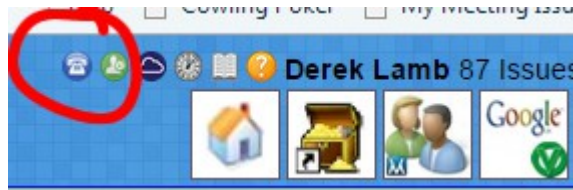


VM3COP27.08 Intrastats Telephone Logging System

Take a new call:



Click the blue telephone icon, then click the 'Take 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 entering the Company and/or Contact name, as you do so a list will appear on the right, the more you type the list should decrease in size to a known company 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	10000002	ADD Joe Smith to CRM
Viamed Limited	Derek Lamb	10000002	Link to CRM
Viamed Limited	Jonathan	10000002	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:

CALL ID #1271 - Taken by Katie Evans On Wednesday 22nd of June 2016 03:45:30 PM

☒ Generic ☐ Viamed ☐ Vandagraph ☐ VST ☐ Human Med ☐ Viamed Properties

Ongoing Query / I'm Done for now | Turn to Order | Create Issue | Type: Call | Complete/Close off Telephone Call

Select the name of the company called.

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.

Clicking 'Create Issue' will generate a new issue

Under the Notes field

Current User : Derek Lamb

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 through to the member of staff – that must still be done using the regular Phone system.

This page is also used for obtaining feedback. If a customer calls or emails in response to a malishot / e-mailshot then it must be logged here. This is done by selecting whether the contact was a call or an email, and clicking the relevant box next to the mailshot they are responding to.

CALL ID #1271 - Taken by Katie Evans On Wednesday 22nd of June 2016 03:45:30 PM CONTACT not Linked to Contact Management Search

☒ Generic
 ☐ Viamed
 ☐ Vandagraph
 ☐ VST
 ☐ Human Med
 ☐ Viamed Properties

Ongoing Query / I'm Done for now
 Turn to Order
 Create Issue
 Take Call
 Complete/Close off Telephone Call

Company : Contact :
 Telephone : Email :
 Notes :

Current User: Katie Evans Deadline:

Information Search:

Feedback To	Description
<input type="checkbox"/>	MD300 Paediatrics Email Mailing
<input type="checkbox"/>	MD300 Series Mailing - Sent to Paediatrics Group
<input type="checkbox"/>	Automotive Catalogue Mailing
<input type="checkbox"/>	CO Screen Carbon Monoxide Monitor
<input type="checkbox"/>	CO Check CO Monitor

Show all Calls - Show all UN-linked Calls

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,

Information Search:

Search : Stock

Stock
 Serial Numbers / Barcodes
Stock
 SRS Returns
 Invoice
 Document
 Outstanding Orders
 History of Call #61

In the pull down you can select to search customer specific 'Repairs', 'Invoices', 'Outstanding Orders', 'SRS Returns' etc