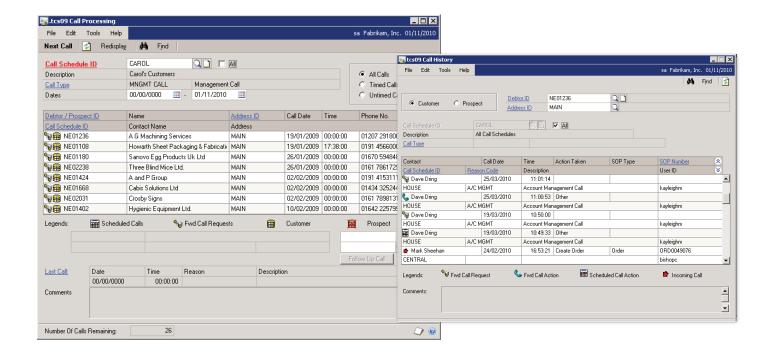# dynavistics

Customer Call Scheduling

The Need

Managing customer calls—whether it be as part of regular telesales schedules or responding to a one-off request for technical information, is at the heart of good customer relationship management.

The Solution

The customer call scheduling module offers sophisticated call management facilities, via simple implementation and set-up routines.

This radically improves customer contact management—giving immediate benefits for sales and service.

Key Features

• Call schedule management

Schedules for customers and prospects can be generated and attached to a specific user or multiple users.
These may be for a one-off event or could automatically generate a next call date and time, based upon a recurring pattern, e.g. daily, weekly, and monthly.

• Call control

Permits the user to 'select' a customer from a schedule so that even where multiple users are working to a schedule there is no possibility of doubling up on calls.

• Action linking

Once contact is made (or not), the user can go straight to a series of pre-defined activities, including creating an order, quote or generating a request for later call-back.

• User-defined results

Users may set up unlimited response categories for later analysis.

• Follow-up calls

Users in one schedule can generate a call in another schedule with the call itself linked to a document such as an order or quote.

• Detailed history

Each contact (or failure to contact) can be supported by a date and text. Users may scroll through such text either for a specific schedule or show all contact with the customer.

• Call schedule import

Having generate an identified list of customers or prospects, perhaps using Crystal or Explorer, this simple tool allows the user to import the customer data into a named call schedule to generate a one-off campaign.

What It Means For You

The flexible design of this software demonstrates that it has the ability to meet a wide variety of user needs.

• Telesales schedules

Contact customers at the correct times to tie in with their requirements and the organization's delivery capabilities. Manage exceptions, call-backs, post follow up calls to reps, technical assistance and customer service etc. In addition, you can also measure the effectiveness of call-outs.

• Marketing campaigns

Use powerful reporting to pinpoint the target audience. Generate one-off marketing campaigns that can be actioned by a team of representatives if necessary.

• Delivery optimization

Even when customers call in with their orders the system can be set up to recognize that there is a call schedule to be updated. At the chosen review time, those who have not called in as expected may be easily identified. Calls may then be made to selected customers in order to make up economic loads, or the facility may simply be used as an early warning of possible customer problems.

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Dynavistics transforms your "I wish we could" into "I know we can" with innovative solutions to provide relief from common business software frustrations—helping you to run your business more effectively and get paid faster. Our applications are used by businesses across a wide variety of industries to extend the useful lifetime of their software investment while improving staff productivity and filling the gaps in collections, delivery, trade promotion and distribution software processes.
Dynavistics makes it easy to integrate with Microsoft Dynamics GP, Microsoft Dynamics AX, and Microsoft Dynamics NAV, as well as other leading ERP systems. Whether your frustrations result from software shortcomings in purchasing, inventory management, or accounts receivable—we offer solutions that complete the processes and bridge the gaps.

TRINITY

Trinity from Dynavistics, Inc. is a collection of advanced distribution features that work hand in hand with Microsoft Dynamics® GP to enhance every aspect of your supply chain process. Simply put, Trinity turns the basic Dynamics GP inventory modules into a full-featured distribution powerhouse.
Running a successful distribution business requires more than just inventory management. That's why Trinity was designed to improve every aspect of your distribution operation from Sales, Pricing, and Customer Service to Purchasing & Replenishment, Inventory Control, and Delivery Logistics. Adding Trinity to Dynamics GP makes your business *more effective, efficient, competitive and profitable*.

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