

The CRM built for Customer Experience.



CyCX CRM & Case Management

Every customer record, every interaction, every case natively connected to the desktop your agents already use. No pipeline. No lead scoring. Just the tools your team needs to resolve issues faster.

One

Unified workspace

Zero

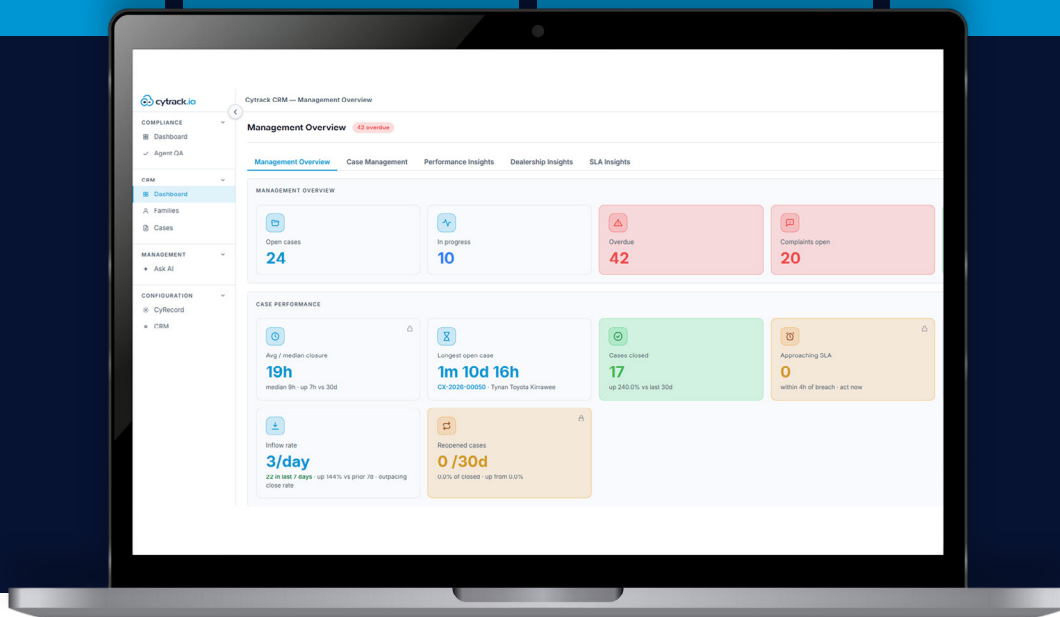
Separate CRM Needs

Full

Interaction call insight

Native

CyCX Integration



“ Not another CRM. A customer and case management system built for the contact centre. ”

Know Exactly Who You're Talking To



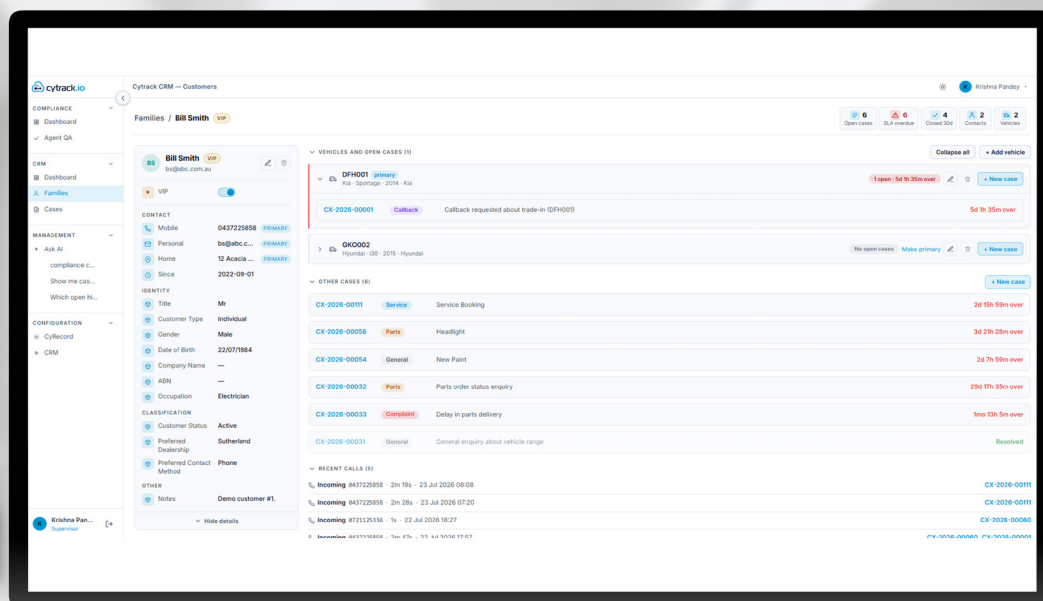
Account & contact architecture

Accounts and contacts reflect real relationships — a business, a family, or a household, with every linked contact sharing the same account-level context and history. One control centre -supervisors manage routing, queues, and performance from one place.



Products & assets

Assign products or assets — a vehicle, a piece of equipment, a purchased part — directly to an account or contact, so every case ties back to exactly what's involved.



Two problems. One native solution.

Every customer record, every interaction, every case natively connected to the desktop your agents already use. No pipeline. No lead scoring. Just the tools your team needs to resolve issues faster.



Cost & Complexity

You need a CRM - but not an enterprise one

Most businesses outgrow spreadsheets quickly, or find that basic in-house databases lack the maturity for APIs and connectivity to contact centre solutions - but the jump to Salesforce, ServiceNow, or Zendesk brings licensing costs, long implementation projects, and complex capability that doesn't suit many businesses.

CyCX CRM is purpose-built and natively integrated - delivering affordable, practical CRM and case management from day one, with no third-party licences required.



Fragmentation

Agents managing customers across too many systems

Customer records live in one place, cases in another, call recordings somewhere else. [cite: Agents waste time searching for context that should be in front of them the moment a call lands.

CyCX CRM solves this natively, inside the desktop agents already use every day - every call, recording, message, and case linked to the customer record in a single timeline.

Our Philosophy: Easy In, Easy Out

Core customer data imports quickly to get a contact centre running from day one. And the data is never locked in - export cleanly whenever a business is ready to step up to a full-scale CRM with sales, pipeline, and marketing capability.



Easy In

Get running with core customer data on day one - no lengthy migration project standing between a customer and go-live.



Easy Out

Export cleanly whenever a customer is ready to move to a full CRM platform. Their data, their timeline, their choice.

Account & contact architecture

Interaction-first, not deal-stage or lead-score driven. Built around how real customer relationships actually work.



Accounts

The organisation or household - a business, a family, a property. The shared context every contact on it can see

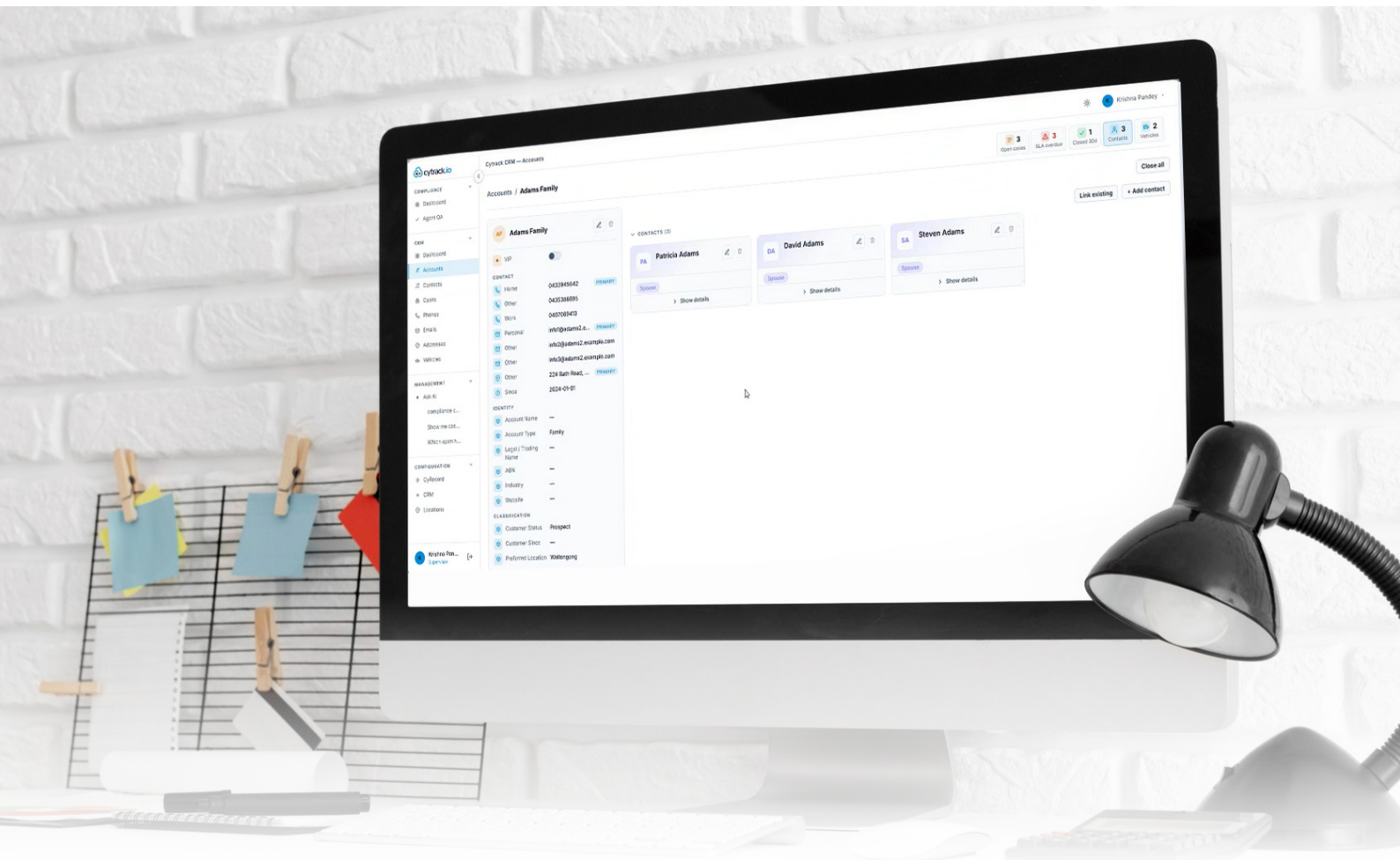


Contacts

The individual people linked to that account - employees, family members, decision-makers - each with their own history.

Why It Matters

- ✓ **Faster recognition** - no repeated questions when a different contact from the same account calls in.
- ✓ **Full context** - agents see the account relationship, not just an isolated contact record.
- ✓ **Scales naturally** - from simple accounts through to complex multi-contact organisations. CyReport.



Products & assets - linking what you sell to who you serve

Beyond accounts and contacts, CyCX CRM lets you assign products or assets directly to an account or a contact - creating a service link between what a customer owns and the people responsible for it.



Automotive

A family account can have each member's vehicle assigned to them individually - a service booking, recall, or enquiry links straight to the right car and the right contact.



Parts & equipment

Parts or equipment purchased by a customer are assigned to their account, so warranty, service history, and repeat orders track against the right item.



Why It Matters

- ✓ **Context in seconds** - agents instantly see what a customer owns, not just who they are.
- ✓ **Accurate case handling** - cases, service history, and coaching all reference the actual product or asset involved.
- ✓ **Built for real-world service models** -serialised products, vehicles, or equipment, without custom development.

Every customer touchpoint on the record

Interactions across every CyCX channel link to the customer record and case automatically where possible, one click where not.

Inbound & outbound calls

Call recordings

Web chat

SMS

Whatsapp

Agent notes

Outlook email (optional)

Case management

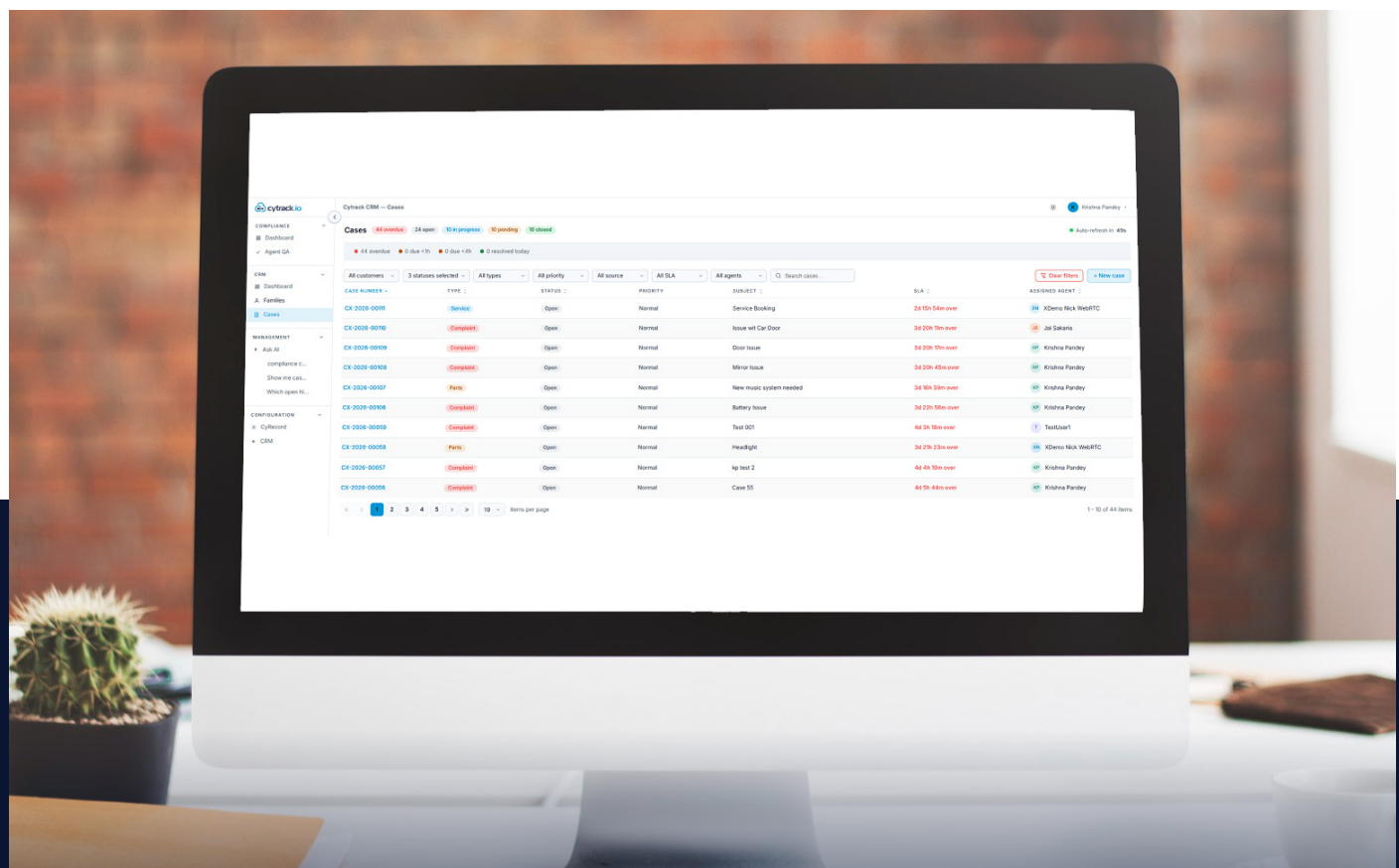
CyCX's optional Case Management module gives your team a structured way to log, track, and resolve customer issues directly from CyDesk - without needing a separate ticketing system.

Cases - logged during or after any call, chat, or email, automatically linked to the account, contact, and any relevant product or asset.

Case & task management - full lifecycle: create, assign, reassign, escalate, resolve. Status, priority, category, and due date all tracked.

Interaction timeline - every call, recording, SMS, WhatsApp message, and note sits on the customer record in a single chronological timeline.

Full history - every note, call, and status change is captured, including full assignment history, for a complete audit trail.



From contact to resolution in one place

A customer calls. Their record and open cases surface instantly. A new case is raised with one click - caller, agent, queue, and recording linked automatically.

1

Customer identified

Inbound call triggers a screen pop. Existing customer record and open cases surface before the agent speaks.

2

Case raised

One click creates a case. Caller, agent, queue, timestamp, and recording link captured automatically.

3

Assigned & actioned

Case assigned to the right agent or team. Full reassignment and ownership history tracked.

4

Closed & visible

Case resolved with notes. Full history sits on the customer record. Performance visible in CyReport.

ESCALATION & SLA

Nothing sits unresolved without visibility

Not every case is equal, and not every case gets resolved on first contact. CyCX Case Management includes built-in escalation and SLA tracking so issues never go quiet.



Escalation paths

Cases automatically escalate to a supervisor or specialist team based on rules you define - time elapsed, case type, or customer priority.



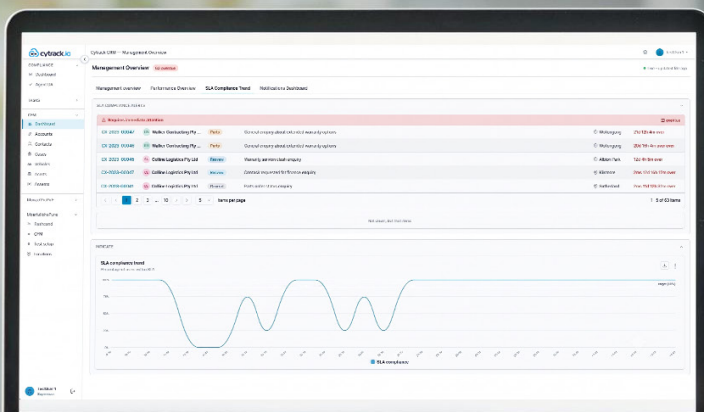
SLA tracking

Every case can carry a target resolution time, with visual indicators as a case approaches or exceeds its SLA.



Configurable by case type

Different SLAs for different case types, customer tiers, or vertical requirements.



Performance visibility at every level

Standard reporting through CyReport - the platform your team already knows.



Case volume:

By period, queue, agent, and category. Identify peaks and resource gaps quickly.



Resolution time:

Average time to close by category, agent, and priority. Track SLA performance.



Agent workload:

Cases assigned vs resolved per agent. Spot overload and underutilisation fast.



Open & overdue:

Current snapshot, filterable by team, agent, and date range.



Activity linkage:

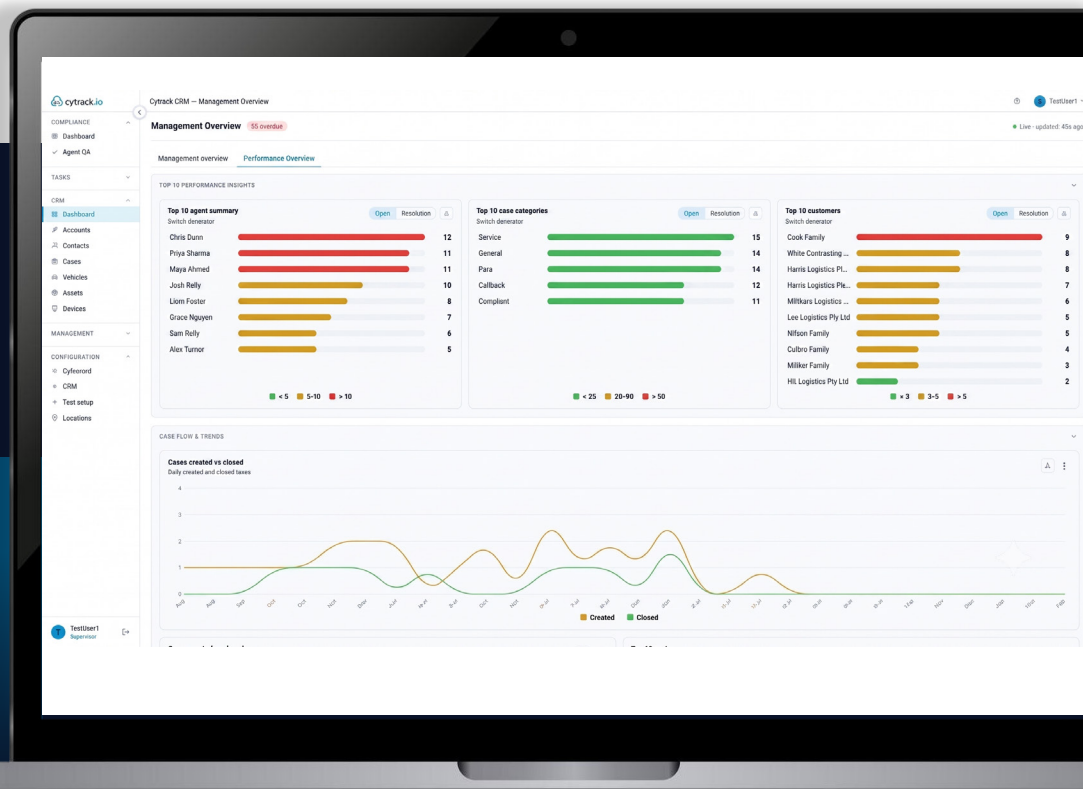
Calls, SMS, WhatsApp, and recordings per case - full communication load visible.



Custom field analysis:

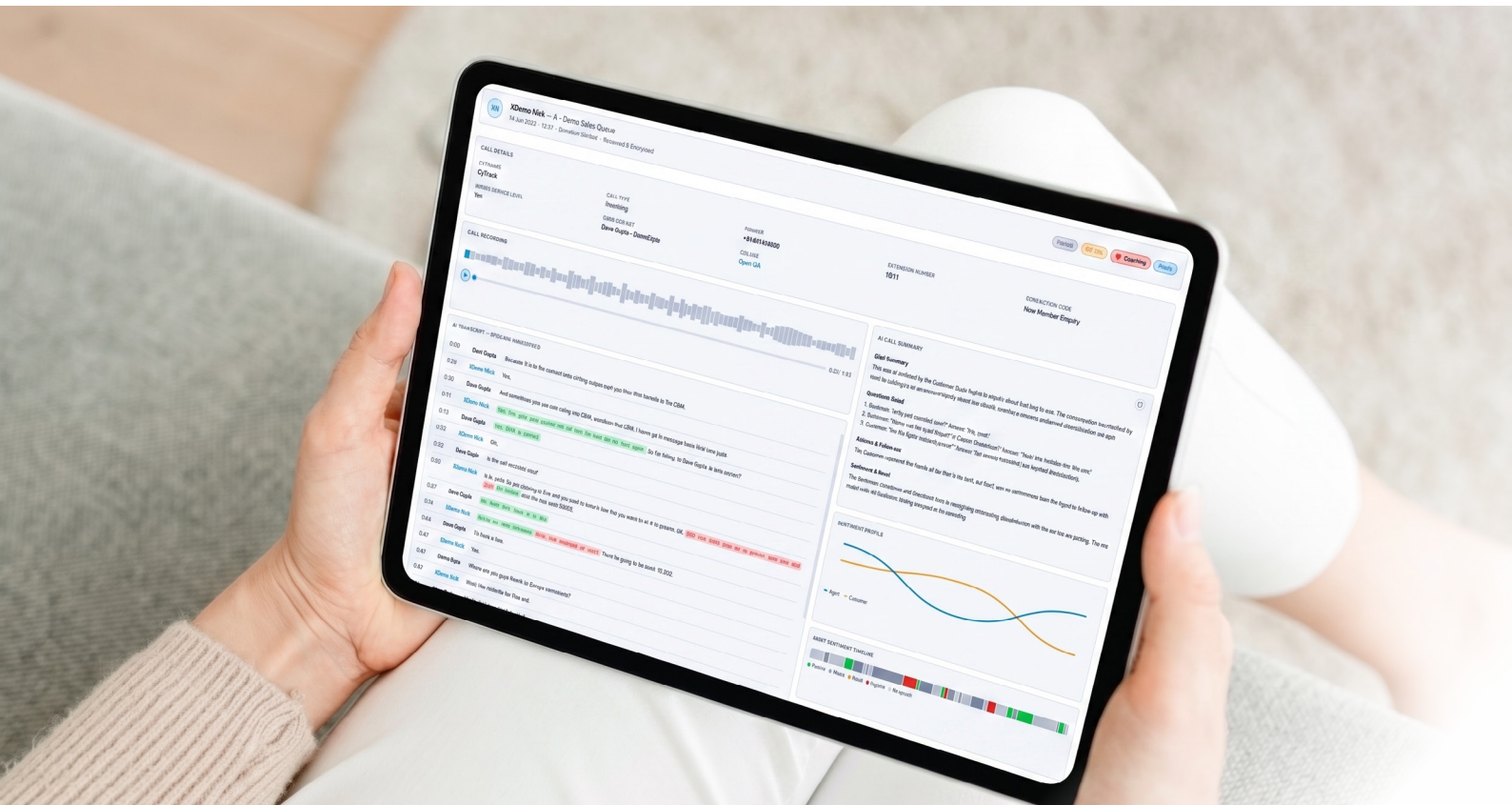
Filter and group by your own business fields - fault type, product line, and more.

A CyDesk widget gives agents at-a-glance case status without leaving their working screen, alongside full CyReport integration.



Call Interaction Report - transcription & coaching

Every case is only as good as the conversations behind it. CyCX's Call Interaction Report brings CyRecord's AI transcription, sentiment, and coaching data directly into the customer and case view - so a case isn't just a written note, it's the full context of everything that was said.



Full transcripts

read exactly what was said on any call linked to a case or customer, without listening to the full recording.



Sentiment tracking

see how a customer's sentiment shifted across a call, or across multiple cases over time.

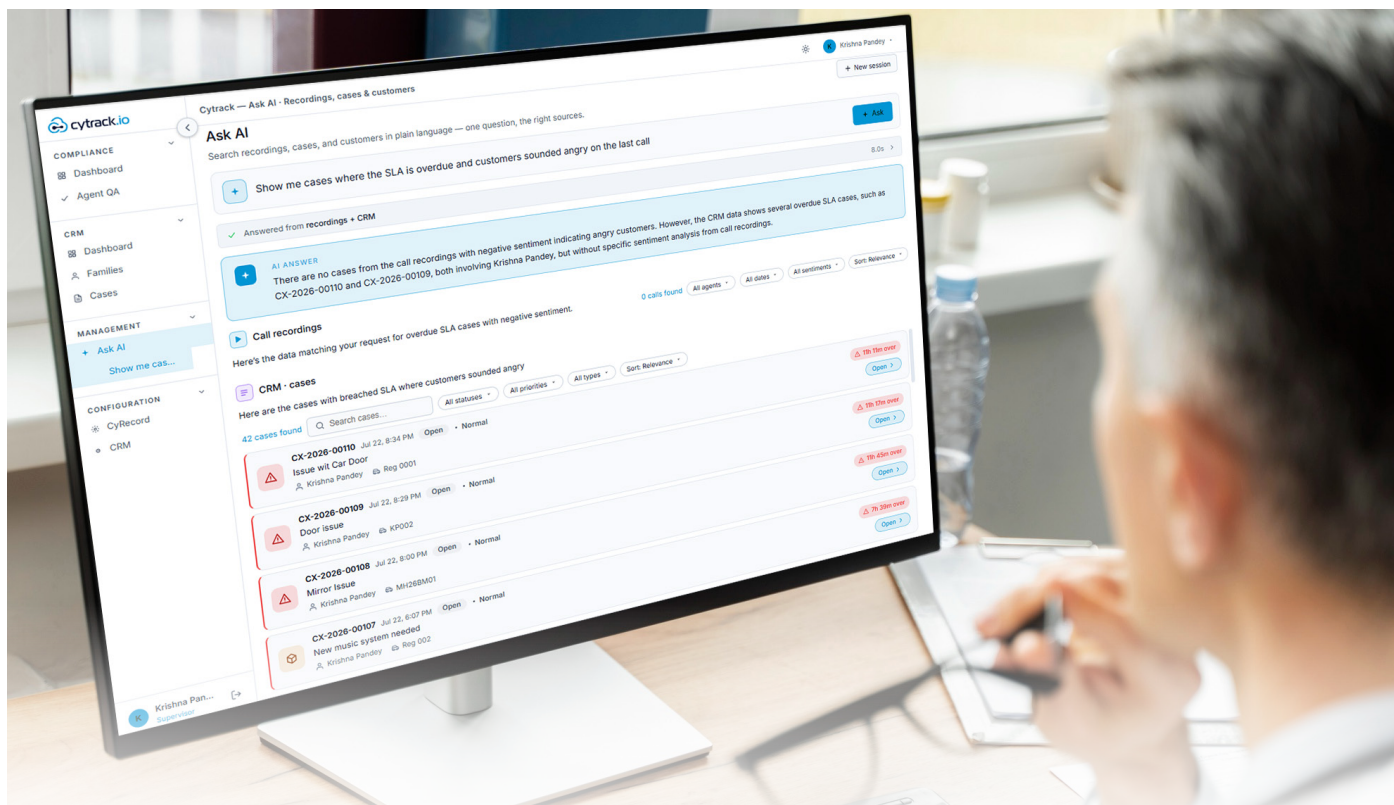


Linked coaching

coaching flags raised against a call are visible alongside the case, connecting agent development to real customer outcomes.

Find what you need - just ask

Ask AI works across accounts, contacts, products and assets, cases, and call transcripts together - answering questions that would otherwise take several searches across several screens.



Ask CyCX anything about your customers or cases...

"Find calls where the case is unresolved and the customer sounded angry."

"Show me cases where the SLA is overdue."

"Which of my accounts have a vehicle due for service this month?"

"Show me every case linked to this part number in the last 90 days."

Adapt to your business without a developer

Administrators define custom data fields that render dynamically on every case form - no code required



Per case type

Different field sets for different case categories - support, billing, complaints, and more.



Four field types

Text, dropdown, date picker, and checkbox cover the most common data capture requirements



Flows into reports

Custom fields are available in CyReport - filter, group, and analyse by your own business dimensions.



No developer required

Configured by an administrator after setup - no professional services engagement needed.

Vertical examples

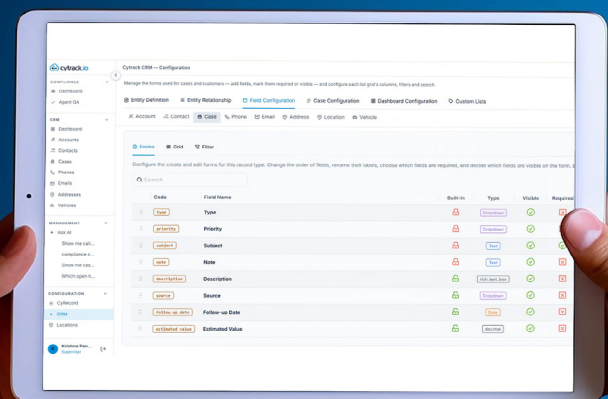
Automotive - vehicle make, model, VIN, and service history against the account.

Real Estate / Financial Services / Membership - property details, policy numbers, or membership tiers.

Trade & Field Services - equipment type, install date, and warranty status.

Custom field manager - example schema

FIELD NAME	FIELD TYPE
Fault category	Dropdown
Account number	Text
Escalated to manager	Checkbox
Follow-up due	Date
Product line	Dropdown



Your storage, your rules

For businesses with specific data residency or security requirements, the CyCX CRM contact database can be stored in a customer-designated storage location, rather than only in Cytrack's default environment - giving security-conscious customers direct control over where their customer data physically resides.

SUMMARY

Key benefits

- ✓ **Purpose-built for customer service**, not repurposed sales software
- ✓ **Account/contact architecture** with products and assets assigned for service context
- ✓ **Optional Case Management** with escalation, SLA tracking, and dashboards
- ✓ **Every channel** - calls, recordings, chat, SMS, WhatsApp, notes, email - on one timeline
- ✓ **Call Interaction Report** linking transcription and coaching to every case
- ✓ **Ask AI for instant**, conversational access to cases, customers, and calls
- ✓ **Configurable custom fields** for vertical industry alignment, with no developer required
- ✓ **Easy In, Easy Out** - fast to start, clean to export when you outgrow it
- ✓ **Works standalone** or alongside an existing CRM

One workspace. Every customer. Every case.

Talk to Cytrack about bringing CRM & Case Management into your contact centre.

