

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.

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)

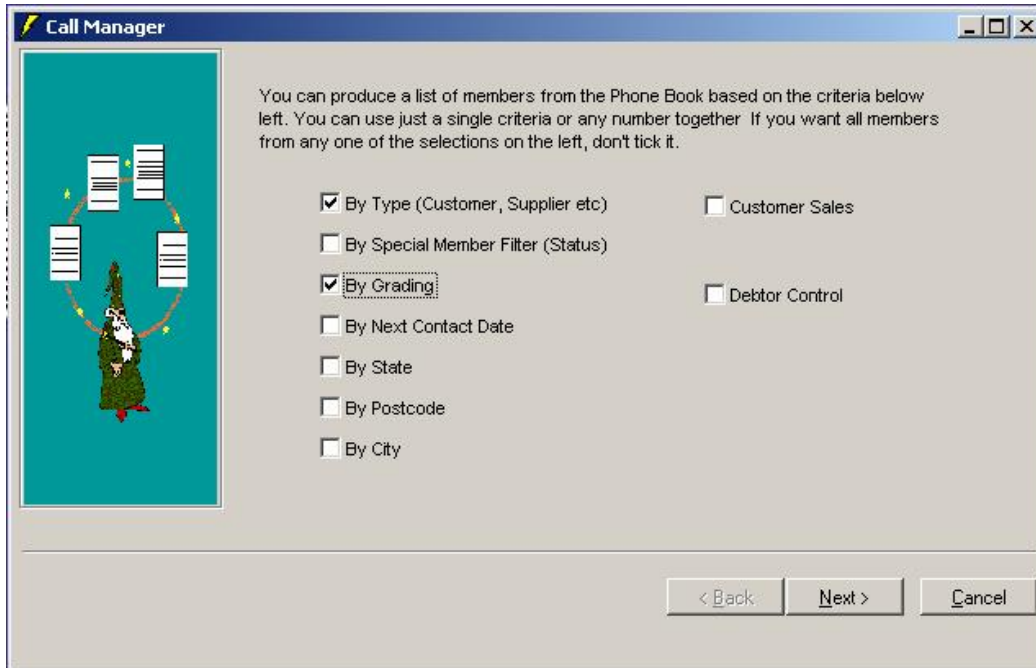
Templates

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.

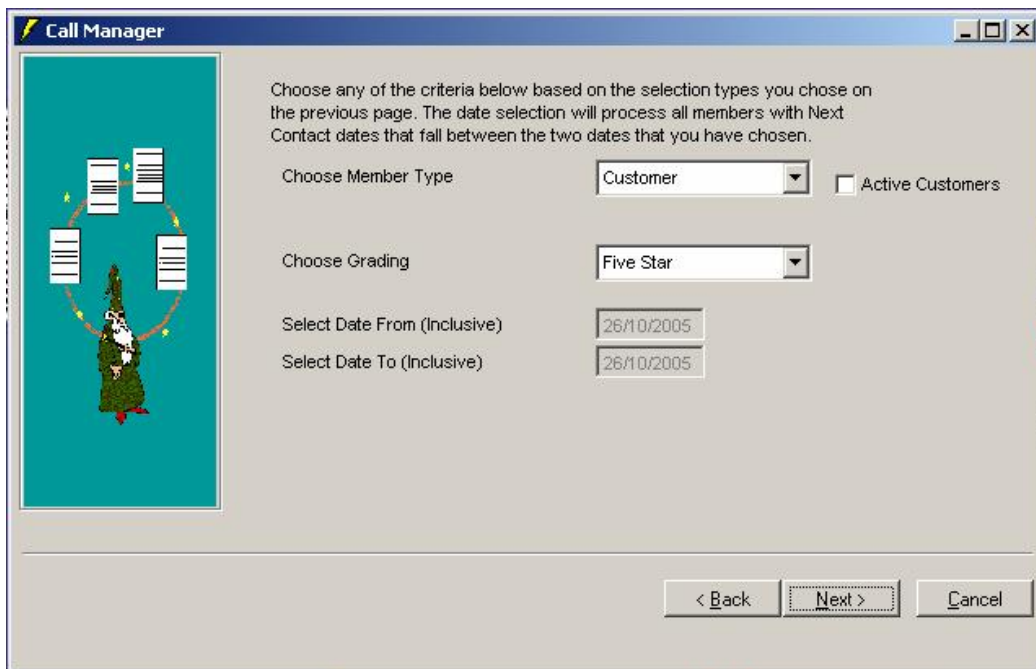
Each time you run the Call Manager for letters you can choose not only the letter template, but you can also choose one of six form layouts. Each of these form layouts can have different headers and footers with pictures etc so you can customise different forms for different purposes.

Steps To Use Call Manager

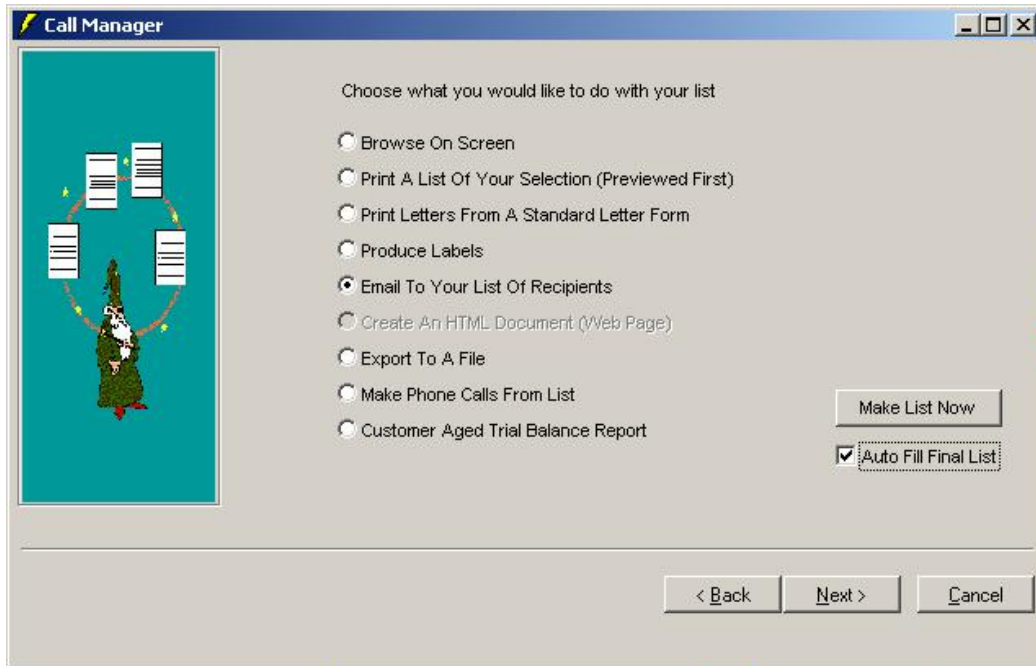
Choose the filtering option you would like bearing in mind all checkboxes on the right can be mixed, while Customer Sales and Debtor Control work by themselves.



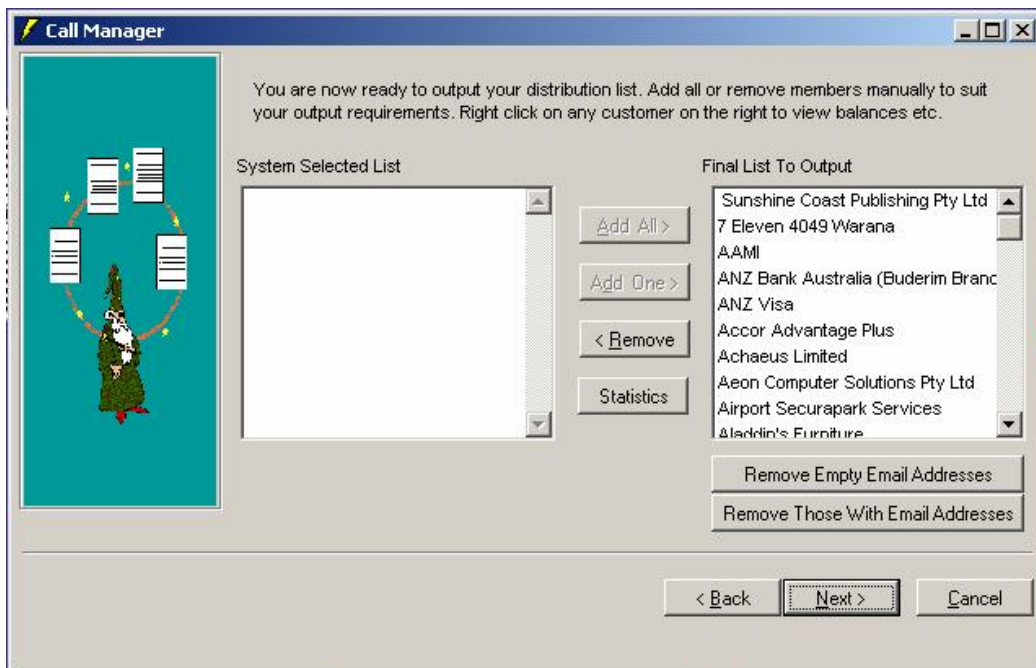
Choose the selection criteria eg; Customer by Grading



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**



Print Labels

This option allows the printing of a label run using the labels of your choice.

Note: Make sure you choose a compatible label type not a product or barcode label.

The description is immediately to the right of the chosen code, in the case of this example Ph/Addr 63.5mm x 46.6mm.



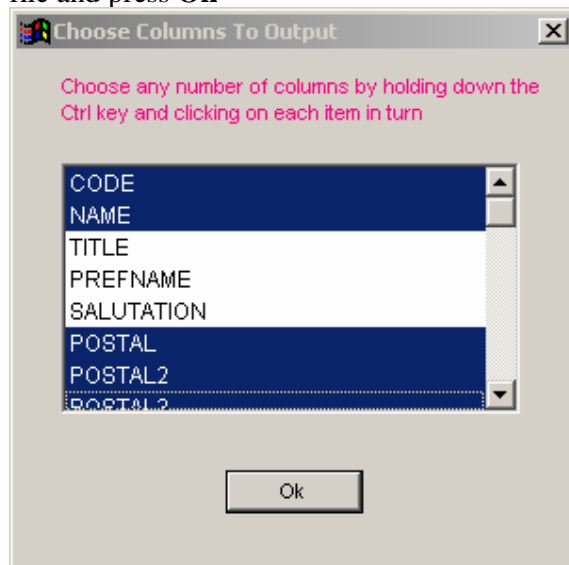
Export To A File

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:

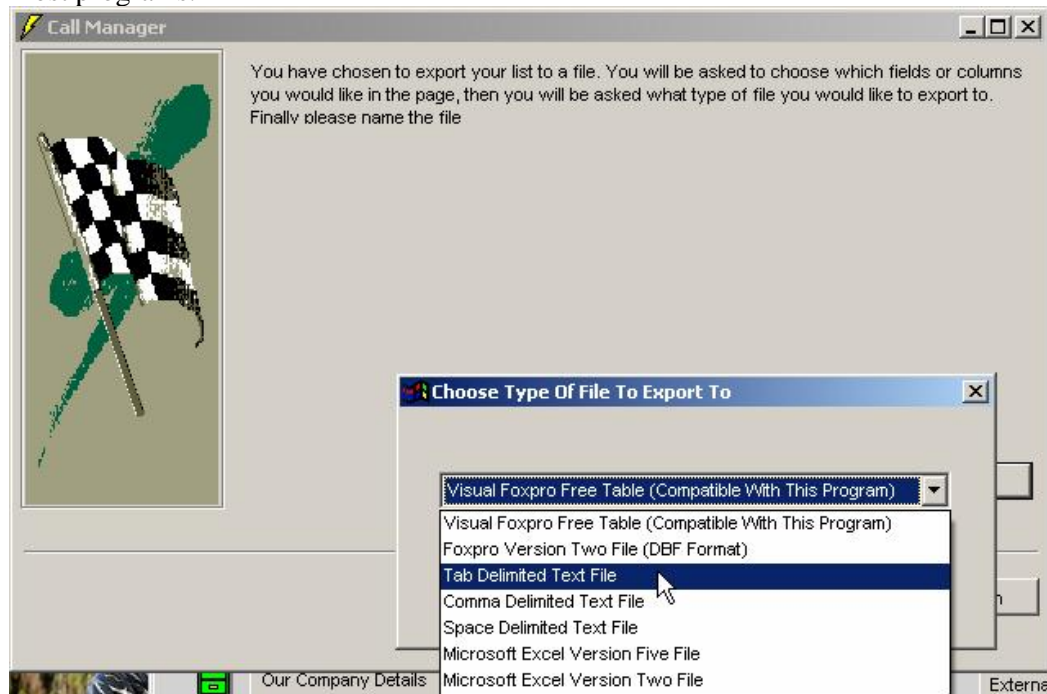
In the Choose what you would like to do this list choose **Export To A File**

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.

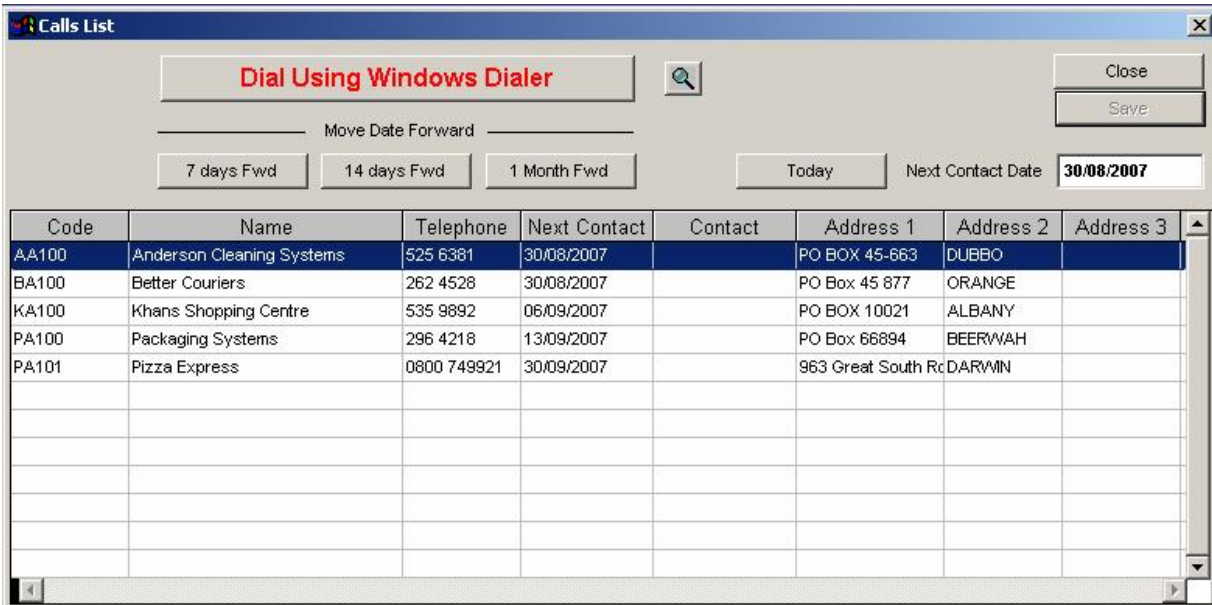


Finally you will be asked to name your file and choose a folder to save it in.

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. 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.



Code	Name	Telephone	Next Contact	Contact	Address 1	Address 2	Address 3
AA100	Anderson Cleaning Systems	525 6381	30/08/2007		PO BOX 45-663	DUBBO	
BA100	Better Couriers	262 4528	30/08/2007		PO Box 45 877	ORANGE	
KA100	Khans Shopping Centre	535 9892	06/09/2007		PO BOX 10021	ALBANY	
PA100	Packaging Systems	296 4218	13/09/2007		PO Box 66894	BEERVAH	
PA101	Pizza Express	0800 749921	30/09/2007		963 Great South Rd	DARWIN	