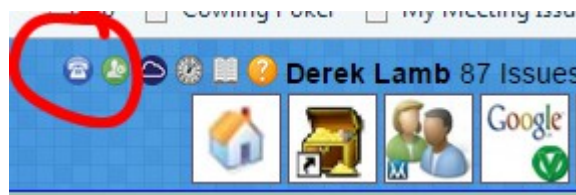


VM3COP27.08 Intrastat Telephone Logging System.

Take a New Call:



Click the Blue telephone Icon, then Click the Take a new call link.



CALL ID #61 | Ongoing Query | Turn to Order | Complete Telephone Call | CONTACT not Linked to CRM Database

Company : Contact : Telephone :

Notes :

Current User: Derek Lamb | Deadline:

Information Search:

Show all Calls

Enter any notes in the Notes Field.

Start by enter the Company name, as you do so a list will appear on the left, the more you type the list should get closer to an known companys and contacts,

CALL ID #61 | Ongoing Query | Turn to Order | Complete Telephone Call | CONTACT not Linked to CRM Database

Company : Viamed | Contact : Joe Smith | Telephone :

Notes :

Current User: Derek Lamb | Deadline:

Information Search:

Show all Calls

Company	Contact	Opera	Tel
Viamed Limited	Joe Smith	00000002	ADD Joe Smith to CRM
Viamed Limited	Derek Lamb	00000002	Link to CRM
Viamed Limited	Jonathan	00000002	Link to CRM
Viamed Ltd	Joe Smith	00000002	ADD Joe Smith to CRM
Viamed Ltd	Cathy Green	00000002	Link to CRM
Viamed Ltd	Derek Lamb	00000002	Link to CRM
Viamed Ltd	Fred Blo	00000002	Link to CRM
Viamed Ltd	Fred Blog	00000002	Link to CRM
Viamed Ltd	Fred Blog2	00000002	Link to CRM
Viamed Ltd	Fred Blogg	00000002	Link to CRM
Viamed Ltd	Fred Bloggs	00000002	Link to CRM
Viamed Ltd	Helen Lamb	00000002	Link to CRM
Viamed Ltd	John Lamb	00000002	Link to CRM
Viamed Ltd	Keith Taylor	00000002	Link to CRM
Viamed Ltd	Ryan Swaine	00000002	Link to CRM
Viamed Ltd	Steve Hardaker	00000002	Link to CRM
Viamed Ltd	Steve Nixon	00000002	Link to CRM
Viamed Ltd	Temp Name	00000002	Link to CRM

Note the RED Contact not linked...

Clicking a Button in the list either ADD to CRM or Link to CRM

Add will add a New contact to an existing organisation,

Link will link the listed Contact to the current Telephone call.

CALL ID #61 Ongoing Query Turn to Order Complete Telephone Call

Company : Viamed Ltd Contact : Derek Lamb Telephone : 01535 643542

Notes :

Current User : Derek Lamb Deadline:

Information Search:

CONTACT LINKED

Derek Lamb
Viamed Ltd
Managing Director
Information Systems
derek.lamb@viamed.co.uk
15/17 Station Road
Crosshills
Keighley
Bradford
West Yorkshire
BD20 7DT (Normal UPS Rates)
UK
Tel: 01535 634542
Opera: 00000002
Type: Customer
Fax: 01535 635582
Mail Department
Responsibility

Show all Calls

Note the GREEN contact linked bar when a contact is selected. If this Bar is Green advanced information searches are possible, if the bar is RED, you only have limited search options.

Main Buttons:

Ongoing Query Turn to Order Complete Telephone Call

Clicking Ongoing Query will complete the Call but leave it ACTIVE in the call log active list, Note how you will have an indication of Active calls you have assigned to you in your main intrastats information bar.

Derek Lamb 1 Calls 87 Issues | Imp

Clicking Turn to Order will take you to the Existing Intrastats Telephone Order Page, any notes you have typed will be transferred to the order page,

Clicking Complete Telephone Call will close the Call screen and Complete the Call from the call log active list.

Under the Notes field

Current User : Derek Lamb De

You can select the current user the call is assigned to in the call log active list. That user will then get the indication in the main intrastats information bar that a call has been taken that they need to deal with. This can be used if a call is for a particular member of staff but they are currently unable to take the call. - IT does NOT transfer the call thru to the member of staff – that must still be done using the regular Phone system.

Advance Search Features if,

CONTACT LINKED

If during the call you have linked to the CRM (Green bar CONTACT LINKED),
you can use the Information search,

The screenshot shows a software interface for information search. On the left, there is a large blue rectangular area. To its right, the text "Information Search:" is followed by a white input field. Below the input field, the text "Search : Stock" is displayed. To the right of the input field is a dropdown menu. The dropdown menu is currently open, showing a list of search categories. The categories are: "Stock" (which is highlighted with a blue background), "Serial Numbers / Barcodes", "SRS Returns", "Invoice", "Document", "Outstanding Orders", and "History of Call #61".

In the Pull down you can select to search customer specific Repairs, Invoices , Outstanding orders,