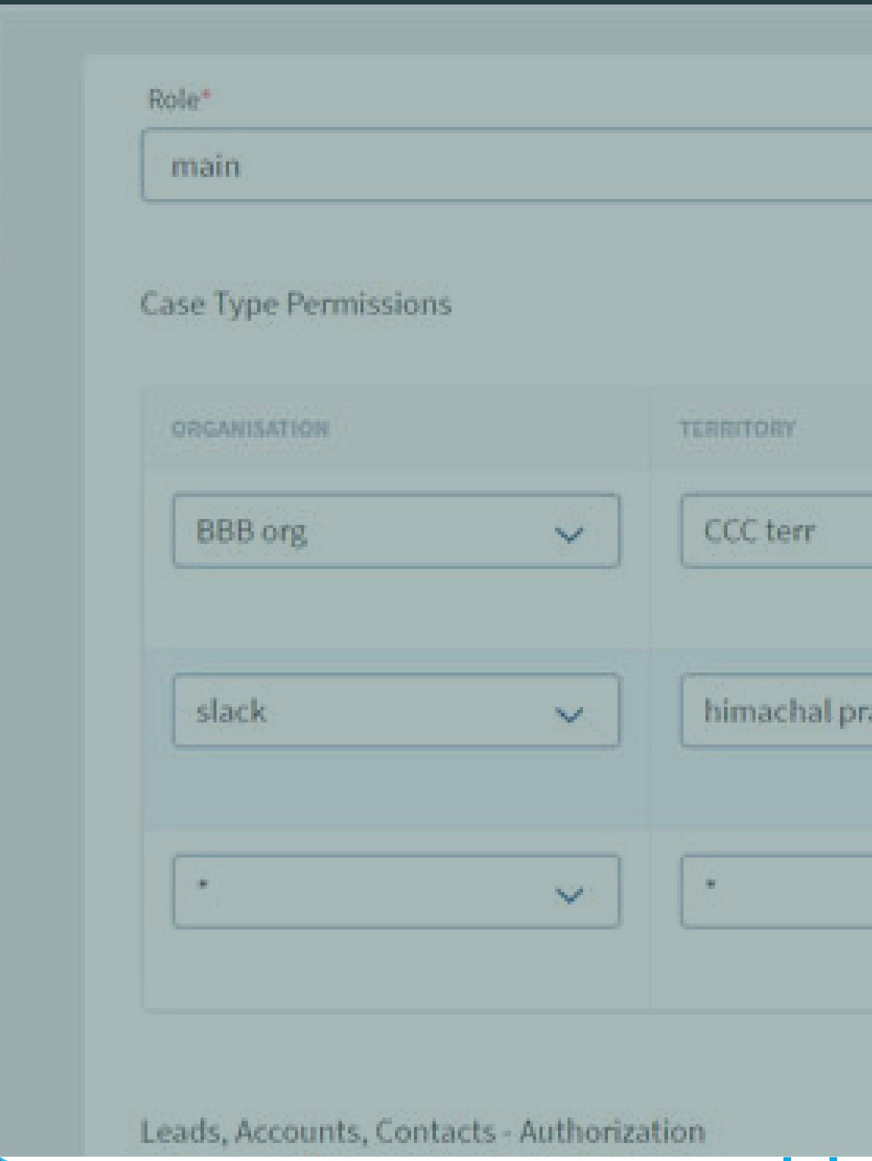
AUTOMATIC ASSIGNMENTS OF STEPS

In the abovesections, you have understood the concept of step template. The steps created in step template can be assigned to the same person or to differentpeople as they are activated. This allowsa seamless transition of casework from one person/ department to the other. For example, after the first few steps, the work moves to backoffice for further processing. This can be achieved easily now. Cross geography, cross-functional area cases are easy to manage.

MULTIPLE DIMENSIONS (CLIENT DEFINABLE) TO ANALYSE THE CASE

While CRM agents are often interested in specific cases, managers want to analyse case performance at a specific group level. For this Solastis offers two dimensions called Organisational unit and territory, which can be assigned to each case. Then analyzing cases of a specific organizational unit or a territory (or a combination thereof) is a breeze.

Whats more important is, you can define the values of these dimensions as per your requirements. For example, one client may define Organisational units to represents the legal entities in their set-up whereas another client may define it as sales teams.



ABOVE DIMENSIONS ARE ALSO AUTHORISATION OBJECTS

The dimensions defined above also act as an authorization object. So in the aboveexample, it is possible to create an authorization role for a specific organizational unit and assign it to specific CRM agents so that nobody else can visit cases belonging to that organizational unit.

Since the dimensions itself are definable by you, you have a perfect control on how you want authorization roles to work.

SIMPLE CONFIGURATION

Inspite of being such a capable system, the configuration is very simple. You don't need any programming, the configuration can be finished in a matter of 1/2 hours. You obviously need to spend some time on listing your processes and steps. But that's it.After configuration, changing the setup is also very easy (if need be). Creating new processes, adding new steps, adding org units etc is super simple.