V6.09 Training Manual

Call Management

Find the freedom to focus on what matters with Nimbus

Contents

Document Information

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Overview

Nimbus is designed to help organisations run their day-to-day business and manage their processes effectively. , The addition of 'Call Logging' means the processing of customer and sales management has improved significantly.

Call Logging involves entering a brief description of a telephone call or personal visit into the Nimbus system. A call may simply be a message or an enquiry. This means that not all calls will result in a Job, although some might after several follow-up calls or action.

Whatever the purpose of the call is, the Call Logging system is used so that follow-up work or action can be logged and monitored. This could be chasing up overdue accounts, following up calls to a supplier, taking a sales enquiry and so on.

Logged calls are displayed in a web report so that users can check to see if there is a logged call for them to respond to. Opportunity to record the response is possible. Over time, a call history is developed by logging all follow-up calls.

Should a logged call result in a Prospect Job or a Logged Job, all calls can be linked to the Job for future reference, if required.

From a long term point of view, monitoring telephone calls or personal visits can be important information.

The Nimbus system allows calls to be logged so that follow-up work or action can take place, if required. Follow-up calls can also be logged so that a call history can be developed. Note that the call logging process can also be used for taking messages.

Contacts

A person or organisation must exist as a 'Contact' in the database before a call can be logged. If the 'Contact' does not exist, the 'Contact' must be created. The procedure is:
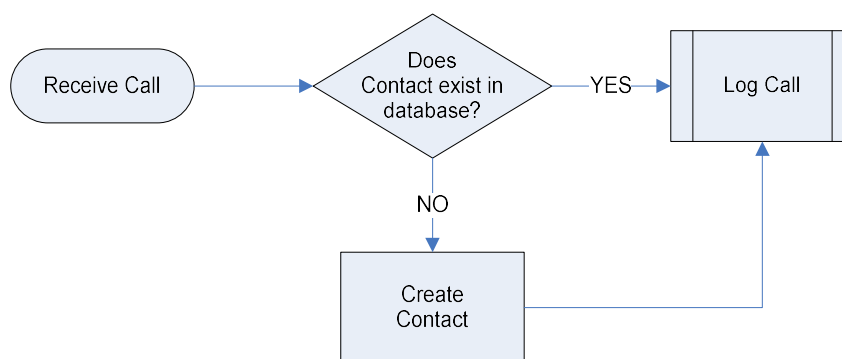
To find out if a 'Contact' (a person or organisation) exists in the database:

1. From the **Enquiry** menu, click on the Contacts menu item.

2. Use the filters to find the person or organisation. If the Contact exists, you are ready to log the call. If the Contact does not exist, you will need to create a new Contact first; refer to the instructions below.

Logging an Incoming Call

To create a new **Contact and Call**:

1. From the **Enquiry** menu, click on the **Contacts** menu item.

2. Click on **New Caller**, located in the header of the **Contacts** web report as shown below. This action opens the **Call Log** form. From here a new Contact can be created and a call can be logged at the same time. (Do not click on **New Contact** as this will open the **Contact** form so a call would need to be logged afterwards, slightly slower.)

3. Enter the name of the new Contact in the **Call Contact** field, do not use the binoculars. Enter this name as you would want the Shortname to be displayed in the **Contacts** web report.
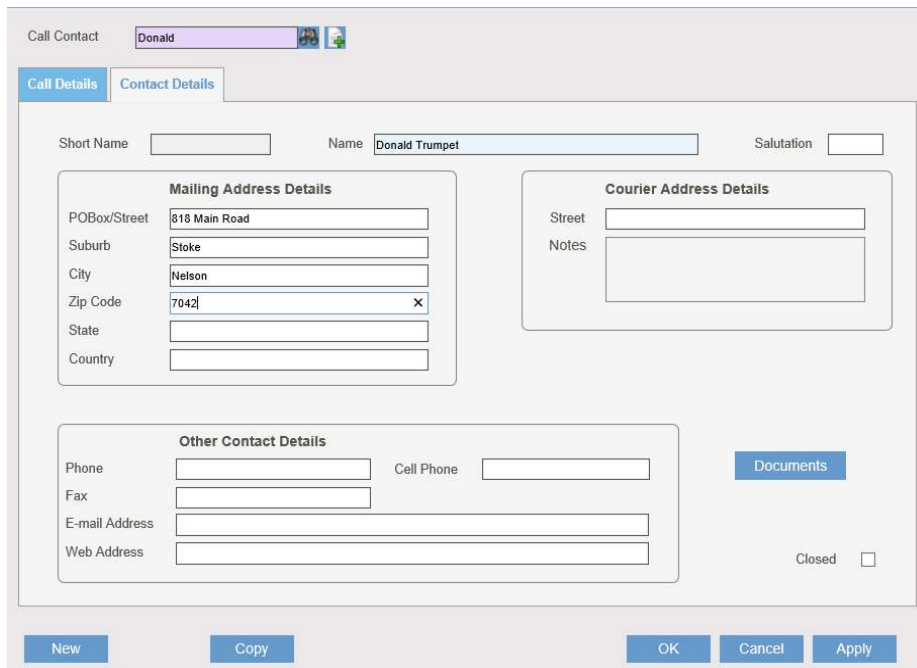
4. On the **Call Details** tab:
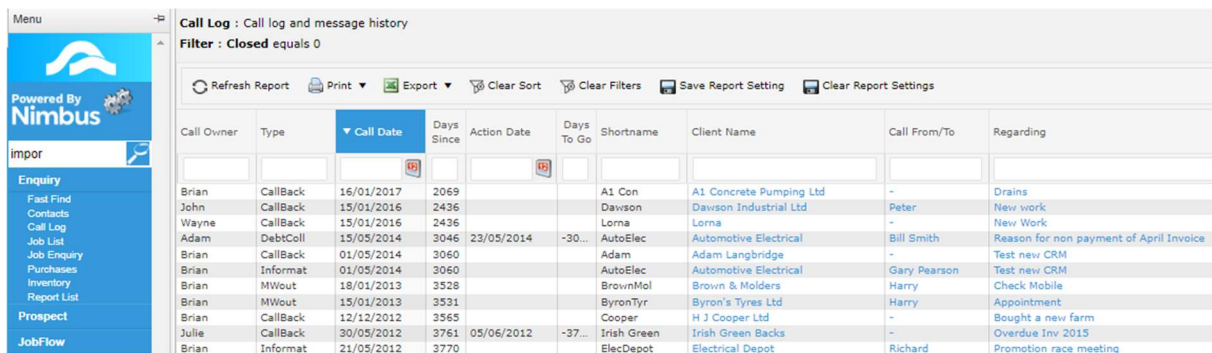   a. Enter the name of the person to reply to in the **Person to Reply to** field.

b. Enter their telephone number in the **Phone Back Number** field.

c. Using the drop-down list in the **Call/Message for** field, select the name of the person this call should be followed up by.

d. Enter a brief description for this call/message in the **Regarding** field.

e. Enter the details for this call/message in the **Call Notes** field.

f. Using the drop-down list in the **Type** field, select the type of call/message this is.

  · This field is particularly important as it is used to filter the Call Log to specific call types e.g. it can be utilised by the Overdue Debtors report to show when a client has been given 7 days' notice, and the date from which this applies, or if they are disputing an invoice. Additional call types can be added by your Admin User if required.

g. Using the drop-down list in the **Category** field, select the category for this call/message i.e. potential new work, a message regarding an account etc. Additional categories can be added by your Admin User if required.

h. If the call/message must be actioned by a due date, enter that date in the **Action Date** field.

i. Using the drop-down list in the **Taken by** field, select the name of the person taking the call/message.

j. Today's date is automatically entered in the **Taken at** field; change this date if required.

k. As the call/message is an incoming call, do NOT tick the **Outgoing** field.

5. On the **Contact Details** tab:

a. Enter the full name of the Contact in the **Name** field. This is a compulsory field.

b. Enter any other known contact details in the appropriate field.

6. Click the **Apply** button to save the record. Alternatively, click the **OK** button to save the record and close the form.

7. This has now created the Contact record and the Call at the same time.
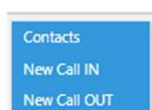
To log a call for an existing Contact:

From the **Enquiry** menu, click on the **Call Log** menu item.

1. Use the filters to find the existing Contact and then press **Enter** to activate the filter(s).

2. To begin logging a call, click on the 'Call this Contact' header link held in the Call column for the Contact, as shown below. This action opens the Call Log format.

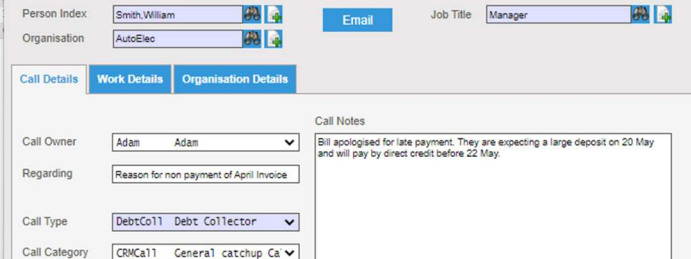3. Complete the **Call Log** form as described above.

Call Log

A report listing all calls/messages logged can be viewed. All Nimbus users should know how to access this report so that they can be kept up to date with any calls/messages left for them.

To view the **Call Log** report:

1. From the **Enquiry** menu, click on the **Call Log** menu item. This action opens the **Call Log** report.

2. Enter your name in the **Call Owner** filter field and then press **Enter** to activate the filter. All calls and/or messages specifically for you are now listed.

3. Click the **Call Date** heading; this action will order the items in descending date order so that the newest call/message is listed first.

4. Note the **Type** column; this indicates the action you should be taking.

5. To find out more about this call/message, click on the item held in the **Regarding** field to open the **Call Log** form.

Logging an Outgoing Call

A follow-up response to a call should be logged so that the history can be recorded. This is done by logging an outgoing call.

To log an outgoing call:

1. Open the **Call Log** report as above.

2. If this is a new Out Going conversation use the **New Call OUT** header link.
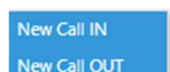
3. If it is a follow up action for an existing conversation string, click on the item held in the **Regarding** field to open the existing **Call Log** form.

4. Use the details on this form to help you with the follow-up activity.

5. In the **Call Notes** section, enter the result of the follow-up activity.

6. As this is an outgoing call, tick the **Outgoing** field.

7. Enter the date of the follow-up activity in the **Response Date** field.

8. If the follow-up activity results in a Job or a Prospect Job, create the Job in the normal way and then link the call log to the Job by entering the Job number in the **Job Number** field. A lookup is available, if required.

9. What happens next depends on whether the follow-up activity settled the matter or not.

   a. If the follow-up activity settled the matter, tick the **Closed** field and then click the **OK** button to save the record and close the form. This action also enters today's date in the **Closed Date** field and removes the item from the **Call Log** report.

   b. If the follow-up activity did NOT settle the matter, i.e. further follow-up is required, edit the **Action Date** field (if applicable) and then click the **OK** button to save the record and close the form. This action ensures that the item remains on the **Call Log** report so that further follow-up can take place.

Call History

All logged calls can be viewed to monitor the frequency of calls and the follow-up taking place. This is especially useful if you are a new Account Manager as the call history report will help you to get up to speed with the communications that have been taking place to date.

To view the **Call Log and History** report:

1. From the **Enquiry** menu, click on the **Call Log** menu item.

2. Use the **Name** filter field to find the Contact you want to view the Call and Log History report for and then press **Enter** to activate the filter.

3. In the **Closed** column, delete the '0' and all call logs will appear, i.e. open and closed call log entries.

Contact Details

ContactID	1163	City	Nelson
Shortname	A1 Con	Phone	5443199
Name	A1 Concrete Pumping Ltd	Fax	5443197
Street	128 Main Rd	EMail	email4contact@gmail.com
Suburb	Stoke	Type	Client and Supplier
POBox	PO Box 2285	Warnings	-

Call Log : Call log and message history
Filter : Shortname contains 1 and **Closed** equals 0

○ Refresh Report   🖶 Print ▼   📊 Export ▼   Clear Sort   Clear Filters   💾 Save Report Setting   💾 Clear Report Settings

Call Owner	Type	▼ Call Date	Days Since	Action Date	Days To Go	Shortname	Client Name	Call From/To	Regarding	Category
						1				
Brian	CallBack	16/01/2017	2069			A1 Con	A1 Concrete Pumping Ltd	-	Drains	NewWork

4. The Call Log and messages history report itself will give you information, however if more is required, click on an item in the **Regarding** column. This action opens the **Call Log** form where the **Call Notes** section can be referred to for additional information.