Good Software

User Manual

WiseApp

Version 12.2.0

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1. Introduction

WiseApp is a product from **Good Software** that helps organizations manage customer data throughout the customer lifecycle.

Purpose of this Manual

- Provide step-by-step guidance for new and experienced users
- Explain WiseApp features in detail
- Offer troubleshooting and support resources

Audience

This guide is intended for:

- **End-users** who need to manage customer data
- **Admins** responsible for configuration
- **Support teams** who assist customers

Tip: If you are new to WiseApp, start with the Getting Started section.

2. Getting Started

System Requirements

Requirement	Minimum	Recommended
Operating System	Windows 10 / macOS 11	Latest version
Browser	Chrome 100+, Firefox 100+, Safari 14+	Latest version
Internet Speed	5 Mbps	20 Mbps
Other	JavaScript enabled, cookies allowed	–

Installation & Access

WiseApp is a **cloud application**, so no local installation is required.

Steps to Access:

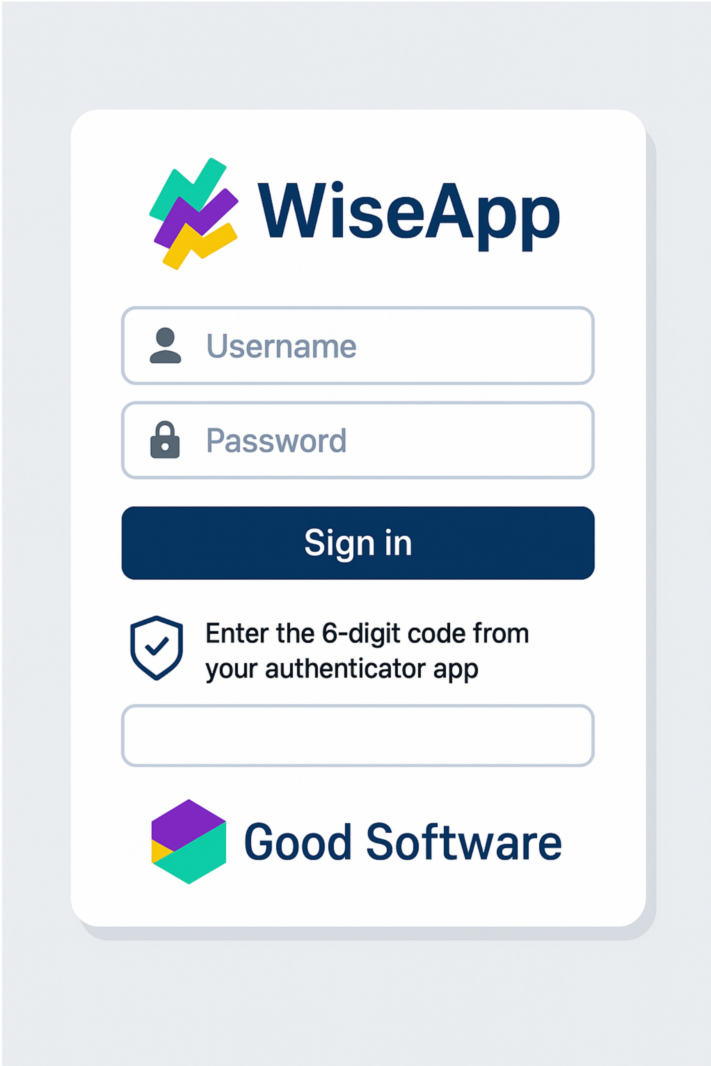
1. Open your browser
2. Go to https://wiseapp.goodsoftware.com
3. Log in with your organization credentials

Note: Make sure cookies and JavaScript are enabled in your browser.

First-Time Login

Steps for first-time users:

1. Enter your username and password provided by your admin
2. Accept the Terms of Service
3. Set up your profile (name, photo, contact info)
4. Enable multi-factor authentication if required



Wise App Login screen

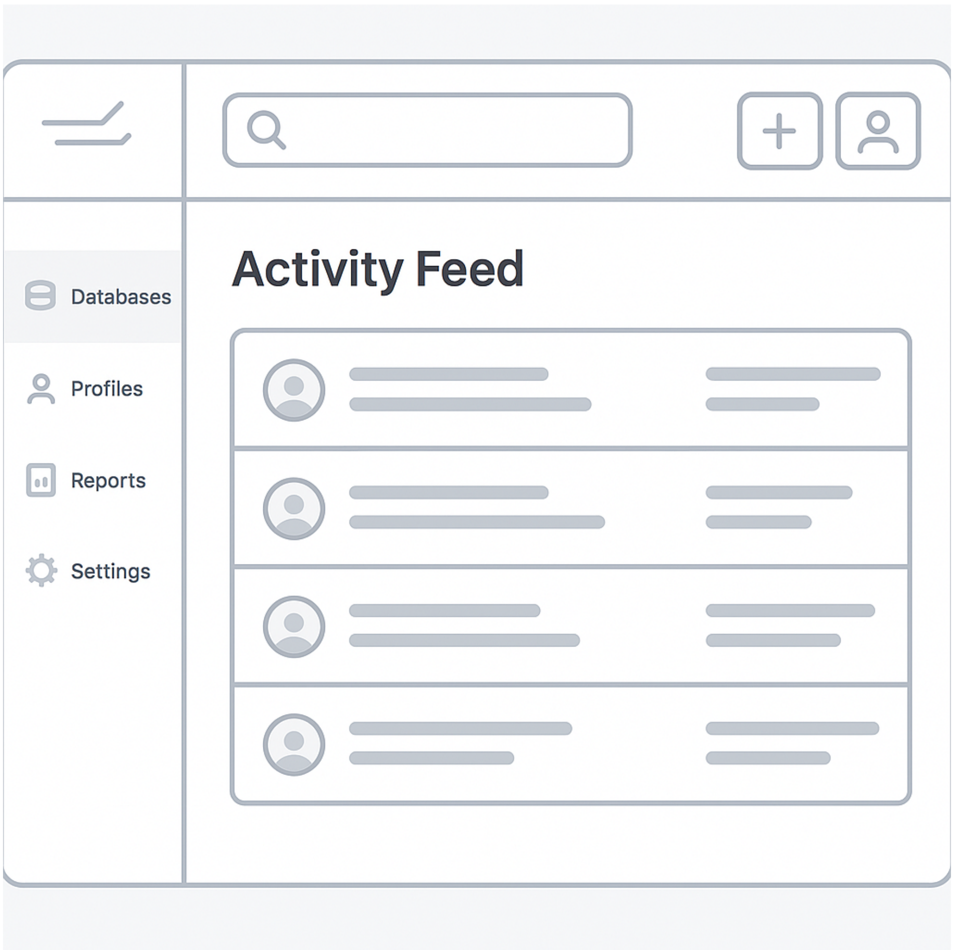
3. Product Tour

Portal Overview

The **WiseApp Portal** is the central hub for navigating and working with customer data.

Key Areas:

- **Navigation Menu (left side)**: Access main features including Databases, Profiles, Reports, and Settings.
- **Search Bar (top)**: Quickly find a customer record by name, ID, or email.
- **Activity Feed (center)**: Displays recent changes, customer updates, and workflow notifications.
- **Quick Actions (top-right)**: Add new customers, generate reports, or access your profile.



Wise App Portal Overview

User Profiles

Every customer has a **profile** where key data is stored and displayed.

A typical profile includes:

- **Basic Information**: Name, contact details, company.
- **Lifecycle Stage**: Prospect, Active Customer, Returning Customer, Churn Risk, etc.
- **Activity History**: Calls, emails, meetings, purchases.
- **Associated Data**: Linked databases or custom fields.

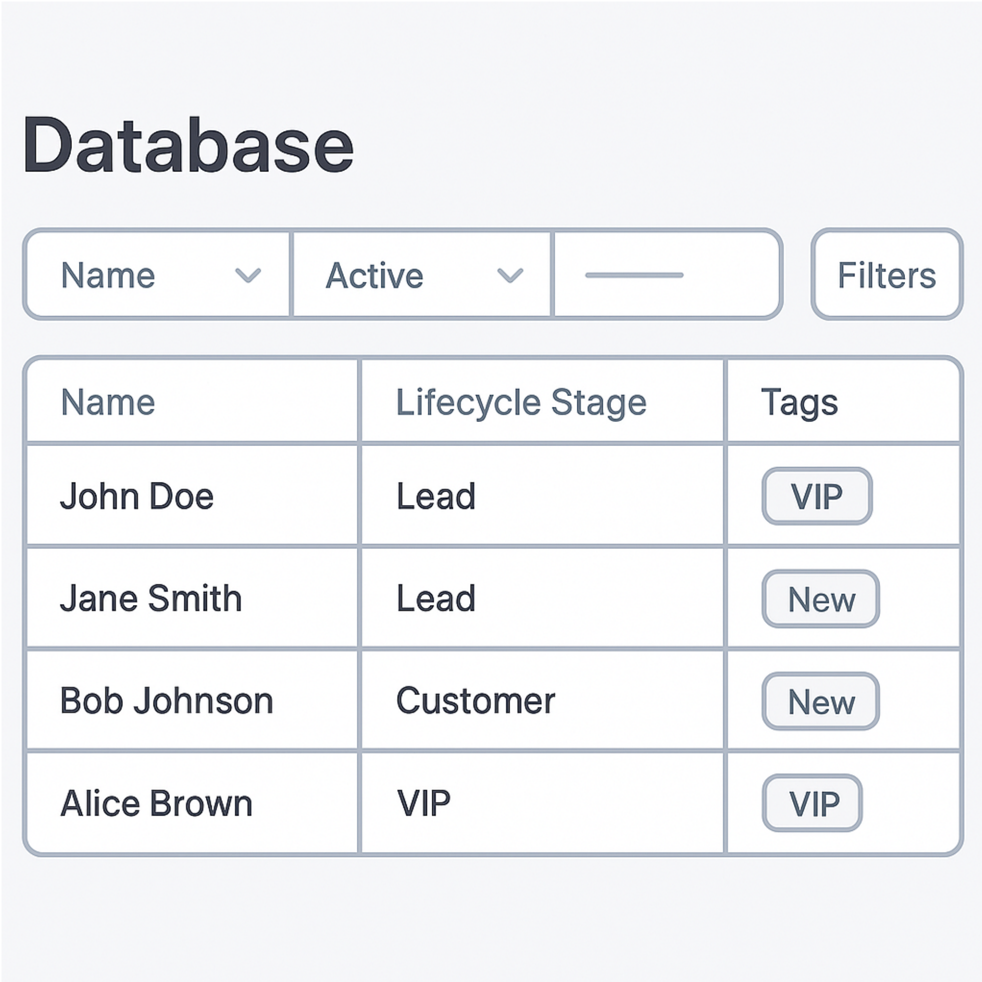
Use profile tags (e.g., VIP, At Risk) to categorize and prioritize customer interactions.

Databases

Databases allow you to store and organize large sets of customer records.

Database Features:

- Advanced filtering and search.
- Bulk import and export (CSV, Excel).
- Automated rules for updating fields (e.g., moving customers between lifecycle stages).
- Role-based permissions to control who can view or edit records.



Database example

4. Using WiseApp

Managing Customer Data

WiseApp allows you to create, update, and organize customer records throughout their lifecycle.

Adding a New Customer

1. Navigate to **Databases > Add Customer**.
2. Enter required details:
    - *Full Name*
    - *Email Address*
    - *Lifecycle Stage* (e.g., Lead, Active, At Risk)
3. Add optional fields such as *Phone Number*, *Company*, *Tags*, or *Notes*.
4. Upload attachments (contracts, onboarding documents, etc.).
5. Click **Save**.

> *Tip: Use the **Bulk Import** feature under Databases > Import to add multiple customers from a CSV file. Make sure to download the provided template so your column headers match WiseApp's required format.*

Editing Customer Data

1. Locate the customer profile via the **Search Bar** or in **Databases**.
2. Open the record and select **Edit**.
3. Update fields as needed (e.g., phone number, lifecycle stage).
4. Save changes.
5. All edits are logged in the **Activity History** for auditing.

Archiving or Deleting Records

- **Archiving**: Keeps the record in the database but hides it from default views. Useful for inactive or churned customers.
- **Deleting**: Only administrators can permanently delete a record. This action cannot be undone.

Warning: Before deleting a customer, ensure compliance with your organization's data retention policy.

Customer Lifecycle Stages

WiseApp tracks customers across standardized lifecycle stages:

Stage	Description	Example Actions
Lead	Initial contact but not yet qualified.	Capture basic details, send introduction email.
Prospect	Engaged and showing interest.	Schedule demo, send proposal.
Active Customer	Currently purchasing or using services.	Manage support tickets, upsell opportunities.
Returning Customer	Previously churned but re-engaged.	Track repeat orders, rebuild relationship.
Churn Risk	Low activity, potential loss.	Send reactivation campaign, assign account manager.

Best Practices for Lifecycle Management:

- Update lifecycle stages promptly to keep reports accurate.
- Use automated rules (set by Admins) to move customers based on behavior.
- Review churn risk reports weekly.

Searching & Filtering

Searching helps you locate records quickly, even in large databases.

Search Bar

- Enter keywords like **Name**, **Email**, or **Customer ID**.
- Use quotation marks `" "` for exact matches.

Filters

- Apply filters such as **Lifecycle Stage**, **Tags**, or **Date Created**.
- Combine multiple filters to narrow results.
- Click **Reset Filters** to return to the full view.

> *Tip: Save frequent searches as **Custom Views** to avoid repeating filter setup.*

Using SQL Queries (Advanced)

WiseApp includes an optional **SQL Workspace** for power users who need flexible queries beyond the standard filters. This is ideal for ad-hoc analysis, audit checks, and building custom views.

Before you start

- **Access:** Admins can grant *SQL Workspace* permission (read-only or read/write).
- **Schema (typical tables):**
  - `customers(id, full_name, email, lifecycle_stage, created_at, company, phone)`
  - `interactions(id, customer_id, occurred_at, channel, type)` – e.g., email, call, meeting
  - `tags(customer_id, tag)` – one row per tag
  - `orders(id, customer_id, total, status, placed_at)` *(optional, if enabled)*

> Tip: Prefer **read-only** access for exploration. Use **parameterized queries** for anything you might save/share.

Common read-only queries

1) Customer Growth (last 6 months)

```
SELECT
  DATE_TRUNC('month', created_at) AS month,
  COUNT(*) AS new_customers
FROM customers
WHERE created_at >= CURRENT_DATE - INTERVAL '6 months'
GROUP BY 1
ORDER BY 1;
```

2) Churn Risk (no interactions in 30+ days)

```
SELECT c.id, c.full_name, c.email, MAX(i.occurred_at) AS last_touch
FROM customers c
LEFT JOIN interactions i ON i.customer_id = c.id
GROUP BY c.id, c.full_name, c.email
HAVING COALESCE(MAX(i.occurred_at), TIMESTAMP '1970-01-01') < CURRENT_DATE
- INTERVAL '30 days'
ORDER BY last_touch NULLS FIRST;
```

3) Engagement (avg interactions per active customer, 90 days)

```
WITH active AS (
  SELECT id FROM customers WHERE lifecycle_stage = 'Active Customer'
),
recent_interactions AS (
  SELECT customer_id FROM interactions
  WHERE occurred_at >= CURRENT_DATE - INTERVAL '90 days'
)
SELECT
  ROUND(1.0 * COUNT(*) / NULLIF((SELECT COUNT(*) FROM active), 0), 2) AS
avg_interactions
FROM recent_interactions
WHERE customer_id IN (SELECT id FROM active);
```

4) Find customers by tag and recent activity

```
SELECT c.id, c.full_name, c.email
FROM customers c
JOIN tags t ON t.customer_id = c.id
WHERE t.tag IN ('VIP', 'Priority')
  AND EXISTS (
    SELECT 1 FROM interactions i
    WHERE i.customer_id = c.id
      AND i.occurred_at >= CURRENT_DATE - INTERVAL '14 days'
  )
ORDER BY c.full_name;
```

Reporting & Analytics

WiseApp provides built-in reports for tracking customer lifecycle performance.

Common Reports:

- **Customer Growth**: New customers added per month.
- **Churn Analysis**: Percentage of customers at risk.
- **Engagement Metrics**: Average number of interactions per customer.
- **Data Quality Report**: Highlights incomplete or outdated records.

Example Use Case:

- A sales manager reviews the *Customer Growth Report* weekly to track lead conversion.
- If churn risk increases, they drill into individual profiles and assign follow-up tasks to account managers.

Analytics report on customer

5. Troubleshooting & FAQs

Common Issues & Solutions

Issue	Cause	Solution
Cannot log in	Wrong credentials, expired password, or SSO issues	Use *Forgot Password* to reset. If SSO is enabled, contact IT for account reset.
Missing data	Filters applied or insufficient permissions	Clear filters. If still missing, check with your admin for access rights.
Slow performance	Weak internet connection, outdated browser, or large data load	Test internet speed, update your browser, and close unused tabs. If issue persists, contact IT.
Error: "Permission Denied"	User role does not allow access	Contact admin to adjust your permissions.
Import errors (CSV)	File format not matching template	Download the latest import template and reformat your file.
Multi-Factor Authentication not working	Authenticator app out of sync	Resync your app or request a temporary bypass from IT.

⚠ *Warning: If none of the solutions work, contact **Good Software Support** at support@goodsoftware.com.*

Provide:

- *Your username*
- *Browser version*
- *Screenshot of the error*
- *Steps you tried already*

Frequently Asked Questions

Q: Can I access WiseApp from my phone?
A: Yes, WiseApp supports mobile browsers. Some advanced reporting features may not be fully optimized on smaller screens.

Q: How often is my data saved?
A: Data is auto-saved in real-time. You can also manually save at any point.

Q: Can I undo a change after editing a customer profile?
A: Yes, you can revert to a previous version of the record by checking the **Activity History**.

Q: How secure is WiseApp?
A: WiseApp uses enterprise-grade encryption (AES-256) and supports multi-factor authentication. Data is stored in compliance with GDPR and other major regulations.

Q: Can I customize lifecycle stages?
A: Yes, administrators can rename or add new stages under **Admin Settings > Lifecycle Configuration**.

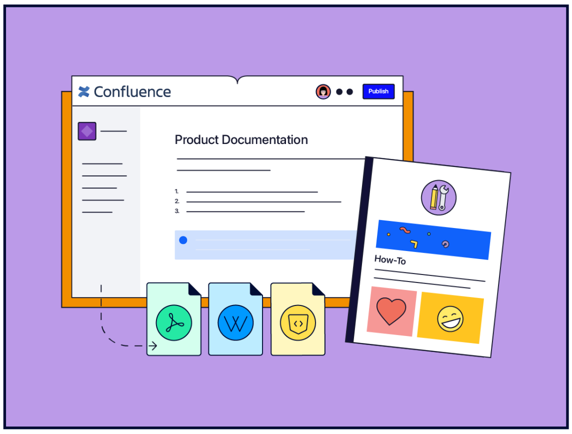
For a full list of FAQs, visit the WiseApp Knowledge Base.

6. Support & Resources

- 📧 **Support Email**: support@goodsoftware.com
- 📚 **Knowledge Base**: https://docs.goodsoftware.com/wiseapp
- 💬 **Community Forum**: https://community.goodsoftware.com
- 🎓 **Training Webinars**: Available monthly through the Good Software Academy.

> ✅ *Always check the Knowledge Base before opening a support ticket — most common issues are already covered there.*

Thanks for Checking Out This PDF Export Example



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