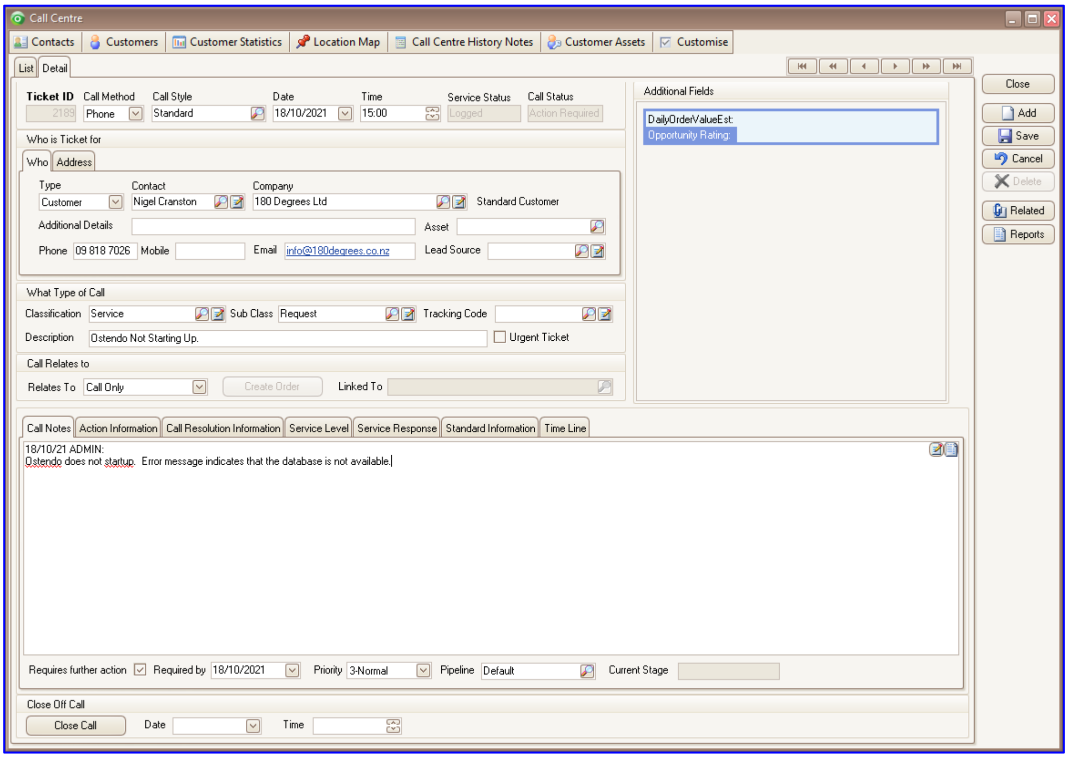
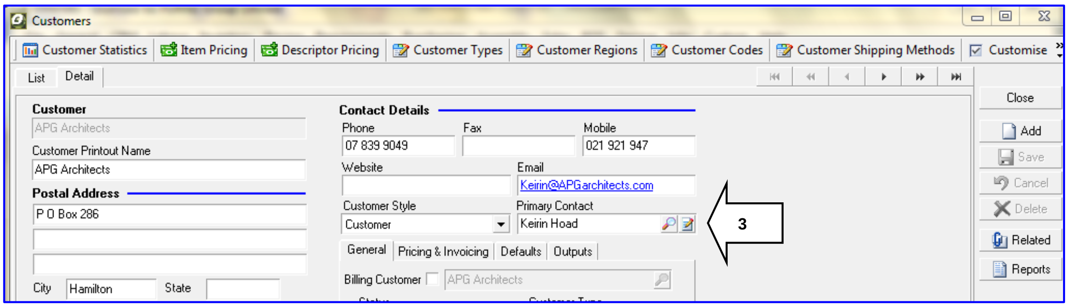
CRM -> Call Centre

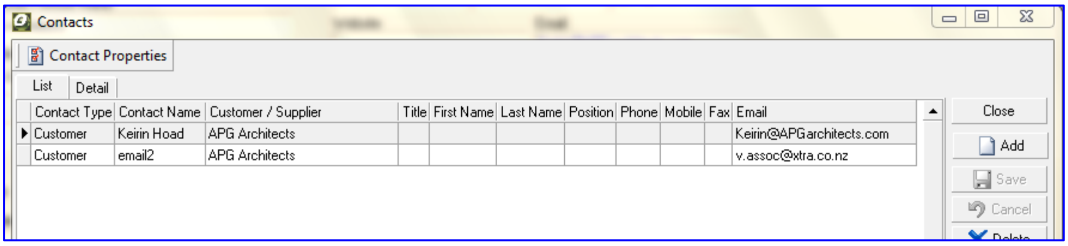


1. Click the ‘**Add**’ button.
2. For customer contacts: From the main menu select **Sales** -> **Customers**. Locate the customer and select the ‘**Detail**’ tab.

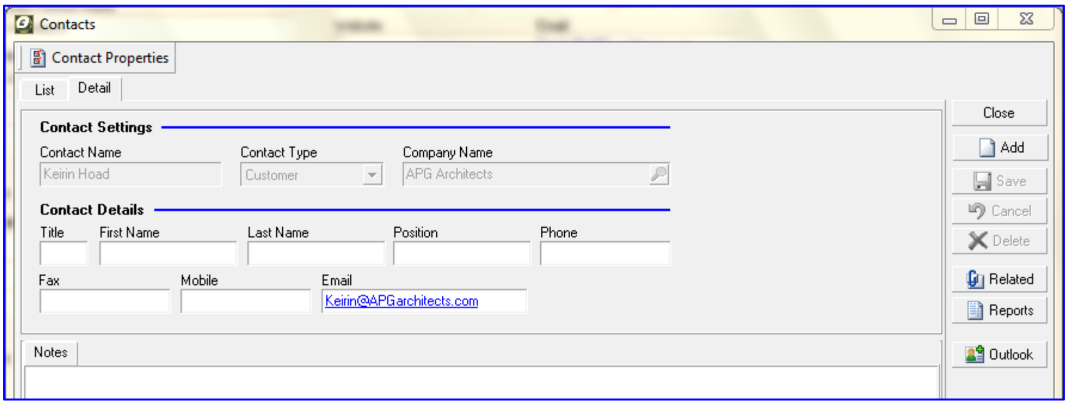
   For supplier contacts: From the main menu select **Purchasing** -> **Suppliers**. Locate the supplier and select the ‘**Detail**’ tab.



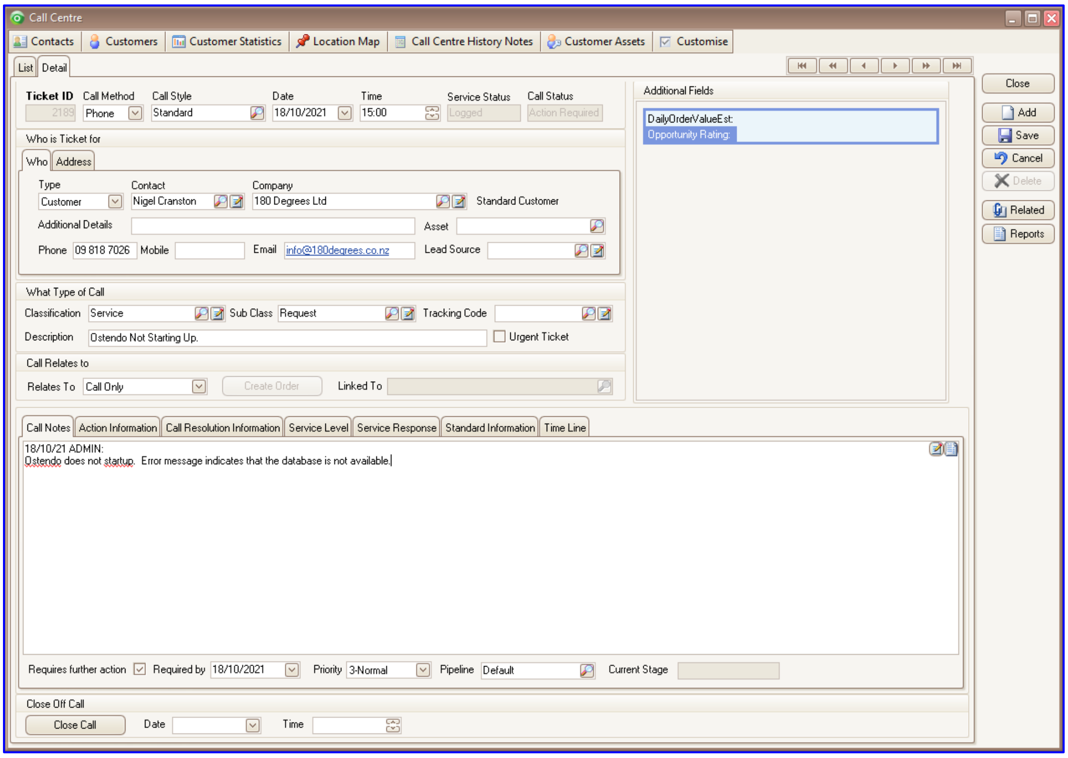
3. To remove a Primary Contact, first delete the name that is in the Primary Contact field.
4. Click on the pencil-on-paper icon to the right of the Primary Contact field; this opens up the Contact Master table, filtered for the customer/supplier you are viewing.



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.

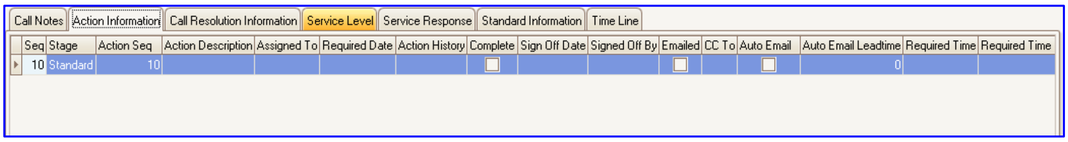


7. Edit the information as required (note: the Contact Name field is the unique field for the contact and cannot be changed once it has been saved).
8. Click the '**Save**' button and '**Close**' button to close the Contacts screen.
9. Back at the customer/supplier '**Detail**' screen, click on the magnifying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

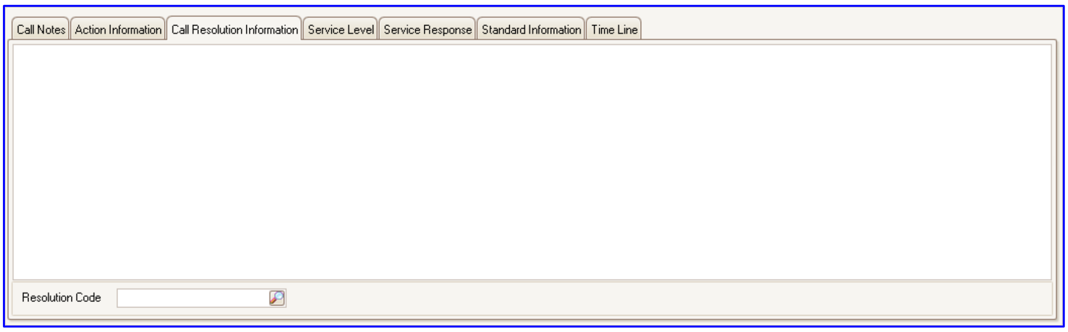


10. '**What Type of Call**' section: Populate as appropriately
11. '**Call Relates to**' section: If this is not just a '**Call Only**' ticket you have the option to link this ticket to one of seven systems
    a. Job Order
    b. Sales Order
    c. Item
    d. Customer Asset
    e. Company Asset
  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

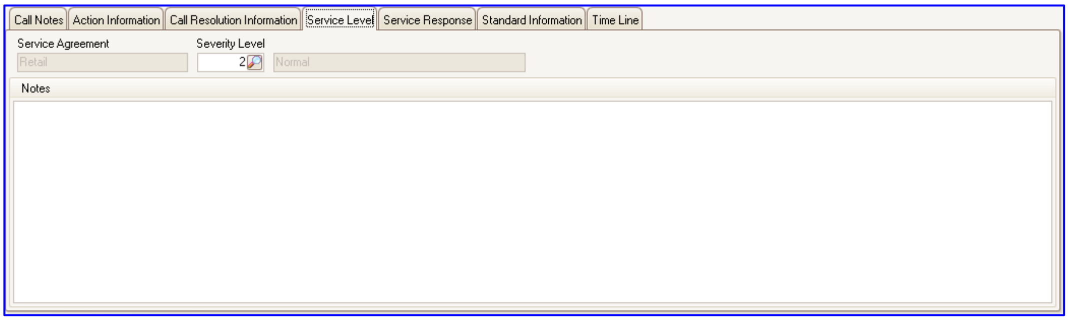
12. ‘**Call Notes**’ tab: Allows you to enter a detailed note relating to the ticket.



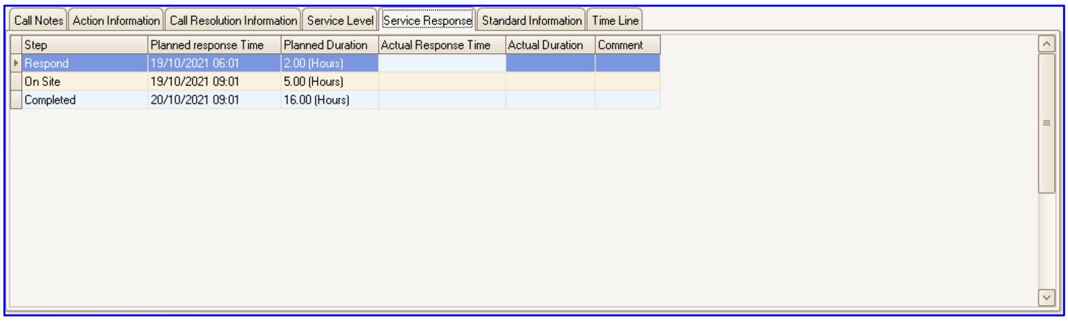
13. ‘**Action Information**’ tab: Allows you to assign employee to specific tasks and also capture when these tasks have been completed.



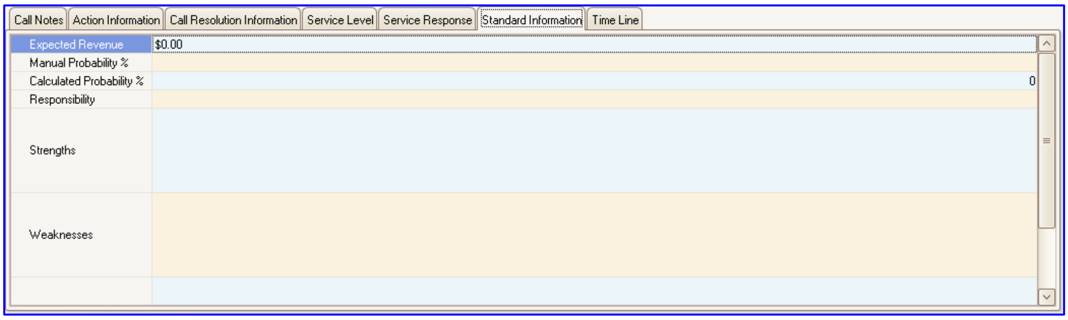
14. ‘**Call Resolution Information**’ tab: Allows you to document the resolution.



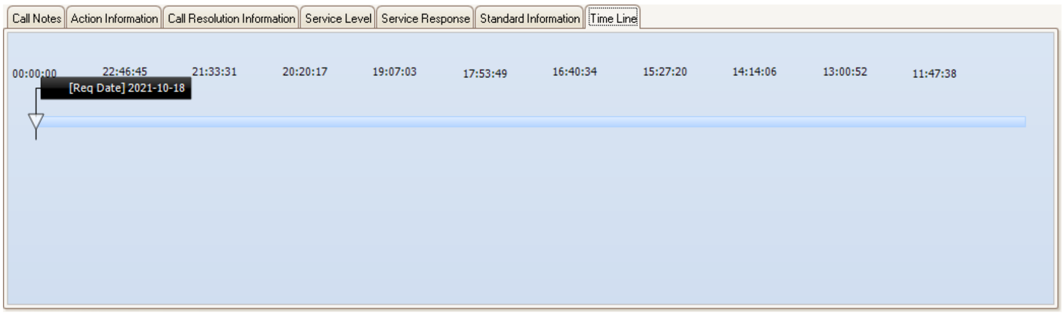
15. ‘**Service Level**’ tab: Allows you to document the service level requirements.



16. ‘**Service Response**’ tab: Allows you to document the service response.



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



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.