

SupportLogic Alerts

OFFICE HOURS

The background of the slide features a large, abstract graphic on the right side. It consists of several overlapping diagonal bands of color: a green band at the top right, a teal band below it, a blue band at the bottom right, and a white band in the center. A small, multi-colored triangular shape (with shades of purple, pink, and blue) is positioned over the white band. The SupportLogic logo is located in the bottom right corner, overlaid on the blue band.

SupportLogic

SupportLogic Presenters



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Agenda

- Overview
- Product Demo
- Q&A



Why are Alerts important?

Alerts help you keep track of important case events by notifying you via email, Slack, or MS Teams when certain criteria are met or updating a list service, database, etc. via a URL POST method.

What Alert Triggers are available?
















Triggers are the conditions that must be met for the Alert to activate.

Some examples are

- Escalation Statuses,
- Sentiment Scores,
- Case Fields,
- Other metadata

Combining many different criteria enables users to get very specific Alerts.

Alert Conditions

- >  Negative Sentiment
- >  Positive Sentiment
- >  Need Attention
- >  Product Feedback
- >  Issue
- >  Miscellaneous
- >  Message Type
- >  Escalation Activity
- >  Sentiment Score
- >  Attention Score
- >  Customer
- >  Agent
- >  Case Events
- >  Last Case Activity
- >  SLA

Custom Fields

- > Liability
- > Account
- > Category
- > Component

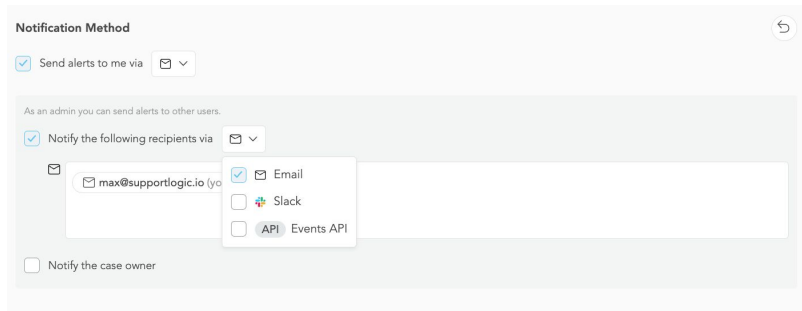
What are my options for alert notifications?

Notifications are a combination of the types of communication and the individuals who will receive them

- Slack
- MS Teams
- Email
- Events API

Personal alerts are limited to one individual

Shared or System Alerts can be sent to multiple individuals including the case owner



The screenshot shows a 'Notification Method' configuration window. At the top, there is a section 'Send alerts to me via' with a checked checkbox and a dropdown menu showing an email icon. Below this, a note states 'As an admin you can send alerts to other users.' The next section is 'Notify the following recipients via', also with a checked checkbox and a dropdown menu. This dropdown is open, showing three options: 'Email' (checked), 'Slack' (unchecked), and 'API Events API' (unchecked). To the left of this dropdown, there is a text input field containing the email address 'max@supportlogic.io (yo'. At the bottom of the window, there is an unchecked checkbox labeled 'Notify the case owner'.

What about the Payload?

Payload is the set of information to be included in the Alert notification.

Include any pertinent information necessary to take action on Case(s) associated with the Alert.

This will automatically include any custom field values that were included in the alert condition

Payload ▾

The following data variables that are part of the alert conditions will be automatically added to this alert:

CSAT Score Account Product

Optional: Use '/' to add additional data variables.

Negative Sentiment Sentiment Score Agent Last Outbound Activity



Step 4 – *from the Success Plan*

Take action on alerts to stay up to date throughout your day

What alerts should I configure?

1. Alert me when a negative or needs attention signal is detected on an inbound comment
2. Alert me when a case is Likely to Escalate

What should I do with these cases?

Take steps to prioritize the cases as needed to drive an improved outcome for the customer



What do we mean by *Take Action*?


Support Organizations have standard operating procedures for handling troubled cases such as but not limited to the following


1. Respond to the customer
2. Add an internal case note with relevant instructions for the case owner
3. Initiate a swarm on the case with relevant subject matter experts
4. Engage the CSM or AM if needed


SupportLogic is an early warning system and should act as a force multiplier for your existing processes

Alert #1 – Configuration

Negative or Needs Attention Signals



Negative Signals Detected on my Team's Cases 

Trigger when of the conditions below are met: 

1  Sentiments:

Negative OR Profanity OR Frustration OR Confusion OR Not Helpful OR
Customer Waiting OR Impatience OR Escalation Request OR Churn Risk OR
Critical Issue OR Urgency OR Follow-Up Request OR Call Request

↔ Message Type:

2   My Team



1. Go to My Alerts
2. Select + New Alert
3. Add Sentiment Signals
4. Add Message Type – Inbound
5. Add your Virtual Team or other relevant condition

*Detailed instructions on creating alerts can be found [here](#)


Alert # 2 – Configuration

Escalation Predictions

Escalation Predictions on my Team's Cases 

Trigger when all  of the conditions below are met: 

1 Likely to Escalate


2  My Team


1. Go to My Alerts
2. Select + New Alert
3. Add Likely to Escalate
4. Add your Virtual Team or other relevant condition



**Detailed instructions on creating alerts can be found [here](#)*



Alert # 3 – Configuration

Last Outbound Activity – Premium Accounts

Last Case Activity Outbound 2 days ago 

Trigger when of the conditions below are met: 

1  Last Case Activity is  Outbound and was days ago

2   Premium Accounts

1. Go to My Alerts
2. Select + New Alert
3. Add Last Case Activity Outbound – 2 days ago
4. Add your Virtual Group or Accounts

**Detailed instructions on creating alerts can be found [here](#)*

Alert # 4 – Configuration

Last Outbound Activity – Notify Case Owner

Notify Case Owner - Last Outbound Activity 2 days ago

Trigger when of the conditions below are met:

1 Last Case Activity is → Outbound and was 2 days ago

2 My Team

3 Drag and drop another condition here!

Notification Method

☒ Send alerts to me via

As an admin you can send alerts to other users.

☒ Notify the following recipients via

max@supportlogic.io (you)

☒ Notify the case owner via

1. Go to My Alerts
2. Select + New Alert
3. Add Last Case Activity Outbound – 2 days ago
4. Add your Virtual Team
5. Select Notify Case Owner

*Detailed instructions on creating alerts can be found [here](#)

SupportLogic

Demo

Question and Answer



Thank you for joining.