Welcome to eSMART

What is it? (back to top)

In response to your requests for faster, flexible reporting of customer feedback provided via telephone follow-up interviews and e-mail surveys, SERVICE 800 has developed a **web reporting tool** that will allow reporting and analysis in the format(s) that mean the most to you.

Whereas drill-down analysis was always available through SERVICE 800 reporting, **eSMART** will allow you to run instant drill-downs on the fly, without making special reporting requests. Distributing your company's results is also a thing of the past as each authorized user has direct access to their results at any time.

How does eSMART work? (back to top)

eSMART is an easy to use, online ad hoc reporting tool designed with service managers in mind. The tool will allow you to drill-down into your results, view trends, locate problem areas and share results with your co-workers. Simply click on the area you are most interested in and begin using your reports.

Depending on your Service 800 program, feedback will be updated daily, weekly, monthly or on a predetermined schedule. This allows you to have timely, complete results to base your business and service decisions.

How do I access eSMART? (back to top)

Log on to our website https://www.service800.com/esmart

What are the system requirements? (back to top)

- Internet Explorer 6.0 or higher
- Any pop-up blockers must be <u>disabled</u> or pop-ups must be allowed for this web site
- Browser <u>must accept</u> cookies
- Browser <u>must accept</u> JavaScript

How do I set up a User ID and Password to begin using eSMART?
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If you are a sponsor (owner) of a SERVICE 800 customer satisfaction program, please contact your SERVICE 800 Account Manager at 800-475-3747 for assistance. If you are receiving SERVICE 800 results from within your organization, please contact your current report source for assistance.

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electronic Service Measurements And Report Tool

Logging onto eSMART

For roll-out purposes, all initial participants will have their User ID set to their email address and the Password either set to a SERVICE 800 or client requested value.

The results available to each user will be determined by their security/access level designated by the program's sponsor. Regardless of access level, all reporting functionality will be identical for all users. Only the results released to each user will vary.

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eSMART Main Screen Layout

Select your follow-up program here

Select the date range you are interested in

Use items listed here for quick results

Today's History

Save today's session or restore a saved list

Change to display your results as a percentage, export records and more

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Select Program and Select Date Range Menus

Select Program

If you are running multiple SERVICE 800 programs using eSMART, using the drop-down menu, select the program you would like to view.

Select Date Range

Select a single report period, or range of periods, or choose to select results collected on a specific day or range of days.

Once you have selected your date range, click the "Refresh with Selected Range" to update your report.

Please note:
The 'Report Period' option will display all results tagged to be included within a specific period for reporting purposes. Some results may have been collected during the preceding or trailing months so be sure to take note of the interview days in the 'began on/ended on' range when using the 'Report Period' option.

The 'Daily Activity' option allows you to limit the view to program activity on specific days regardless of the report period.

Quick Results Menu

Program Summary   A summary of account activity during the selected date range.

Create a Comparison   A menu option to generate a side-by-side comparison of multiple elements (Example: Technicians, Product Types, etc.).

Insert a Benchmark   Allows you to insert an Industry Benchmark into a chart for comparison purposes. *Available only if your organization is actively participating in a benchmark program.

Display Details   Displays the detail of each individual call reflected on the chart/page being viewed.

Custom Dashboard   On programs receiving custom charts/views, this link will flip back and forth between the standard eSMART reports and your custom view.

Start New Drill-Down   Reverts back to the combined results based on the date range selected in order to begin a new series of drill-downs.

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Report Tools Menu

Chart Options   A menu option to modify the chart from displaying a simple average to a percentage of a specific rating or ratings. (Example: % of ratings of a 4 and 5).

Export Details Behind this Page
View or export the records behind the current chart/drill-down being viewed.

Print Options   Choose to print, or copy, the chart/Program Summary displayed on the screen.

Program Search   An option to quickly view specific records across multiple programs based on a string of values. *Not available on all programs.

Reset Report   Resets the report to display the page similar to when you first logged in. Be aware that Reset Report will clear all of the items listed under Today's History.

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Favorites Menu

Save History as a Favorite
This option allows you to save the set of charts/drill-downs shown under Today's History and quickly recall them the next time you visit the web site.

Restore a Favorite
Recalls a previously saved Favorite made during an online session. This feature is ideal for users creating numerous drill-down reports that need to be viewed repeatedly.

Delete a Favorite
A feature that deletes a previously saved Favorite report.

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Today's History

Today's History

This area lists all of the drill-downs/reports you have created during your online session. You may flip back and forth between reports by selecting Display.

If you have created several drill-downs you would like to save as a Favorite but want to remove unnecessary chart/drill-downs first, select Remove.

To remove all items listed in Today's History, use the Reset Report option (listed under the Report Tools Menu).

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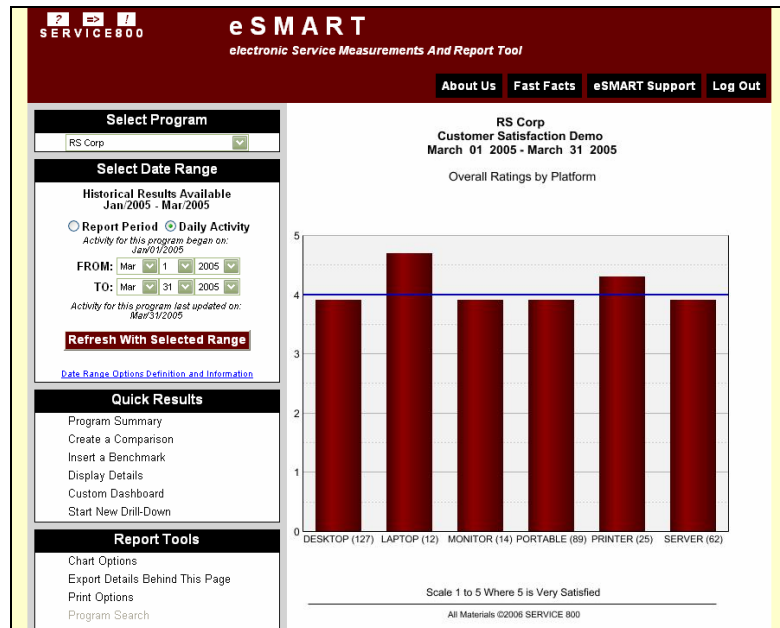## Q. How do I drill down into a report?

A: With your mouse, click on any one of the rating bars to display the Drill-Down menu (shown below). From this menu, select the element you would like to see the rating you have selected broken apart by (from the left-hand side of the Drill-Down menu).
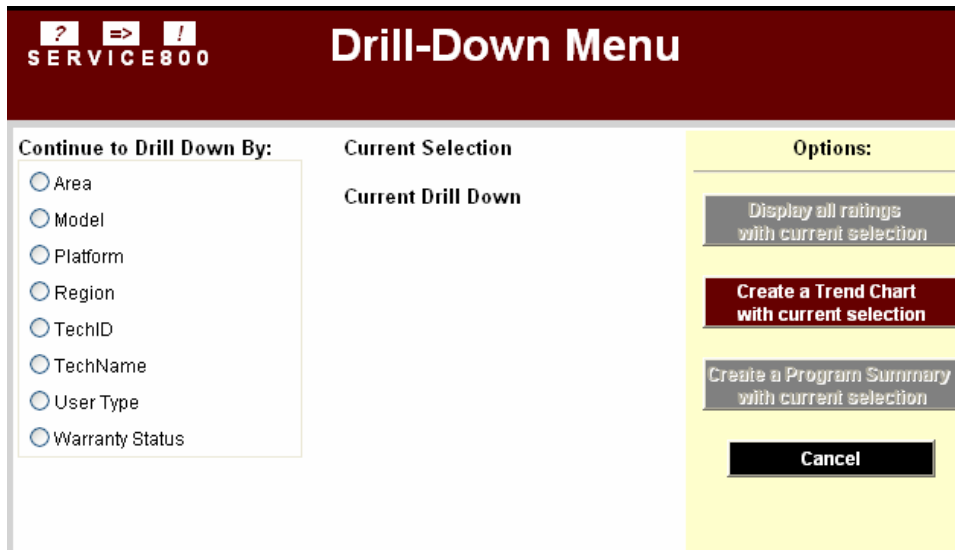
Example: The chart below was created by selecting PLATFORM from the above Drill-Down menu:

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Q. I want to quickly review all of the details for certain records but in a format that summarizes each call. How do I do this?

A. Once you are viewing the element or date range you are interested in, simply select 'Display Details' found under the Quick Results menu. This will generate a format displaying your organization's information in the upper portion and the contact's feedback in the lower portion.


From this view, you may choose to print the details using your browser menu. Each record will appear on a separate page to easily share with your co-workers or use during reviews.

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Q. How do I compare items within my report?

A: Click the 'Create a Comparison' menu button located under 'Quick Results' to bring up the pop-up menu (shown below). On the left-hand side of the menu, click the comparison group (such as Platform, Region, etc) and select the values to compare from the right-hand side of the menu. To generate the new chart click the Display Comparison button.

*To select multiple values, hold down Ctrl on your keyboard while making your selections.
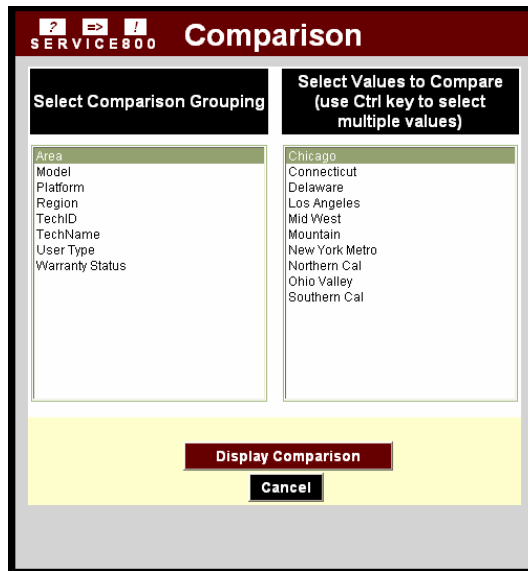
Example: By using the above selections, the chart below was generated:
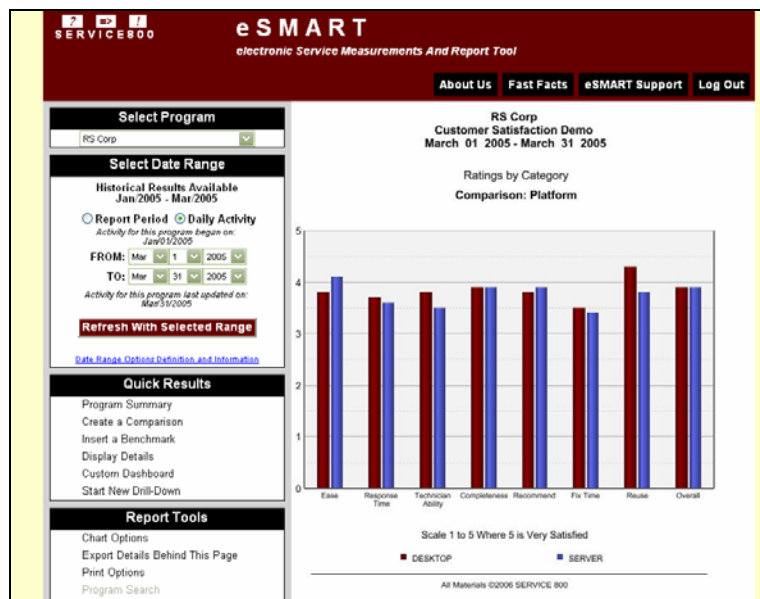
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Q. How do I view the data behind the chart?

A. Click the 'Export Details Behind this Page' option listed under Report Tools.   This will create a pop-up menu with potential data elements in your reports. Select the items you wish to see displayed by clicking the box next to the data element or, if you wish to see all elements, simply click Select All Elements.

Once all the elements you wish to see displayed have been selected, click Preview Results and the data elements will be displayed. This file can be viewed as is or saved onto your local hard drive for later use.

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Q. How do create a Program Summary for an individual element?

A. First, create a drill-down chart containing the element you are interested in reviewing. In the below example and using the Overall Rating, a drill-down chart was created by Platform. From this chart, "SERVER" was selected to bring up the Drill-Down menu once again.
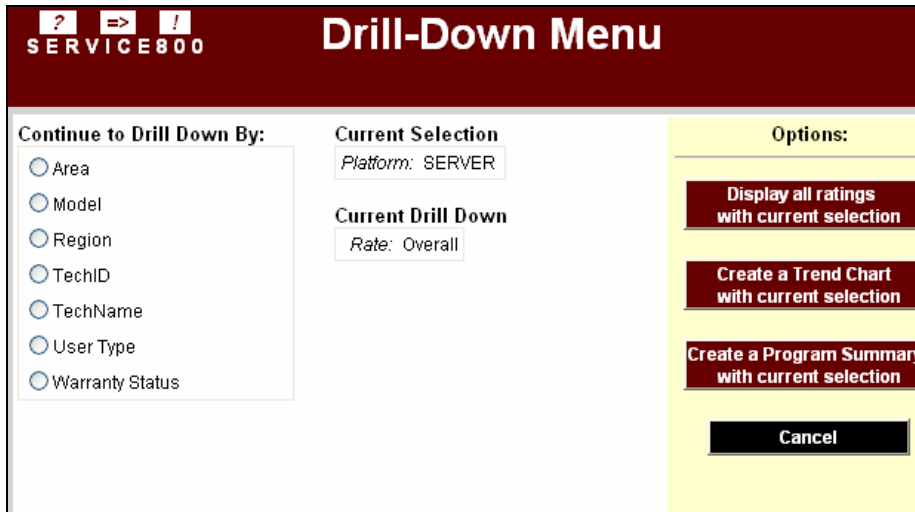
At this point, select "Create a Program Summary with current selection". This option will generate a Program Summary detailing only the element you are interested in. In this example, a Program Summary was created "SERVER" records.
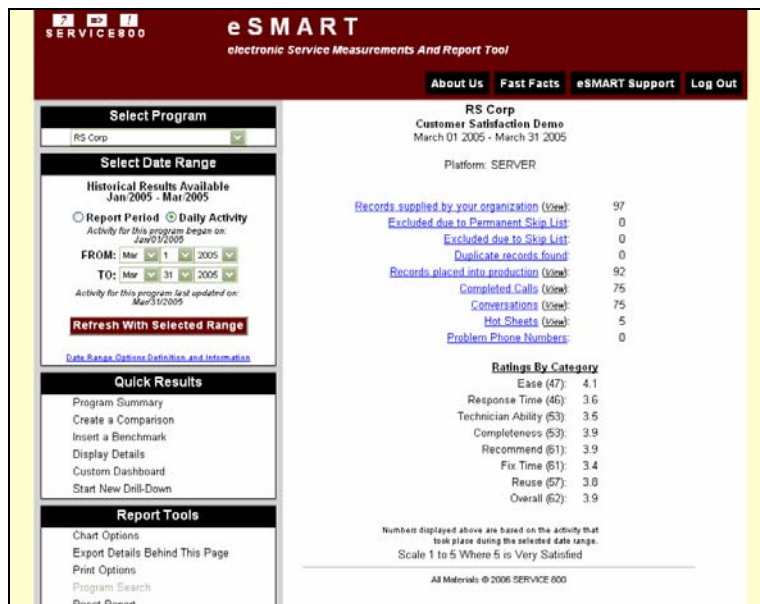
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Q. How do I save my current session's history?

A. First, create the chart(s)/drill-down(s) you would like to save (displayed under Today's History). Click on the "Save History as a Favorite" button from the left-hand menu under the 'Favorites Menu'.
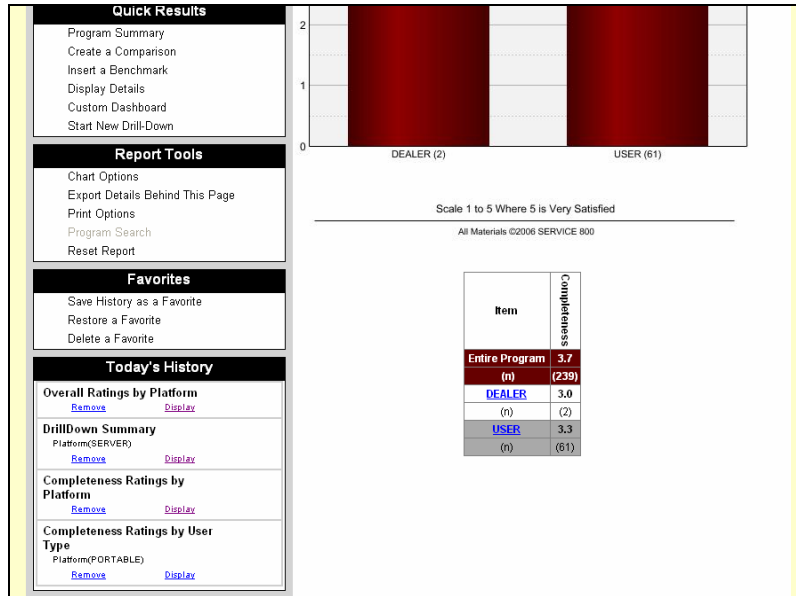
A menu will pop up asking you to provide a name, enter the name and click the save button. This report is now accessible for future use by clicking the "Restore a Favorite".

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SERVICE 800 eSMART Terms and Definitions (back to top)

SERVICE 800 eSMART Terms and Definitions

Insert a Benchmark: (back to top)   (back to list of definitions)
This option inserts the Industry Benchmark Average(s) onto the chart for comparison purposes. Available only if you are an active Benchmark Participant.

Blue Line on Charts: (back to top)   (back to list of definitions)
This displays your programs' comprehensive (combined) average for the category selected allowing you to easily compare each drill-down element to your combined average.

Display Details: (back to top)   (back to list of definitions)
Displays the detail of the individual calls reflected on the chart/page being viewed in a formatted manner.

Chart Options: (back to top)   (back to list of definitions)
This option allows you to modify the chart from displaying an average to displaying a percentage, or percentages, of specific ratings.

Create a Comparison: (back to top)   (back to list of definitions)
A menu option used to create side-by-side comparisons of two or more elements. Please see the Frequently Asked Questions section for instructions.

Completed Calls: (back to top)   (back to list of definitions)
Consists of one of the following 3 elements; 1) A Conversation or 2) 3 documented attempts to reach a customer or 3) A Problem Phone Number. Any one of the 3, result in a record being flagged as 'Completed'.

Contact: (back to top)   (back to list of definitions)
A contact is the individual to be reached by phone or email and invited to complete a follow-up survey.

Conversations: (back to top)   (back to list of definitions)
SERVICE 800 has reached the contact provided and have obtained at least one comment or rating from that contact. Conversations may be further defined by your current Service Agreement.

Custom Dashboard: (back to top)   (back to list of definitions)
A custom report/chart requested by a SERVICE 800 client and included within eSMART.

Delete a Favorite: (back to top)   (back to list of definitions)
A feature that allows you to delete previously saved "Favorites".

SERVICE 800 eSMART Terms and Definitions

Records placed into production: (back to top)   (back to list of definitions)
The number of records assigned to SERVICE 800 Calling Reps to achieve your established targets.

Drill Down: (back to top)   (back to list of definitions)
By clicking on one of the charted categories; you are able to 'drill down' by selecting certain elements.

Duplicate records found: (back to top)   (back to list of definitions)
Records provided to SERVICE 800 that were found to contain the same contact values on multiple records. Removed from the data file prior to being 'Placed into Production'.

Export Details Behind This Page: (back to top)   (back to list of definitions)
An option to allow the user to either view or export records creating the specific chart/drill-down being viewed. See Frequently Asked Question for instructions.

Hot Sheets: (back to top)   (back to list of definitions)
A Hot Sheet is an urgent customer situation. Examples may include an incomplete service event, a sales opportunity or a customer requesting to be contacted by a manager.

Records supplied by your organization: (back to top)   (back to list of definitions)
The total number of records SERVICE 800 has received for your program during this reporting period.

(n): (back to top)   (back to list of definitions)
This denotes the exact number of ratings behind the displayed average or percentage on a chart or table. The (n) number is updated to reflect each drill-down and category being viewed.

Excluded due to Permanent Skip List: (back to top)   (back to list of definitions)
Permanent Skips are identical to the Skip List except on a permanent basis. Records flagged to be permanently skipped may include both customer and program sponsor requests to be removed permanently.

Print Options: (back to top)   (back to list of definitions)
A feature used to print the page you are viewing or the Call Details for those records. Please see the Frequently Asked Question section for instructions.

Problem Phone Numbers: (back to top)   (back to list of definitions)
SERVICE 800 Calling Reps were unable to obtain a conversation because of difficulties with the number or contact provided.

SERVICE 800 eSMART Terms and Definitions

Program Search: (back to top)   (back to list of definitions)
An option to quickly view specific records within your program based on a string of values.

Program Summary: (back to top)   (back to list of definitions)
A summary of account activity during the time frame selected.

Refresh With Selected Range: (back to top)   (back to list of definitions)
To be used after modifying the report period. This will refresh the report to reflect the selected range.

Reset Report: (back to top)   (back to list of definitions)
Resets 'Today's History' by removing all reports/charts created during the online session.

Restore A Favorite: (back to top)   (back to list of definitions)
This feature allows users to restore 'Favorites' you have previously saved.

Save History As A Favorite: (back to top)   (back to list of definitions)
Saves the current list of charts/drill-downs displayed under 'Today's History' for future review. This will allow you to recall the report the next time you visit the web site without going through the steps to recreate them.

Selected Date Range: (back to top)   (back to list of definitions)
The date range you have active in your current report view.

Skip List, Records excluded by: (back to top)   (back to list of definitions)
A list of contacts SERVICE 800 recently spoke with that are blocked from being contacted again until a set timeframe has expired. Defined in your program set up, the contact will stay on the list for a predetermined length of time (normally 30, 60 or 90 days).

Start New Drill-Down: (back to top)   (back to list of definitions)
Takes the user back to the combined results based on the date range selected in order to begin a new drill-down sequence.

Today's History: (back to top)   (back to list of definitions)
Displays the reports you have created during your online session.

Trend, Create a: (back to top)   (back to list of definitions)
An option to trend results over time.