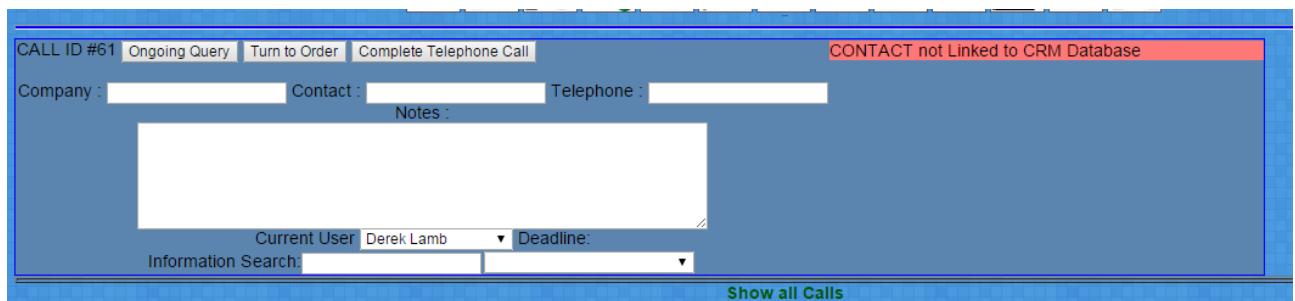


VM3COP27.08 Intrastat Telephone Logging System.

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

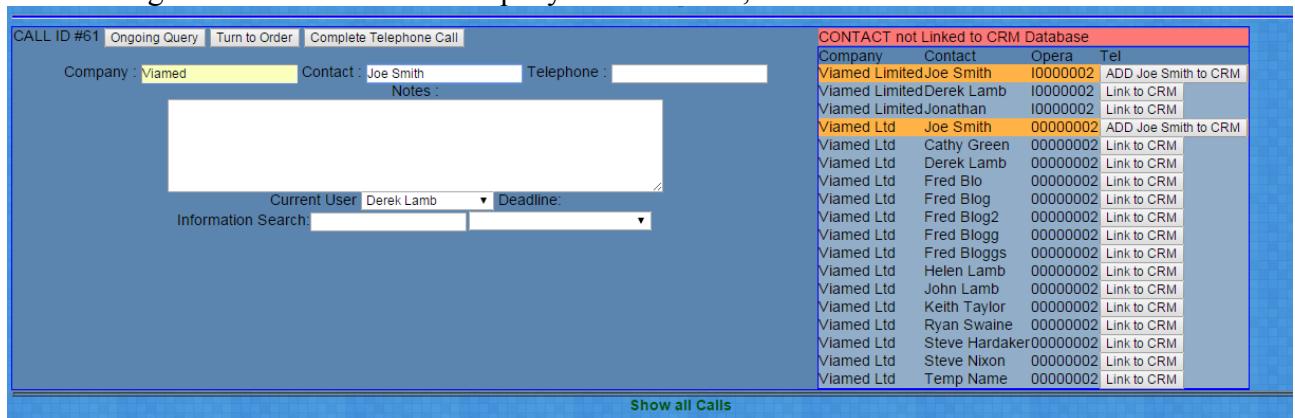
Company : Contact : Telephone :
Notes :

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 : Contact : Telephone :
Notes :

Current User Derek Lamb Deadline:
Information Search:

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

Show all Calls

Note the RED Contact not linked...

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

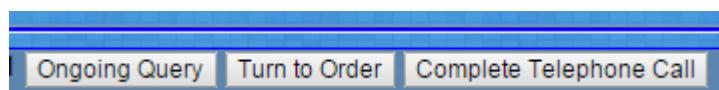
Add will add a New contact to an existing organisation,

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 :
<div style="border: 1px solid black; height: 100px; width: 100%;"></div>						
Current User: Derek Lamb Deadline: <input type="button" value="▼"/> Information Search: <input type="button" value="▼"/>						
Show all Calls						
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: <input type="button" value="▼"/> Responsibility: <input type="button" value="▼"/>						

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:



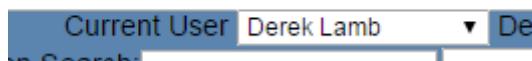
Clicking Ongoing Query will complete the Call but leave it ACTIVE in the call log active list, Note how you will have an indication of Active calls you have assigned to you in your main intrastats information bar.



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



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.

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,



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