

Welcome to eSMART

	Page
Overview	
<u>What is it?</u>	2
<u>How does eSMART work?</u>	2
<u>How do I access eSMART?</u>	2
<u>What are the system requirements?</u>	2
<u>How do I set up a User ID/Password?</u>	2
<u>Logging onto eSMART</u>	3
<u>eSMART Main Page Layout</u>	4
<u>Select Program and Select Date Range</u>	5
<u>Quick Results</u>	6
<u>Report Tools Menu</u>	7
<u>Favorites Menu</u>	8
<u>Today's History</u>	9
FAQ's	
<u>How do I drill down into a report?</u>	10
<u>How do I view formatted individual feedback?</u>	11
<u>How do I compare items within my report?</u>	12
<u>How do I export/view the data behind the report?</u>	13
<u>How do I create a Drill-down Program Summary?</u>	14
<u>How do I save my current items as a Favorite?</u>	15
<u>Terms and Definitions</u>	16

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 disabled or pop-ups must be allowed for this web site
- Browser must accept cookies
- Browser must accept JavaScript

How do I set up a User ID and Password to begin using eSMART?
([back to top](#))

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.

Logging onto eSMART

SERVICE 800 **eSMART**
electronic Service Measurements And Report Tool

[Change Password](#)

Please Log In

User ID:

Password:

[Click here for eSmart Support](#)

This site requires:

- **Internet Explorer 6.0 and above.**
- **Javascript must be Enabled**
- **Popups must not be blocked (check with your software vendor for instructions on unblocking selected websites.)**
- **Cookies must be Enabled**

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.

[\(back to top\)](#)

eSMART Main Screen Layout

The screenshot shows the eSMART main screen layout. The top navigation bar includes 'SERVICE 800', 'eSMART', and 'electronic Service Measurements And Report Tool'. Navigation links include 'About Us', 'Fast Facts', 'eSMART Support', and 'Log Out'. The main content area is titled 'RS Corp Customer Satisfaction Demo March 01 2005 - March 31 2005' and displays 'Ratings by Category' as a bar chart. A sidebar on the left contains sections for 'Select Program', 'Select Date Range', 'Quick Results', 'Report Tools', 'Favorites', and 'Today's History'. A data table at the bottom shows values for various categories.

Select your follow-up program here (Callout pointing to the 'Select Program' dropdown menu)

Select the date range you are interested in (Callout pointing to the 'Select Date Range' section)

Use items listed here for quick results (Callout pointing to the 'Quick Results' section)

Today's History (Callout pointing to the 'Today's History' section)

Save today's session or restore a saved list (Callout pointing to the 'Favorites' section)

Change to display your results as a percentage, export records and more (Callout pointing to the 'Report Tools' section)

Value	Ease (212)	Response Time (228)	Technician Ability (236)	Completeness (239)	Recommend (289)	Fix Time (289)	Reuse (257)	Overall (329)
(n)	(212)	(228)	(236)	(239)	(289)	(289)	(257)	(329)

[\(back to top\)](#)

Select Program and Select Date Range Menus

Select Program

RS Corp

Select Date Range

Historical Results Available
Jan/2005 - Mar/2005

Report Period Daily Activity

Activity for this program began on: Jan/01/2005

FROM: Mar 1 2005

TO: Mar 31 2005

Activity for this program last updated on: Mar/31/2005

Refresh With Selected Range

[Date Range Options Definition and Information](#)

Quick Results

- Program Summary
- Create a Comparison
- Insert a Benchmark
- Display Details
- Custom Dashboard
- Start New Drill-Down

Report Tools

- Chart Options
- Export Details Behind This Page
- Print Options
- Program Search
- Reset Report

Favorites

- Save History as a Favorite
- Restore a Favorite
- Delete a Favorite

Today's History

Ratings by Category

Scale 1 to 5 Where 5 is Very Satisfied

Category	Value	Count
Ease	3.9	(212)
Response Time	3.7	(228)
Technician Ability	3.7	(236)
Completeness	3.7	(239)
Recommendation	3.8	(289)
Fix Time	3.5	(289)
Reuse	4.1	(257)
Overall	4.0	(329)

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.

[\(back to top\)](#)

Quick Results Menu

The screenshot shows the eSMART interface for RS Corp. The left sidebar contains a 'Quick Results' menu with options: Program Summary, Create a Comparison, Insert a Benchmark, Display Details, Custom Dashboard, and Start New Drill-Down. The main area displays a bar chart titled 'Ratings by Category' for the period March 01 2005 - March 31 2005. The chart shows scores for various categories: Ease (3.9), Response Time (3.7), Technician Ability (3.7), Completeness (3.7), Recommend (3.8), Fix Time (3.5), Rouse (4.1), and Overall (4.0). Below the chart is a data table with the following values:

	Ease	Response Time	Technician Ability	Completeness	Recommend	Fix Time	Rouse	Overall
Value	3.9	3.7	3.7	3.7	3.8	3.5	4.1	4.0
(n)	(212)	(228)	(236)	(239)	(289)	(289)	(257)	(329)

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.

[\(back to top\)](#)

Report Tools Menu

The screenshot shows the eSMART web application interface. At the top, there is a navigation bar with 'About Us', 'Fast Facts', 'eSMART Support', and 'Log Out' buttons. Below this, the user is logged in as 'RS Corp' for a 'Customer Satisfaction Demo' covering the period 'March 01 2005 - March 31 2005'. The main content area is titled 'Ratings by Category' and features a bar chart showing ratings for various categories: Ease (212), Response Time (228), Technician Ability (236), Completeness (239), Recommendation (289), Fix Time (289), Reuse (257), and Overall (329). The y-axis represents the rating scale from 0 to 5. Below the chart, a table provides the numerical values and counts for each category.

	Ease	Response Time	Technician Ability	Completeness	Recommendation	Fix Time	Reuse	Overall
Value	3.9	3.7	3.7	3.7	3.8	3.5	4.1	4.0
(n)	(212)	(228)	(236)	(239)	(289)	(289)	(257)	(329)

The left sidebar contains several menu sections: 'Select Program' (RS Corp), 'Select Date Range' (Historical Results Available Jan 2005 - Mar 2005, with options for Report Period or Daily Activity and date pickers), 'Quick Results' (Program Summary, Create a Comparison, Insert a Benchmark, Display Details, Custom Dashboard, Start New Drill-Down), 'Report Tools' (Chart Options, Export Details Behind This Page, Print Options, Program Search, Reset Report), 'Favorites' (Save History as a Favorite, Restore a Favorite, Delete a Favorite), and 'Today's History'.

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.

[\(back to top\)](#)

Favorites Menu

The screenshot shows the eSMART web application interface. On the left side, there is a navigation menu with several sections: 'Select Program' (showing 'RS Corp'), 'Select Date Range' (with options for 'Report Period' and 'Daily Activity', and date pickers for 'FROM' and 'TO'), 'Quick Results' (with links like 'Program Summary', 'Create a Comparison', etc.), 'Report Tools' (with links like 'Chart Options', 'Export Details Behind This Page', etc.), 'Favorites' (highlighted with a yellow arrow and containing 'Save History as a Favorite', 'Restore a Favorite', and 'Delete a Favorite'), and 'Today's History'. The main content area on the right displays a bar chart titled 'Ratings by Category' for 'RS Corp Customer Satisfaction Demo' from 'March 01 2005 - March 31 2005'. The chart shows ratings for various categories: Ease (212), Response Time (228), Technician Ability (236), Completeness (239), Recommendation (289), Fix Time (289), Reuse (257), and Overall (329). Below the chart is a table with the same data.

	Ease	Response Time	Technician Ability	Completeness	Recommend	Fix Time	Reuse	Overall
Value	3.9	3.7	3.7	3.7	3.8	3.5	4.1	4.0
(n)	(212)	(228)	(236)	(239)	(289)	(289)	(257)	(329)

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.

[\(back to top\)](#)

Today's History

The screenshot shows the eSMART interface for 'RS Corp Customer Satisfaction Demo' covering the period 'March 01 2005 - March 31 2005'. The main chart, 'Ratings by Category', displays scores for various service metrics on a scale of 1 to 5. Below the chart is a table with the following data:

	Ease	Response Time	Technician Ability	Completeness	Recommend	Fix Time	Reuse	Overall
Value	3.9	3.7	3.7	3.7	3.8	3.5	4.1	4.0
(n)	(212)	(228)	(236)	(239)	(289)	(289)	(257)	(329)

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](#).

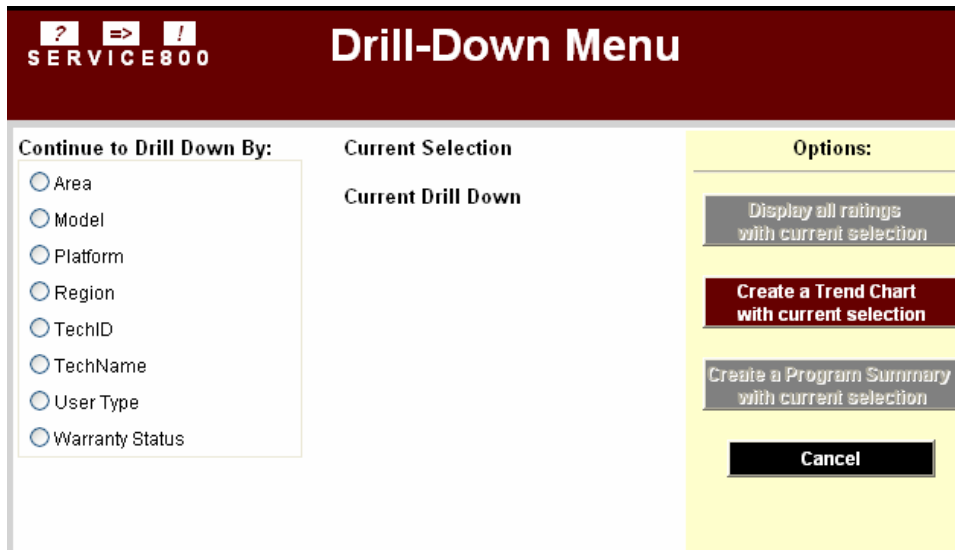
If you have created several drill-downs you would like to save as a Favorite but want to remove unnecessary chart/drill-downs first, select [Remove](#).

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

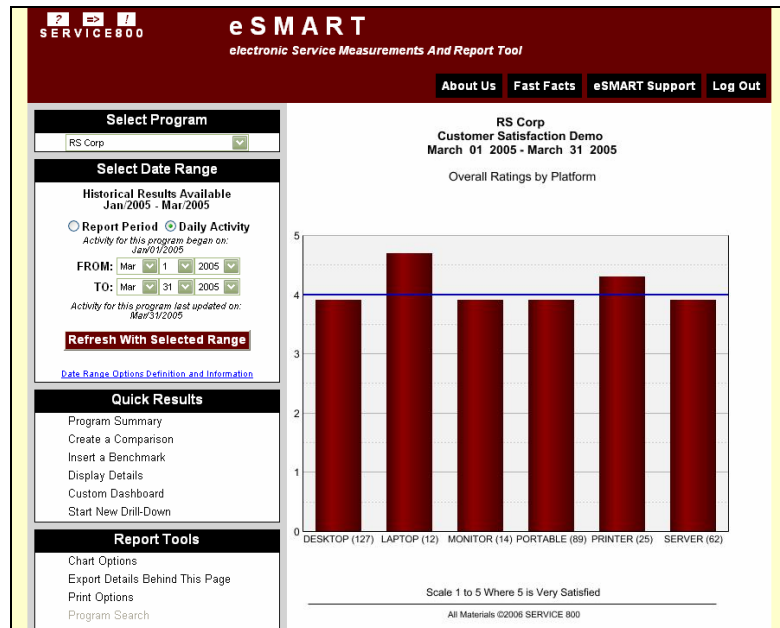
[\(back to top\)](#)

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:



[\(back to top\)](#)

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.

The screenshot displays the eSMART interface with the following content:

SERVICE 800 **eSMART**
electronic Service Measurements And Report Tool

RS Corp
 Customer Satisfaction Demo
 March 01 2005 - March 31 2005
 Ratings by Category

Ticket: 508654715.70000654	ProjCode: ZZ
CustID: 77528	Company: YE OLDE TECH SHOPPE
Contact: DEANNA	Phone: 5553624811
Email:	Service Date: 5/9/2004
TechID: 700	TechName: JEAN
Description: SYSTEM WILL NOT REBOOT	Platform: DESKTOP
Model: 77622	Area: Ohio Valley
User Type: USER	Warranty Status: WARRANTY
Region: CENTRAL	Request Followup Call: 0
Rep Hot:	Automatic Hot Condition:

Ratings

Ease	Response Time	Technician Ability	Completeness	Recommend	Fix Time	Reuse	Overall
							3

Scale 1 to 5 Where 5 is Very Satisfied

Comments:

How do you feel the service contact went?: HAD A POWER OUTAGE WHICH CAUSED THE PROBLEM, TECH WAS QUICK & FRIENDLY

What one thing (if any) could we do better next time?: NOTHING

What one element is most important?: RESPONSE TIME

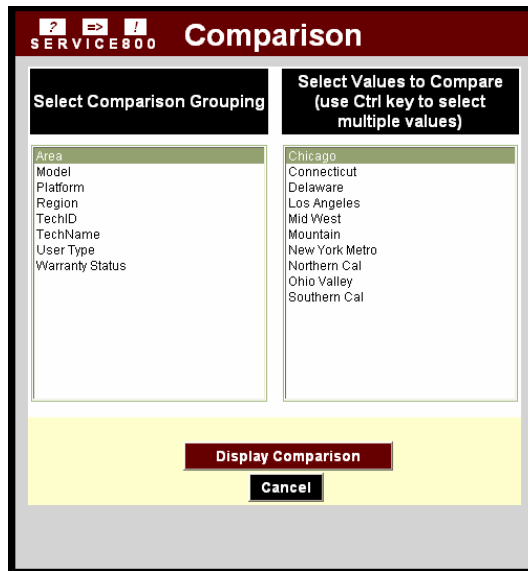
From this view, you may choose to print the details using your browser menu. Each record will appear on a separate page to easily share with your co-workers or use during reviews.

[\(back to top\)](#)

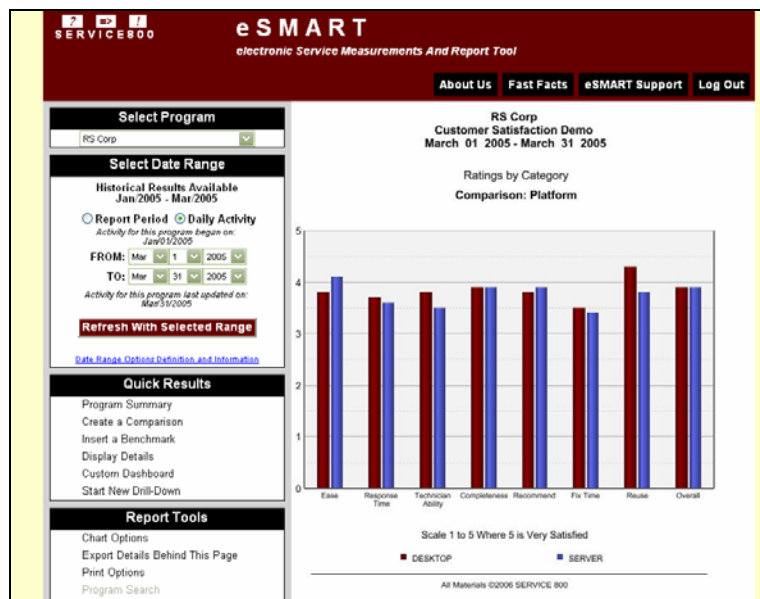
Q. How do I compare items within my report?

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:



[\(back to top\)](#)

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.

The screenshot shows a window titled "View / Export Details" with a "Select Elements to Export" dialog box. The dialog box contains a list of data elements with checkboxes next to them. On the right side of the dialog, there are four buttons: "Select All Elements", "De-Select All Elements", "View Records", and "Cancel".

Element	Selected
<input type="checkbox"/> Ticket	
<input type="checkbox"/> ProjCode	
<input type="checkbox"/> CustID	
<input type="checkbox"/> Company	
<input type="checkbox"/> Contact	
<input type="checkbox"/> Phone	
<input type="checkbox"/> Email	
<input type="checkbox"/> Service Date	
<input type="checkbox"/> TechID	
<input type="checkbox"/> TechName	
<input type="checkbox"/> Description	
<input type="checkbox"/> Platform	
<input type="checkbox"/> Model	
<input type="checkbox"/> Area	
<input type="checkbox"/> Region	
<input type="checkbox"/> Ease	
<input type="checkbox"/> Response Time	
<input type="checkbox"/> Technician Ability	
<input type="checkbox"/> Completeness	
<input type="checkbox"/> Recommend	
<input type="checkbox"/> Fix Time	
<input type="checkbox"/> Reuse	
<input type="checkbox"/> Overall	
<input type="checkbox"/> How do you feel the service contact went?	
<input type="checkbox"/> What one thing (if any) could we do better next time?	
<input type="checkbox"/> What one element is most important?	
<input type="checkbox"/> Code	
<input type="checkbox"/> Status	

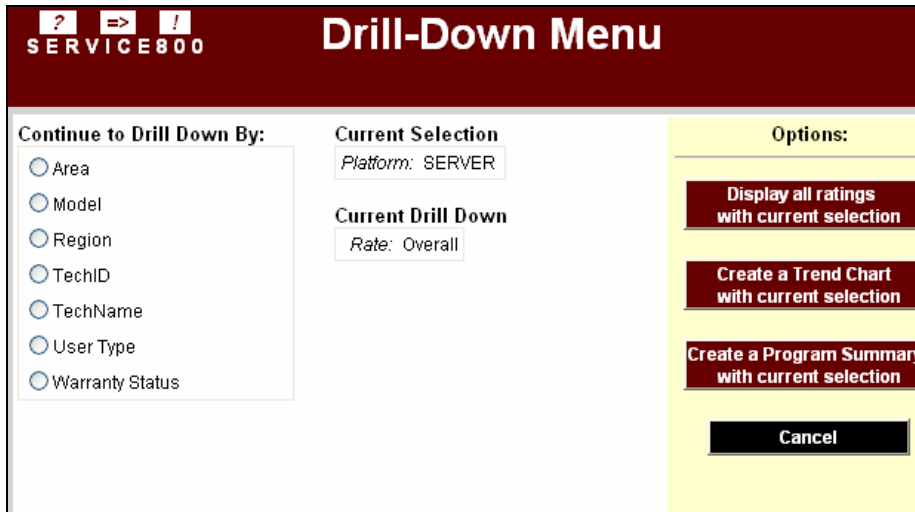
Once all the elements you wish to see displayed have been selected, click Preview Results and the data elements will be displayed. This file can be viewed as is or saved onto your local hard drive for later use.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Reporting Period:	March 01 2005 -	March 31 2005									
2	Reportings by Category											
3	Status	Ticket	ProjCode	CustID	Company	Contact	Phone	Email	Service Date	TechID	TechName	Description
4	Interview	508654715.7.ZZ		77528	'YE OLDE TECH SHOPPE	DEANNA	5553624811		5/8/2004	700	JEAN	SYSTEM WILL NOT R
5	Interview	508654726.1.ZZ		12312	ABC COMPANY	EDDIE	5553624814		5/9/2004	600	DAVID	DISPLAY PROBLEMS
6	Interview	508655064.1.ZZ		82868	MOUNTAIN RANGE SERVERS	CAROL	5553624923		5/21/2004	800	CHAD	PM
7	Interview	508655117.4.ZZ		77777	THE QUOTA	NANCY	5553624940		5/9/2004	600	DAVID	MOUSE ERRORS
8	Interview	508654861.3.ZZ		97380	GONE FISHIN INC	CATHERINE	5553624857		5/16/2004	400	MONICA	DISPLAY PROBLEMS
9	Interview	508654789.9.ZZ		77528	'YE OLDE TECH SHOPPE	BRENDA	5553624855		5/27/2004	300	ELLISA	PRINTER ERRORS
10	Interview	508654986.9.ZZ		99999	BUBBAS OFFICE SUPPLY	DAVID	5553624891		5/8/2004	400	MONICA	DISPLAY PROBLEMS
11	Interview	508654792.8.ZZ		77528	'YE OLDE TECH SHOPPE	BRENDA	5553624855		5/27/2004	300	ELLISA	PRINTER ERRORS
12	Interview	508654009.8.ZZ		92300	BUZZ COFFEE PRODUCTS	JEFF	5553624446		5/16/2004	600	DAVID	PRINTER JAMMING
13	Interview	508654795.9.ZZ		77528	'YE OLDE TECH SHOPPE	DWIGHT	5553624833		5/27/2004	400	MONICA	BROKEN MONITOR
14	Interview	508654977.ZZ		12312	ABC COMPANY	DAVID	5553624894		5/16/2004	400	MONICA	DISPLAY PROBLEMS
15	Interview	508654827.6.ZZ		12312	ABC COMPANY	BOB	5553624845		5/1/2004	400	MONICA	BROKEN MONITOR
16	Interview	508654704.ZZ		92300	BUZZ COFFEE PRODUCTS	LINDA	5553624806		5/21/2004	600	DAVID	MOUSE ERRORS
17	Interview	508655148.6.ZZ		77777	THE QUOTA	CRAIG	5553624950		5/16/2004	300	ELLISA	MONITOR PROBLEMS
18	Interview	508654979.6.ZZ		77045	PHONE GUYS	SUSAN	5553624896		5/9/2004	600	DAVID	KEY BOARD PROBLE
19	Interview	508655036.9.ZZ		92300	BUZZ COFFEE PRODUCTS	PAMELA	5553624915		5/9/2004	200	SUE	REPORTING SYNTAX
20	Interview	508655110.9.ZZ		84709	ABOVE AVERAGE TECH SHOP	RALPH	5553624999		5/9/2004	400	MONICA	PM
21	Interview	508654752.1.ZZ		92300	BUZZ COFFEE PRODUCTS	AARON	5553624823		5/9/2004	400	MONICA	GENERAL FAILURE
22	Interview	508654964.ZZ		99999	BUBBAS OFFICE SUPPLY	DAVID	5553624891		5/9/2004	400	MONICA	DISPLAY PROBLEMS
23	Interview	508654694.9.ZZ		22657	DEF COMMUNICATIONS	CHRISTINE	5553624804		5/9/2004	600	DAVID	BROKEN MONITOR
24	Interview	508654792.8.ZZ		77777	THE QUOTA	TOM	5553624826		5/9/2004	600	DAVID	MOUSE ERRORS
25	Interview	508654670.4.ZZ		82868	MOUNTAIN RANGE SERVERS	KRISHNA	5553624860		5/9/2004	400	MONICA	DISPLAY PROBLEMS
26	Interview	508655031.6.ZZ		81897	BIG ISLAND COMPUTERS	ANDRE	5553624913		5/9/2004	200	SUE	REPORTING SYNTAX
27	Interview	508655142.1.ZZ		92300	BUZZ COFFEE PRODUCTS	PAUL	5553624949		5/9/2004	400	MONICA	PM
28	Interview	508654901.6.ZZ		97420	SYSTEMS AND MORE	JOHN	5553624871		5/9/2004	300	ELLISA	PAPER MISFEEDING
29	Interview	508655010.0.ZZ		77392	'YE OLDE TECH SHOPPE	GARY	5553624906		5/9/2004	800	CHAD	PRINTER JAMMING
30	Interview	508655179.9.ZZ		22657	DEF COMMUNICATIONS	AMANDA	5553624959		5/9/2004	600	DAVID	PRINTER JAMMING
31	Interview	508655090.1.ZZ		12312	ABC COMPANY	TY	5553624932		5/9/2004	600	DAVID	MOUSE ERRORS
32	Interview	508654834.ZZ		12312	ABC COMPANY	JUDY	5553624848		5/16/2004	200	SUE	PRINTER ERRORS
33	Interview	508654891.2.ZZ		12312	ABC COMPANY	KAY	5553624867		5/16/2004	400	MONICA	DISPLAY PROBLEMS
34	Interview	508654959.0.ZZ		12312	ABC COMPANY	LINDA	5553624899		5/16/2004	100	BOB	BROKEN MONITOR

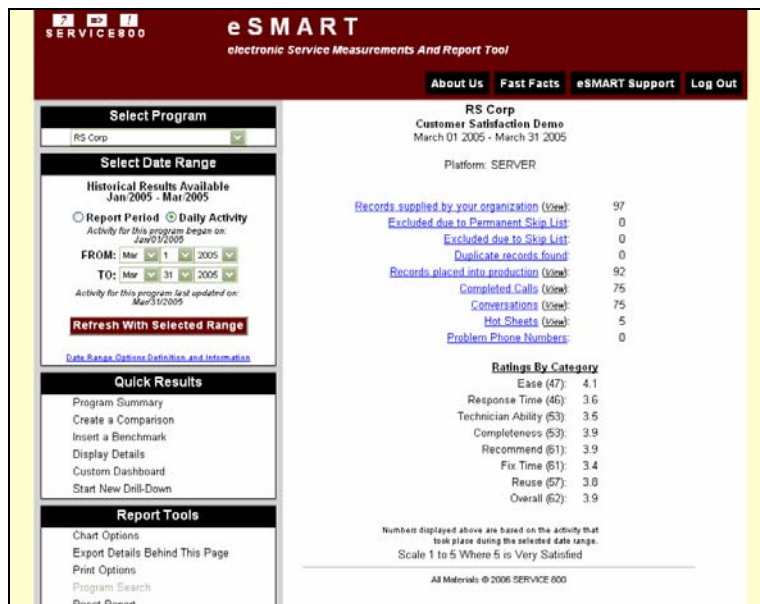
[\(back to top\)](#)

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.



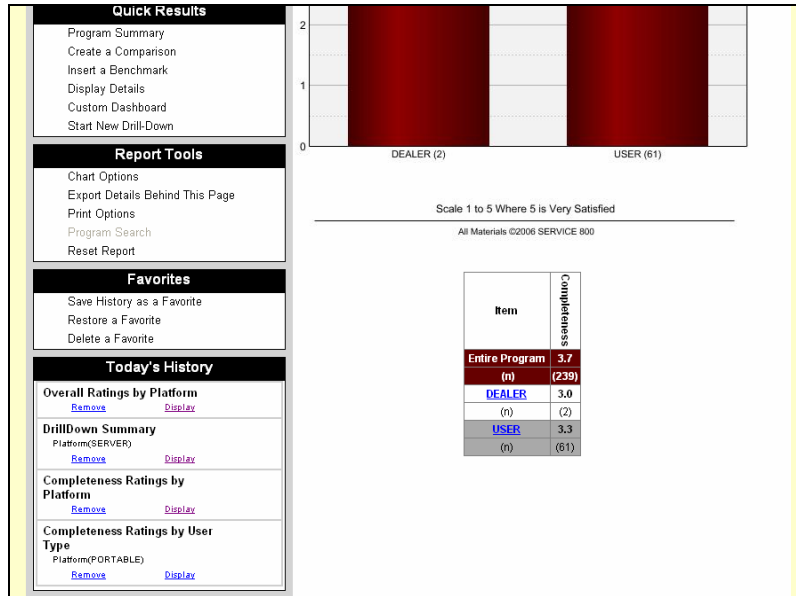
At this point, select “Create a Program Summary with current selection”. This option will generate a Program Summary detailing only the element you are interested in. In this example, a Program Summary was created “SERVER” records.



[\(back to top\)](#)

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".

The screenshot shows a dialog box titled 'Save A Favorite' with the SERVICE 800 logo. It contains the instruction: 'Enter the name you would like to use to save your Favorites'. Below this is an input field with a placeholder '(Letters and/or Numbers Only Please)'. At the bottom are two buttons: 'Save Favorites' and 'Cancel!'.

[\(back to top\)](#)

SERVICE 800 eSMART Terms and Definitions ([back to top](#))

[Insert a Benchmark](#)
[Blue Line on Charts](#)
[Display Details](#)
[Chart Options](#)
[Create a Comparison](#)
[Completed Calls](#)
[Contact](#)
[Conversations](#)
[Custom Dashboard](#)
[Delete a Favorite](#)
[Records placed into production](#)
[Drill Down](#)
[Duplicate records found](#)
[Export Details Behind This Page](#)
[Hot Sheets](#)
[Records supplied by your organization](#)
[\(n\)](#)
[Permanent Skip List, Records excluded due to](#)
[Print Options](#)
[Problem Phone Numbers](#)
[Program Search](#)
[Program Summary](#)
[Refresh With Selected Range](#)
[Reset Report](#)
[Restore a Favorite](#)
[Save History as a Favorite](#)
[Selected Date Range](#)
[Skip List, Records excluded by](#)
[Start new Drill-Down](#)
[Today's History](#)
[Trend, Create a](#)

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.