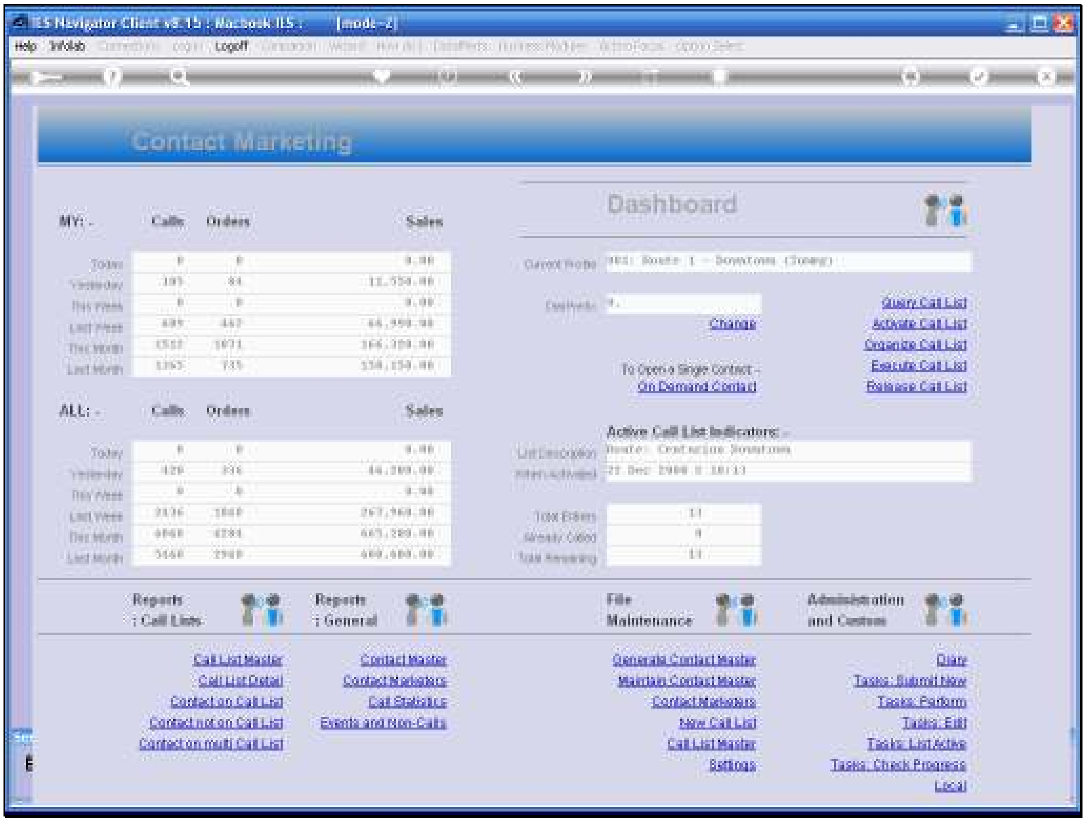
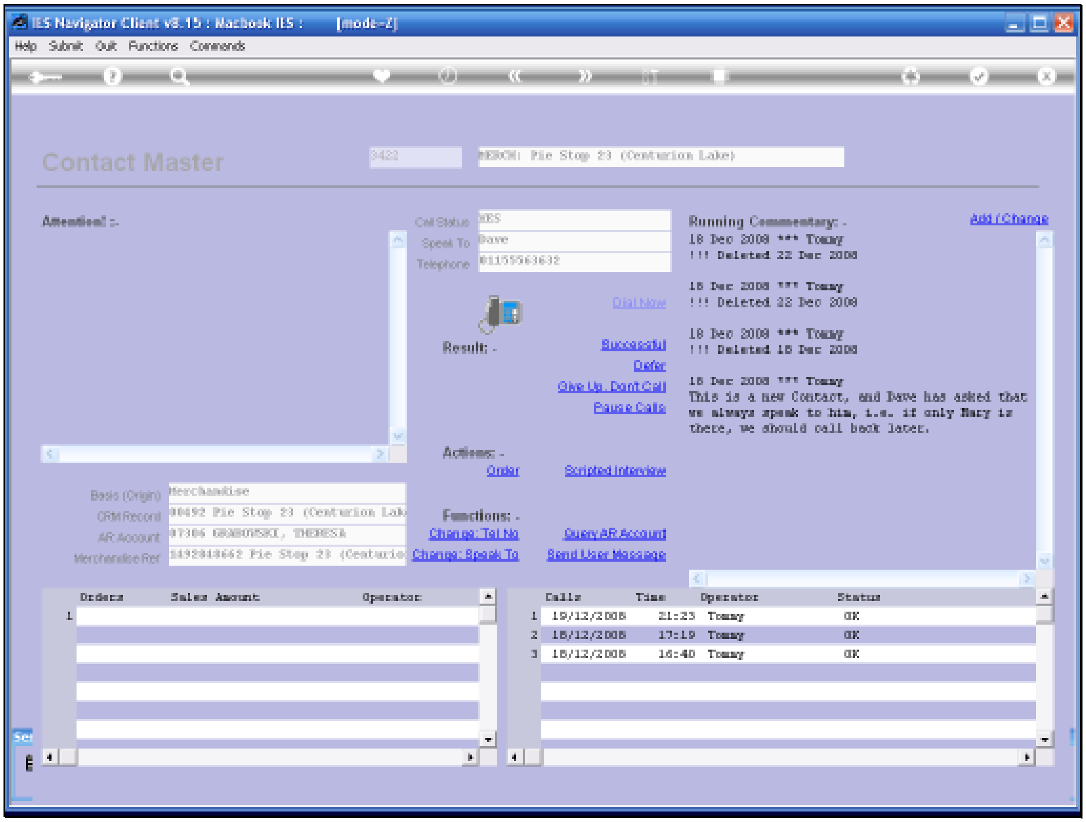
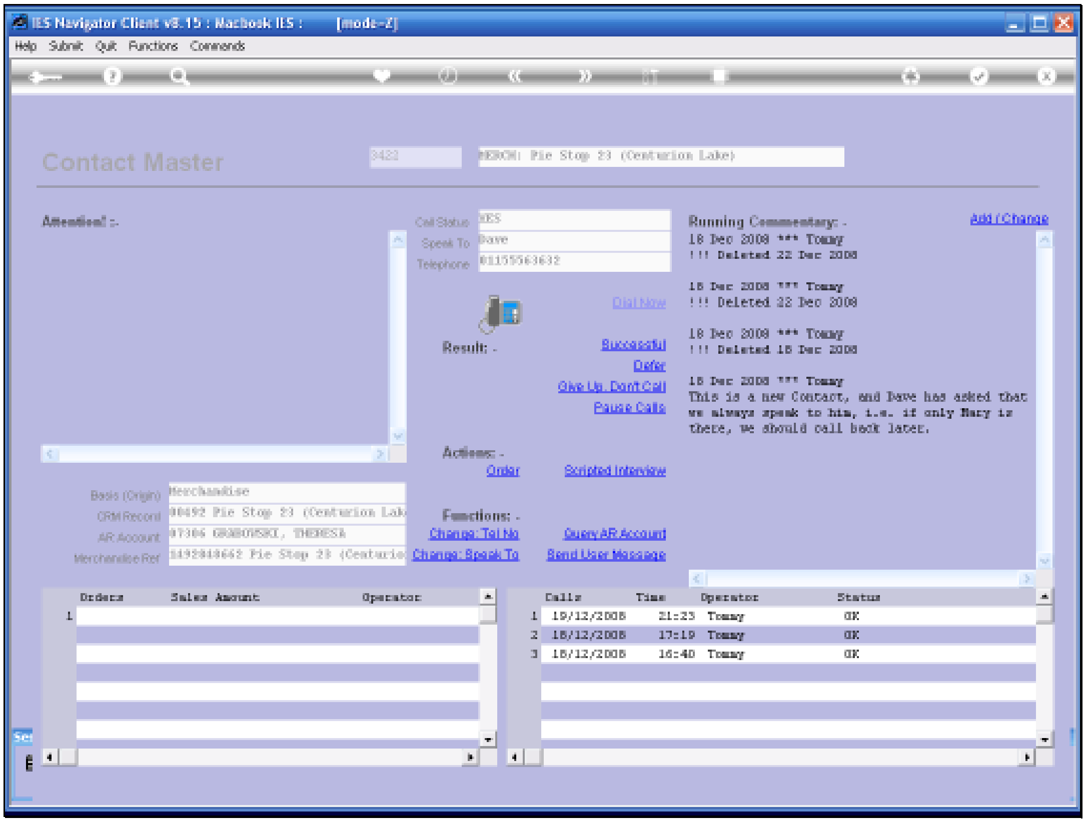


Slide 1

Slide notes: In this tutorial we demonstrate how we perform a Contact Call. When we "execute" the Call List, one Contact entry after another will appear.

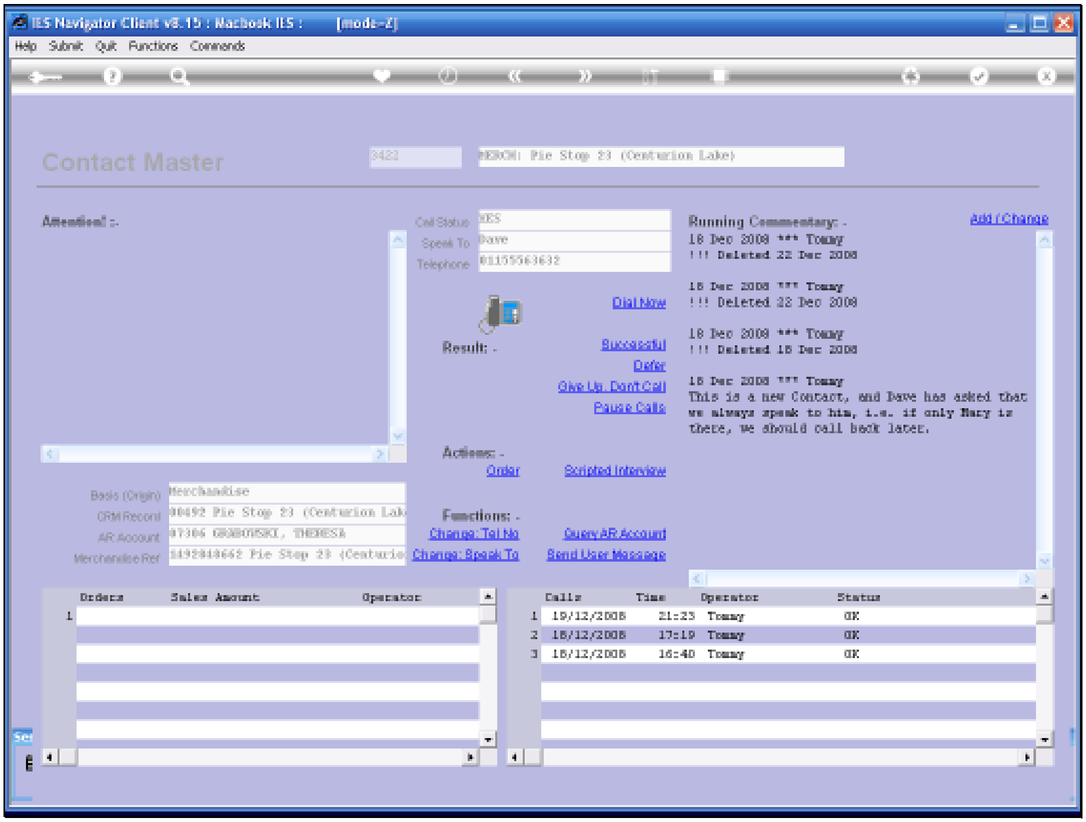


Slide 2
Slide notes:



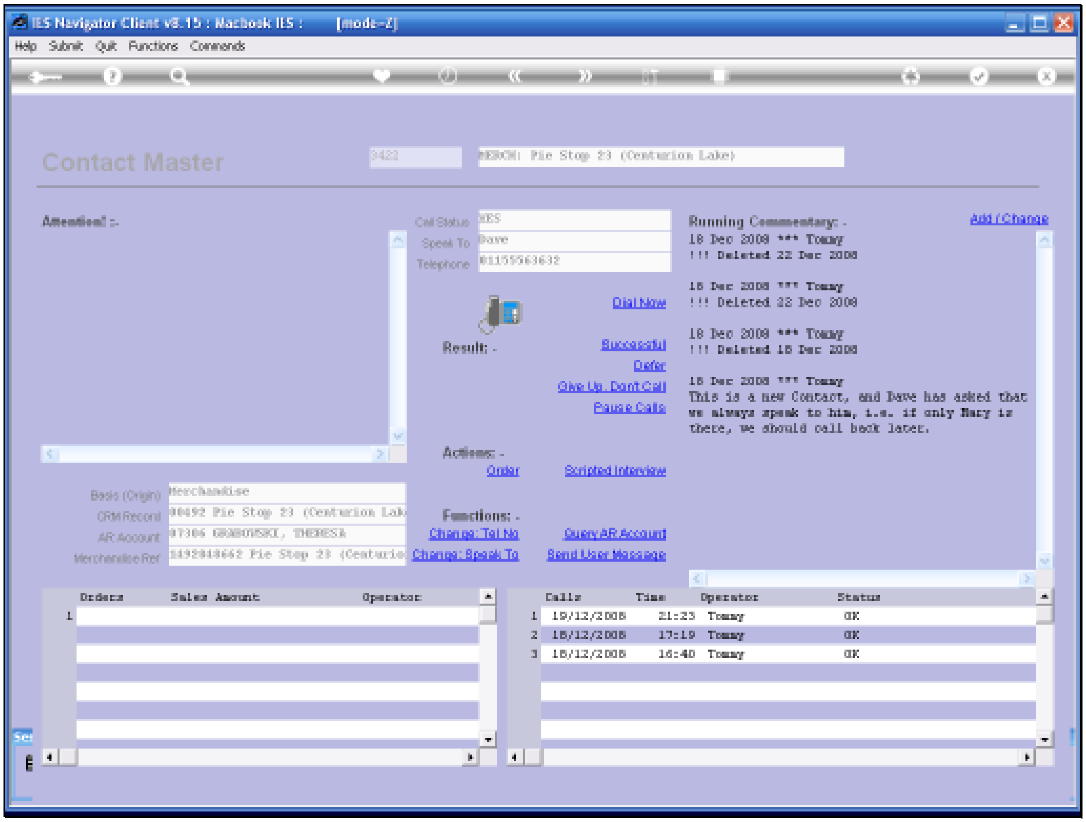
Slide 3

Slide notes: On the Contact Record, there may be important information indicated under the "Attention" banner. This is information recorded on the Master Record, and cannot be changed here.



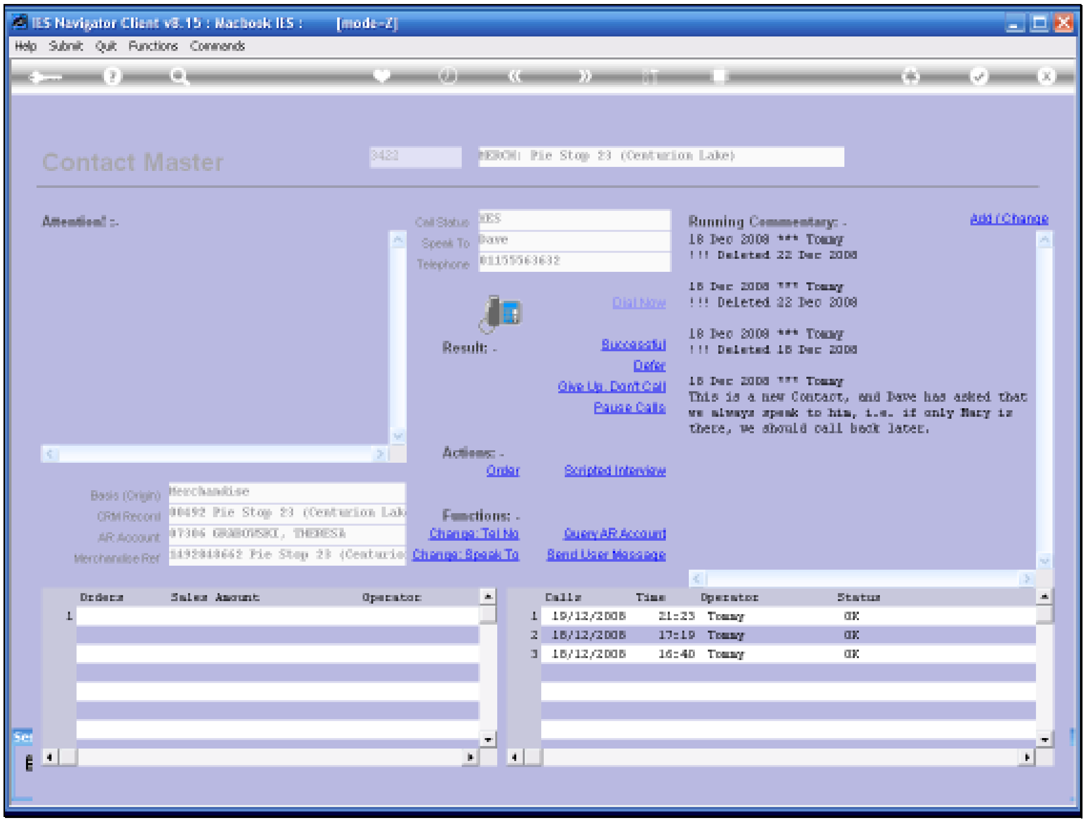
Slide 4

Slide notes: On the right, we have running commentary that shows history of all prior comments, and we can also add to this commentary.



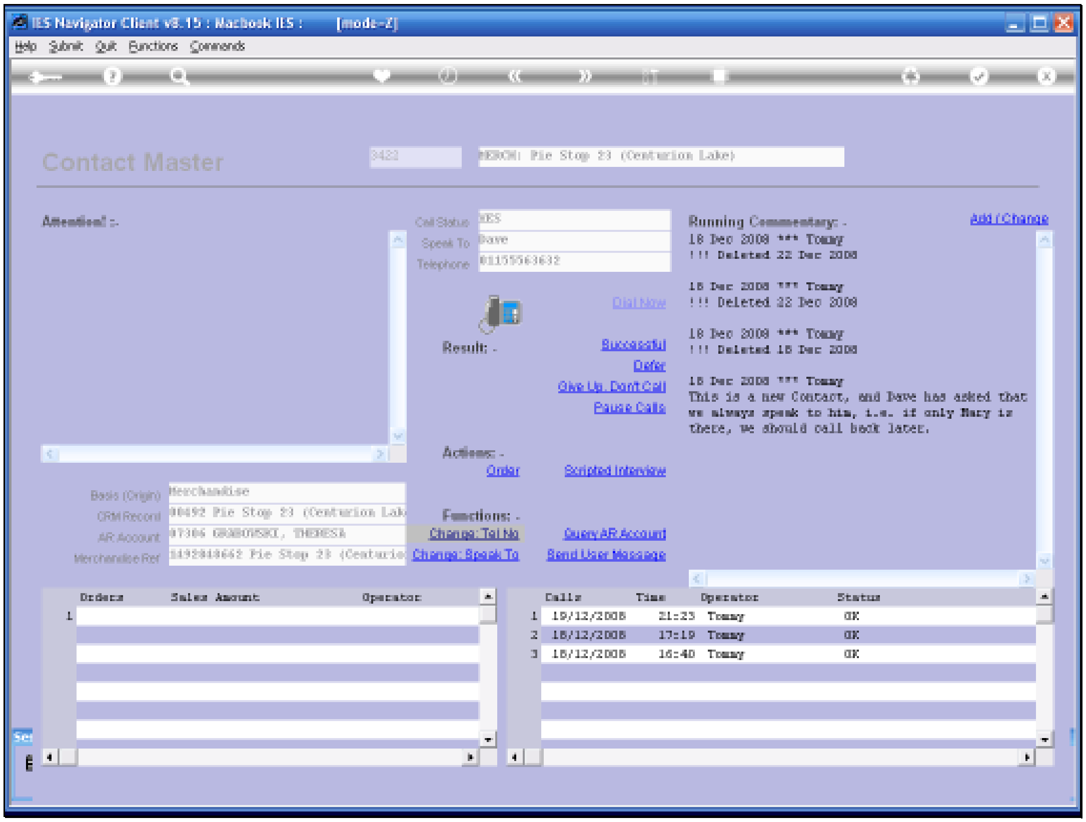
Slide 5

Slide notes: At the bottom we can see both Order History and Call History for this Contact, and if there are Orders present we can drill into those, if necessary.



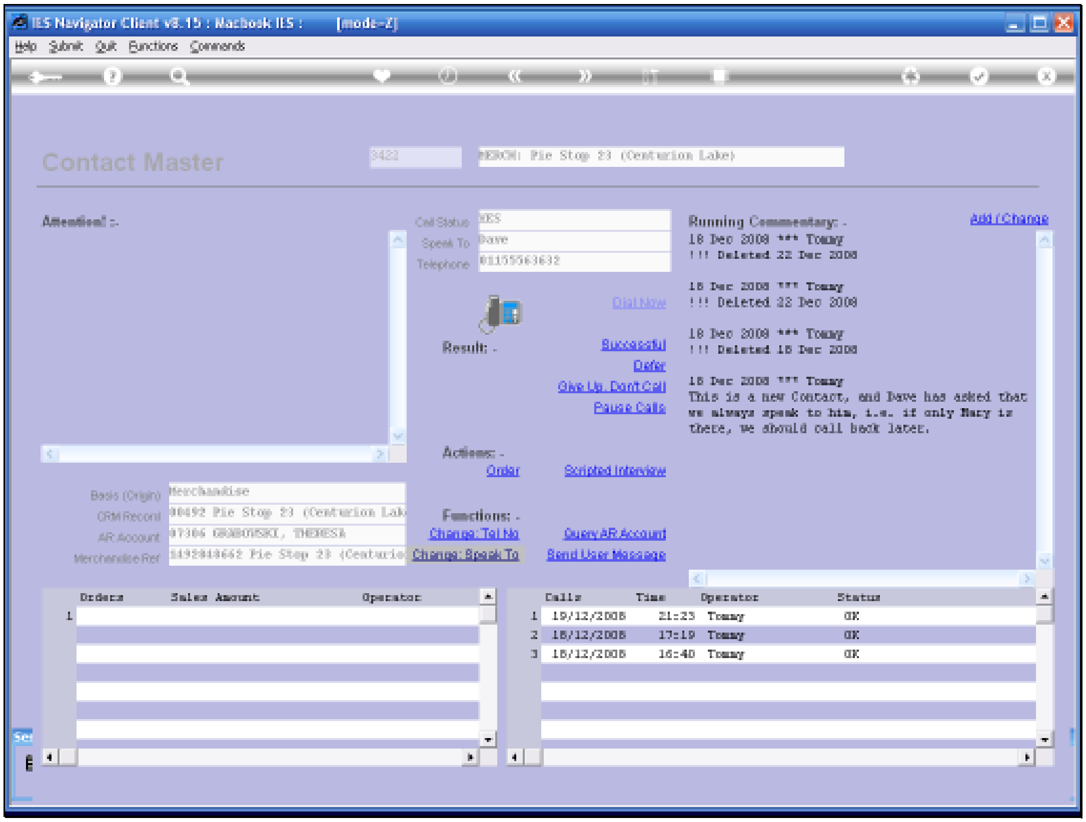
Slide 6

Slide notes:



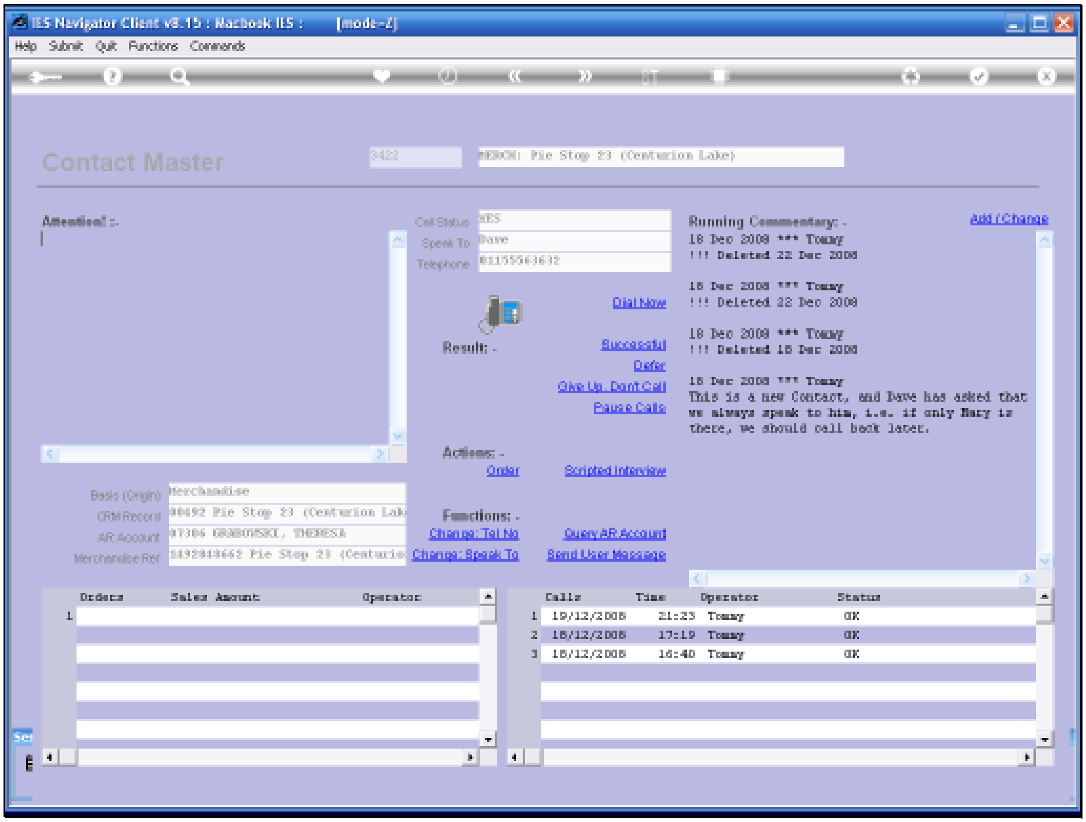
Slide 7

Slide notes: If for some reason the telephone number is not shown, or is incorrect, and if we have the correct information, we can change the telephone number, either permanently or only for this call.



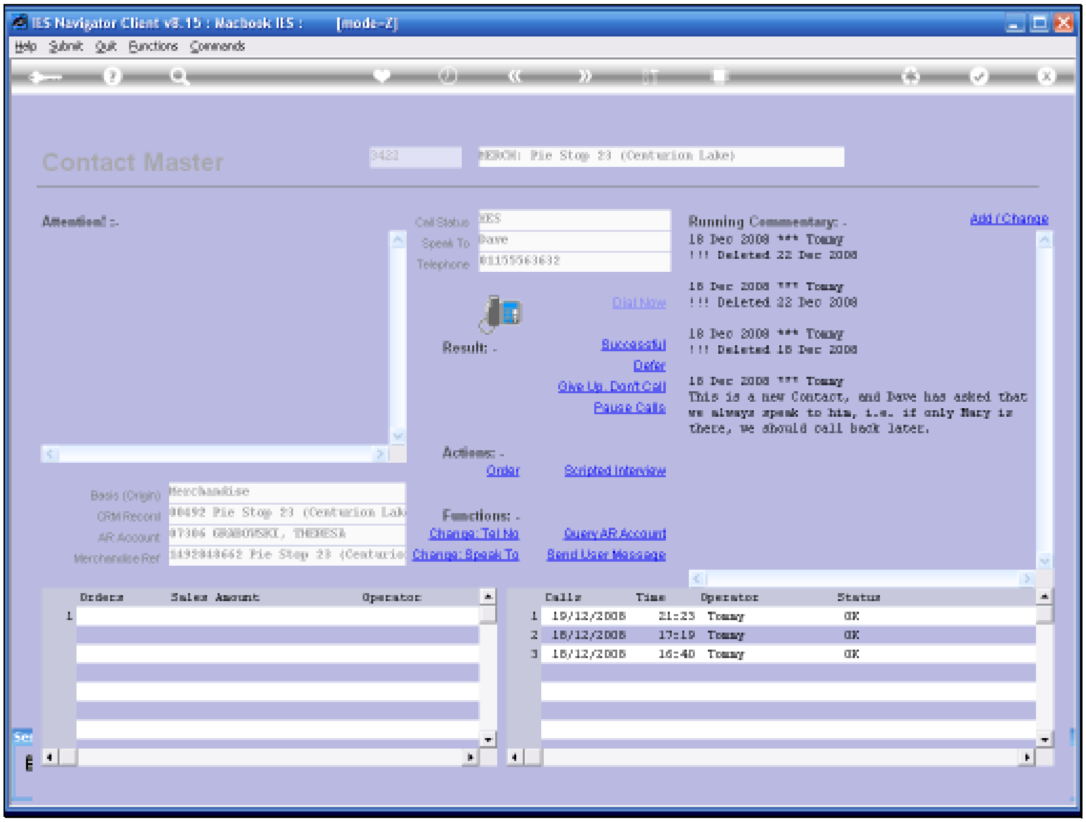
Slide 8

Slide notes: And likewise with the "Speak To" name.



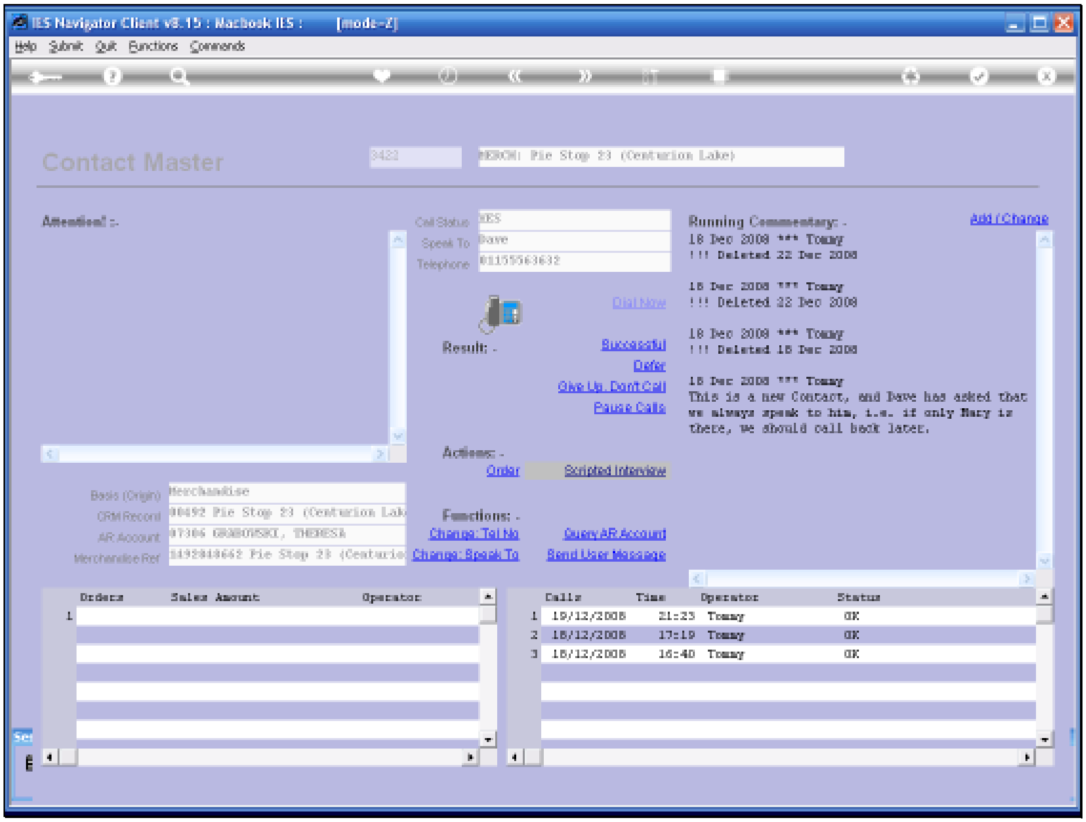
Slide 9

Slide notes: When we are ready to call the Contact, then we choose DIAL NOW. The system will now place the call.



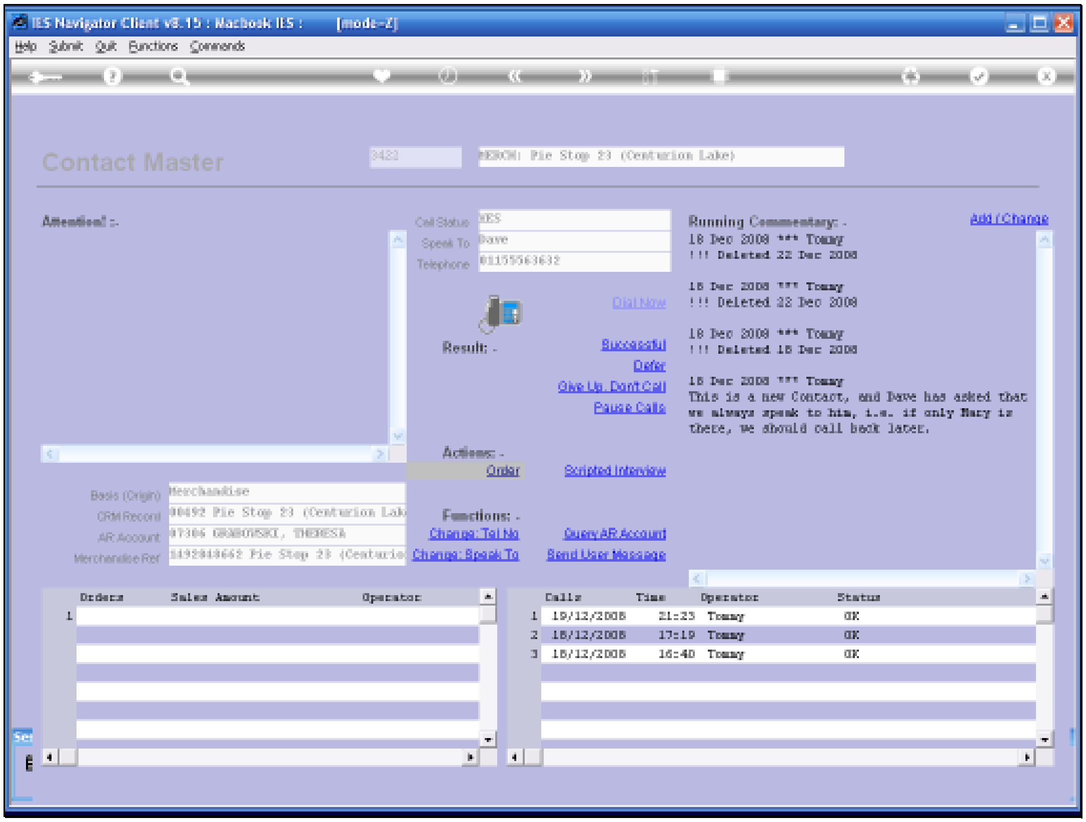
Slide 10

Slide notes:



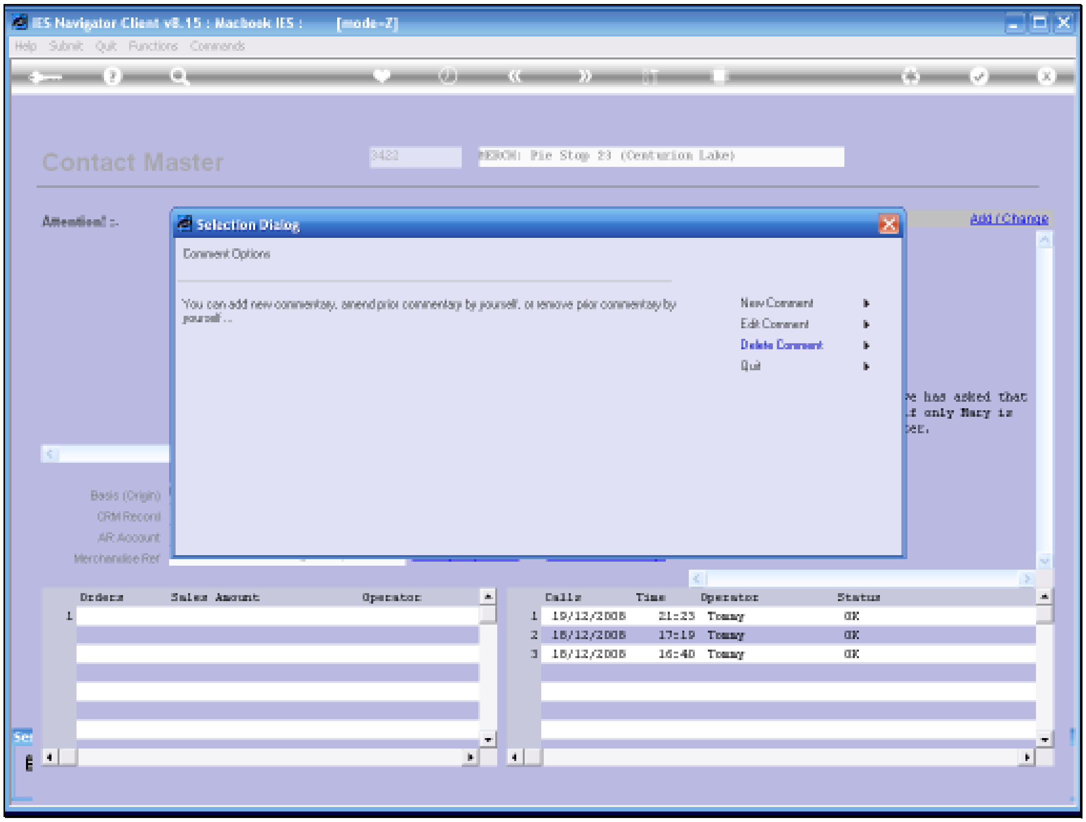
Slide 11

Slide notes: Once we have the Contact on the line, the next option will be selected according to the current action or purpose with the Call. We may enter a Scripted Interview.



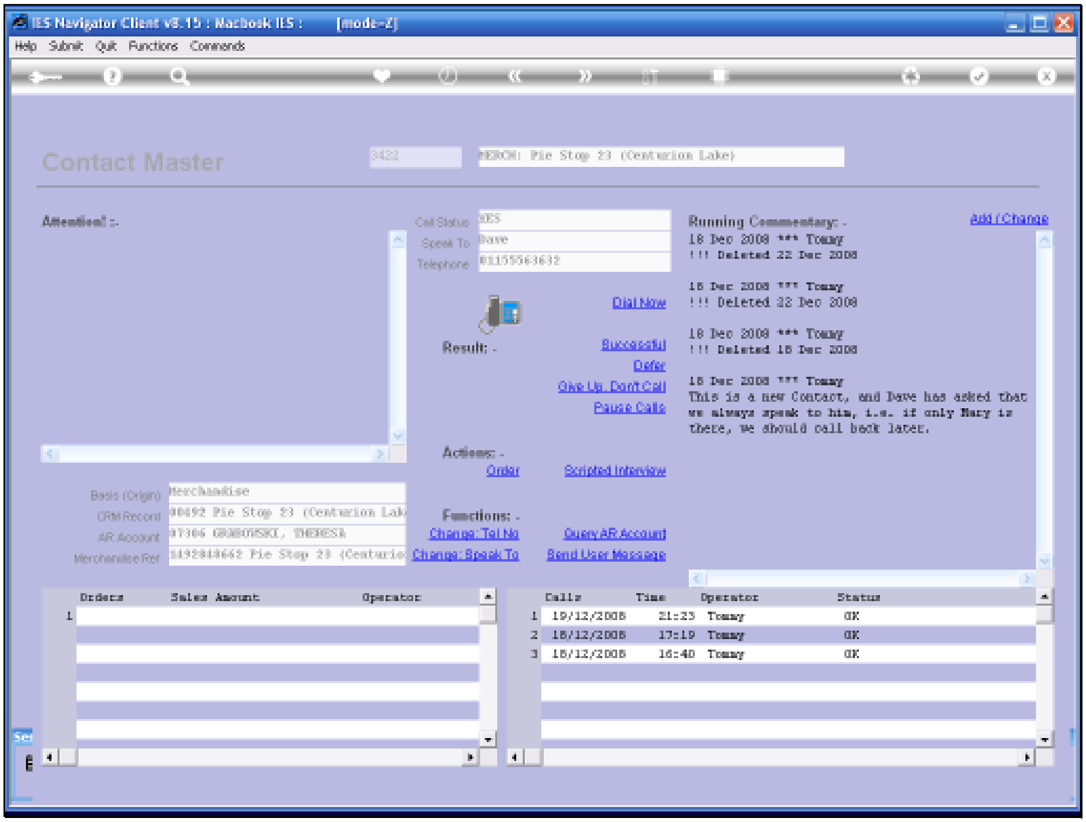
Slide 12

Slide notes: Or we may enter the Order Function. The Order Function is demonstrated in a separate tutorial.



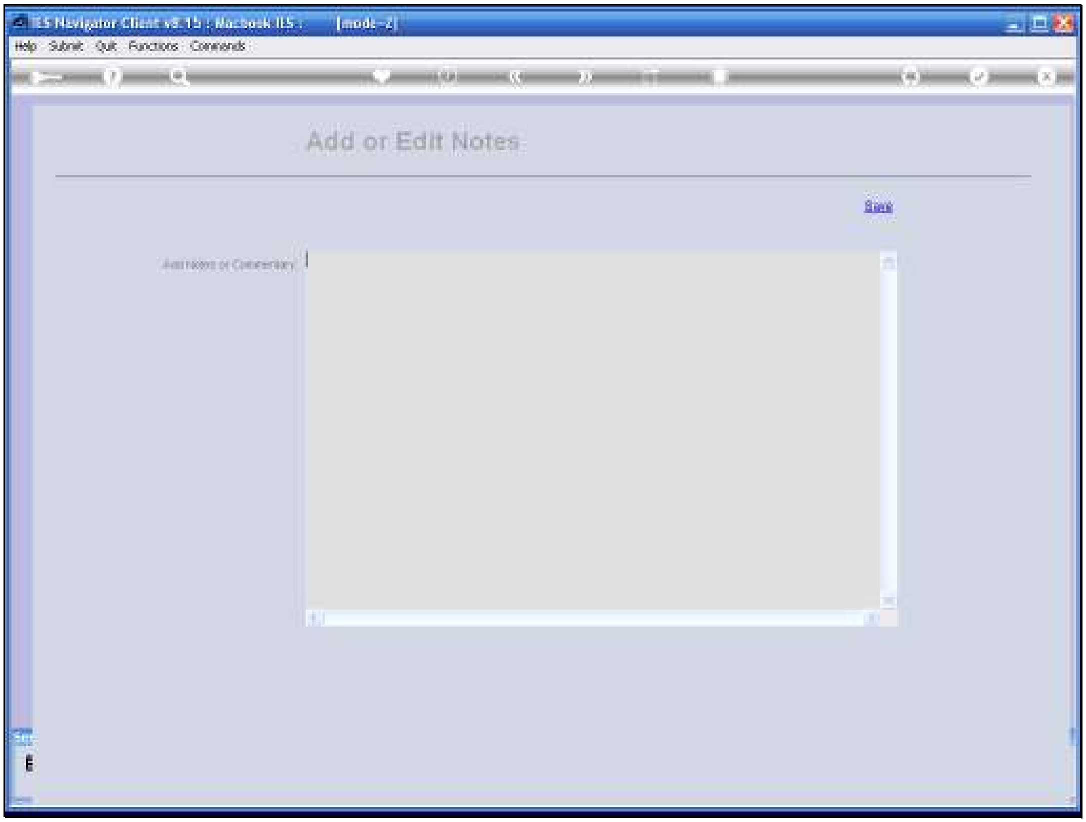
Slide 13

Slide notes: Where relevant, we may add to the Comments. For example, something may arise during the Call that is good or necessary to record. For example, if the call is about Collections, we may need to record some comments about what was said or agreed.



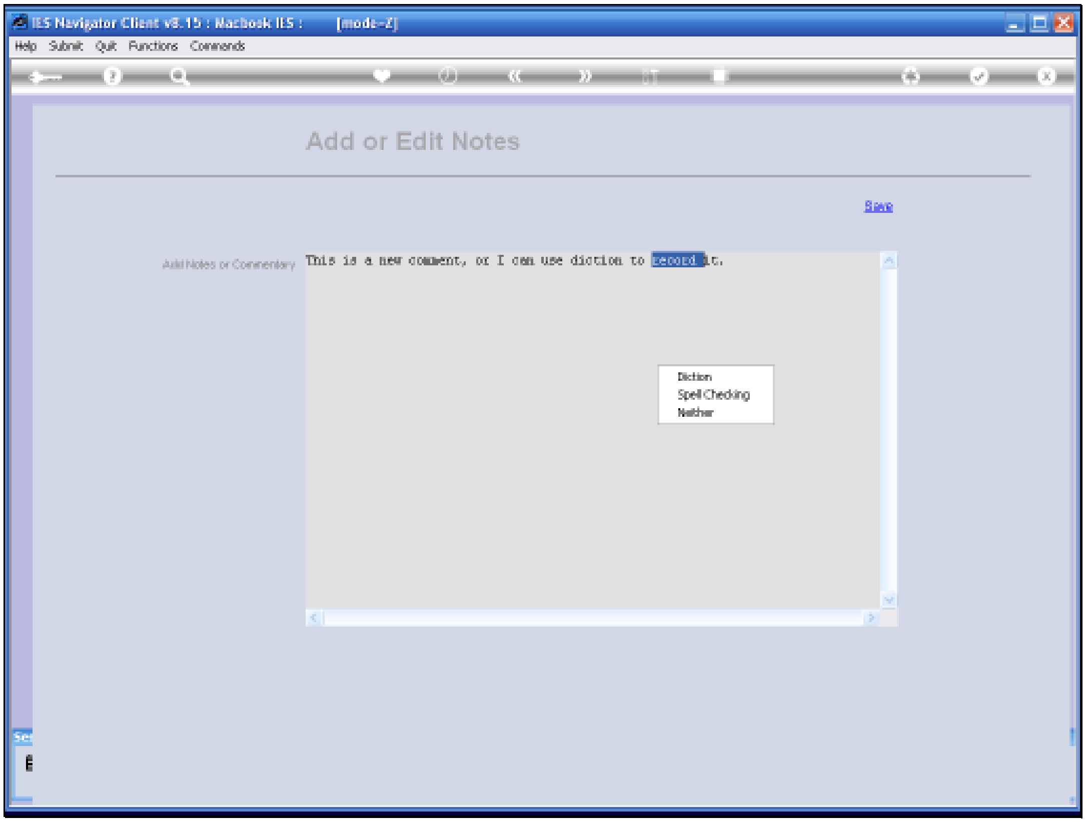
Slide 14

Slide notes:



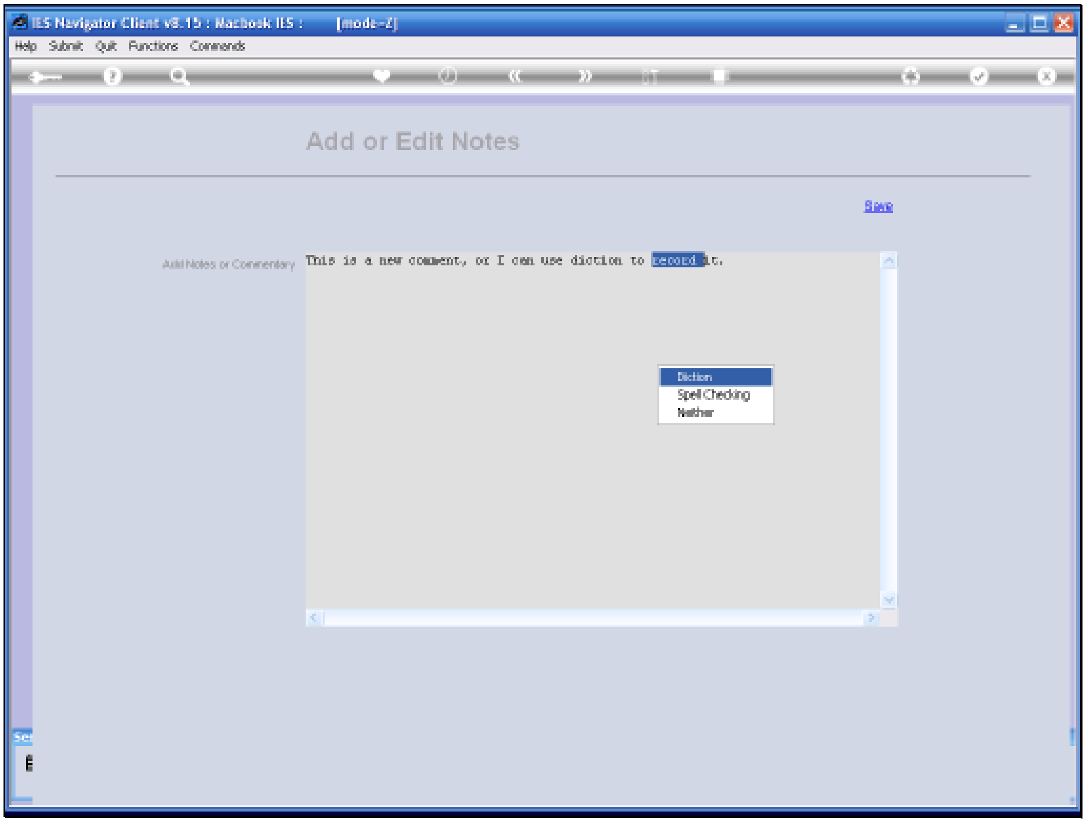
Slide 15

Slide notes: The Comments can be typed, or can be dictated.

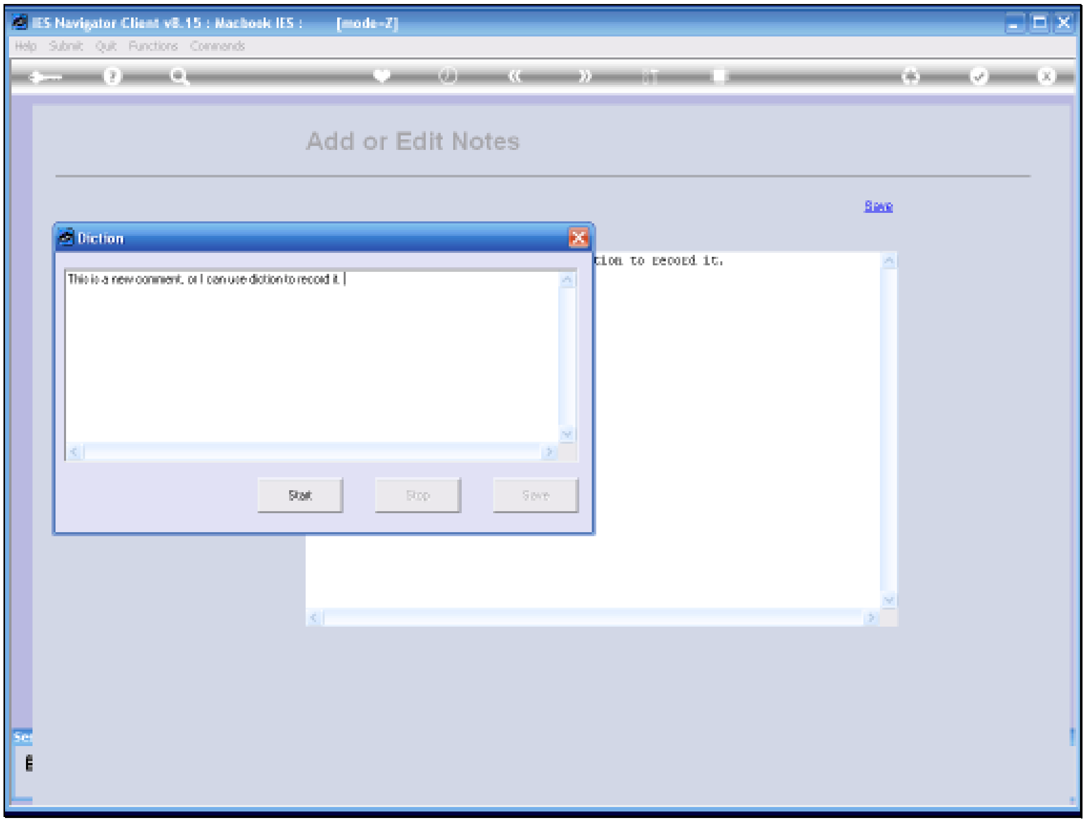


Slide 16

Slide notes: A dbl-click on the Comment box will reveal an option to enter DICTION mode.

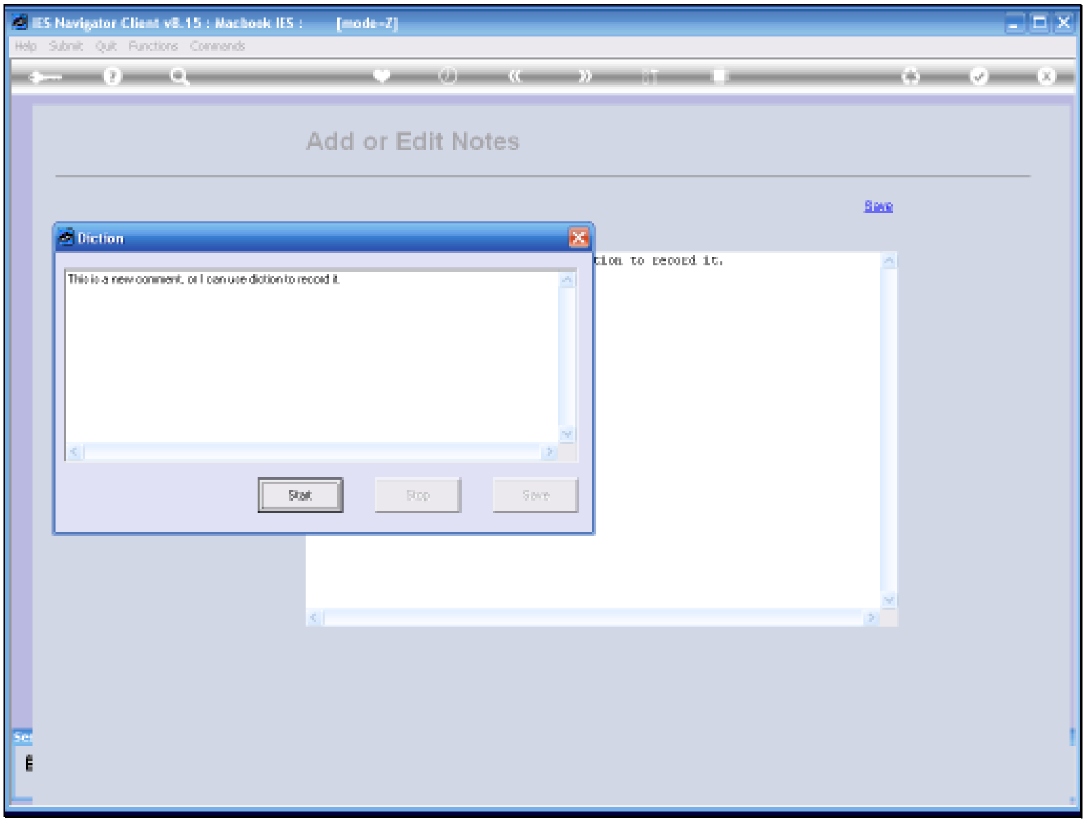


Slide 17
Slide notes:

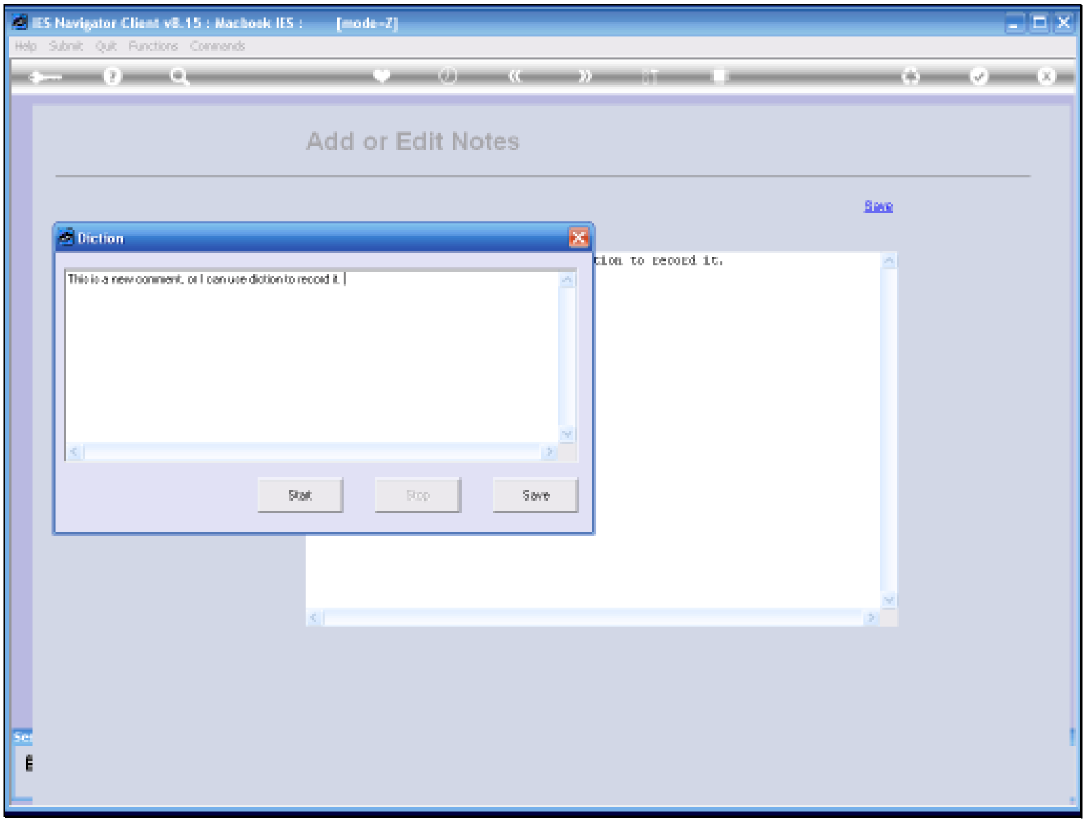


Slide 18

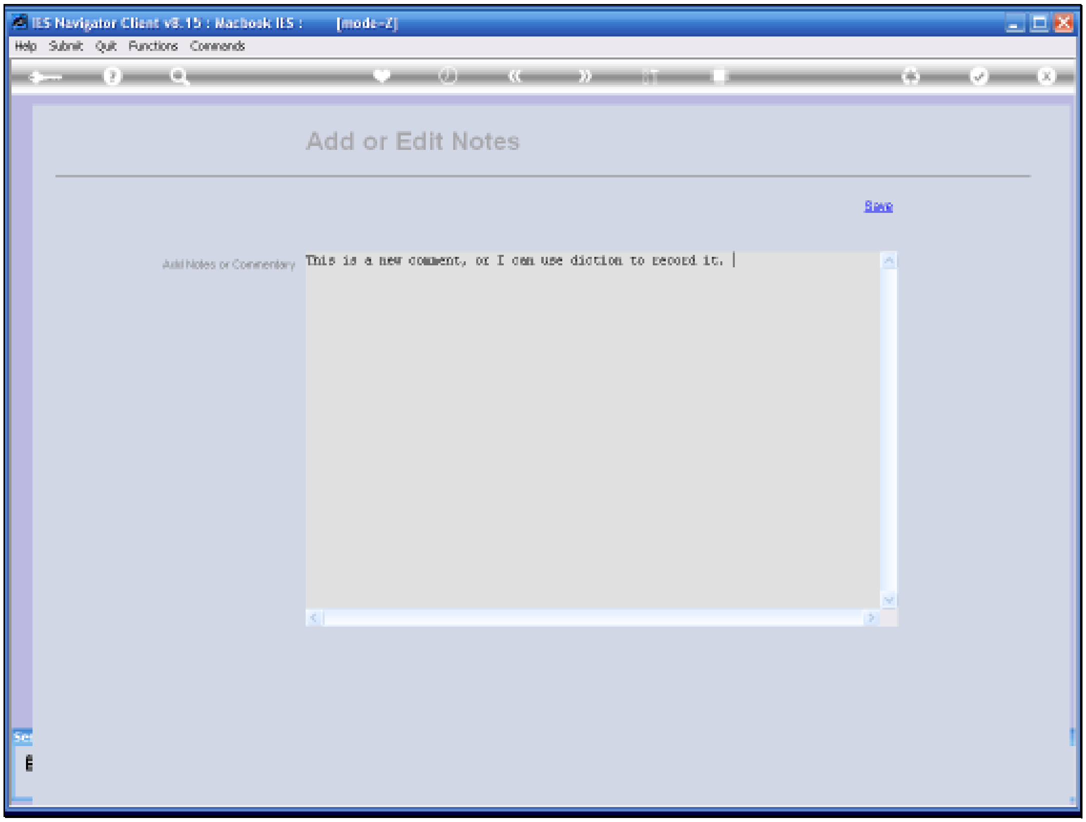
Slide notes: Here we can click start to record what we speak, i.e. speech to text.



Slide 19
Slide notes:

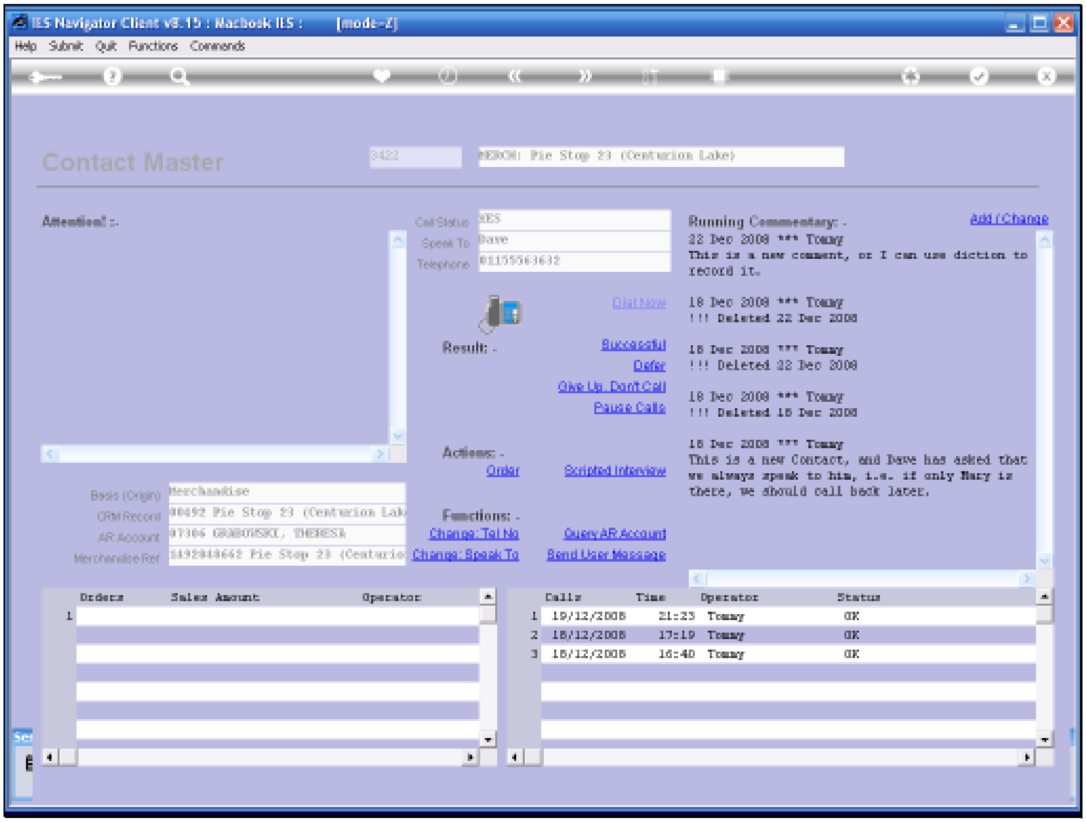


Slide 20
Slide notes: Then click STOP and SAVE.



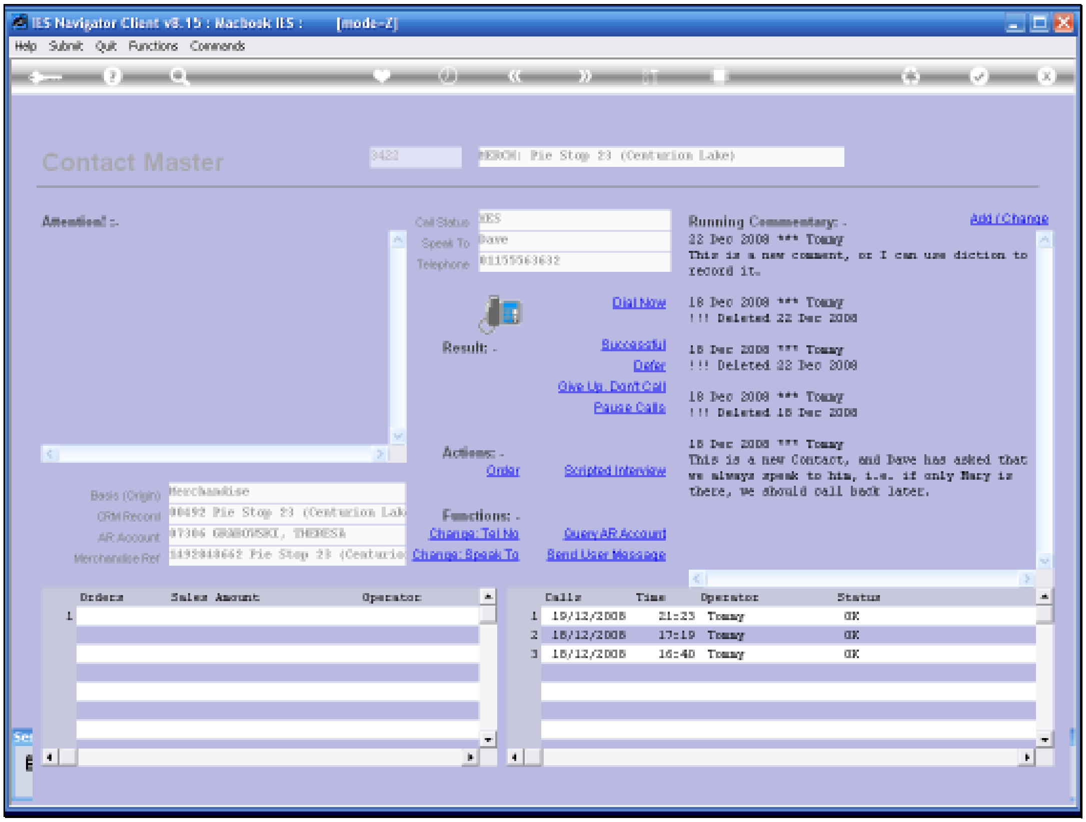
Slide 21

Slide notes: Save the final comment.



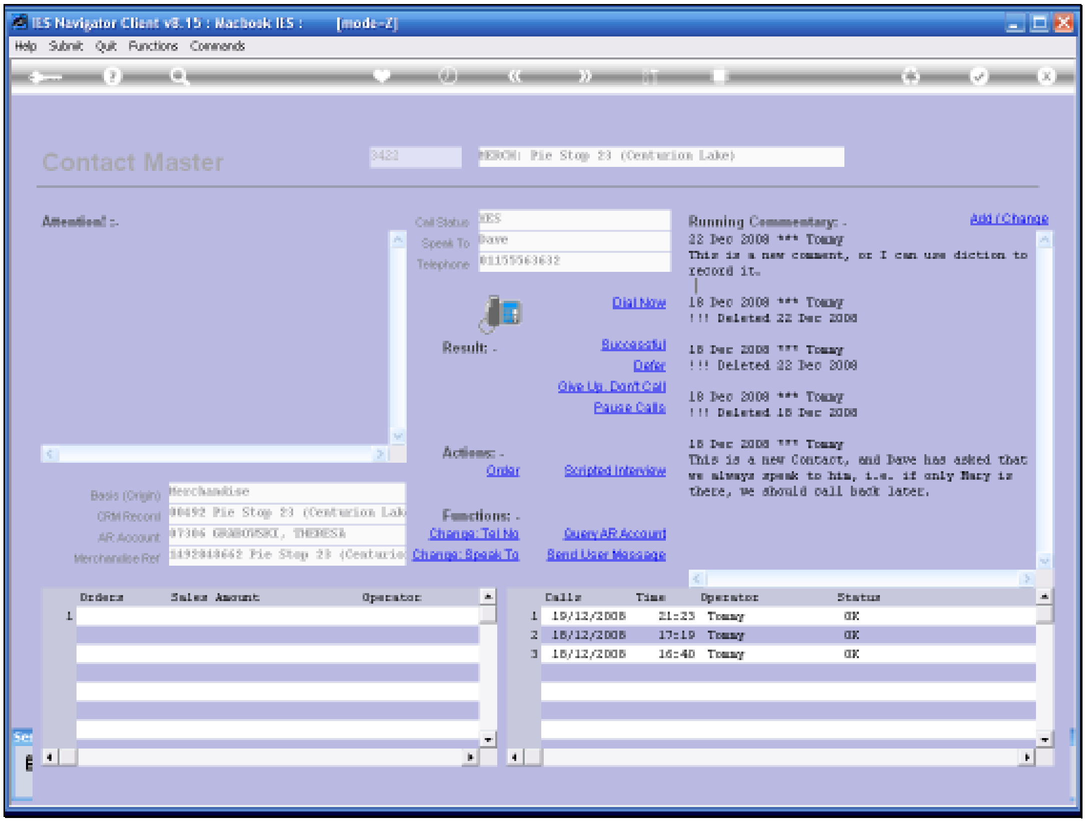
Slide 22

Slide notes: And the comment is now part of the Contact Record.



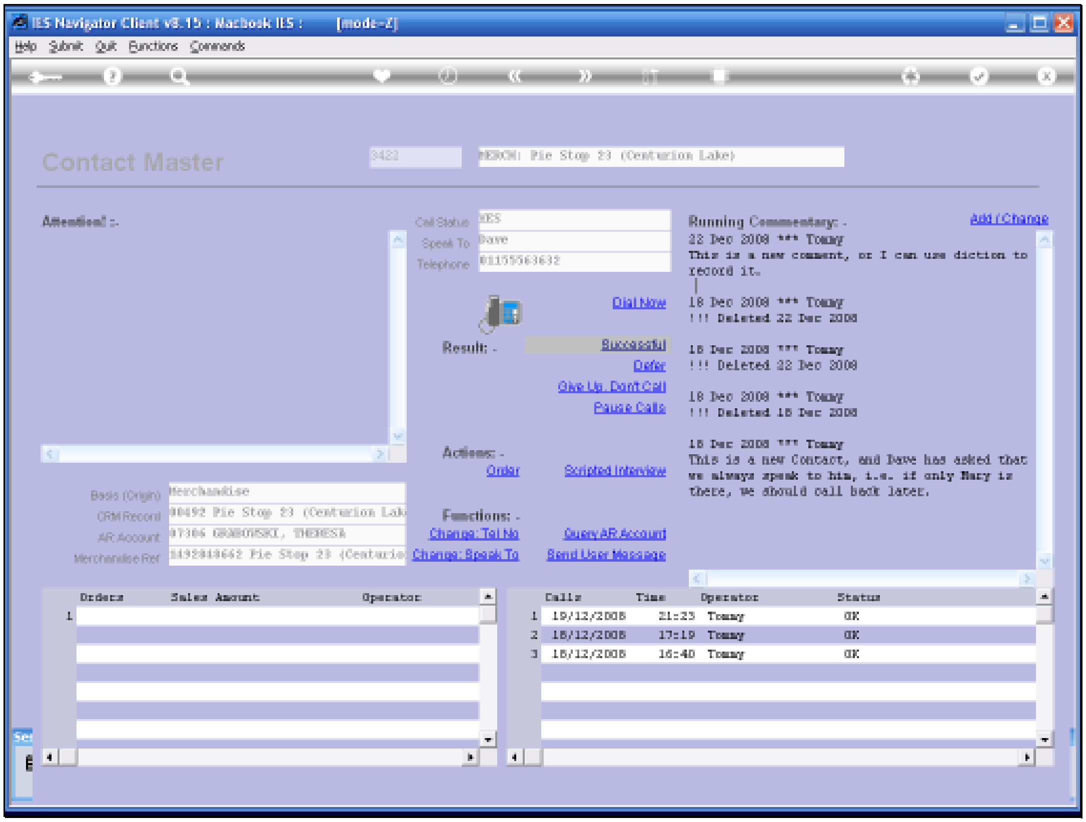
Slide 23

Slide notes:



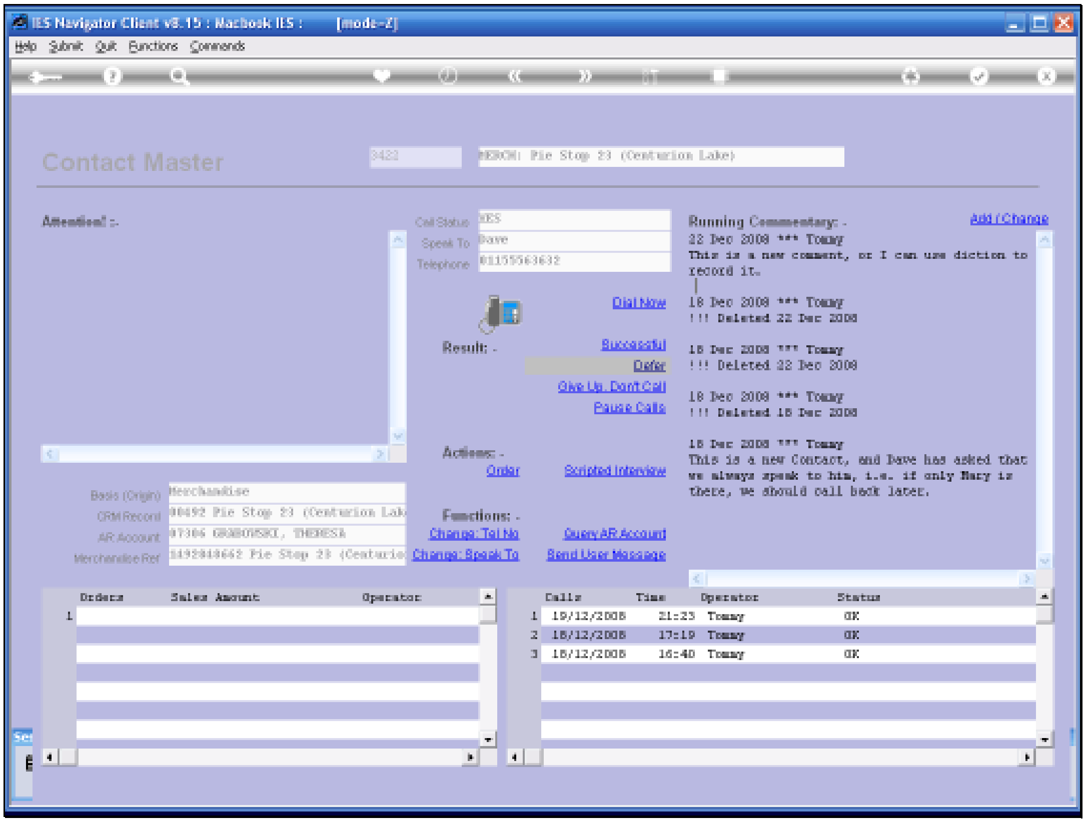
Slide 24

Slide notes:



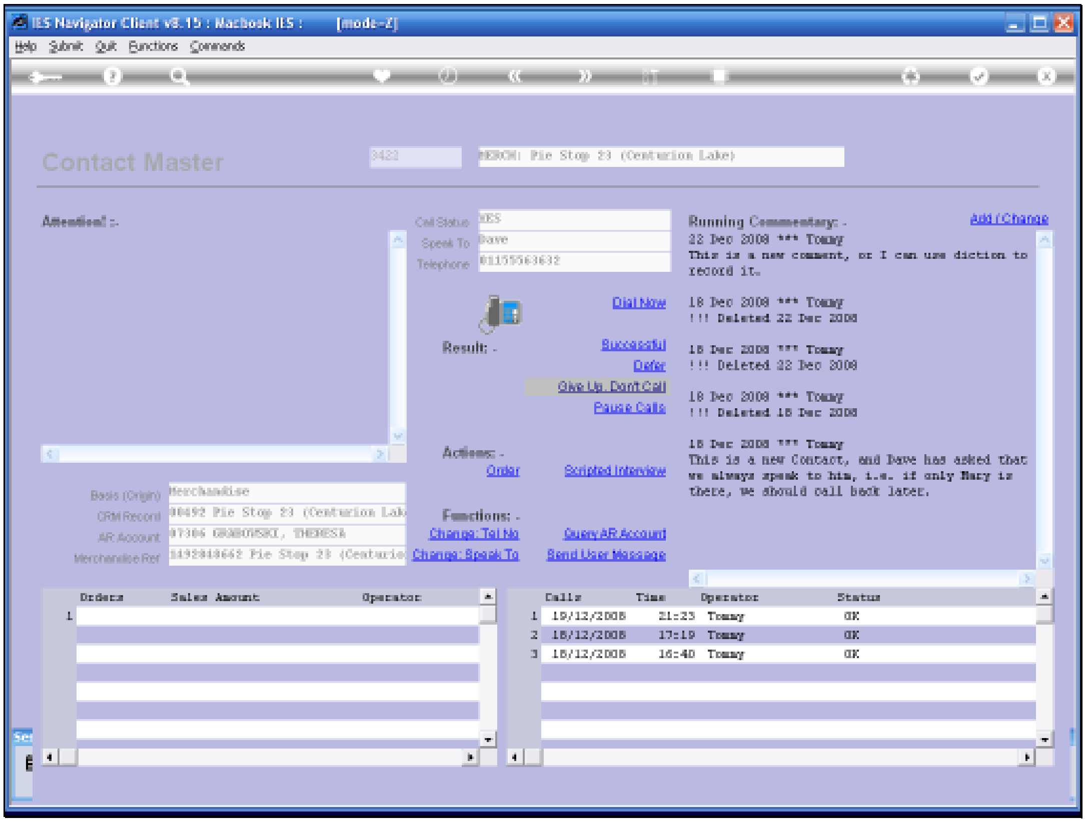
Slide 25

Slide notes: If indeed we got through to the Contact, we will choose SUCCESSFUL when we are ready to conclude with this Contact and move on to the next one.



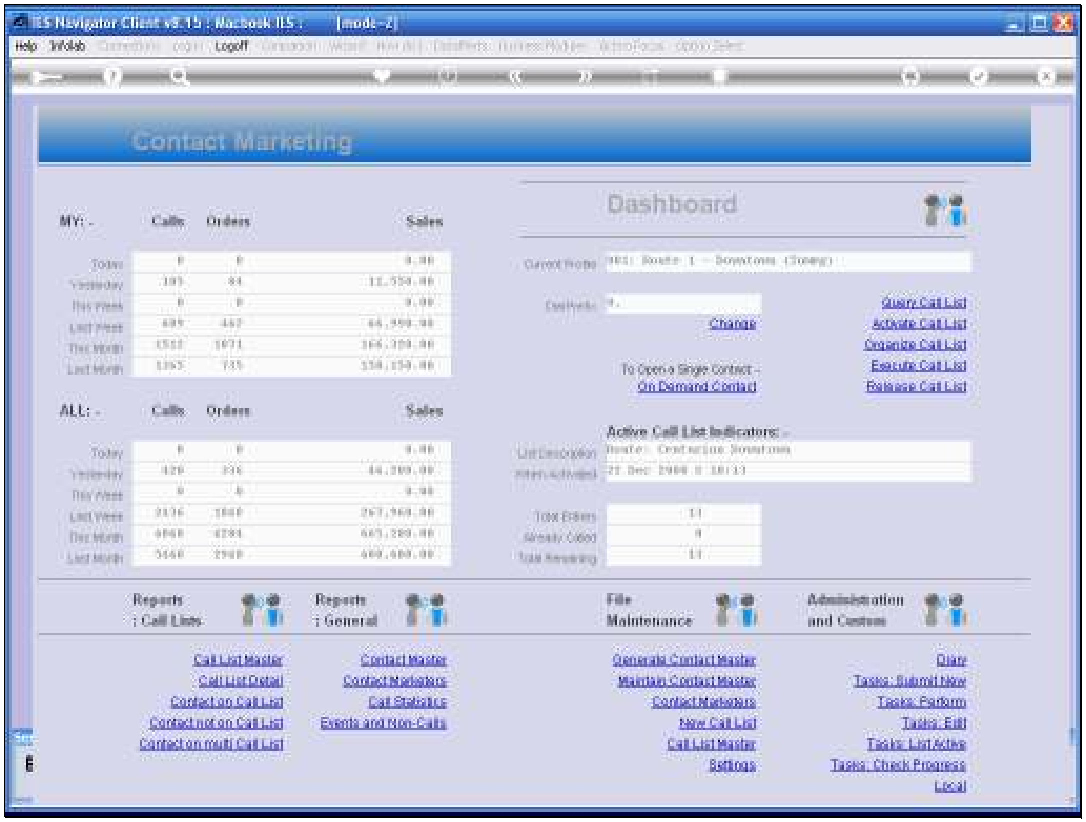
Slide 26

Slide notes: We will use DEFER if we cannot get through. The entry is then pushed to the back of the Call List queue and will come up again later.



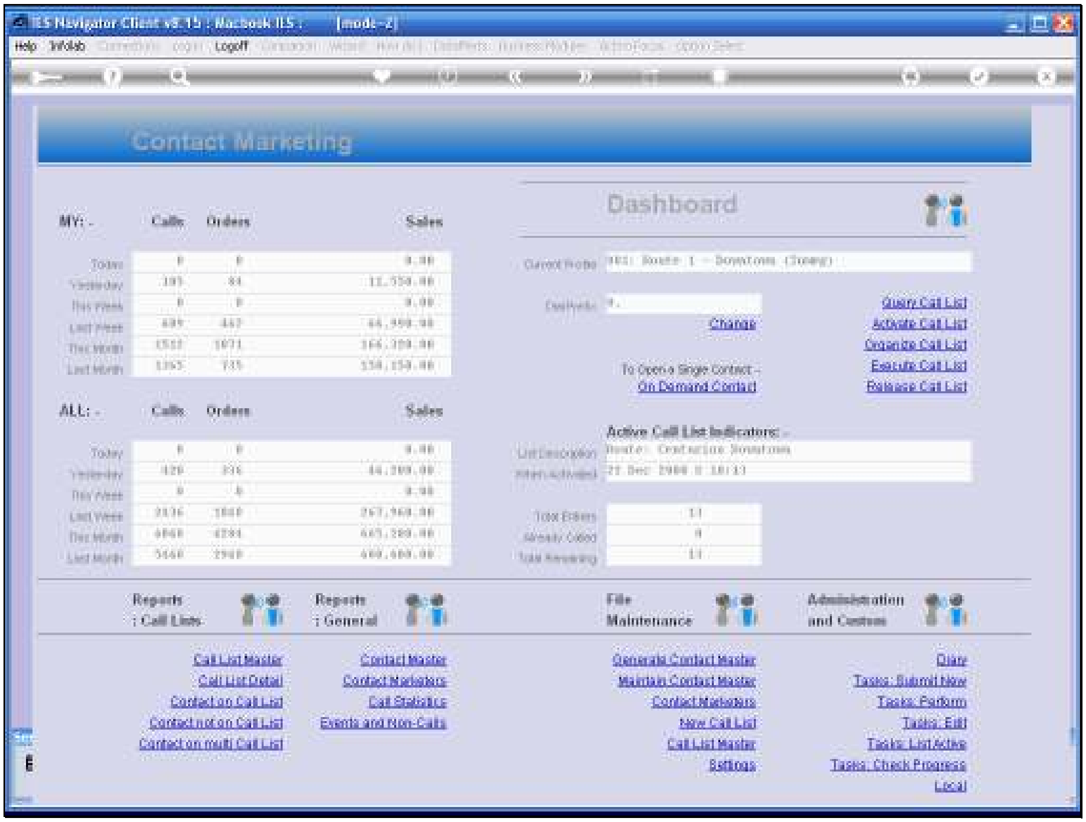
Slide 27

Slide notes: We use GIVE UP if there is no way we can reach the Contact, and in this case the system will prompt some standard reasons to select from, and this fact will also automatically be recorded for the "Unsuccessful Calls" report.



Slide 28

Slide notes: We can use PAUSE at any stage to return to the dashboard, and when we choose EXECUTE again, we will have the same Contact as when we paused, unless we re-organize the List in the meantime.



Slide 29

Slide notes: So the Call procedure is well facilitated.