CSR Trainer's Manual

By: Aexxis LLC

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1. Course Introduction

We are very pleased that you have selected OrangeCRM as your continuity business software solution! We are dedicated to training your CSRs (Customer Service Representative) and improving your customer's service experience. So, we have designed a truly amazing Customer Resource Management (CRM) system that is easy to use, feature rich and most of all CSR friendly!

However, to benefit the most from this software, your CSRs need to understand how to handle the daily customer issues in OrangeCRM. (OCRM) So, we have prepared this training manual to provide an overview of the most common tasks your CSRs will face in handling customer service issues.

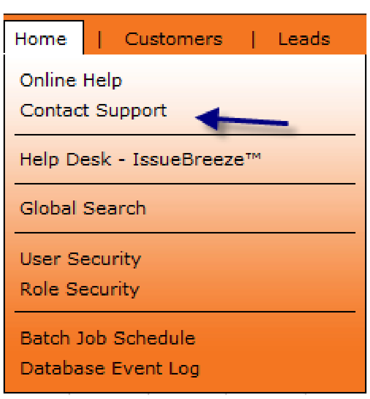
Additionally, if your company is using IssueBreeze, for escalating advanced customer service issues please refer to our IssueBreeze CSR training documentation located at: http://help.issuebreeze.com in the downloads area.

The better your CSRs understand OrangeCRM and its functionality, the more useful it will be to them in providing excellent customer service to your customers.

Note: We regularly update our training manuals as the CRM is enhanced. However, if you are looking for something and it is not listed anywhere in this document, you may contact us directly by any of the options below for more training.

2. Additional Training and Support

To contact us, please use one of the following options:
Mailing Address: Aexxis LLC, P.O. Box 38 Griffin, Georgia 30224
Call us at: 770-227-0036, Main Office Phone Support
Fax us at: 770-783-8868
Email us at: support@orangecrm.com
Online help text: http://help.orangecrm.com
Click on the Contact Support for assistance in the program



3. Logging In and Out of OrangeCRM

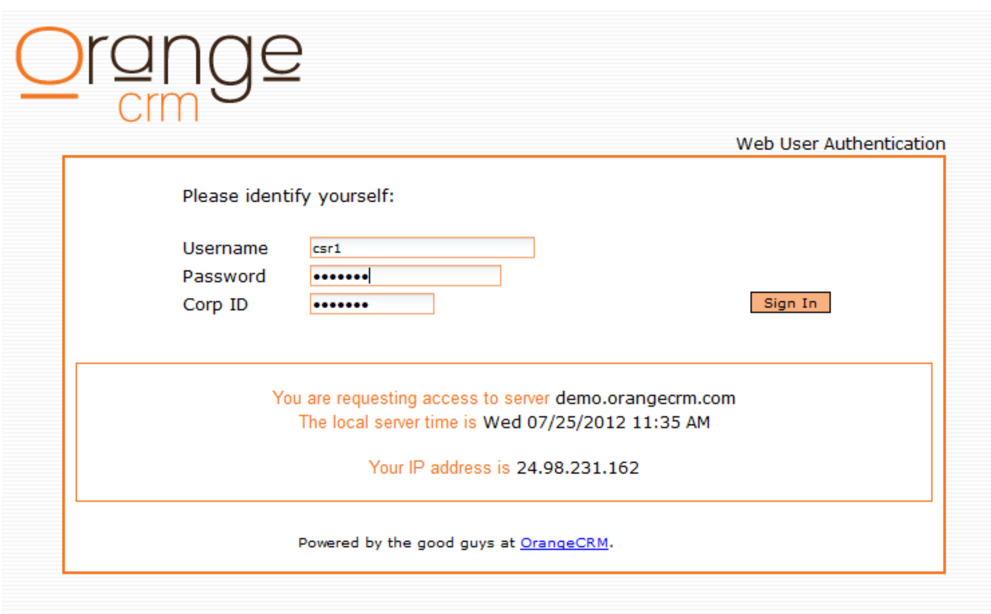
Logging In

When you log into OrangeCRM, you will be logged in for as long as your browser remains open. If you want to keep your browser open when leaving your workstation, please remember to apply your local company information security policies such as password screen savers to prevent unauthorized access to this or other applications. To log on to OrangeCRM:

Enter your User name and password:

1. The Corp. ID field will auto populate. You do not need to enter anything in the Corp. ID field. It identifies which corporation you are signing into automatically.
2. Click on the Sign in Button to log into OrangeCRM. (Contact your system administrator if you cannot log into OCRM)

Note: The software can be setup to log out all users automatically after a specific period of time. For example, all users can be automatically logged out after each eight hour shift. Please contact your system administrator to determine your current setting and to setup this feature.



If at any point you cannot sign into your CRM's main URL, simply go to one of our backup locations by adding a 2 or 3 to the URL. This will take you to a different datacenter that is normally running only 10 minutes behind the main URL's datacenter. (See Example)

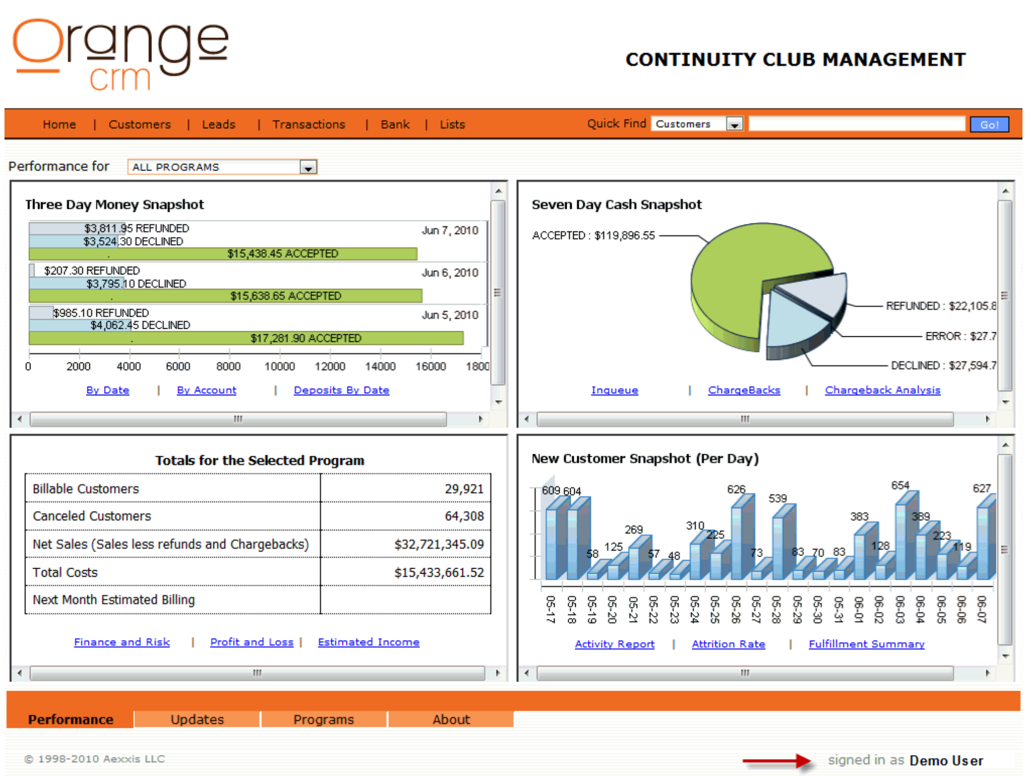
https://mycompany.orangecrm.com
https://mycompany2.orangecrm.com
https://mycompany3.orangecrm.com

Logging Off

To log off completely, simply close **all of your browsers** to prevent any unauthorized access to this program. Now, you are now completely signed out of the system.

To log off and quickly sign in as a different user, you can click on the line below that says: "signed in". It will take you back to the log in page where you can enter a different user id and password.

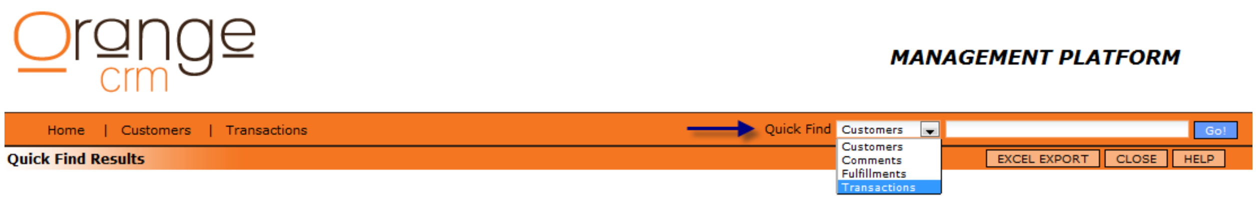
Note: The "sign in" does not sign you out completely from the system. It's just a quick way to change the log in to a different user. If you click the back button, on the web browser, you will notice that you are still logged in.) You MUST close all of browsers to log out completely.



4. Menus and Definitions

Quick Find Drop down list

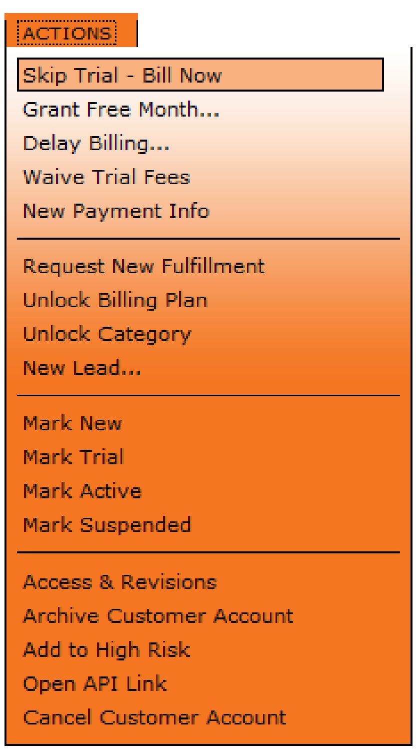
This is your main way for looking up Customers, Comments, Fulfillments, and Transactions in OCRM. It's your eye into the system. Think of it like Google where you always search to find things. You can find information by the menus, but the quick find is much easier.



The Action menu in the customer record, transaction record and other records are the main menus you will be working with to action items in the CRM. Please notice them below and the functions that they can perform.

Note: Views below are with Level One CSR access. Your menus maybe different depending on your ACL role.

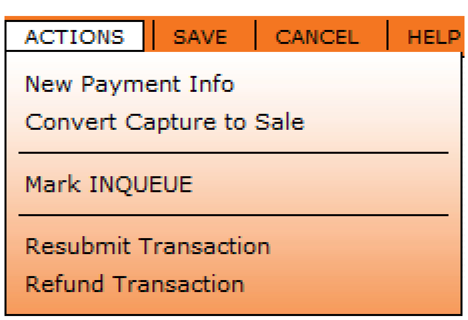
Customer Record Action Menu



Skip Trial - Bill Now - This option allows you to immediately bill the customer by skipping the trial period.
Grant Free Month - This option allows you to specific the number of free months.
Delay Billing - This option allows you to delay or extend the trial period by a specified number of days.
Waive Trial Fees - If the customer status is Trial, this option allows you to waive the trial fee and set the customer account to Active.
New Payment Info - This option allows the admin user to make changes to the bank route for this customer.
Request New Fulfillment - This option will bring up a new window for the customer's fulfillment. From this window, you can choose a new fulfillment for this customer.
Unlock Billing Plan - If you wish to manually change the billing plan that this customer is on, this option will allow you to change it on the form from the drop down options. You cannot change the billing plan without first unlocking it.
Unlock Category - If you wish to change the category information about this customer, this option will allow you to change it on the form from the drop down options. You cannot change the category without first unlocking it. Categories are a way of grouping customer products in the CRM.
Mark New, Mark Trial, Mark Active, and Mark Suspended - These options allow you to change the status of a customer.
Access and Revisions - This will show you the Access and Revisions tab of the customer form.
Archive Customer Account - Archives the customer. It is not recommended to archive customers. It removes them from reports and allows them to rejoin as a new customer and get free trials.
Add to High Risk - This option allows you to mark the customer as High Risk if they are in Canceled or Archived status.
Open API Link - If a customer's status is Trial, you can use this feature to open the API Interface window.
Cancel Customer Account - Cancels the customer's account and ends billing cycles. Canceled customers can be reactivated in the system by marking them active again.

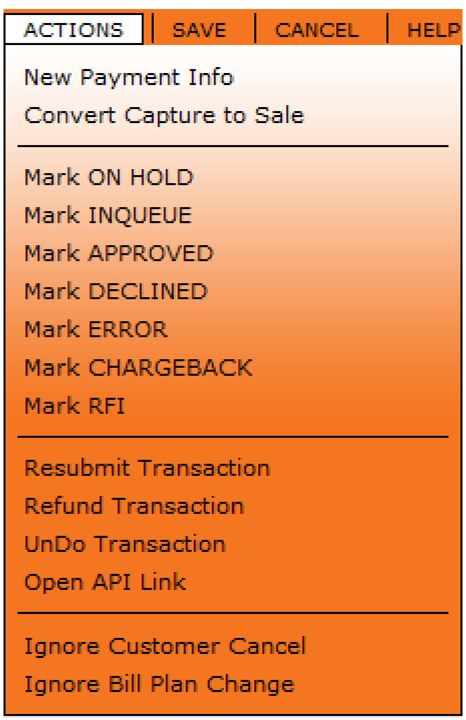
Transaction Action menu –

Level One CSR view



New Payment Info – Allows new Payment number to be entered.
Convert Capture to Sale – Allows a manager to convert a captured transaction and run it as a sale if PREAuth information was lost.
Mark INQUEUE - This will mark the transaction as Inqueue to be sent to the bank.
Resubmit Transaction - This will change the current transaction status to retried. It then creates a new identical transaction and places that transaction INQUEUE to be sent to the bank. The date issue is set to the current date, and the number of retries is incremented by one.
Refund Transaction – Allows partial or full refunds for customer's transactions. If the transaction is pending, the new status will be pending refund. If the transaction is in approval state from the bank, the transaction will be refunded. If no approval from the bank has been received, the transaction will be changed to declined, and no refund is issued. Only purchase and captured transactions can be refunded.

Manager or Admin view



Mark On Hold - This will mark the status of the transaction on hold.
Mark InQueue - This will mark the transaction as inqueue to be sent to the bank
Mark Approved - This will mark the status approved. **Note:** This does not update the customer status, the date last processed, or the cycle count. This should only be done by administrators that have a good understanding of how the CRM works.
Mark Declined - See above for status definitions. This will mark the status declined. **Note:** This does not update the customer status, the date last processed, or the cycle count. This should only be done by administrators that have a good understanding of how the CRM works.

Mark Error - See above for status definitions. This will put the status of the transaction as in error. **Note:** This does not update the customer status, the date last processed, or the cycle count. This should only be done by administrators that have a good understanding of how the CRM works.
Mark Chargeback - See above for status definitions. This will mark the status of the transaction as chargeback. **Note:** When a transaction is marked as a chargeback (either by a CSR or from a bank update procedure), merchant banks will be set to auto refund for all subsequent transactions (purchase transactions dated later than the CB). In addition, the customer is canceled, the lead is updated to out-of-compliance and any chargeback fulfillments are issued.
Mark RFI - See above for status definitions. This will change the status to RFI. In addition, it requires you to complete the RFI fields. Upon saving the transaction, RFI fulfillments will be triggered.
Resubmit Transaction - This will change the current transaction status to retried. It then creates a new identical transaction and places that transaction Inqueue to be sent to the bank. The date issue is set to the current date, and the number of retries is incremented by one.
Refund Transaction - If the transaction is pending, the new status will be pending refund. If the transaction is in approval state from the bank, the transaction will be refunded. If no approval from the bank has been received, the transaction will be changed to declined, and no refund is issued. Only purchase and captured transactions can be refunded.
UnDo Transaction - This will perform actions that will make it as if the transaction never happened. The lead status will be reset, the transaction will be taken off, comments stating what happened and when will be made on the transaction, and the customer cycle counter will be reset. The fee schedule will be reset so that if need be the fee schedule will process again.
NOTE: Transactions that have been processed by a bank cannot be undone.
Open API Link - This action is only available to system administrators and allows you to open the API link that made the transaction.
Ignore Customer Cancel – This allows for a customer to be canceled in the CRM and a transaction that is still Inqueue or pending to be processed and billed to that customer. However, no further billing or shipping will occur since the customer has been canceled in the system. The product or item will be sent to the customer.
Ignore Billing Plan Change – This allows a customer that wants a billing plan change, who has a transaction that is pending or Inqueue, to still receive that transaction processed under the previous billing plan. Any future transactions will continue under the new billing plan.

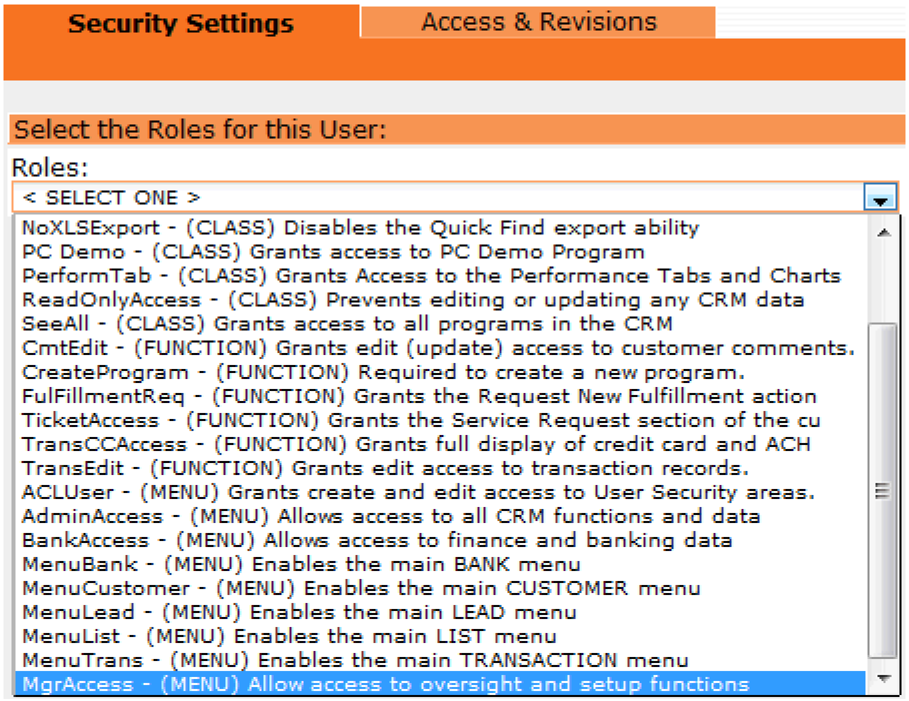
Transaction Status Definitions:

It is important to know the definition of the following transaction status. This way when you are talking with a customer you can explain clearly what that transaction status means.

1. **Approved -** The status of the transaction will read approved. This is generally when receiving an approval from the merchant bank. The customer information will be updated with the approval, changing the last processed date to the current date.
2. **Declined** - The status of the transaction will read declined. A Transaction that has been declined has been refused by the bank. The bank has declined to process the transaction.
3. **Error** - The status of the transaction will read error. This status is the same as declined, but due to an invalid format being sent to the bank. The bank refused to process the transaction due to an invalid format or at times an unknown account number.
4. **Retried** - The status of the transaction will read retried. This is a declined transaction that has created a new transaction to be tried at a later date according to a retry schedule on the merchant bank.
5. **Refunded** - The status of the transaction will read refunded. This is a purchase or capture transaction that has issued a refund transaction.
6. **On Hold** - The status of the transaction will read on hold. This is a transaction that will never be sent to a bank until there is a change in status. By default all refund transaction are created on hold. A setting in the acquisition centers under transactions can take on hold transactions and automatically set them to in queue at a set time interval.
7. **In Queue** - The status of the transaction will read in queue. This is a transaction that is waiting to be sent to a merchant bank.
8. **RFI** - The status of the transaction will read RFI. This is the status a transaction will be placed in while a customer disputes the transaction. The bank has requested further information (RFI) for its investigation for the transaction, while it decides whether or not it’s a valid transaction.
9. **Charged Back** - The status of the transaction will read charged back. The bank has forced a refund at the customer’s request.
10. **CB Memo** - The status of the transaction will read CB memo. This is a credit transaction that is created by the system as a result of a charged back transaction.
11. **Pending** - The status of the transaction will read pending. This is a transaction that has been sent to a merchant bank, but no answer has come back yet.
12. **Pending refund** - The status of the transaction will read pending refund. This is a refund transaction that has been sent to the bank and no answer has been sent back. This type of status is as a result of a CSR requesting a refund on a transaction.

5. Recommended User Security Roles

Protecting your company data is extremely important to both your company and to us! So we recommend that you grant your ACL users, **ONLY** the level of access that their work function requires. If you need more access or to add a new role in the system, contact you system administrator.



Recommended Roles for various ACL Users:

These are the recommended roles for each ACL user level.

CRM Administrator –

1. CmtEdit (CLASS) - Grants edit and update access to the customer comments area.
2. CreateProgram (CLASS) - Grants access to create a new program in the CRM.
3. PerformTab (CLASS) - Grants access to the Performance Tabs and charts in various forms, excluding the Performance charts on the Home Page.
4. SeeAll (CLASS) - Grants access to all the programs and data in the CRM.
5. Fulfillment Requests (FUNCTION) - Gives access to request new fulfillments for customers.
6. Ticket Access (FUNCTION) - Grants access to Service request area of customer record
7. TransCCAccess (FUNCTION) - Gives access to full display of CC and ACH information.
8. TransEdit (FUNCTION) - Grants edit access to transaction records.
9. ACLUser (MENU) - Grants create and edit access to User Security area
10. AdminAccess (MENU) - Allows access to all CRM features and function

11. BankAccess (MENU) - Allows access to the finance and banking data
12. MenuBank (MENU) - Enables the main BANK menu
13. MenuCustomer (MENU) - Enables the main CUSTOMER menu
14. MenuLead (MENU) - Enables the main LEAD menu
15. MenuList (MENU) -Enables the main LIST menu
16. MenuTrans (MENU) - Enables the main TRANSACTION menu
17. MgrAccess (MENU) - Allows access to the oversight and setup functions

CRM Manager -

1. CmtEdit (CLASS) - Grants edit and update access to the customer comments area.
2. PerformTab (CLASS) - Grants access to the Performance Tabs and charts in various forms, excluding the Performance charts on the Home Page.
3. SeeAll (CLASS) - Grants access to all the programs and data in the CRM.
4. Fulfillment Requests (FUNCTION) - Gives access to request new fulfillments for customers.
5. Ticket Access (FUNCTION) - Grants access to Service request area of customer record
6. MenuBank (MENU) - Enables the main BANK menu
7. MenuCustomer (MENU) - Enables the main CUSTOMER menu
8. MenuLead (MENU) - Enables the main LEAD menu
9. MenuList (MENU) - Enables the main LIST menu
10. MenuTrans (MENU) - Enables the main TRANSACTION menu
11. MgrAccess (MENU) - Allows access to the oversight and setup functions

Customer Service Manager -

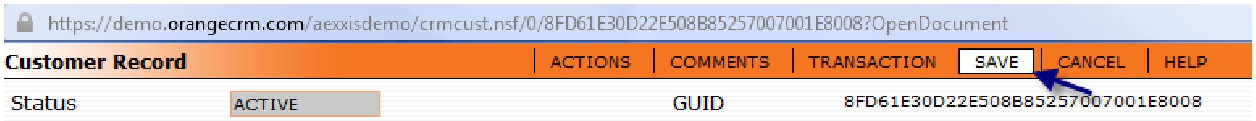
1. CmtEdit (CLASS) - Grants edit and update access to the customer comments area.
2. SeeAll (CLASS) - Grants access to all the programs and data in the CRM. (Depending)
3. FulfillmentRequests (FUNCTION) - Gives access to request new fulfillments for customers.
4. TicketAccess (FUNCTION) - Grants access to Service request area of customer record
5. MenuCustomer (MENU) - Enables the main CUSTOMER menu
6. MenuTrans (MENU) - Enables the main TRANSACTION menu

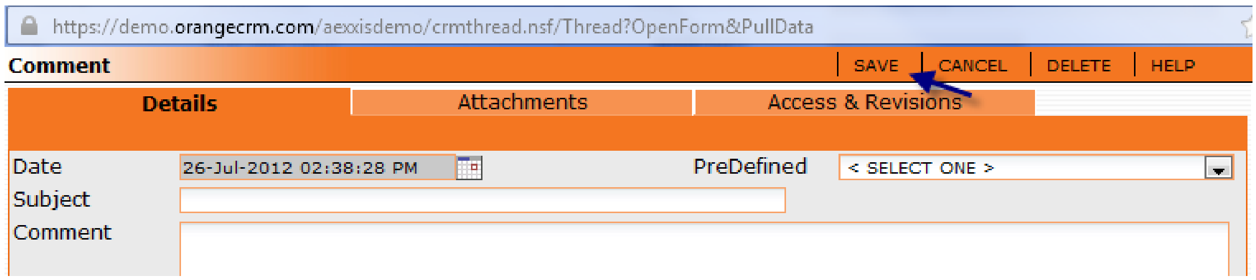
Customer Service Representative (CSR) -

1. SeeAll (CLASS) - Grants access to all the programs and data in the CRM. (Depending)
2. Fulfillment Requests (FUNCTION) - Gives access to request new fulfillments for customers.
3. Ticket Access (FUNCTION) - Grants access to Service request area of customer record
4. MenuCustomer (MENU) - Enables the main CUSTOMER menu
5. MenuTrans (MENU) - Enables the main TRANSACTION menu

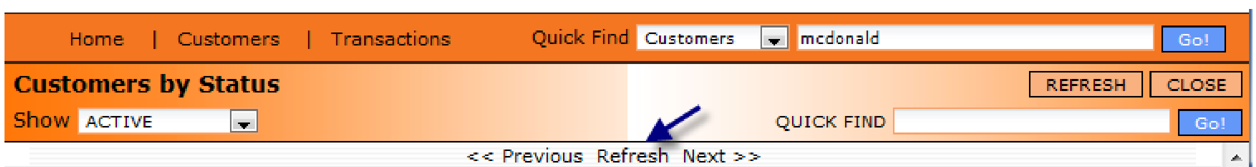
6. General Information

a. All edited data must be saved for the customer record to be updated. Closing the window without saving it first will cause your edits to be lost.





b. Click on the refresh button when you need to refresh changes to a display list. So, if you make a change to a record and you do see it, just click on the refresh button to refresh the list.



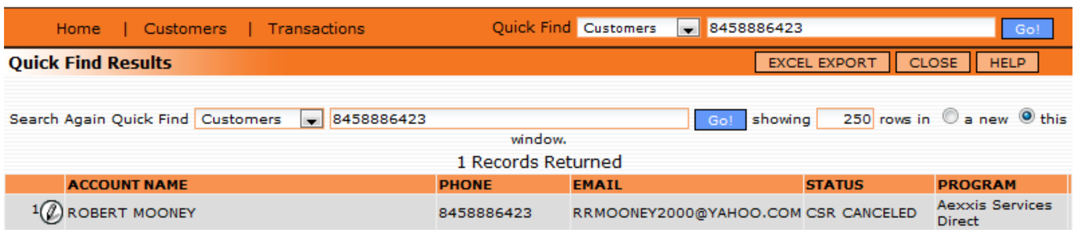
c. Choose Icon –  Displays a context sensitive list of available items

d. Paper Icon -  Displays the detail sensitive list of a selection

7. Searching

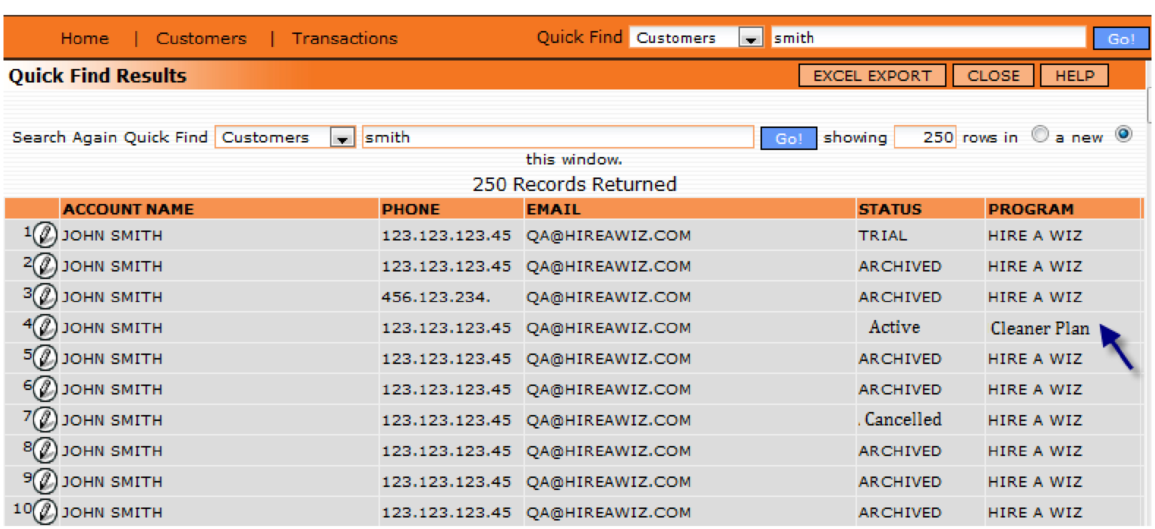
a. Searching for customers

1. Basic search instructions - Searching for information in Orange is like searching in on the Internet. Use the Quick find. It's the best way to find things.
    a. The Quick find field allows you to search for customers by their phone number, or by their first and last name.
    b. Ask for the customer's phone number FIRST and search of the customer record.
    c. This is the recommended and best way to find a specific customer record. See example:



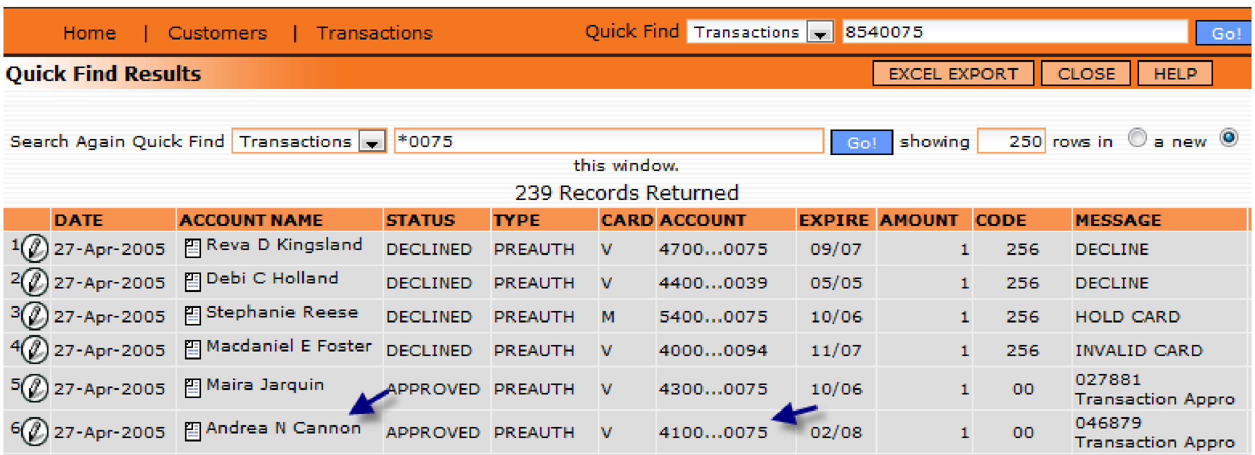
    d. If the record is not found, then you can search by the customer's first and last name.
    e. Ask customer to verify his contact information – Address, or email account, and so forth as a security check to prevent problems.

2. Searching for a specific customer with a common name – (Mr. Smith in the Cleaner Plan)
    a. Enter the first and last name in the quick find.
    b. You may get several people with the same or similar name.
    c. Verify with the customer which program or offer they are calling in about before opening or editing the record.
    d. Make sure you only open the correct customer record by checking the status and program or order they purchased.
    e. It may be better to search by the customer's phone number instead.



b. Searching for Transactions

1. If you want to find a transaction using the customer's credit card information, you can use the quick find field and drop down to search by Transactions. You should ask for the **last six digits** of the credit card. Enter the Credit card information and click on Go.
    a. The result will return with all data that contain those six digits including other customer's addresses with those numbers.
    b. Look for the credit card number and the customer name and open that record.
    c. See example.

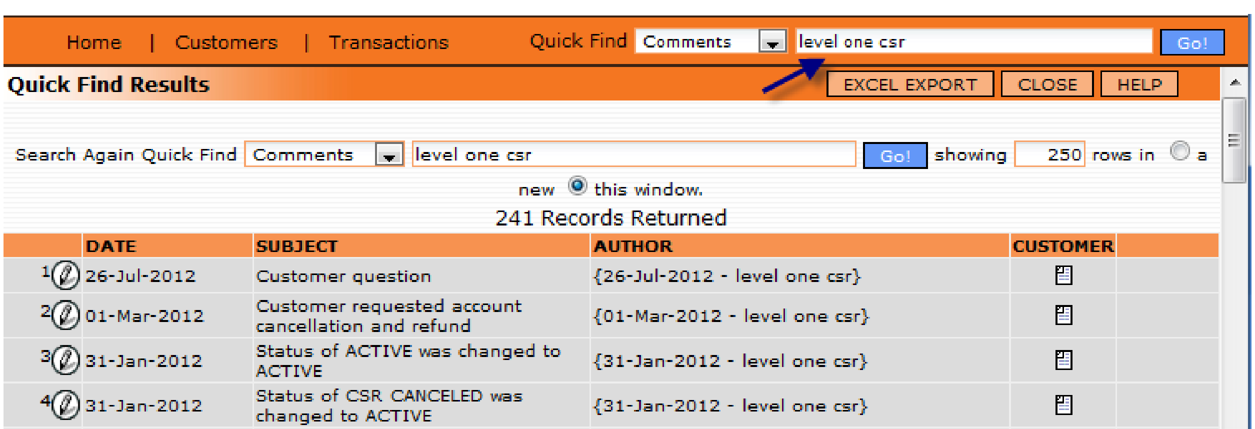


	DATE	ACCOUNT NAME	STATUS	TYPE	CARD	ACCOUNT	EXPIRE	AMOUNT	CODE	MESSAGE
1	27-Apr-2005	Reva D Kingsland	DECLINED	PREAUTH	V	4700...0075	09/07	1	256	DECLINE
2	27-Apr-2005	Debi C Holland	DECLINED	PREAUTH	V	4400...0039	05/05	1	256	DECLINE
3	27-Apr-2005	Stephanie Reese	DECLINED	PREAUTH	M	5400...0075	10/06	1	256	HOLD CARD
4	27-Apr-2005	Macdaniel E Foster	DECLINED	PREAUTH	V	4000...0094	11/07	1	256	INVALID CARD
5	27-Apr-2005	Maira Jarquin	APPROVED	PREAUTH	V	4300...0075	10/06	1	00	027881 Transaction Appro
6	27-Apr-2005	Andrea N Cannon	APPROVED	PREAUTH	V	4100...0075	02/08	1	00	046879 Transaction Appro

    d. If no results appear, check with the customer to be sure that this was, in fact the same Credit card they used for the transaction.
    e. It may be best to search by the customer's phone number instead.
    f. You may not have access to view full credit information depending on your role.

c. Searching for Comments

1. You can search for comments that you have made in the system to customer records.
    a. This may be helpful when you need to go back to a customer record that you worked on and need to find again, but you cannot remember their name.
    b. To do this, enter your user id in comment quick find field. See example:



	DATE	SUBJECT	AUTHOR	CUSTOMER
1	26-Jul-2012	Customer question	{26-Jul-2012 - level one csr}	
2	01-Mar-2012	Customer requested account cancellation and refund	{01-Mar-2012 - level one csr}	
3	31-Jan-2012	Status of ACTIVE was changed to ACTIVE	{31-Jan-2012 - level one csr}	
4	31-Jan-2012	Status of CSR CANCELED was changed to ACTIVE	{31-Jan-2012 - level one csr}	

d. Advanced searches

1. You can use a wildcard * when searching for less than five characters (before or after those characters)
2. Four characters or less will give you an error message that says the search expression is too short.

3. More advance search options:
   a. Quick Find searches can be done on multiple fields and can be done with the options of equal to (=), not equal to (Not =), greater than (>), or less than (<).
   b. Using parentheses will execute the command within the parentheses before the rest of the search is conducted.
   c. Listed below are some examples:
      i. [LastName]=Smith
      ii. This search will return all records with the value of 'Smith' in the Last Name field.
      iii. [LastName]=Smith and [FirstName]=John
      iv. This search will return all records with the value of 'Smith' in the Last Name field and the value of 'John' in the First Name field.
      v. [DateCreated]>12/31/2008 and [DateCreated]=<01/31/2009
      vi. This search will return all records where the creation date is greater than 12/31/2008 and equal or less than 01/31/2009.
      vii. [CallCenter]=Alpha or [CallCenter]=Beta
      viii. This search will return all records with the value of 'Alpha' **OR** 'Beta' in the Call Center field.
      ix. [LastName]=Smith and [DateCreated]>07/31/2009
      x. This search will return all records with the value of 'Smith' in the Last Name field that were created after 07/31/2009.
      xi. Not [CallCenter]=Alpha
      xii. This search will return all records where the value of 'Alpha' is NOT in the Call Center field.
      xiii. (Not [CallCenter]=Alpha and Not [CallCenter]=Beta) and [DateCreated]>07/31/2009
      xiv. This search will return all records where the value of 'Alpha' or 'Beta' is **NOT** in the Call Center field and the records were created after 07/31/2009.

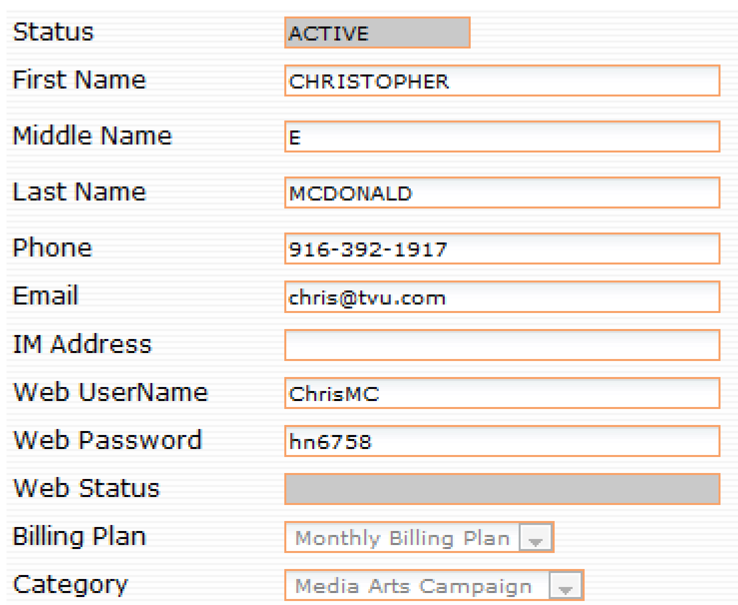
8. Handling Customer Issues

a. Understanding Customer records

1. Now let's take a look at the layout of a customer record. The left hand side of the record focuses on the customer's status, contact information, and web site login info. (If needed)

2. The Billing Plan and Category fields are grayed out by default. You MUST unlock them using the tabs Unlock Billing plan or Unlock Category on the Action drop down menu.
   a. If you need to verify the customer's current billing plan or category, you can reference them in these fields.
   b. Categories are a way of grouping products or items. Some companies many not use them.

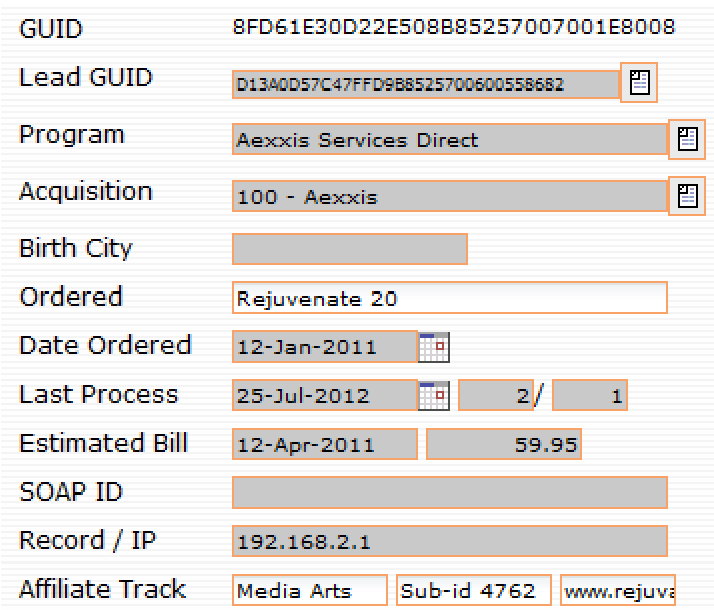
<u>Left hand side of customer record</u>



Status	ACTIVE
First Name	CHRISTOPHER
Middle Name	E
Last Name	MCDONALD
Phone	916-392-1917
Email	chris@tvu.com
IM Address	
Web UserName	ChrisMC
Web Password	hn6758
Web Status	
Billing Plan	Monthly Billing Plan
Category	Media Arts Campaign

3. The right hand side of the customer record is focused on the customer's order. There you will find the customer's program, acquisition center, when the order was placed, last processed information, the estimated next billing date and amount. (CSR's cannot change the customer's program or acquisition center)
   a. Each customer is assigned a unique 32 digit GUID number. You may use the last six digits of the customer record when if needed to find that customer record again.
   b. Last process field – Shows the last time the customer was billed. The next two field's show the transaction cycle counters. The first one counts the billing cycles based on the transaction being issued and second one counts the successfully paid transaction cycles.
   c. The Record / IP field is used to paste a link to a third party storage location of a phone conversation with a customer. (Not all companies use this feature)
   d. Afflilate Tracking information is stored in the customer record. This tells you which Affiliate sent you that customer lead. Sub-affiliates are tracked in the second and third fields.

<u>Right hand side of customer record</u>



4. The bottom section of the customer record contains six important tabs. They are the: Comments, Address, Account, Details, Fulfillments and IssueBreeze (Help Desk) tabs. Let's take a look at each of them.

   a. Comments - Lists all previous CSR or system comments added to the customer record. These comments will include the CSR user Id and the date the record was edited. Encouraging your CSR's to add comments to each customer record is a good practice.

b. Address – This tab contains the customer's shipping and billing addresses. It is re-commended that you verify, with the customer, that you have all of his current address information in these fields to insure that the customer is properly billed and will receive his purchased items.

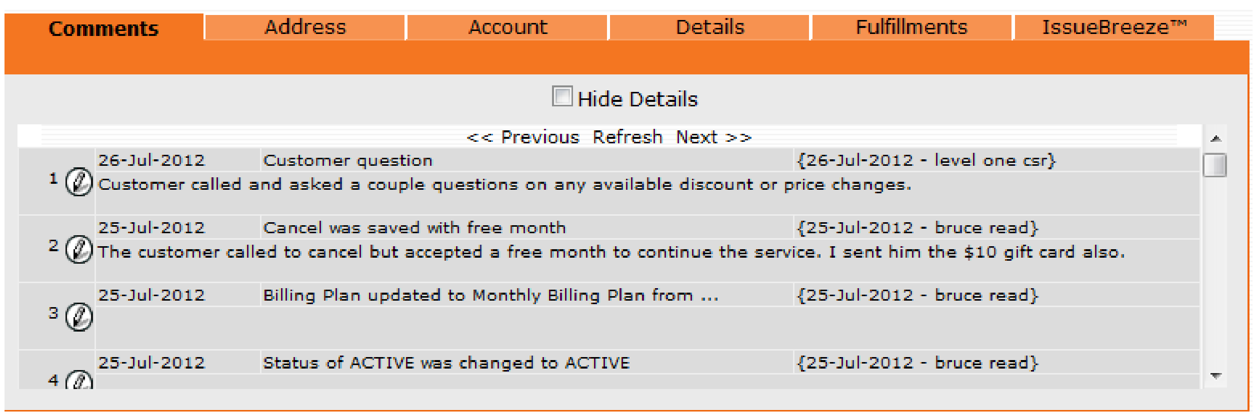
c. Account - This tab can be accessed by the Actions menu New Payment Information button or at the bottom of the customer record. It is used to change the customer's credit card information. CSR do not have access to view customer's credit card information, but they can update that information. They cannot change the Bank Routing information (Sticky route) CVV information is not stored in OrangeCRM.

d. Details – This tabs contains specific data about the customers. There are five customizable fields that your company may use. CSR's can add specific information in those fields as required per your company.

e. Fulfillments – This tab will show all fulfillments that are linked to a customer. You can select from the list of fulfillments available and send a manual or email fulfillment to the customer.

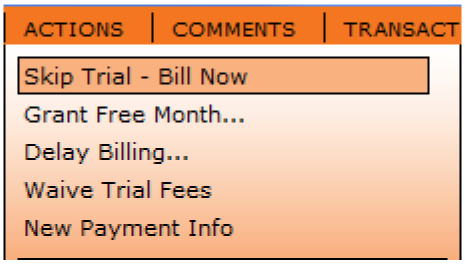
f. IssueBreeze – This tab allows you to create a help desk ticket where an advanced customer issue or concern can be forwarded to a second level support team. The new ticket will auto populate with the customer information and a link to the original OrangeCRM customer record and transaction.

Bottom portion of customer record

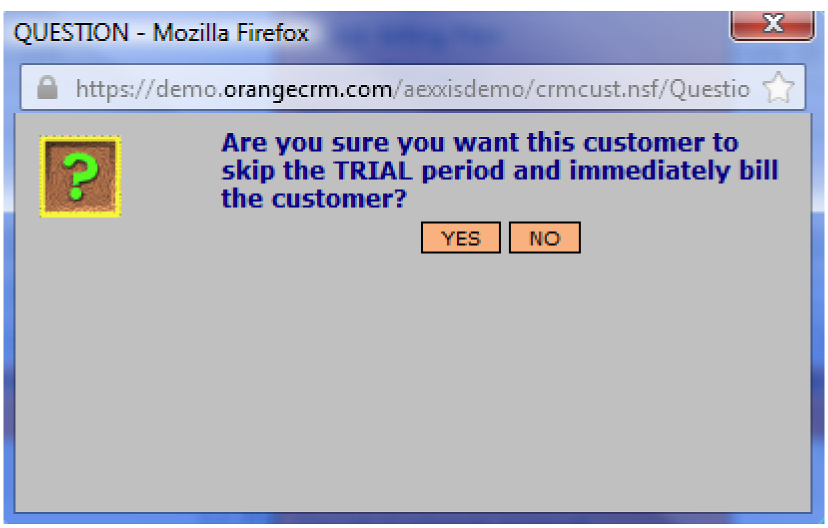


b. Skip Trial - Bill Now

1. When a customer wants to order an item immediately over the phone or requests to be billed immediately, you can use the Skip Trial and bill now button on the Actions drop down menu.



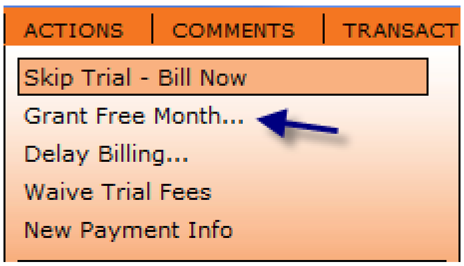
2. Confirm that you want to bill them immediately. Click Yes.



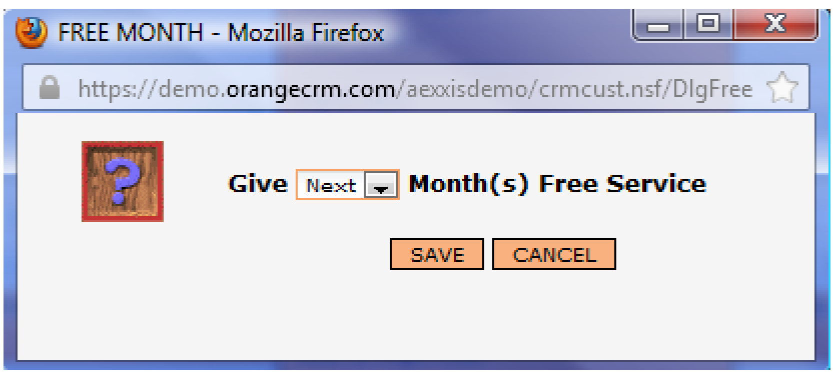
3. Save the customer record. The change will be added below in the Comments tab.

c. Grant Free month

1. To grant a customer free month(s) of service, click on the Grant free month button on the Action menu.



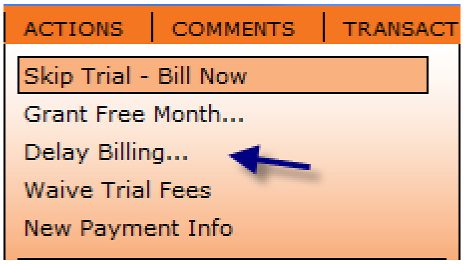
2. Select the number of free months.



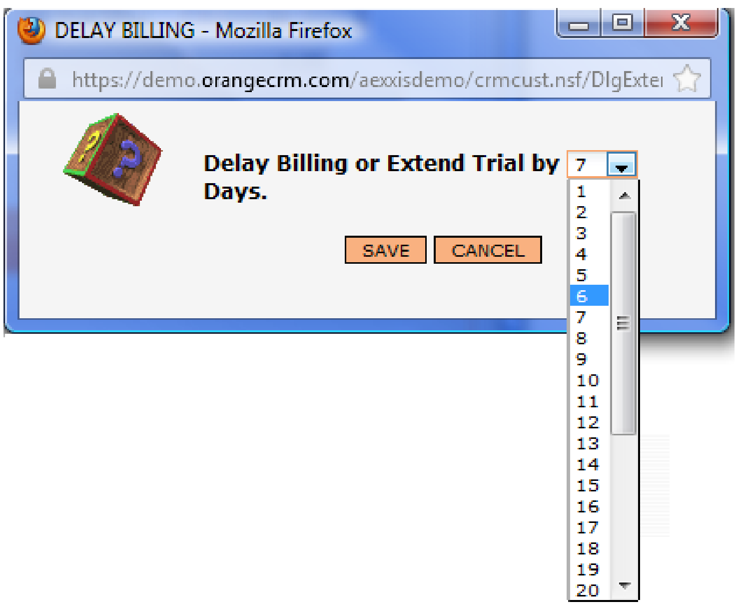
3. Click Save and then save Customer record. The change will be added below in the Comments tab.

d. Delay billing & Waive Trial Fees

1. The Delay billing button allows you to delay a scheduled bill by a up to 30 days. Click on the Delay Billing button in the Action drop down menu.



2. Select the number of days you want to delay the scheduled bill.

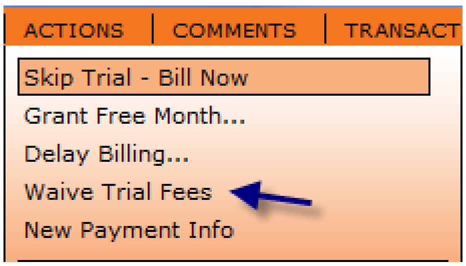


3. Click save and then Save the customer record. The change will be added below in the Comments tab.

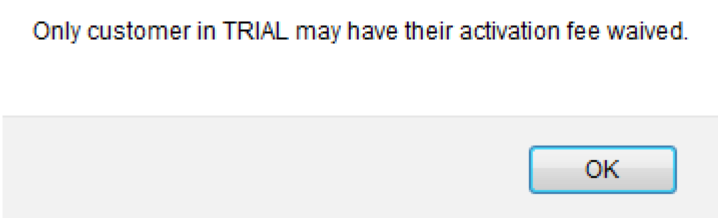
Note: The Estimate bill date will not change immediately when you do this. A batch job will run at a later time during the day and update these records. If the customer asks when the account will be billed, simply do a manual calculation by adding the number of delayed days to the Estimated bill date.

Waiving Trial fees

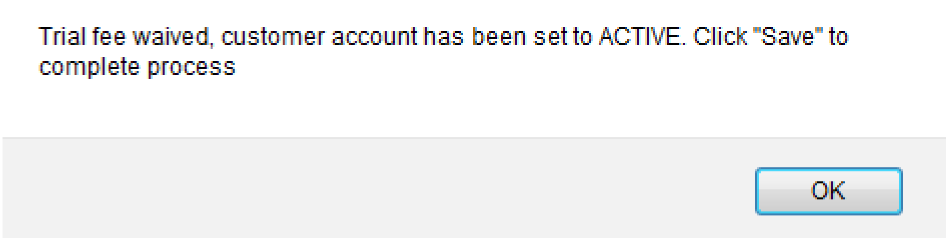
1. The waive trial fee button will waive the trial fee of a customer.



2. The customer must be in Trial status for you to waive their trial fee. Otherwise, you will receive the following message.

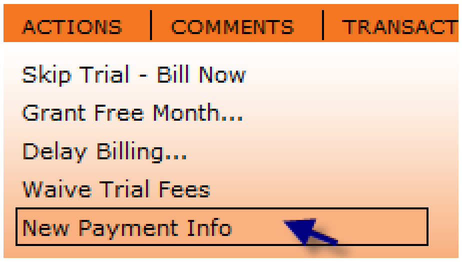


3. Click on Waive trial fee and then Save the customer record. The change will be added below in the Comments tab.

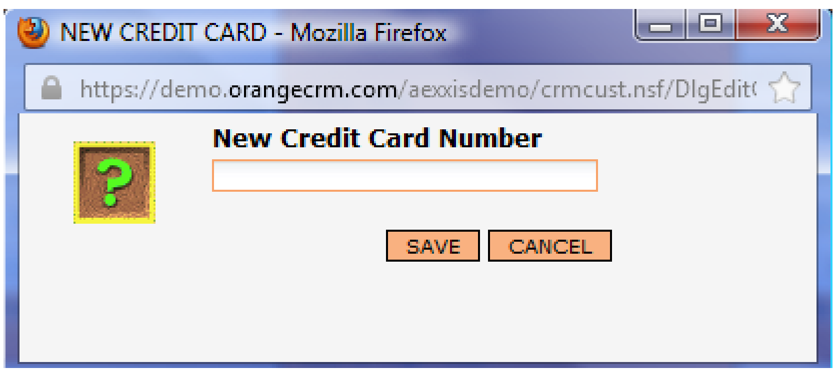


e. New Payment Information

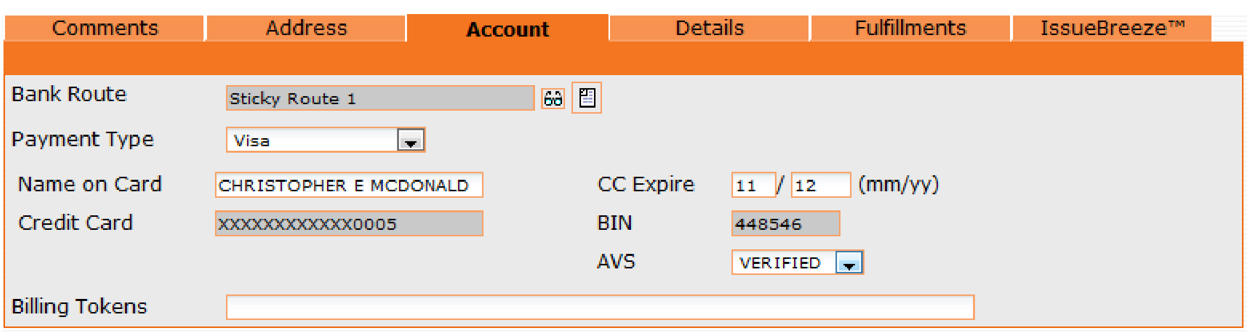
1. To change the customer's payment information, click on the New Payment Info button on the Action Menu.



2. A window will appear where you can enter the new credit card number.



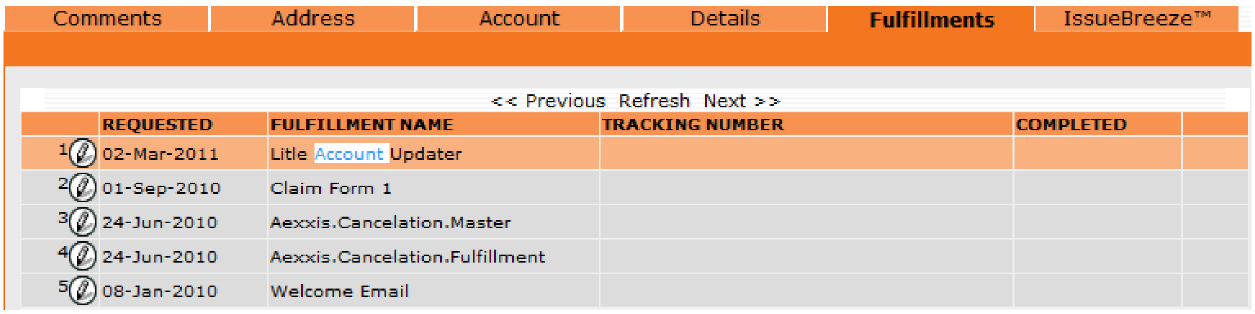
3. The Account tab below allows you to enter further credit card details such as the type of credit card, the customer's name, and expiration.



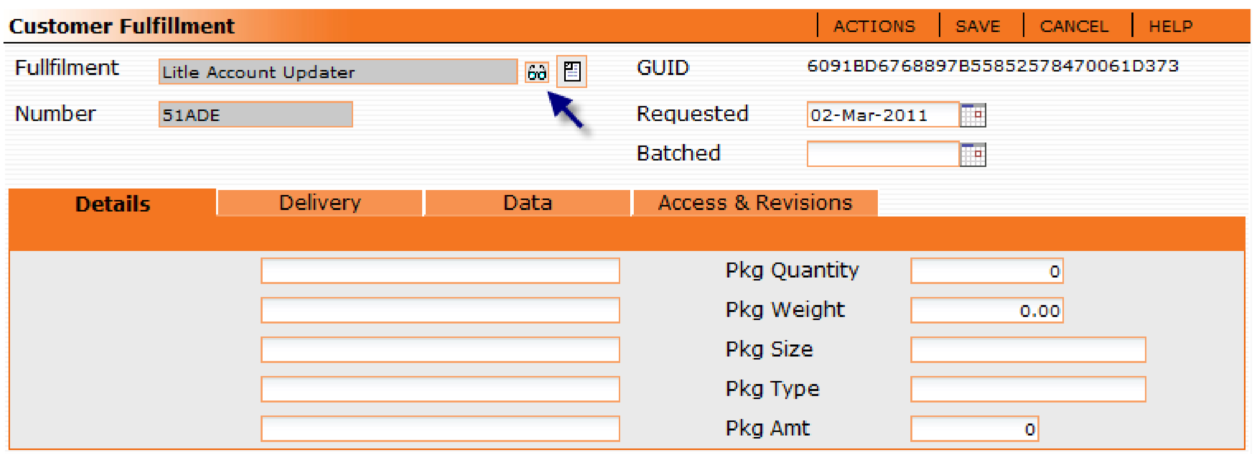
4. Be sure to Save the record so that this important change will take effect.

f. Requesting New Fulfillment

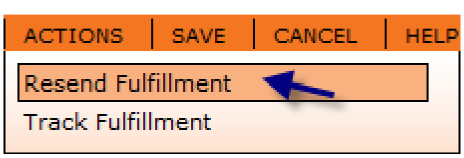
1. When a customer needs a new or different fulfillment sent, click on the Fulfillments tab. Select from the available list of fulfillments.



2. When the selected fulfillment has opened, click on the Chooser Icon. From the list provided there, send the customer a scheduled or manual fulfillment according to the request and Save the record. The change will be added below in the Comments tab.

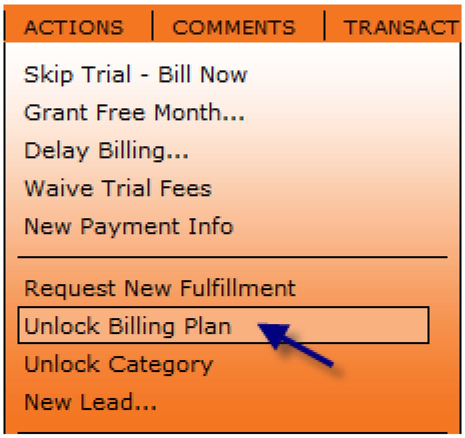


3. You can resend the customer the same fulfillment by clicking on the Action menu – Resend Fulfillment.

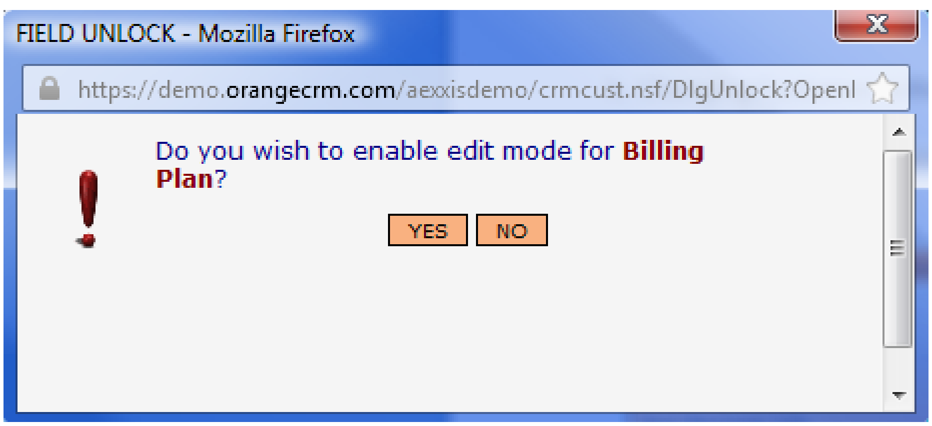


g. Unlocking and Changing Billing Plan & Category

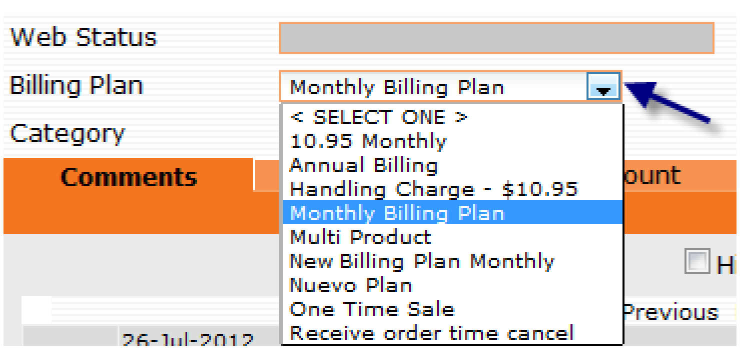
1. To change a customer's billing plan or category follow the same steps. Click on the Unlock Billing Plan or Category button on the Action Menu.



2. Click Yes to confirm that you want to unlock the Billing Plan or Category.



4. This give you access to the Billing Plan or Category field drop down list where you can select a new billing plan or Category for the customer. You must save the customer record for this to take effect. The change will be added below in the Comments tab.

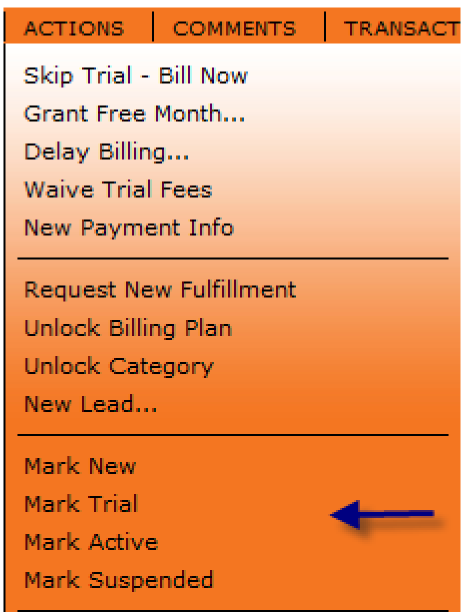


h. Changing the Customer Status

1. To change the status of a customer, find and open the customer record.

2. Click on the Action drop down menu. There you can click on the one you want to change a customer status to. You will see the customer status in the record change, but you must save the record for it to take effect. The change will be added below in the Comments tab.

3. The Customer status includes: Mark New, Trial, Active or Suspended.



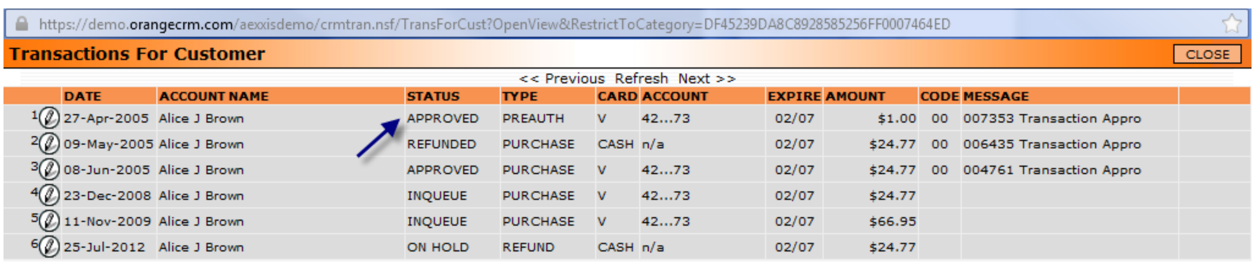
Note: A customer in Suspended status remains in the system, but will not be billed. A suspended customer can be marked Active again to be billed exactly where they left off in their billing cycle.

i. Making Partial & Full Refunds

1. Only transactions that are in Approved or Pending status can be refunded by the system. Also, the transaction must be a Purchase or Captured transaction to be refunded.

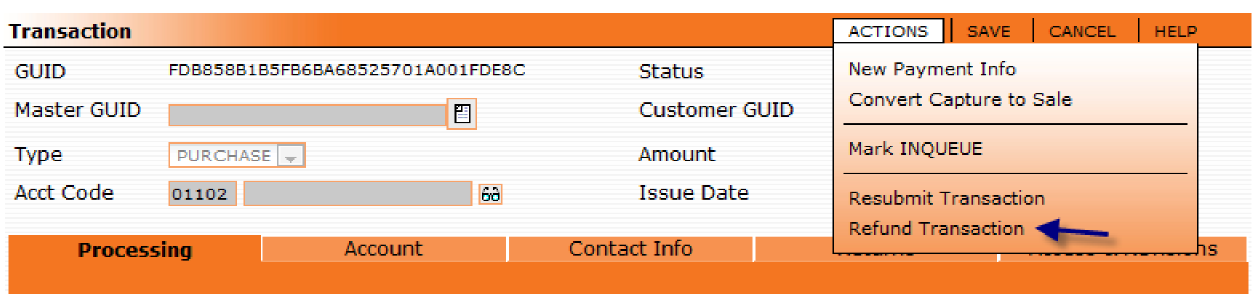
2. To make a partial or full refund, first find the customer record using the Quick find search. When you have the correct customer record, click on the Transaction menu and select Show Transactions.

4. Ask the customer which transaction they want you to refund and verify it by the date.

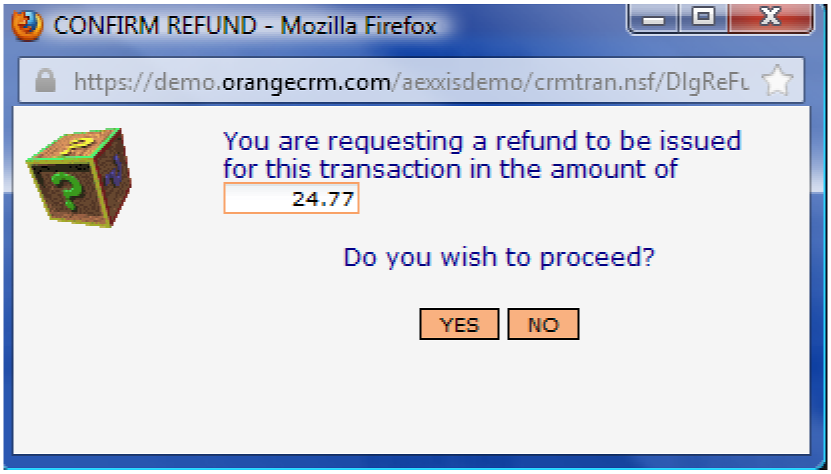


	DATE	ACCOUNT NAME	STATUS	TYPE	CARD	ACCOUNT	EXPIRE	AMOUNT	CODE	MESSAGE
1	27-Apr-2005	Alice J Brown	APPROVED	PREAUTH	V	42...73	02/07	$1.00	00	007353 Transaction Appro
2	09-May-2005	Alice J Brown	REFUNDED	PURCHASE	CASH	n/a	02/07	$24.77	00	006435 Transaction Appro
3	08-Jun-2005	Alice J Brown	APPROVED	PURCHASE	V	42...73	02/07	$24.77	00	004761 Transaction Appro
4	23-Dec-2008	Alice J Brown	INQUEUE	PURCHASE	V	42...73	02/07	$24.77		
5	11-Nov-2009	Alice J Brown	INQUEUE	PURCHASE	V	42...73	02/07	$66.95		
6	25-Jul-2012	Alice J Brown	ON HOLD	REFUND	CASH	n/a	02/07	$24.77		

5. Click on that transaction and open it. Then from the Transaction Actions menu select Refund Transaction.



6. A pop up window like this will open. Enter a partial or full refund for the customer and click Yes to Save the refund. The system will process the refund and update the customer record.

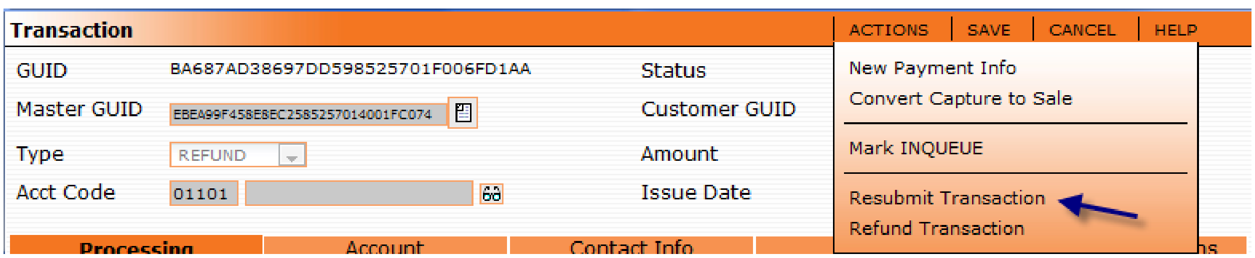


j. Changing a Transaction status

1. There are various types of status for transactions. Go to Topic Four for the definitions of each transaction status.

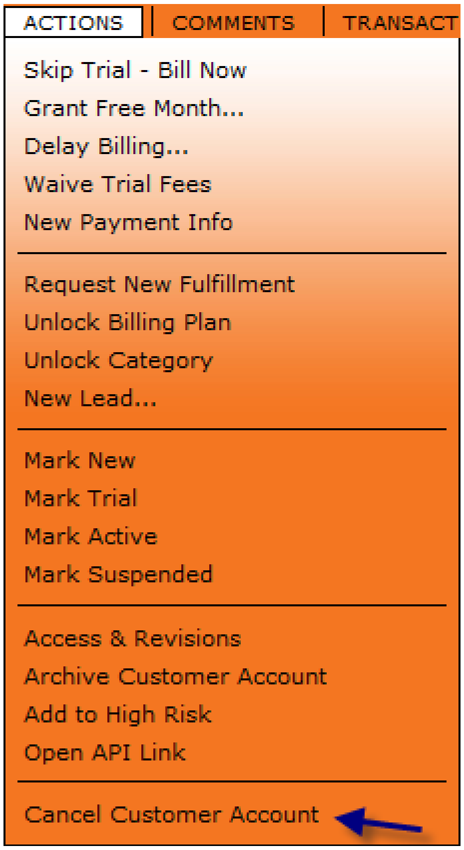
2. When a customer's credit card did not process correctly because of insufficient funds, they may call in and request for the transaction to be resubmitted.

3. First find the correct customer and transaction. Then, you can click on the Resubmit Transaction and Mark it InQueue for it to be sent to the bank with the next Batch job. Save the record for it to take effect.

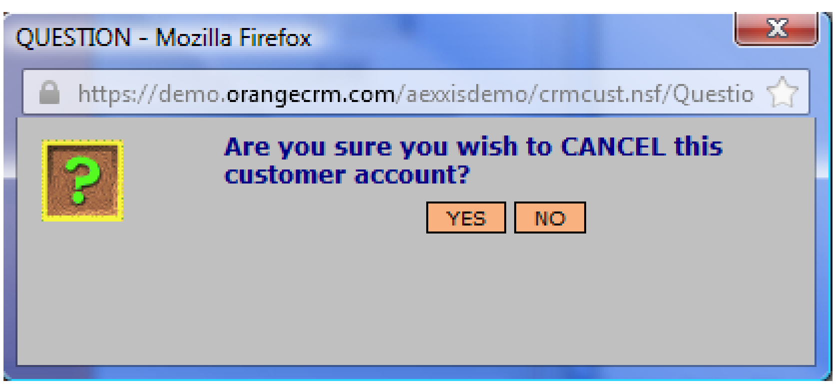


k. Cancelling Customers

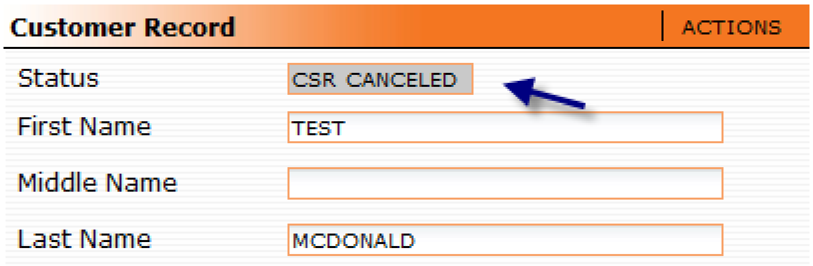
1. When a customer requests to cancel his account, you can click on the Cancel customer Account button on the Action menu.



2. Click Yes to confirm that you want to cancel the account.



3. You will notice that the Customer Status has been changed to CSR canceled. Then Save the customer record to make the change. The change will be added below in the Comments tab.

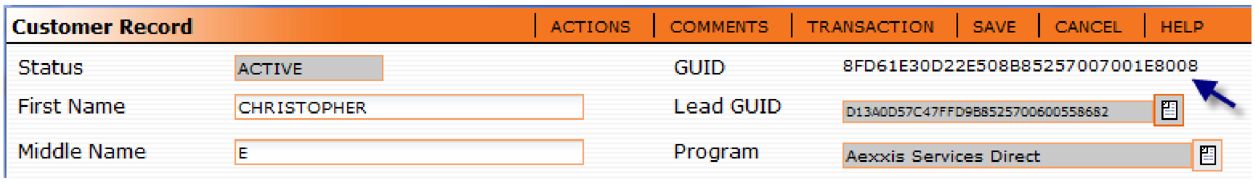


4. Changing the status of a Canceled customer to Active, allows them to return back as an Active customer exactly in the billing cycle where they canceled.

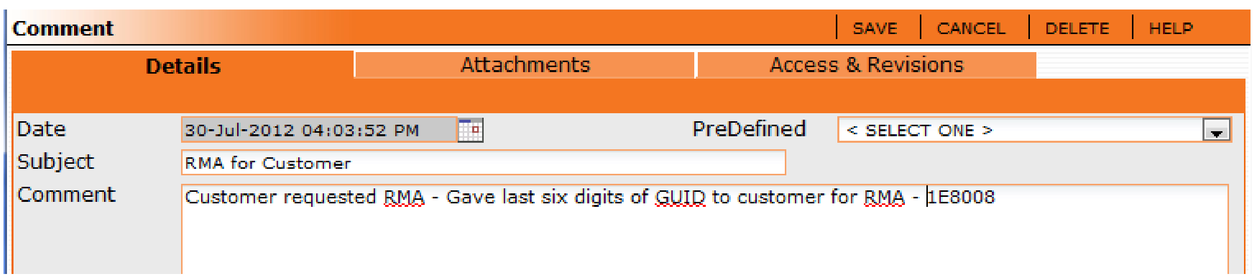
Note: Never Archive customers. You may suspend a customer's account if they no longer want to be billed, but would like to keep their account available to be used again later.

I. Making an RMA number (Return Merchandise Authorization)

1. When a customer requests an RMA number, give them the last six digits of their customer GUID number. This unique number will allow you to search for their record later when a shipped item is returned.

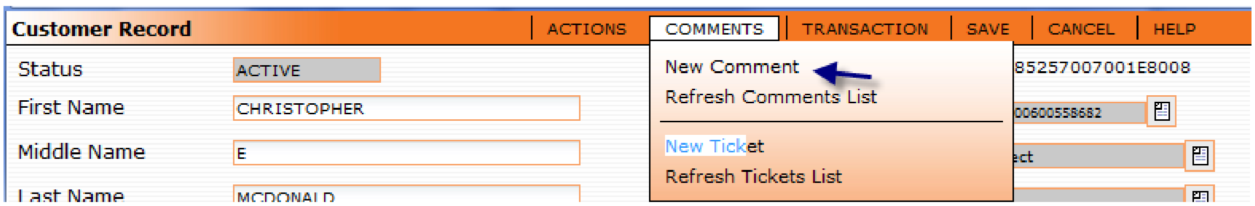


2. Add the following information in a comment for that customer record. "Customer requested RMA" – Paste in the LAST SIX digits of their GUID. Save the record.

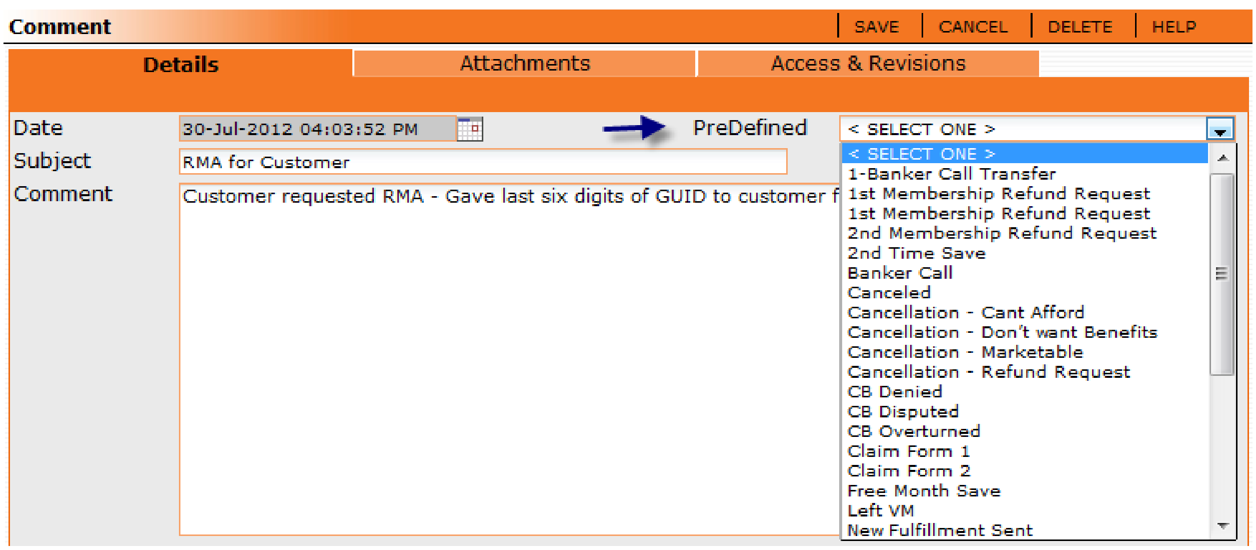


m. Comments & Predefined Comments

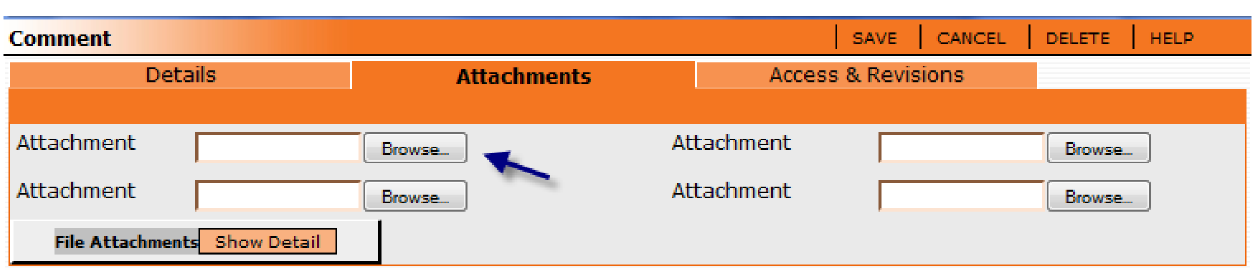
1. It is recommended that you add comments to each customer record. This allows other CSR's to have some history to read about each customer interaction.
   a. To add a comment to a customer record, click on the New Comment button under the Comment drop down menu.



2. A comment window will open. Type in your comments manually or add a predefined comment by the Predefined drop down arrow.

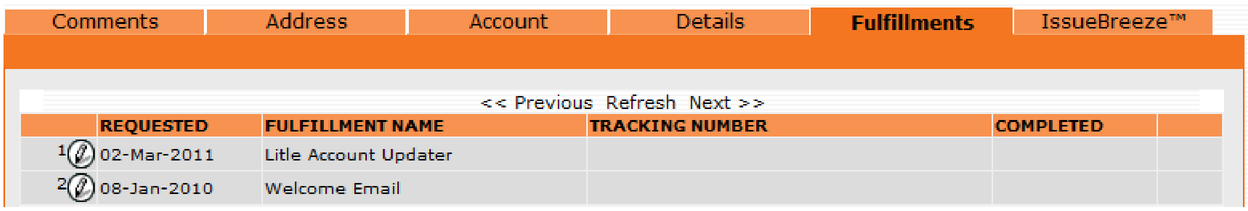


3. Add any attachment by clicking on the browse button. Select the file and click on Open. Save the record to make the attachment.

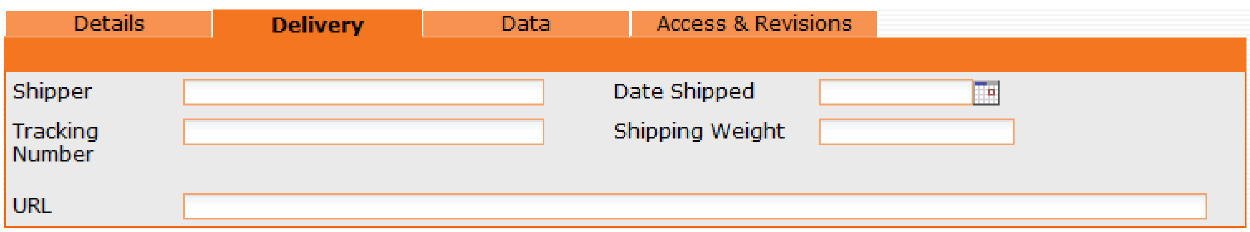


n. Tracking customer shipments

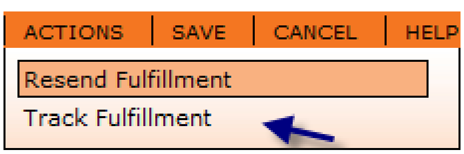
1. When customers call in to check on their shipping or tracking information, click on the Fulfillment tab.



3. Select the correct fulfillment by its name and the date of purchase. Click on it and the following window will open. Click on the Delivery tab.
4. When a Fulfillment house has sent out their shipment, they update OrangeCRM with shipping and tracking information. You can give the customer the tracking number and shipping URL once it becomes available in the system.

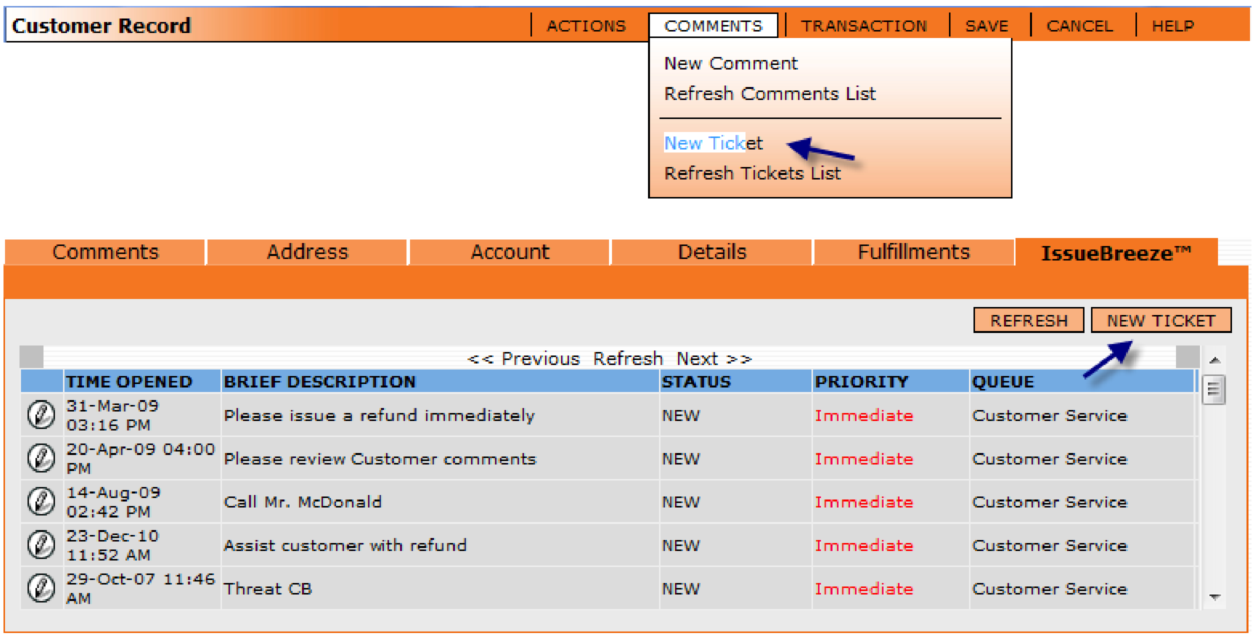


5. When the Tracking information is provided you can track the fulfillment by the Action menu option – Track Fulfillment.

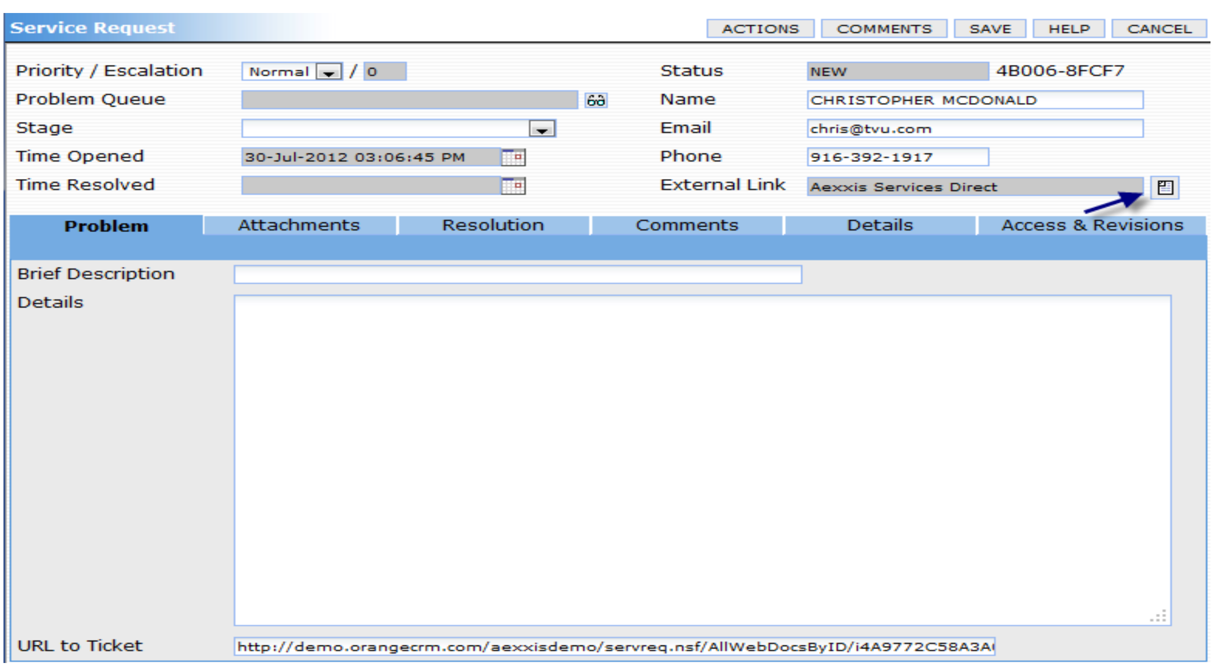


o. Creating Help Desk Tickets

1. To create a help desk ticket for a customer, find the customer record and click on the bottom right hand tab called IssueBreeze. You will notice a list of any previous tickets that have been created for this customer.



2. When you click on the new ticket button, a new IssueBreeze window will open. The customer's contact information will automatically populate in the ticket. The external link paper icon links you back to the customer record in OrangeCRM.

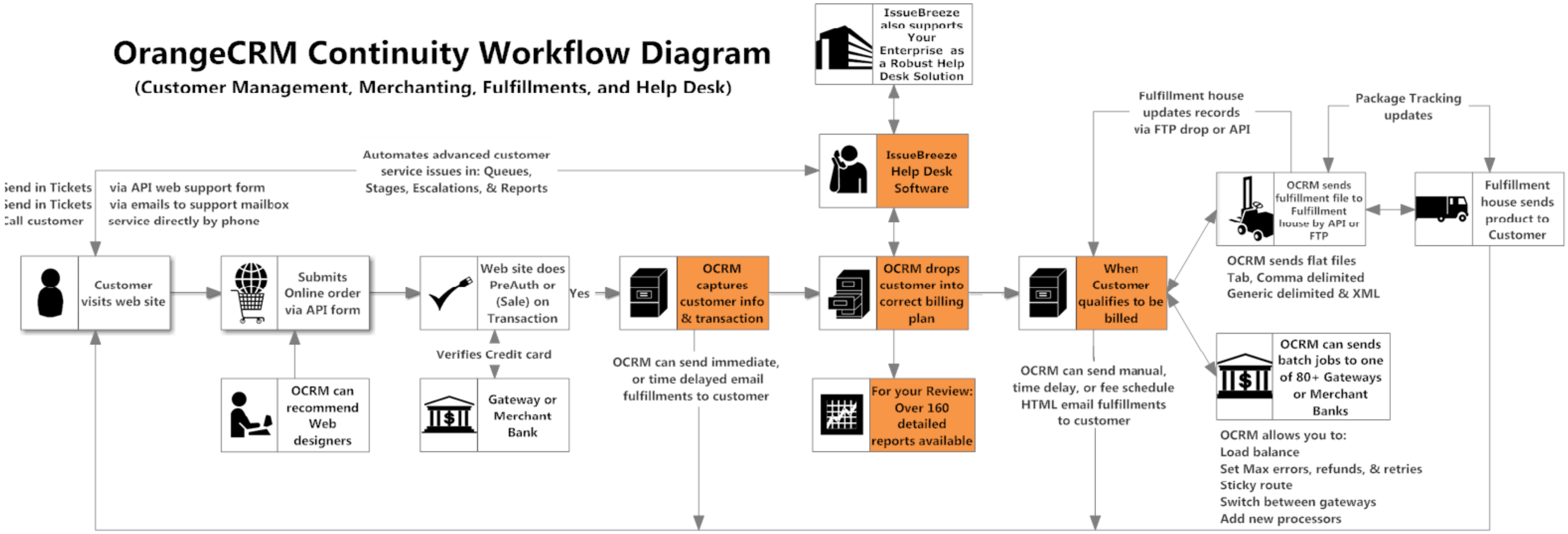


3. Enter the Priority, Queue, description and the details of the customer issue and save the ticket.

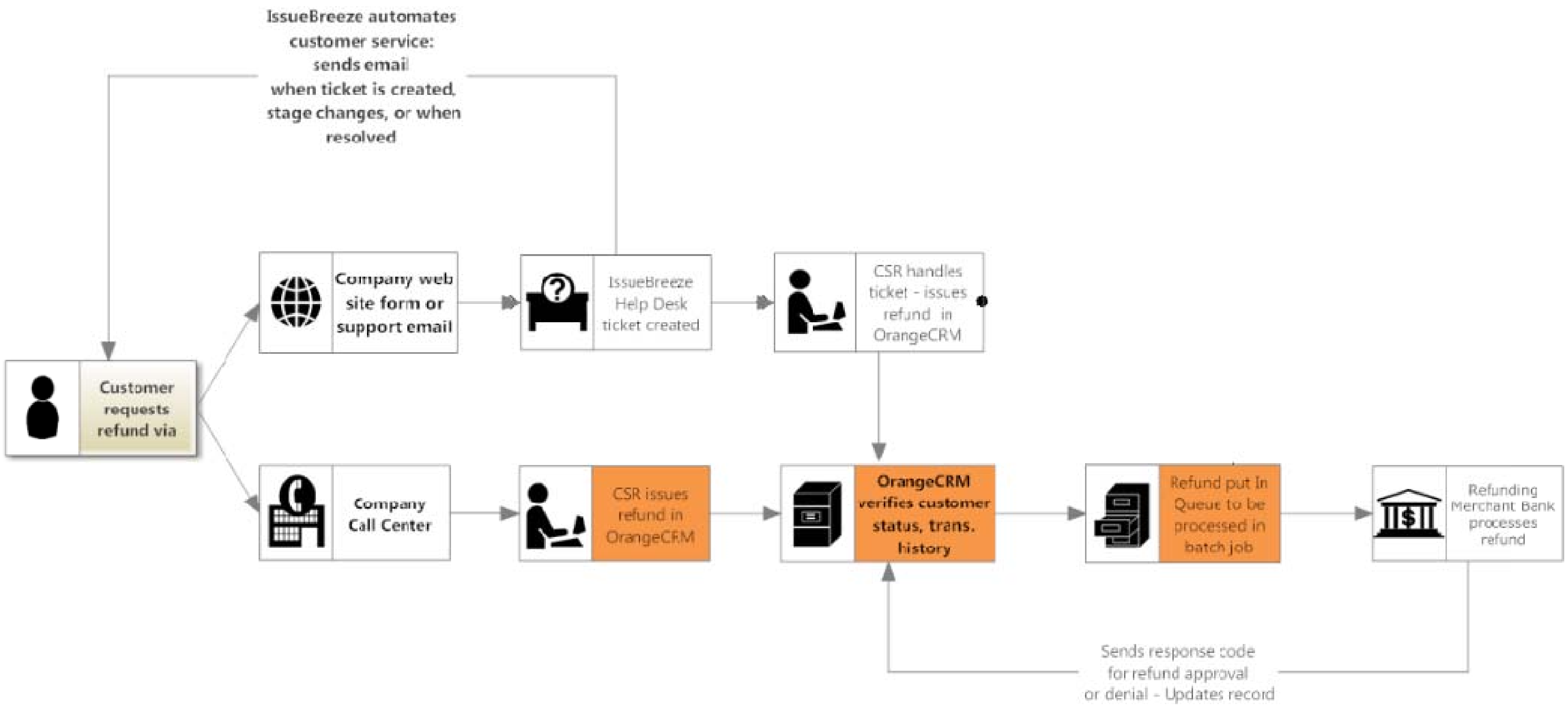
Note: If your company is using IssueBreeze, for escalating advanced customer service issues please refer to our IssueBreeze CSR training documentation located at: http://help.issuebreeze.com in the downloads area.

OrangeCRM Continuity Workflow Diagram

(Customer Management, Merchanting, Fulfillments, and Help Desk)

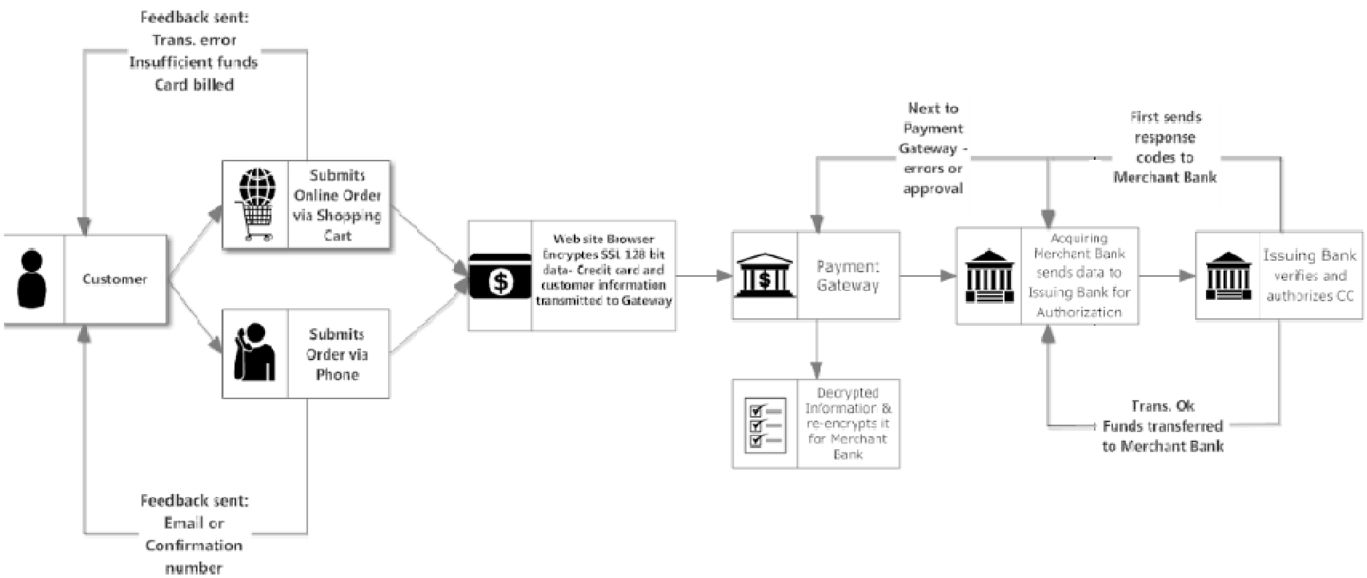


OrangeCRM Refund Flowchart



How Payment Gateways Work

(This process may only take seconds)



A cardholder/customer orders a product or service at an e-Commerce merchants website by clicking the: Order or Send to Shopping Cart buttons.
The cardholder is taken to an automatically generated order form, where he/she is asked to provide the credit card details and the shipping details.
After clicking the Submit Form button at the bottom of the form(s) all the data is encrypted (SSL 128-bit) by the cardholder's web-browser, a key is generated and passed on, along with the details, to the e-Commerce merchant's payment gateway.
The payment gateway (if function available and switched on) decrypts some of the information (only for statistical usage, no credit card details are held), re-encrypts it and forwards it to the e-Commerce merchant's acquiring bank.
The acquiring bank forwards the data to the credit card issuing bank for verification and authorization.
The issuing bank sends a so-called response code back to merchant bank, and the latter sends it to the payment gateway. This response code is used to denote any error that might have had occurred during the verification or transaction process.
If everything is in order the credit card is billed and, usually, at the end of the day the funds are transferred to the merchant bank, where they are safely deposited until the payout day.
The e-Commerce merchant's website also generates feedback based on the response code received by the payment gateway. Some of the codes may be interpreted as: You card has been billed, Error, Insufficient funds, and so on.

Thanks for Joining Us!

For any further training questions, contact us at:

770-227-0036, Main Office Phone Support

Email: support@orangecrm.com

You may also refer to our training videos at:

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