

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)

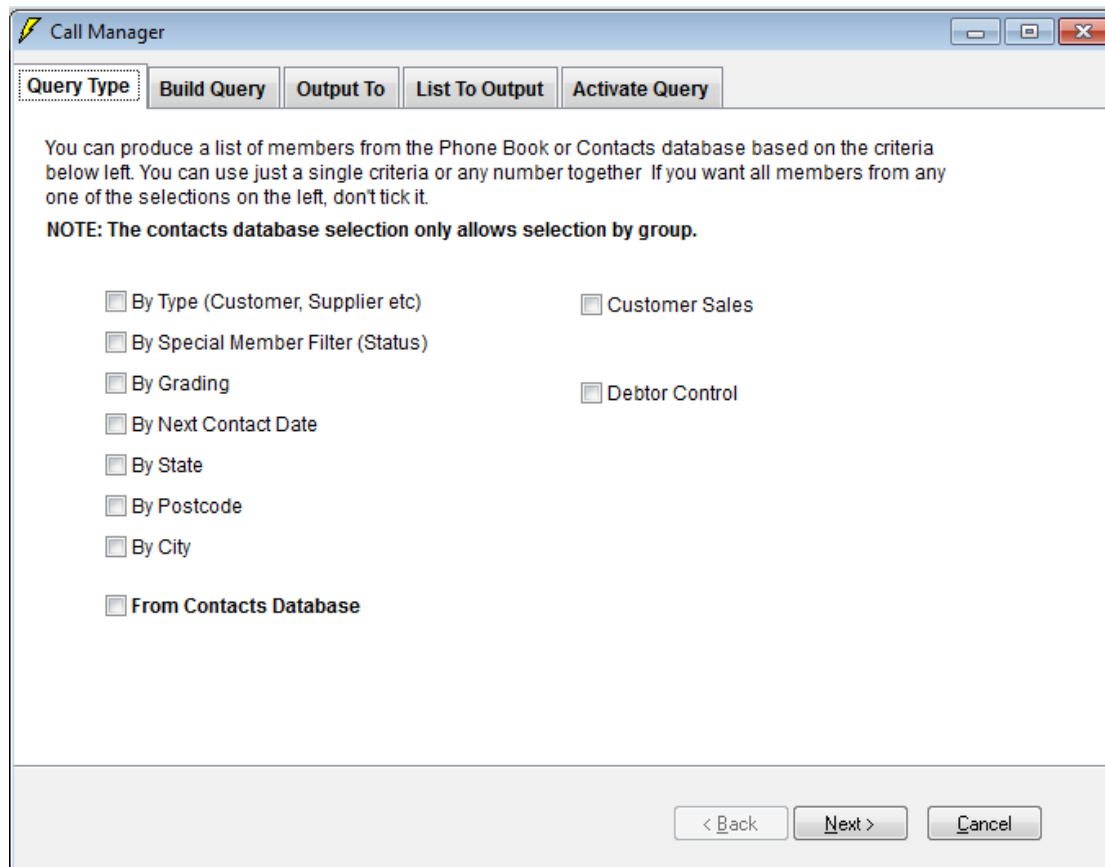
Templates

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.



The screenshot shows a window titled "Call Manager" with a standard Windows-style title bar (minimize, maximize, close buttons). Below the title bar is a tabbed interface with five tabs: "Query Type" (selected), "Build Query", "Output To", "List To Output", and "Activate Query".

Under the "Query Type" tab, there is instructional text: "You can produce a list of members from the Phone Book or Contacts database based on the criteria below left. You can use just a single criteria or any number together. If you want all members from any one of the selections on the left, don't tick it."

Below the text is a note: "NOTE: The contacts database selection only allows selection by group."

There are two columns of checkboxes for selection:

- ☐ By Type (Customer, Supplier etc)
- ☐ By Special Member Filter (Status)
- ☐ By Grading
- ☐ By Next Contact Date
- ☐ By State
- ☐ By Postcode
- ☐ By City
- ☐ From Contacts Database
- ☐ Customer Sales
- ☐ Debtor Control

At the bottom right of the window are three buttons: "< Back", "Next >", and "Cancel".

Choose the selection criteria eg; Customer by Grading

Call Manager

Query Type Build Query Output To List To Output Activate Query

Choose any of the criteria below based on the selection types you chose on the previous page. The date selection will process all members with Next Contact dates that fall between the two dates that you have chosen.

Choose Member Type Customer ☐ Active Customers

Choose Grading Five Star

Select Date From (Inclusive) 21/04/2014

Select Date To (Inclusive) 21/04/2014

< Back Next > Cancel

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

Call Manager

Query Type | Build Query | **Output To** | List To Output | Activate Query

Choose what you would like to do with your list

- ☐ Browse On Screen
- ☐ Print A List Of Your Selection (Previewed First
- ☐ Print Letters From A Standard Letter Form
- ☐ Produce Labels
- ☒ **Email To Your List Of Recipients**
- ☐ Send SMS (Phone Text)
- ☐ Export To A File
- ☐ Make Phone Calls From List
- ☐ Customer Aged Trial Balance Report

Make List Now

☐ Auto Fill Final List

< Back | Next > | Cancel

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.

Call Manager

Query Type | Build Query | Output To | **List To Output** | Activate Query

You are now ready to output your distribution list. Add all or remove members manually to suit your output requirements. Right click on any customer on the right to view balances etc.

System Selected List

Final List To Output

Buttons: Add All > | Add One > | < Remove | Statistics

Buttons: Remove Empty Email Addresses | Remove Those With Email Addresses

Buttons: < Back | Next > | Cancel

Final List To Output

- Stewart Hill Trenching Services Ltd
- Suncoast Health Foods
- Switched On Electrical Ltd
- Tait Mobile Radio (AKL)
- The Mechanic
- Tiger Transport Ltd
- Tisco Christchurch
- United Auto Spares
- Viking Homewares Ltd
- W.J. Toomey
- Woolworths NZ

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.

Call Manager

Query Type **Build Query** **Output To** **List To Output** **Activate Query**

You have chosen to email to your list of recipients. Choose which message to use, add a subject, alter the message if you like, connect to your mail host, then press the Activate button below to send

Attachment File Name

Choose Which Email Message To Use **GST Changeover - October 2010 (NZ)**

Enter Email Subject **GST Changeover - October 2010 (NZ)**

Please ensure this is distributed around your team members and management if applicable.

NZ clients are no doubt starting to think about the GST changeover in October. Here is the state of play as we see it.
In configuration (Page One) the 'Calculate GST at Customer Invoice Total (One Rate)' should be ticked for NZ in any case.
Further down the 'Overall (One) GST Rate' can be changed to 15 (15%) This takes care of customer invoices.

☐ Add Salutation And Preferred Name **Add Header And Footer** **Activate**

< Back **Next >** **Finish**

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

Call Manager

Query Type Build Query Output To List To Output **Activate Query**

You have chosen to print letters using your list of recipients. Make sure your printer is on line and the paper tray full then press the Activate button below. The system will pause on the first few to give you a chance to check

Choose Which Letter To Christmas 2005

Choose Letter Form

- Letter No One
- Letter No Two
- Letter No Three
- Letter No Four
- Letter No Six
- Letter No Six

☐ Add Salutation And Preference

Edit Ok

Form Design Cancel

Activate

< Back Next > Finish

< Back Next > Finish

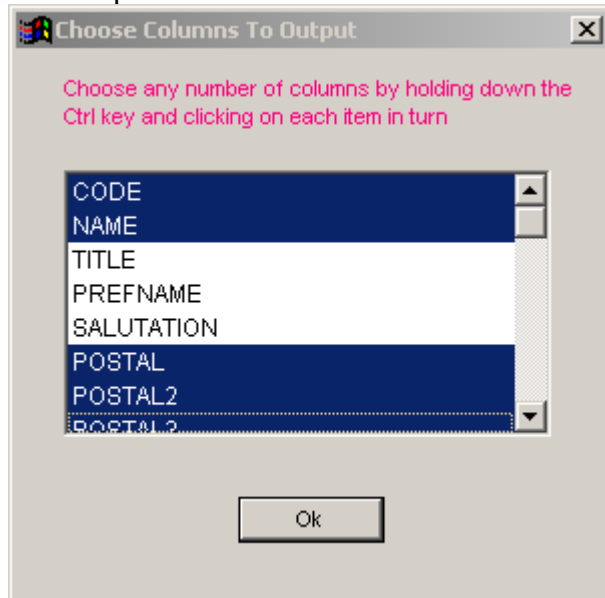
Export To A File

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:

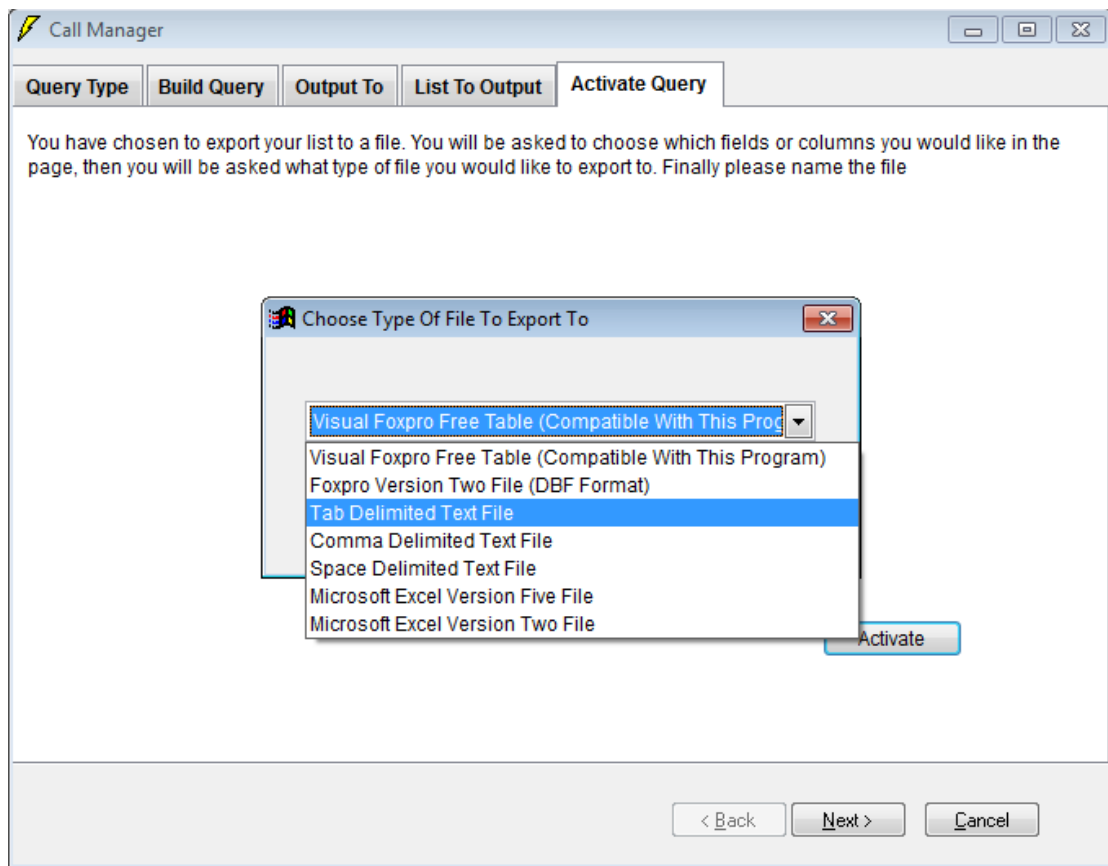
In the Choose what you would like to do this list choose **Export To A File**

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 be 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.

[illegible]