

Spotlight - Communication Centre

Preparation

Preparation if using demo data attached:

1. Import general UK Demo Data
2. Login with:
 - Standard ID: sample@hansaworld.com
 - Passworld: Sample99

NOTE: If you use Sample data, calls wont be initiaeted unless you have SIP servers set up . Also nothing will show up on Who is online report. You can demonstrate it on HansaMail.

Script

Welcome to this short presentation on Standard ERP's Communication Centre.

In today's world, telecommunication is key to keeping businesses, in contact with their customers and suppliers, as well as internal communication, within the organization. More and more, companies are turning to VOIP providers and other apps, to enhance their companies communication channels.

Standard ERP's Communication Center, goes a step further and, allows companies to manage all of their incoming, and outgoing calls, from within the business system, including calls, chats, emails, and text messages. Let's walk through how we can use this feature.

ACTION: In Navigation Centre select the Communication Centre icon

Here, you will find all the company-wide customers and contacts.

ACTION: Hover mouse over contacts

Contacts can be sorted by Name or Number.

ACTION: Select Name ... and then No. to demonstrate sorting

By selecting a contact, you can view contact details, -

ACTION: Show Contact record close the Contact record window (Escape)

From here, you can see which of your colleagues is logged in, and call them from the Communication Center.

ACTION: Select Who is online button to show the report, close with Esc

You can use the Communication Center to make calls, email and text people.

ACTION: Search for a couple of customers and point at their contact details

Look up multiple numbers, to make multiple calls, from the same dashboard, or leave a message for unanswered calls, directly from the same center with ease.

ACTION: Select the email address for one of them and create email with text - 'We tried to reach you to discuss your order'

Simply select the contact, with which you wish to communicate, select the desired communication method, and begin your conversation.

Let's make a call!

ACTION: Highlight contact phone number and select a button to make a call (use your own contact or another staff member in the office and dial)

When the call starts, Standard ERP will create a record ,including all details of the call, such as, time and date, and the person you spoke to. Here, comments and additional information about the call, can be added immediately or later if you so wish.

The record of the call can be found in the Customer Status report.

**ACTION: Show Activity record, add comments and Save
Select button Customer Status to open the report and open activity which was just created**

Standard ERP's Communication Center, is easy to use and very efficient, to handle all of your calls.