

SERVICE CREATIO FUNCTIONALITY FOR END-USERS CORPORATE TRAINING

Who should take this course: This training is intended for starting end-users of Service Creatio. It will as well provide a complete overview of the system for partners and clients of Creatio who would like to receive an in- depth look at the complete functionality of Service CreatioEnterprise.

What to expect: Participants will receive basic knowledge of the Creatio platform, support ideology, as well as experience using the out-of-the-box support tools for resolving support issues or requests, both for internal and external support. It will cover the organization of support services, support engineers, as well as contact center agents.

Course duration & format: The training takes place over 1 day with a total of 8 hour. In-person or online.

Time	Topic
15 mins	Introduction to Service Creatio. Service management for all communication channels.
30 mins	Introduction to the Creatio interface and terminology. <ul style="list-style-type: none"> • Omnichannel communication (communication panel and notification center.) • Summary of workspaces and system sections. • System section structure. • Creatio Academy and how to find answers
30 mins	360° Customer view. Single Contact and Account database. <ul style="list-style-type: none"> • Managing client/partner/competitor data in the "Account" section • Managing contacts and employee data in the "Contact" section
1,5 hours	Special tools and actions <ul style="list-style-type: none"> • Duplicate search and merge • Contact synchronization with Google Contacts and MS Exchange
15 mins	Service catalog management – single look-up for formalizing support service workflows <ul style="list-style-type: none"> • Service catalog characteristics • Summary analytics for services
15 mins	Service Agreements <ul style="list-style-type: none"> • Multi-calendar functionality • Service team management • Service list detail
25 mins	Case Management <ul style="list-style-type: none"> • Support center organization Case registration <ul style="list-style-type: none"> • Entering key information – addressee and case description • Case auto-registration on incoming emails • Case registration via phone call
20 mins	Investigation and resolving cases <ul style="list-style-type: none"> • Out-of-the-box case management process • Resolving support cases with the help of the Knowledge Base Using the basic case analytics Problem Management <ul style="list-style-type: none"> • Problem Registration • Managing connected cases • Problem resolution team management

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Time	Topic
20 mins	Change Management <ul style="list-style-type: none"> • Section definition • Change classification • Connected configuration items and cases
20 mins	Release Management <ul style="list-style-type: none"> • Section definition • Connected sections • Release team management • Resource management
20 mins	Case and contact segmentation. Advanced search tools and filters. <ul style="list-style-type: none"> • Filter types: Quick, Standard, Advanced • Folder trees and tags • System navigation with the command line. Command line customization. • Aggregated columns on the section page – automated count of cases, contacts, accounts • Interpreting analytics in Creatio
1 hour	Lunch
1 hour 20 mins	Single Agent Desktop – flexible organizational tool for Contact-centers and service specialists <ul style="list-style-type: none"> • Agent Desktop overview • Queue management – organization and setup of case queues
40 mins	Self-service portal – client self-registration and client case creation <ul style="list-style-type: none"> • Setting up the self-service portal • Creating portal users • Access right overview for portal users • Portal user abilities
30 mins	Configuration item management <ul style="list-style-type: none"> • Configuration items • Configuration item connections
30 mins	Communication and task management <ul style="list-style-type: none"> • Working with activities • Integrated email functionality in Creatio • Telephony integration • Corporate social feed
20 mins	Mobile application <ul style="list-style-type: none"> • Installing the application and list setup • Offline vs Online operation mode • Workplace setup
20 mins	Knowledge Management – single look-up database, regulations and instructions, document templates
30 mins	System Designer – complete customization of system settings by administrations. Getting the system ready for end-users. <ul style="list-style-type: none"> • Color and logo customization • Filling and editing lookups • Universal Excel import (importing client databases, lookups, and other information.) • Adding new sections, fields, and details. • Managing and administrating users. • Using business processes • Printable form setup