



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.

tcs09 Call Processing

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Next Call Redisplay Find

Call Schedule ID: CAROL

Description: Carol's Customers

Call Type: MNGMT CALL Management Call

Dates: 00/00/0000 01/11/2010

Debtor / Prospect ID	Name	Address ID	Call Date	Time	Phone No.
Call Schedule ID	Contact Name	Address			
NE01236	A G Machining Services	MAIN	19/01/2009	00:00:00	01207 291800
NE01108	Howarth Sheet Packaging & Fabricati	MAIN	19/01/2009	17:38:00	0191 4566000
NE01180	Sanovo Egg Products Uk Ltd	MAIN	26/01/2009	00:00:00	01670 594848
NE02238	Three Blind Mice Ltd.	MAIN	26/01/2009	00:00:00	0161 7861725
NE01424	A and P Group	MAIN	02/02/2009	00:00:00	0191 4153111
NE01668	Cabis Solutions Ltd	MAIN	02/02/2009	00:00:00	01434 325244
NE02031	Crosby Signs	MAIN	02/02/2009	00:00:00	0161 7898131
NE01402	Hygienic Equipment Ltd.	MAIN	10/02/2009	00:00:00	01642 225795

Legends: Scheduled Calls Fwd Call Requests Customer Prospect

Last Call: Date 00/00/0000 Time 00:00:00 Reason Description

Comments

Number Of Calls Remaining: 26

tcs09 Call History

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Customer Prospect Debtor ID: NE01236 Address ID: MAIN

Call Schedule ID: CAROL

Description: All Call Schedules

Call Schedule ID	Reason Code	Description	Call Date	Time	Action Taken	SDP Type	SDP Number	User ID
Dave Dring			25/03/2010	11:01:14				
HOUSE	A/C MGMT	Account Management Call					kayleighm	
Dave Dring			25/03/2010	11:00:53	Other			
HOUSE	A/C MGMT	Account Management Call					kayleighm	
Dave Dring			19/03/2010	10:50:00				
HOUSE	A/C MGMT	Account Management Call					kayleighm	
Dave Dring			19/03/2010	10:49:33	Other			
HOUSE	A/C MGMT	Account Management Call					kayleighm	
Mark Sheehan			24/02/2010	16:53:21	Create Order	Order	ORD0049076	bishopc
CENTRAL								

Legends: Fwd Call Request Fwd Call Action Scheduled Call Action Incoming Call

Comments

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.



Dynamistics 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.

Dynamistics 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 from Dynamistics, 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.*

