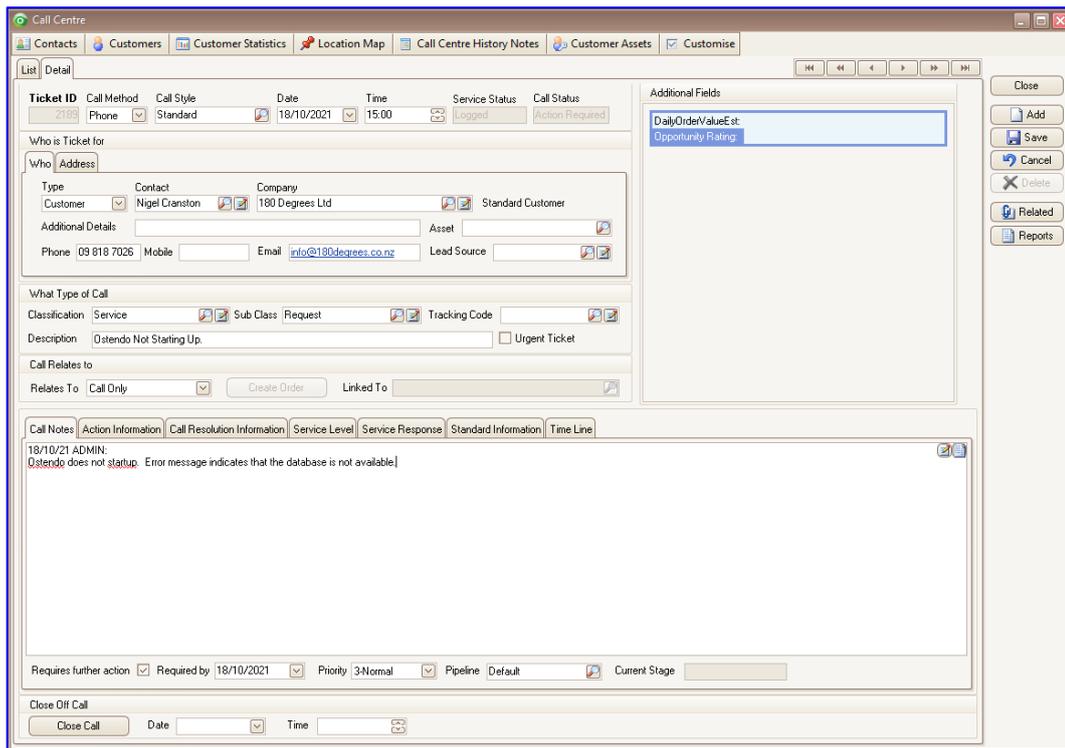
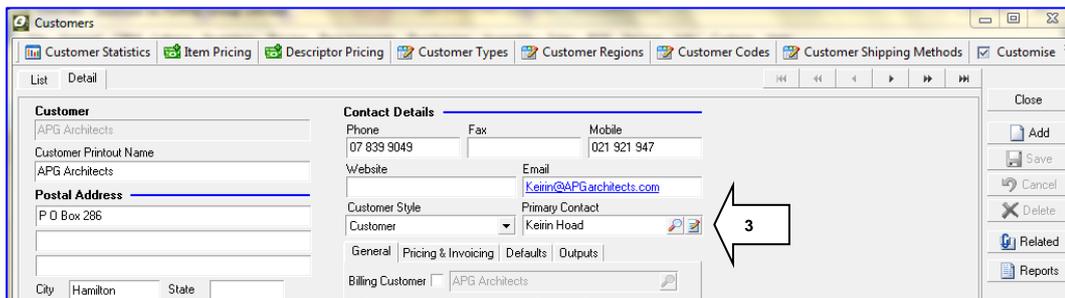


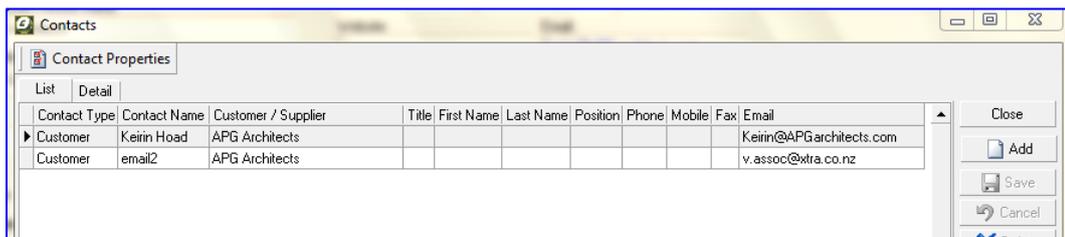
CRM -> Call Centre



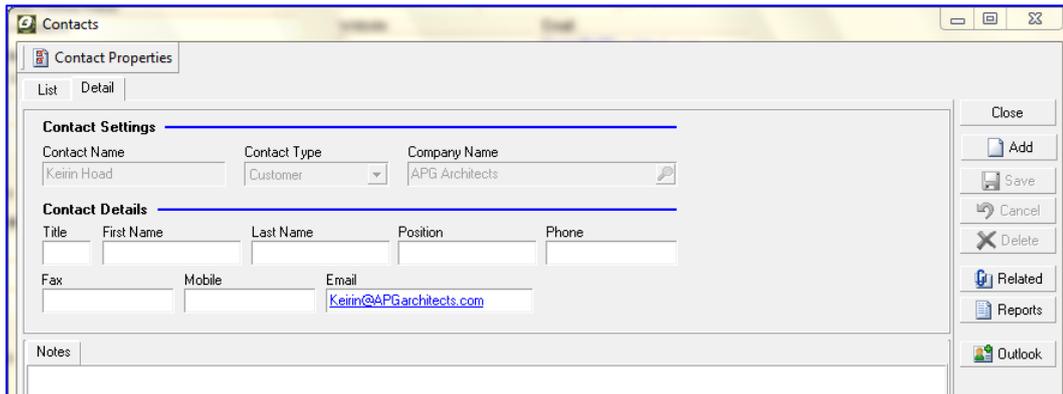
1. Click the 'Add' button.
2. For customer contacts: From the main menu select **Sales -> Customers**. Locate the customer and select the 'Detail' tab.
For supplier contacts: From the main menu select **Purchasing -> Suppliers**. Locate the supplier and select the 'Detail' tab.



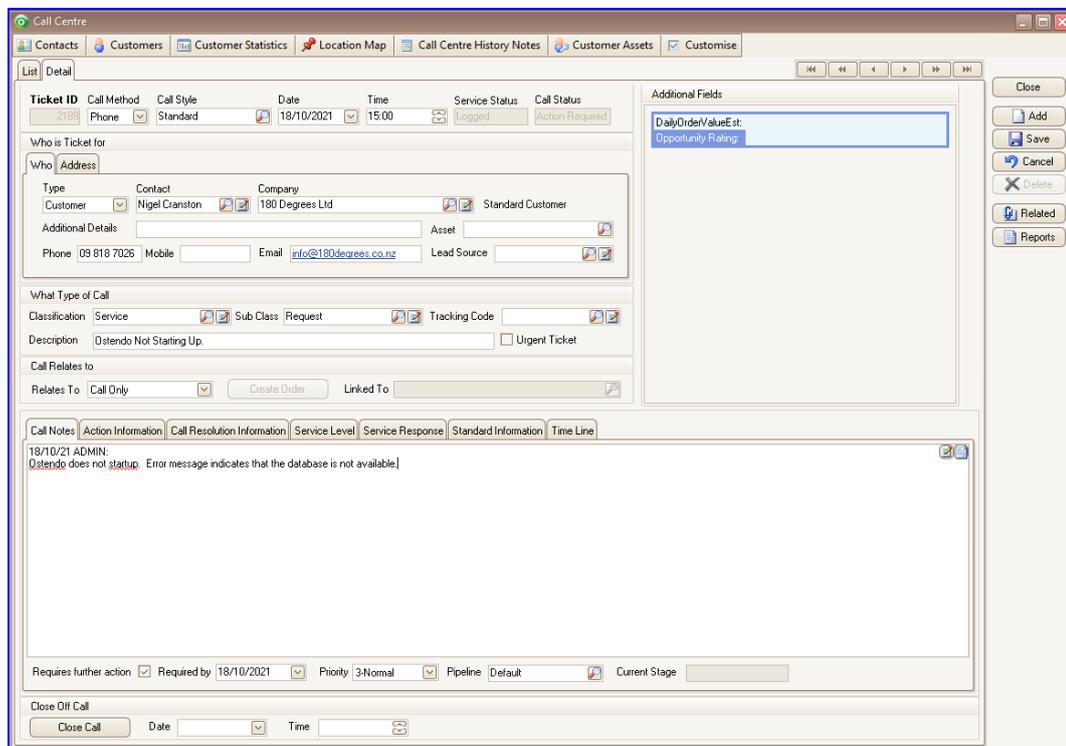
3. To remove a Primary Contact, first delete the name that is in the Primary Contact field.
4. Click on the pencil-on-paper icon to the right of the Primary Contact field; this opens up the Contact Master table, filtered for the customer/supplier you are viewing.



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.

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	10					<input type="checkbox"/>			<input type="checkbox"/>		<input type="checkbox"/>	0		

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

Call Notes	Action Information	Call Resolution Information	Service Level	Service Response	Standard Information	Time Line
Resolution Code <input type="text"/>						

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

Call Notes	Action Information	Call Resolution Information	Service Level	Service Response	Standard Information	Time Line
Service Agreement <input type="text" value="Retail"/>						
Severity Level <input type="text" value="2"/> (Normal)						
Notes						

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

Step	Planned response Time	Planned Duration	Actual Response Time	Actual Duration	Comment
Respond	19/10/2021 06:01	2.00 (Hours)			
On Site	19/10/2021 09:01	5.00 (Hours)			
Completed	20/10/2021 09:01	16.00 (Hours)			

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

Field	Value
Expected Revenue	\$0.00
Manual Probability %	
Calculated Probability %	0
Responsibility	
Strengths	
Weaknesses	

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.