

Lokulus provides excellent customer service, quality responses, and a consistent experience for both customer and agent through our seamless, cross-channel customer and case management.

To meet the customer service demands of a busy call centre for omnichannel support, Lokulus offers comprehensive customer and case management features, including the following:

- Automatic customer and case recognition with configurable rules
- Promotion of data from a query to case and customer
- Definable forms for entering and displaying customer and case data
- Integration with back-office systems
- A unified contact history
- Easy-to-use customer and case maintenance functions such as flexible archiving
- Configurable customer search facilities.

Case Recognition

Configure rules to assign a work item to a case. You can also integrate with other systems to use meaningful data entities, such as order numbers. Where there is no match, a new case is generated automatically.

Customer Recognition



Configure further rules to recognise a customer. This is usually based on data, such as an email address. If a case is recognised, this also identifies the customer. If not, the system uses the customer rules, which, again, could interface with other methods, such as your CRM application. When there is no match, a new customer record is generated and stored automatically.

Customer and Case Records

Data associated with a work item is promoted to the case and customer and held at the appropriate level for future use. You can also store specific data retrieved via interfaces to other systems.

Customer and Case Data Forms

Configure forms to display appropriate customer and case information, which agents can view when actioning work items. These forms also allow agents to record new information provided by the customer. You can configure the data forms to interface with other systems to share data.

Unified Contact History

When viewing or actioning a work item, a simple user interface provides access to all related contacts for this case and all historic contacts for this customer.

Customer and Case Maintenance

Automatic customer and case recognition isn't always accurate. For example, a customer may fail to include appropriate reference numbers in their communication or make contact through a different channel. If you need to organise case information accurately, you can:

- Move work items
- Create new cases
- Close existing cases.

Similarly, if you need to organise customer information more accurately, cases can be moved between customers, new customers created, and duplicate records merged.

Customer Search



Lokulus provides powerful search facilities to look for existing customer records. You can configure customer search screens to use appropriate data fields for the search, including data retrieved by the interface to other systems. Once a customer record is located, you can view related cases and contacts to confirm you have the right customer.

Archiving Customer and Case Data



You can configure archiving rules to remove old case and customer information with no activity for a specified period. Different cases or customers can have additional rules, ensuring the information for your most important customers is always close at hand.

The archiving rules can be configured to aid compliance with GDPR. Rules can be created for when you archive data and when that data, having exceeded its retention period, is deleted. See our *GDPR Fact Sheet* and the *Archiving and Maintenance Fact Sheet* for more details.