Call Manager Usage

The Call Manager is used for basic business relations contact. It can output documents, emails etc conditionally using a wizard style interface in the following formats:

- Browse a list on screen
- Print a list
- Print letters from a standard letter form
- Produce labels
- Send emails
- Export to a file
- Make phone calls from a list

The conditions available to output by are:

- By type (customer, supplier, prospect etc
- By special member filter (status in the contacts section of the phone/address book)
- By grading (phone/address)
- By next contact date
- By state
- By postcode
- By city

These options can be mixed eg; you can choose type – say customer, graded by a chosen grading, from a chosen city.

- From Contact Database

This option is used alone to broadcast to a specific group or type of contact. It will send to all contacts within the chosen group eg; Sales Managers or Purchase Managers etc.

There are also other options:

- Customer sales by value (all those who have reached or exceeded a predetermined value for a chosen period of time)
- Debtor control (all those who owe money in a predetermined aging period)

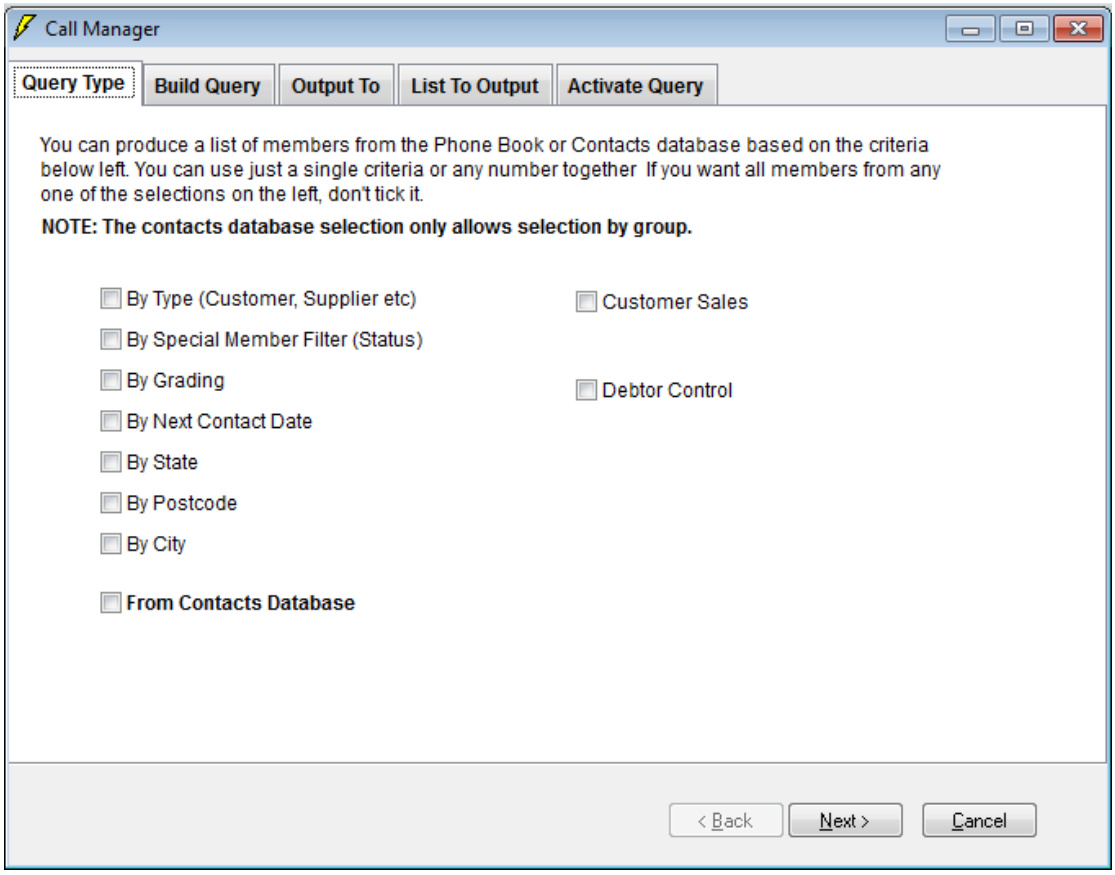
Templates

Of special mention is the fact that the Call Manager uses the Letters and Emails writer (Administration – top left button). This concept allows the building of 'templates' of letters or emails to be used in mass broadcasting. Letter and Email templates are only the 'body' of the document ie; the text between the address and salutation down the signature. The header and signature information is handled using variables from your own company information database.

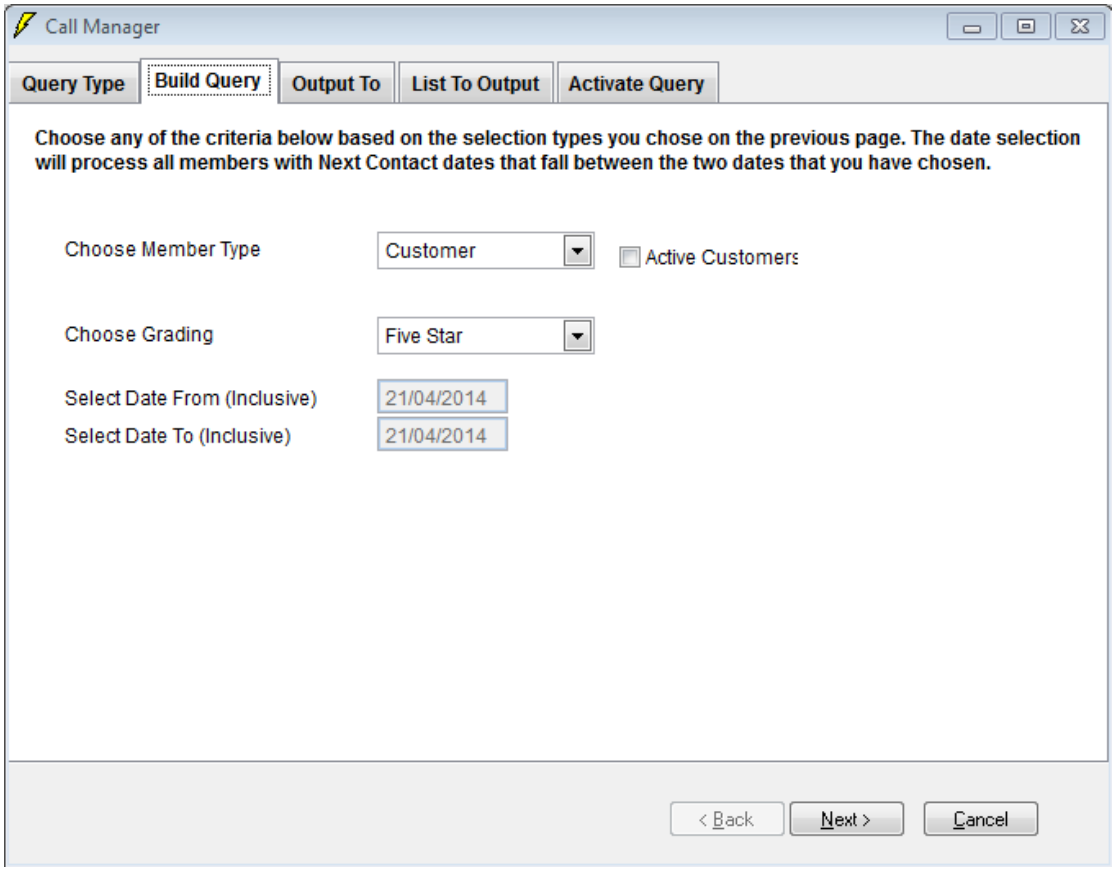
Each time you run the Call Manager for letters you can choose not only the letter template, but you can also choose one of six form layouts. Each of these form layouts can have different headers and footers with pictures etc so you can customise different forms for different purposes.

Steps To Use Call Manager

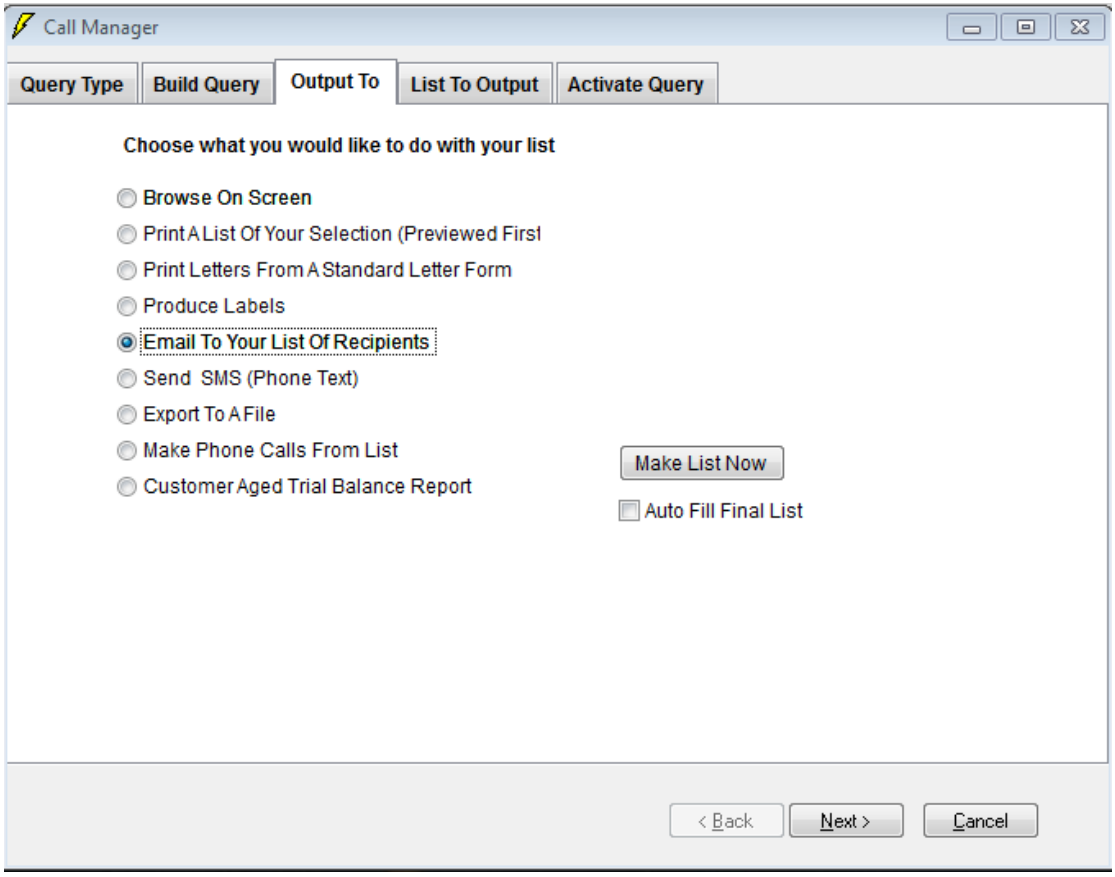
Choose the filtering option you would like bearing in mind all checkboxes on the right can be mixed, while Customer Sales and Debtor Control work by themselves.



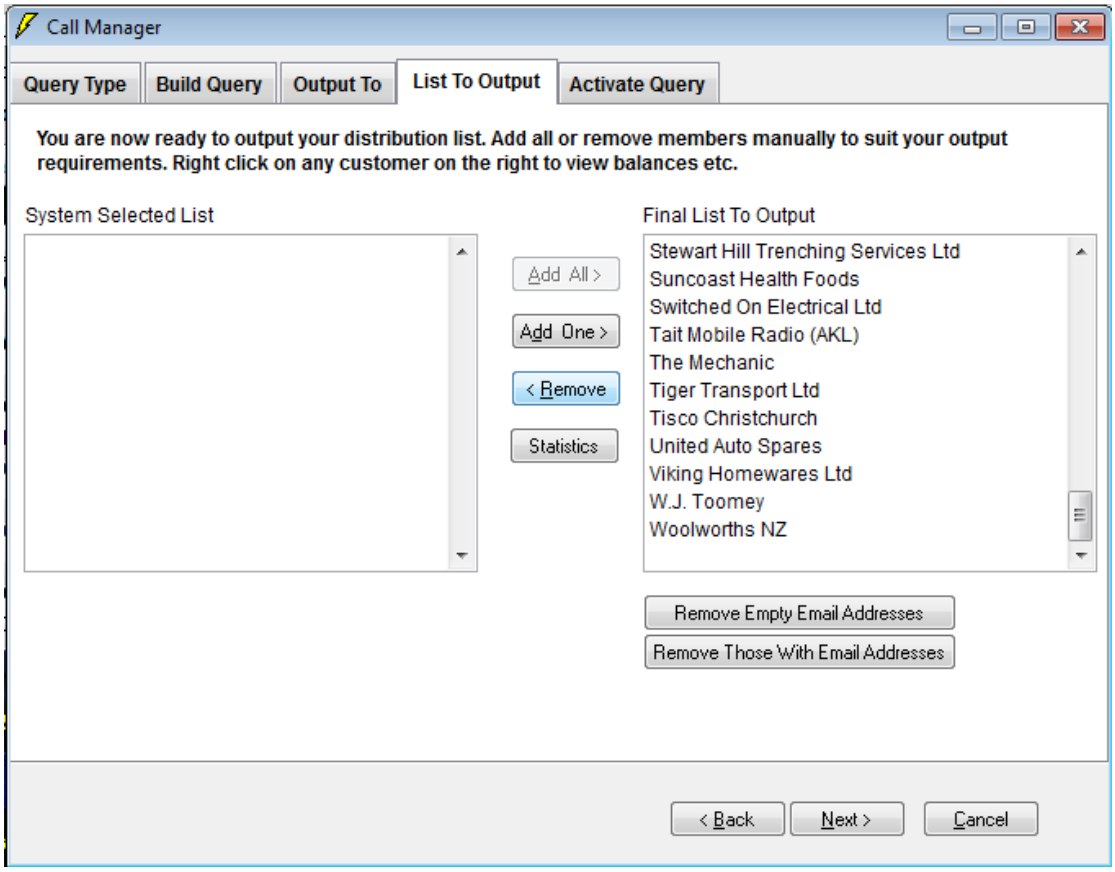
Choose the selection criteria eg; Customer by Grading



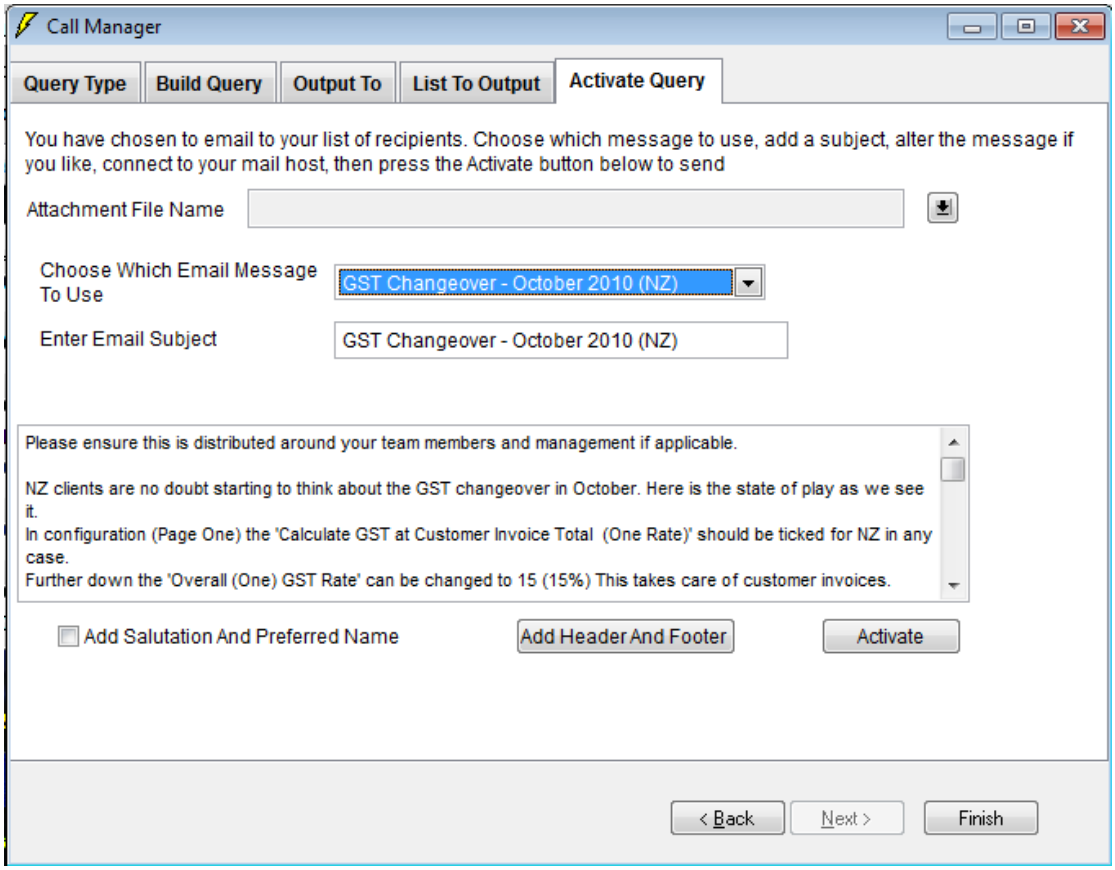
Choose what you want to output to, in this case Email. Then check the **Auto Fill Final List** checkbox and press **Make List Now**



Check your list. Members can be removed or added from/to the final list, you can check the statistics which will also indicate valid email addresses, you can also right click on any member that is a customer and view their details like account information etc. Now would be a good time to use the **'Remove Empty Email Addresses'** in view of the fact we are emailing.



Finally choose the email template containing the message you want to use. In the case of emails you have yet another option, checking the **Add Salutation and Preferred Name** personalises each email with information from the Phone/Address book. **Add Header and Footer** allows you to place a personalised message on the header and footer of any individual (or many) email. This option also allows you to check the salutation and preferred first name of each email.
Note: You have the option of attaching a file to the email which could be an Excel spreadsheet, a PDF file containing a price list or a Word document etc.

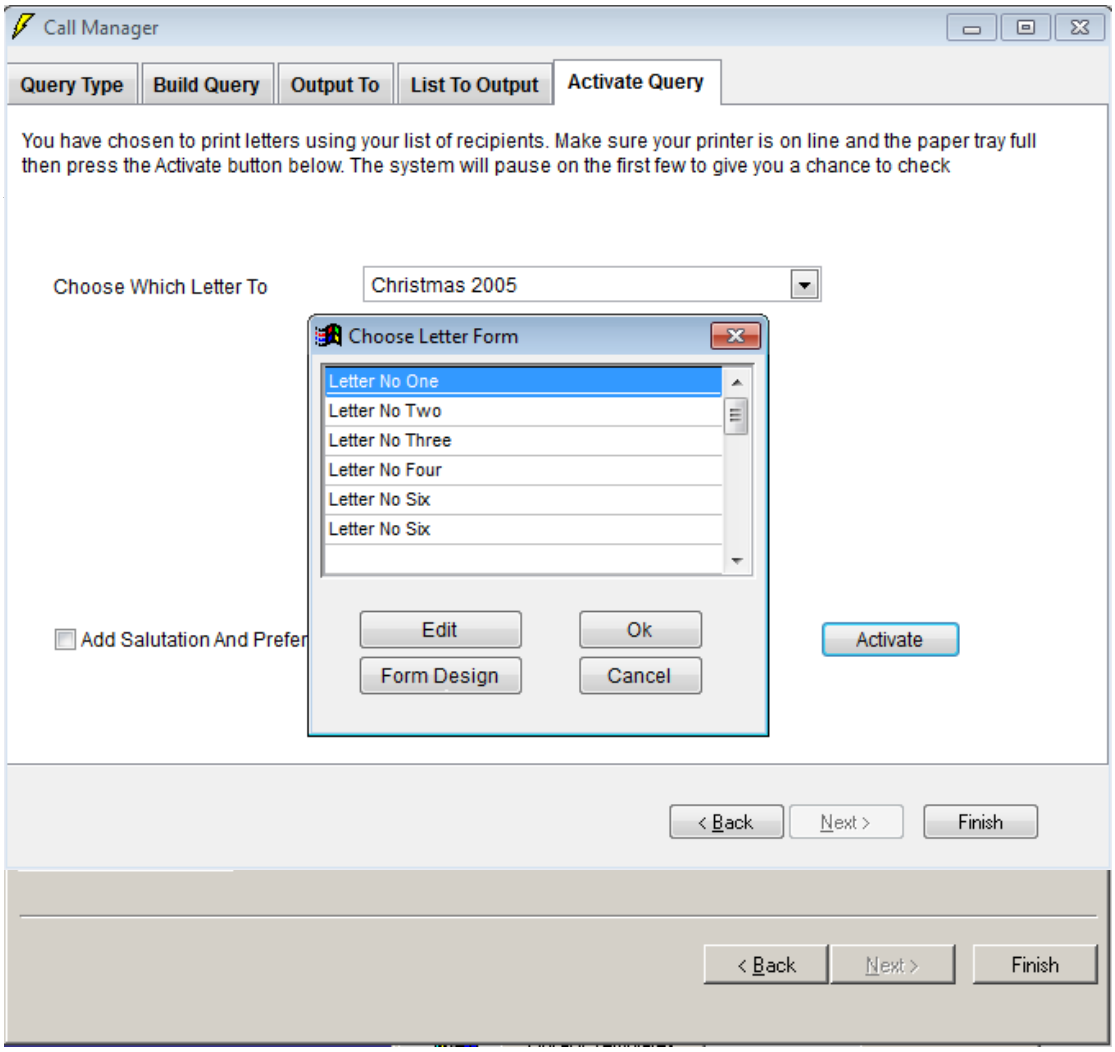


Other Output Options

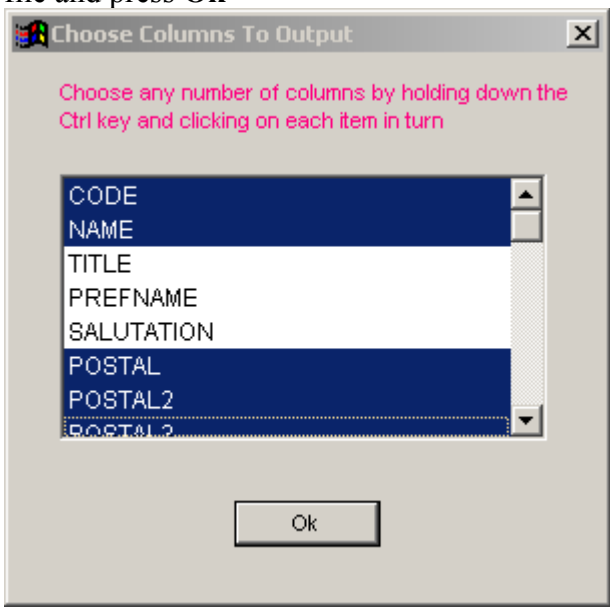
Print Letters From a Standard Letter Form

Assuming you already have the letter template created that you want to use all you have to do on the final step is choose which template. Except to use the **'Remove Those With Email Addresses'** which will ensure the email list you previously sent out is excluded.
When you press Activate you will be given a choice of which form to use. At this stage you can rename the forms or modify them (see Modifying Reports). When you press Ok the print run will start. To give you the opportunity to check the printing and abort the run a message (**Paused For Checking. Pause On The Next Letter ?**) will be displayed giving you the options to:

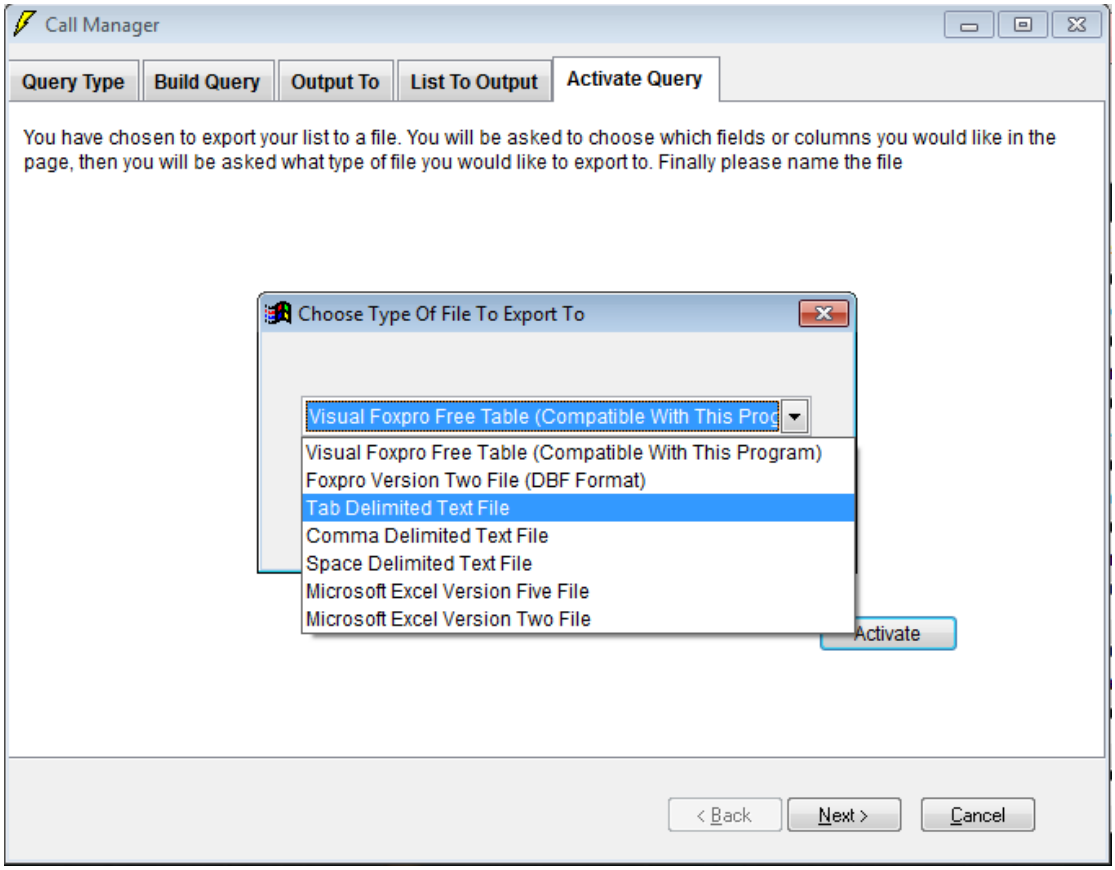
- **Yes** - Pause on the next letter for further checking
- **No** – Carrying with the whole print run
- **Cancel** – Abort the whole run at this point



Export To A File
Choosing this option gives you the opportunity to export the list you have created to the file type of your choice, here is the sequence:
In the Choose what you would like to do this list choose **Export To A File**
On the final page press **Activate**
In the Choose Columns to Output, mark the fields/columns you want to send to your file and press **Ok**



Upon pressing Ok you will offered a choice of file types to Export to, the most common and safest one being Tab Delimited Text File which can be imported by most programs.

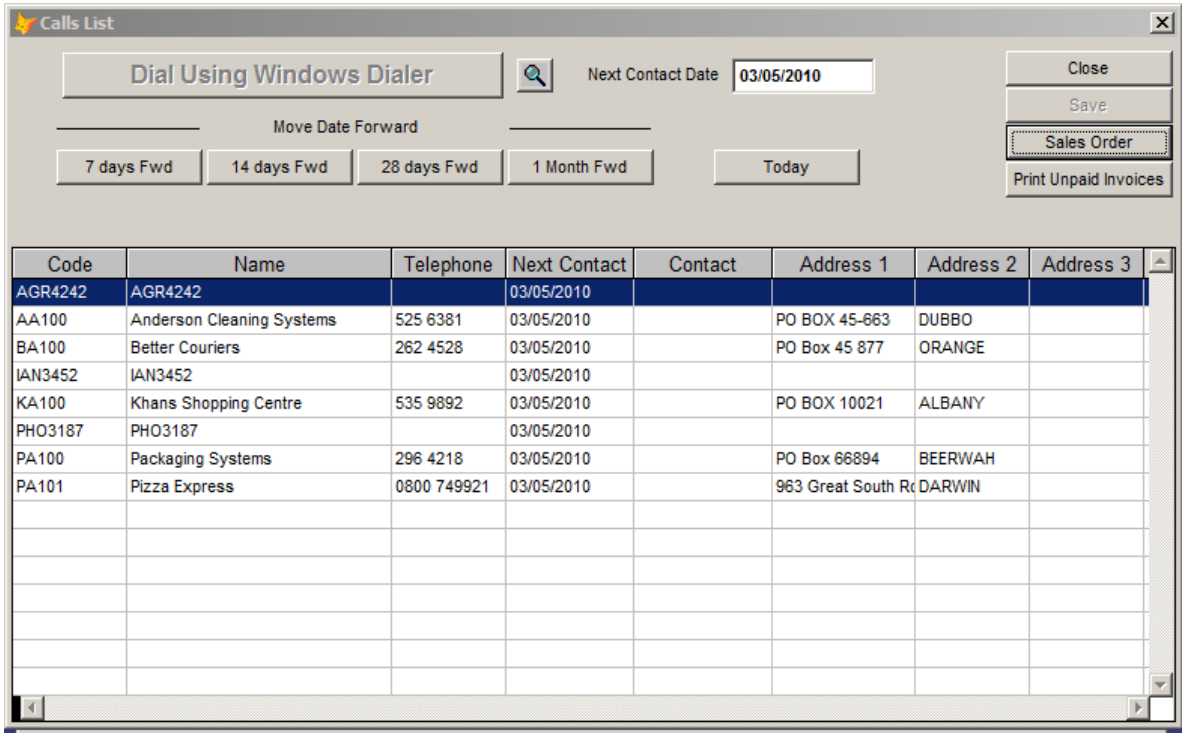


Finally you will be asked to name your file and choose a folder to save it in. IMPORTANT – write the name of the folder and the filename down. The most common problem here is forgetting the file name and it's location.

Making Phone Calls From A List

Typically this would be used together with the Next Contact Date in the Phone/Address database to do calls or order seeking for a specific date, but may be used with any query. Using the magnifying glass button you can view current details for the customer including balances, sales orders on hold etc. The next contact date can be reset from here also when the call is done.

Feature:

Sales orders can be created from this form. This allows creation of sales orders 'on the fly' while talking to a customer.

The Windows dialler option is not part of AstarlaWorks so is not controlled by the program, it simply passes a phone number and activates it if it is available and if you have a dial up modem on the computer.