CRM -> Call Centre

ତି Call Centre	- 8 🛛
🚉 Contacts 👌 Customers 📠 Customer Statistics 🦻 Location Map 📄 Call Centre History Notes 👌 Customer Assets 🗵 Customise	
Lix Detai	
Ticket ID Call Method Call Style Date Time Service Status Additional Fields 2189 Phone Standard [19/10/2021] 15:00 Logged Additional Fields Who is Ticket for Igel Constant [19/10/2021] 15:00 Logged Daily OrderValueE st Daily OrderValueE st Type Concerning Nigel Conston [20] Standard Customer Additional Details Asset Phone 109 918 70265 Mobile Email info@1800Acgrees.cong Lead Source [20] [20]	Close Add Save Cancel C
What Type of Cal Image: Tracking Code Image: Tracking Code Description Ostendo Not Stating Up. Urgent Ticket Call Relates to Relates to Image: Tracking Code	
Call Notes Action Information Call Resolution Information Service Level Service Response Standard Information Time Line 18/10/21 ADMIN: 284crdd does not statup. Error message indicates that the database is not available. Requires further action Required by 18/10/2021 Priority 3Normal Pipeline Default Current Stage Close Olf Cal Close Call Date Time	

- 1. Click the 'Add' button.
- For customer contacts: From the main menu select Sales -> Customers. Locate the customer and select the 'Detail' tab.

For supplier contacts: From the main menu select **Purchasing** -> **Suppliers**. Locate the supplier and select the '**Detail**' tab.

Customers									
🔟 Customer Statistics 🔀	Item Pricing	🔂 Descriptor Pricing	😭 Customer Type	s 🕎 Custome	er Regions 🛛 🕎 C	ustomer Codes	🕎 Customer Sl	hipping Methods	🔽 Customise
List Detail							H4 44 4	b b b	
Customer		Contact	Details						Close
APG Architects		Phone	Fax		Mobile				Add
Customer Printout Name		07 839 5	9049		021 921 947				Save
APG Architects		Website		Email					
Postal Address					architects.com	1			Cance
P 0 Box 286		Custome		Primary Conta					🛛 🗶 Delete
		Custome	er _	 Keirin Hoad 	P	₫ (3			🕼 Relate
		General	Pricing & Invoicing	Defaults Output	ts				
		Billing C	ustomer 🔲 APG Arch	itects	P	'			Repor
City Hamilton Sta	te	Dining Ex		C					

- 3. To remove a Primary Contact, first delete the name that is in the Primary Contact field.
- 4. Click on the pencil-on-paper icon to the right of the Primary Contact field; this opens up the Contact Master table, filtered for the customer/supplier you are viewing.

0	Contacts			-			_						
	🗿 Contact Pr	operties											
	List Detail												
	Contact Type	Contact Name	Customer / Supplier	Titl	e First Name	Last Name	Position	Phone	Mobile	Fax Email		-	Close
•	Customer	Keirin Hoad	APG Architects							Keirin@A	PGarchitects.com		- Date
	Customer	email2	APG Architects							v.assoc@	extra.co.nz		Add 📔
Γ													Save Save
													Cancel
													V Dalata

- 5. Click 'Add' to add a new contact, click 'Delete' to delete the contact you have highlighted.
- 6. To edit, double click on the contact you have highlighted, or click the '**Detail**' tab at the top.

Contact	ts			-		Trail.		
📓 Conta	ct Properties							
List D	etail							
Contac	t Settings –						-	Close
Contact			Contact Type		Company Name			📄 Add
Keirin H	oad		Customer	-	APG Architects	2		Save
Contac	t Details 🗕						•	🔊 Cancel
Title	First Name		Last Name		Position	Phone	-	🗶 Delete
Fax		Mobile		Email		_		归 Related
				Keirin@API	Garchitects.com			Reports
Notes								📲 Outlook

- 7. Edit the information as required (note: the Contact Name field is the unique field for the contact and cannot be changed once it has been saved).
- 8. Click the 'Save' button and 'Close' button to close the Contacts screen.
- 9. Back at the customer/supplier 'Detail' screen, click on the magnifying glass and select a new Primary Contact.

Call Centre	_ 🗆 🔀
🔝 Contacts 👌 Customers 🔚 Customer Statistics 🚀 Location Map 📑 Call Centre History Notes 👌 Customer Assets 🛛 🖂 Customise	
List Detail	
Ticket ID Call Method Call Style Date Time Service Status Call Status Additional Fields	Close
218 Phone 🖌 Standard 🔎 16/10/2021 🗙 15:00 😂 Loggid Action Required	Add
Who is Ticket for Dpportunity Rating	Save
Who Address	🔊 Cancel
Type Contact Company	🗙 Delete
Customer 🖂 Nigel Cranston 🖉 🖉 180 Degrees Ltd 🖉 🦉 Standard Customer	🕼 Related
Additional Details	Reports
Phone 09 918 7026 Mobile Email into@1904egrees.co.ng Lead Source	
What Type of Call	
Classification Service 2 Sub Class Request 2 Tracking Code	
Description Ostendo Not Starting Up. Urgent Ticket	
Call Relates to	
Relates To Call Only 🕑 Create Order Linked To	
Call Notes Action Information Call Resolution Information Service Level Service Response Standard Information Time Line	
Lan voies Action Information Lain resolution information pervice Level pervice response Standard Information Time Line	
Optimized does not statup. Error message indicates that the database is not available.	
Requires further action 🗹 Required by 18/10/2021 🔍 Priority 3-Normal 💟 Pipeline Default 😰 Current Stage	
Close Olf Call	
Close Call Date V Time	

- 10. **'What Type of Call'** section: Populate as appropriately
- 11. **'Call Relates to'** section: If this is not just a **'Call Only'** ticket you have the option to link this ticket to one of seven systems
 - a. Job Order
 - b. Sales Order
 - c. Item
 - d. Customer Asset
 - e. Company Asset
 - f. Purchase Order
 - g. Sales Invoice

12. 'Call Notes' tab: Allows you to enter a detailed note relating to the ticket.

Call Notes Acti	on Information	Call Resolution In	iormation Se	rvice Level S	ervice Respons	e Standa	ard Information	Time Line					
Seq Stage	Action Seq	Action Description	Assigned To	Required Date	Action History	Complete	Sign Off Date	Signed Off By	Emailed CC	To Auto Email	Auto Email Leadtime	Required Time	Required Time
10 Standard													

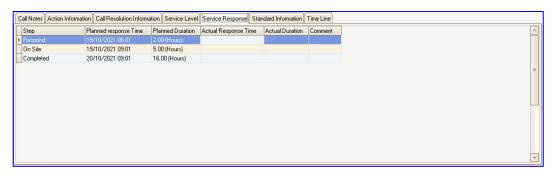
13. 'Action Information' tab: Allows you to assign employee to specific tasks and also capture when these tasks have been completed.



14. **'Call Resolution Information'** tab: Allows you to document the resolution.



15. 'Service Level' tab: Allows you to document the service level requirements.



16. 'Service Response' tab: Allows you to document the service response.

Call Notes Action Informati	tion Call Resolution Information Service Level Service Response Standard Information Time Line	
Expected Revenue	\$0.00	
Manual Probability %		
Calculated Probability %		0
Responsibility		
Strengths		=
Weaknesses		
		V

17. **'Standard Information'** tab: Allows you to capture a set of standard information related to the ticket.

Call Notes	Action Information	Call Resolution Informati	on Service Leve	Service Respons	se Standard Info	rmation Time Line				
00:00:00	22:46:45 [Req Date] 2021-1		20:20:17	19:07:03	17:53:49	16:40:34	15:27:20	14:14:06	13:00:52	11:47:38
Ŷ										

- 18. **'Time Line'** tab: This displays the time line of the various events that you have identified in the previous screens.
- 19. When you have completed entering the appropriate data then click the 'Save' button.
- 20. Click the 'Close' button to close the CRM ticket.