# Introduction on Contact Management Software EZY Call Manager 7

# Leads – How important it is?

- Leads are considered as raw details of un-develop business opportunity .
- Leads can become a great sales opportunities
- Leads are captured through various sources . Internal or External.
- Leads can divide into qualified or unqualified

# Lead Management

- Never miss any new sales opportunities

  So, we have focus on Call Manager 7 :-
- Leads generation
- Leads assignment
- Leads tracking

# Leads Generation

- Leads –generate from existing customer complaint / referral case / any income call / any out-going call
- Leads – Generate from trade shows, new customer, Advertising, Free new products samples, Direct Mail.
- Follow Up on call detail is a must.

# Leads Assignment

- Assign new leads to specific individual by follow a regular workflow rule.
- After Sales Meeting on discuss every new or existing lead .
- According various leads nature, assign to suitable staff to follow .
- Management should keep track on it from top to bottom.

# Leads Tracking

- Lead Qualification .
- Records the whole process include:-
- Customer real problems / requirements .
- Action take to satisfy customer .
- Any Customer Feedback / comment .
- Time on next follow up .
- Lead Status . ( Win / Loss )

# Lead to Business Opportunity

- In Summary , understand the important on following steps : -
- **1/ lead generation**
- **2/ qualification**
- **3/ conversion**
- **4/ sales opportunities**

# Sales Opportunity Management

- **What are Sales Opportunities :-**
- **Never miss any buying signal over the phone.**

**( e.g. ask for quote, ask for best price, ask for good payment terms / ask for better products / services , ask for good returns/ customer complain we can fix / )**

# Leads Handling on Call Manager 7

- Records on lead case background in details .
- Records on Action Taken with date .
- Records lead case on using standard key words .
- Analysis on every lead records .
- Trace the case have potential for converting to actual sales .

# Contact Manager Software

- Many success on business depends on a well-organized contact information .
- Contact management software enhances the relationship between customer and sales life-cycle. Good for acquiring customers .
- Have a better coordination while dealing with customers .

# Follow up Sales Activities

- Log all important customer calls into Call Manager 7 for a quick reference in future.
- Store customer meetings and calls for a quick reference in future.
- Manage daily tasks of the users and for future improvement.
- Set up recurring events with date and time.
- Identify the sales persons daily work is good enough .

# Contact Analysis Meeting

- Report on new leads/existing leads case.
- Report on win case with reason/follow up.
- Report on close case with reason/follow up.
- Report on individual case on separate meeting with follow up action .
- Report on close % increasing lead case with reason / follow up.

# Performance Reports Analysis

- Quotation Listing by Month
- Sales Summary by Month
- Sales Records for Sales person by Month
- Sales Summary by Account by Month
- Stock Movement by Items by Month

**Above report provide by other Software : EZY Invoice 10 **

# Set-Up Training

# Setup Training – Open Database

- Click Database >[Open] from Top Menu.
- OR select [Open] Icon from Top Menu.
- Open Database Windows will Pop Up.
- Input User Name and Password.
- Select correct Database by high-light it.
- Click OK to access Database details.

# Add New Database 1

- Database > New > from top menu.
- New Database Wizard Windows show.
- Input New Company Name.
- Input First name / Last name.
- Input User Name ( Login ).
- Input Password ( recommend 4- 6 digital ).
- Confirm Password ( same with above ).

# Add New Database 2

- Connection Details Windows Show.
- Click Workgroup ( Local ).
- Path To Database :Leave it as default.
- [ For advance User - Click the icon [...] and select pre-define Call Manager data folder .
- Press [Next] to continue.

# Add New Database 3

- Finished : Ready to Create Database.
- Double Check All Input Field in red is correct.
- User can press [Back] for amend.
- User can press [Finished] for create new database.
- Press [Yes] button for confirm create/open database.

# Add New Connection 1
# ( Existing Database )

- Click [Open] Icon .
- Open Database Window Show .
- Click [Add] Button .
- Add New Connection Window Show .
- Confirm add new connection for existing database not equal to add new database .
- Click [Next] to continue .

# Add New Connection 2

- Connection Type Window Show.
- Use Default [Workgroup] and Press [Next] .Then, Path to Database Windows Show.
- Select existing database, and press [next].
- Then, Finished Windows show with Connection Name / Company Name.
- Press [Finished] go back to Open Database Window with new create Connection name.
- User can press [>>] for connection details.

# User Access Control 1

- Click [Go To] User :-
- Show Pre-define User List
- Define All User Access Level
- User Permissions on two aspect:
- Database Access
- Report Access

# User Access Control 2

- Database Access
- No Access- Cannot access the specified data at all.
- Read Only- Can view the data only
- Add - Can add new records but cannot edit or delete existing records
- Update - Can add new records and edit past records but cannot delete existing records
- Change - Can add new records as well as edit & delete existing records
- Full - This is the highest User Permission

# User Access Control 3

- Report Permissions
- No Access - User cannot access this report at all.
- Preview - User can only preview the report on screen.
- Print - User can preview & print a hard copy of this report.
- Full - Above functions plus save the report on disk and export the report to Excel, PDF and other formats.

# Backup & Restore 1

- Ezy Call Manager performs a backup or Archive using the Zip compression format.
- 1/ When you Close a database or exit Ezy Call Manager, you may be prompted to to backup your database.
- 2/ By On Demand Backup Command : -Click [Database] / [Backup]
- After select the backup location , Press [ Start Backup ] Button.

# Backup & Restore 2

- 1. Use the menu command : Database | Restore.
- 2. Complete the Restore From box by selecting the Zip file that you want to Restore.
- 3. Specify the path that you want to restore to. Then click the Start Restore button.

# Data Import & Export

- Ezy Call Manager allows you to import your customers, product list.
- Support Excel Files Format both for Data Import & Export.
- Click Database | Import | followed by the option you want to import to.
- Click Database | Export | followed by the option you want to import to.

# User Training

# Add / Delete / Modify a record 1

- Press [+] Icon from the top on adding record.
- Press [Down arrow] for select source of lead.
- Then [Customer Name] for select existing customer
- Press […] for new records update.

# Add / Delete / Modify a record 2

- Select Caller Salutation by press [Down] button
- Select Received Date of the call by press [Down] button
- Select Product or Subject by press [Down] button
- Input caller requirement detail on Call Description

# Add / Delete / Modify a record 3

- Set the Priority Level (1is most urgent 5 is lowest)
- Update Call Status ( Closed / For action / For info / Ignore / On hold )
- Input Next Follow up Date by press [Down] button
- Press the [Save] Icon for update database.

# Add / Delete / Modify a record 4

- To edit a call record, high light it on the right panel , press [Edit] Icon, input fields will change from dime out to edit mode.
- To Delete a call record, high light it on the left panel , press [Delete] Icon, [Confirm] window show and click [Yes] for continue to delete record.
- Select delete record will not show in database.

# Add / Delete / Modify a record 5

- Follow Up Action Tab
- Record all action take like ( Quote send / Quote amend / Sample Sent / Deposit Paid )

  *** Please notice, all action details can be print to report only .***

  *** Print out Report named Details Call Listing , All follow up action will show***

# Locate specify call records

- Click Down Arrow near [Find] Icon on the Menu.
- Click [ Show All ] for show out all records.
- Click [ Filter ] to set condition for specific records.
- Enter Filter Criteria Window Show
- Select [Call Description] on [Fields] panel.
- Input Search Criteria wording on [Field Value]
- Select [Partial Match Anywhere] and Click [OK]
- **never check the box [Case Sensitive]**

# Win / Loss

- Once you win a case, Try to input standard Wording : Win the case.
- Once you failed a case, try to input standard Wording : Close a case.
- Call status : Active Call / Closed Call
- All Win case / Failed case can be changed to Closed call.
- Any Closed call can change back to active call.

# Reporting 1

- Call Listing report – Show all active call details but without Follow Up Action Information.
- Show all active call meet Search Criteria.
- Show [ Call Description ] details per each records.
- Fields Show : - Call Date and Time / Customer Name / Caller name / Tel / Follow Up by / Call Status / Product

# Reporting 2

- Detailing Call Listing
- Show Active Call Only
- Show Closed Call Only
- Option on select period.
- Show Action Taken By : / Follow up
- Call Date and Time / Customer Name / Caller name / Tel / Follow Up by / Call Status / Product / Call Description

# Reporting 3

- Customer Listing
- Show all Lead call basic information
- Customer Name
- Caller Name
- Tel
- Fax

# Reporting 4

- Product or Subject Listing
- Show all Pre-define Product / Subject name by User.

# Reporting 5

- List of All User Accounts
- Show all User Details Pre-define by user.
- Fields Show : Login Name
- Last name / First Name
- Email
- Tel

# Recommend on Addition EZY Software

- EZY Invoice 10 Pro (Quotation / Invoice / Purchasing / Inventory / Reporter Writer)
- EZY Instant Invoice 10 (Quotation / Invoice / Product List Database / Reporter Writer )
- EZY Instant Cash Book ( Multi – Company / Multi – Bank / Record All Bank In Out Transactions / Print out Payment & Receive Voucher / Support Chart Printing Report )