Inbound Telemarketing

PROGRAM NAME: CSMAIN
MENU OPTION TITLE: Inbound Telemarketing
MAIN MODULE: TELEMARKETING
HELP KEY ACTIVE: YES

PROGRAM OVERVIEW

This system is an interface into the outbound telemarketing system. The intention is to support a very aggressive sales driven marketing team that only performs sales functions. The system is used for tracking the valid customer database for your company. With this program, you can process any functions that the telemarketing staff can do except reschedule their call dates. You can, however, set a priority call so that when the sales rep fires up his scheduled calls the priority call will show up at the top of the list. You can service the customer in every way the sales staff can, so business can proceed uninterrupted even if the sales people are not available.

PROGRAM OPERATION

Please enter your REP CODE: When you start this program you will be asked to enter in your valid rep code given to you by your supervisor. Press <ENTER> and you will be asked to confirm the date.

Please verify today's date: The current day's date will automatically be inserted into this field. In the event you need to process a back order, you can type in the valid date you need to reprocess an order. You will need to back out of the program and get back in to return to the current date. Press <ENTER> to go to the next screen.

The next screen will identify the user who has logged into the system. Also notice any managers notes that are in the system will display here so important information will be communicated to any member of the staff that will be using the system. You have an options menu at this point to perform necessary tasks. To activate this menu, simply press the <F7> key. To advance to the next screen press <ENTER>.

Search by <N>ame, Customer <I>D, or <S>elections: The screen you see now is where you choose the customer you want to work with and perform virtually any function for the customer. You can select the customer you are working with by one of the following methods:
      1) Search by Name, with as much detail as you know
      2) Search by Customer Identification Number
      3) Search by Selection:
            A) With or without rep code
            B) State, YTD ship order
            C) State, Alphabetical
            D) YTD ship order
            E) Alphabetical order

Once you have chosen the method of finding the customer, the program will display customers from the beginning point of any method of your selection to the bottom of the screen, with a minimum of information. You can <PgUp> / <PgDn> or use the <UpArr> / <DnArr> keys to find the specific customer you are looking for. Once you found the customer you want, highlight that customer, then hit <ENTER> to access the customer information. You may <ESC> and select a new customer as many times as necessary. To select

You also have the <F7> option key available at this point, as well. This gives you the ability to service the customer in the most time effective way the system supports. As you may have noticed, the options menu may be different throughout the different system screens.

REMEMBER: You also have the ability to service the outbound sales reps customer if necessary, and even schedule a priority note and call back date for them. You must follow the help screens to utilize this function. You will notice that you cannot access or modify the information that is on the actual <CUST ID>. This has been restricted to personnel that have access to these records.

Now that you have the customer information on screen, you now have access to the following:

1) All the customer information currently available,

2) The profile if it exists. The profile screens will show you information pertaining to the customer's store. If the customer does not have a storefront, he will not have a profile screen.

3) Customer rep

4) Status: If in the conversation you are made aware that the status of this customer is incorrect, you may change it:
     1) <S> = Stocking < > = Non stocking 'S' to ' '; you will be asked to confirm deleting the customer profile, please be sure you want to do this. The deleting of the customer profile just means that this customer is not a store and it will just delete all store front information, if any, for this customer.
     2) ' ' to 'S'; You will automatically create a profile for this customer. Make sure he is a store before changing.

POWER FUNCTIONS

Once within the customer file, you can access a tremendous list of programs, utilizing the pop-up menu with the <F7> function key. Actually, once you have returned beyond the manager's notes, you can activate the pop-up menu with the <F7> key. By accessing the customer information first, you can automatically carry the customer's name through to order-processing, order- viewing and the custid number to Open Account Customer Inquiry. The programs available are:

Order Processing: When this option is chosen, the program will chain out to the order-processing program to allow you to process an order. Please see the order-processing manual for details.

Inventory File Maintenance: When this option is chosen it will chain to the inventory view program. Please see the inventory viewing manuals

Review Orders Any orders for the customer can be review from this options menu.

Review RMA's Returned Merchandise Authorization information can be access by any customer with a valid RMA in the system.

View Serial # Books This operation can be used to view serial numbered items for any customer. This is important when verifying serial number accuracy for serial numbered items sold out of inventory.

Open Account Customer Inquiry Operations people have access to all information pertaining to customers open account status. Again, the ability to have one person able to access all necessary data is another powerful customer service capability.

View Telemarketing Calendar: This is a calendar, which only shows daily calls for actual telemarketers. If you are not designated as a telemarketer you will not see any scheduled calls when viewing this program.

View Subassembly dictionary: This option will allow you to view parts that make up other parts (i.e. subcomponents).