myridas™ User Guide

Version 7.7 for Great Plains 7.5

Customer Call Scheduling

Trinity Computer Services Limited

November 2003

Contents

Using this Guide

The graphics in this document are best viewed or printed with Adobe Acrobat Reader version 4.0 or above.

This guide provides user notes for the Myridas Customer Call Scheduling module:

- Customer Call Scheduling

The mouse symbol has been used throughout the manual to help guide you to the location of windows in the software. See Appendix A for a list of Myridas windows and their location in the software.

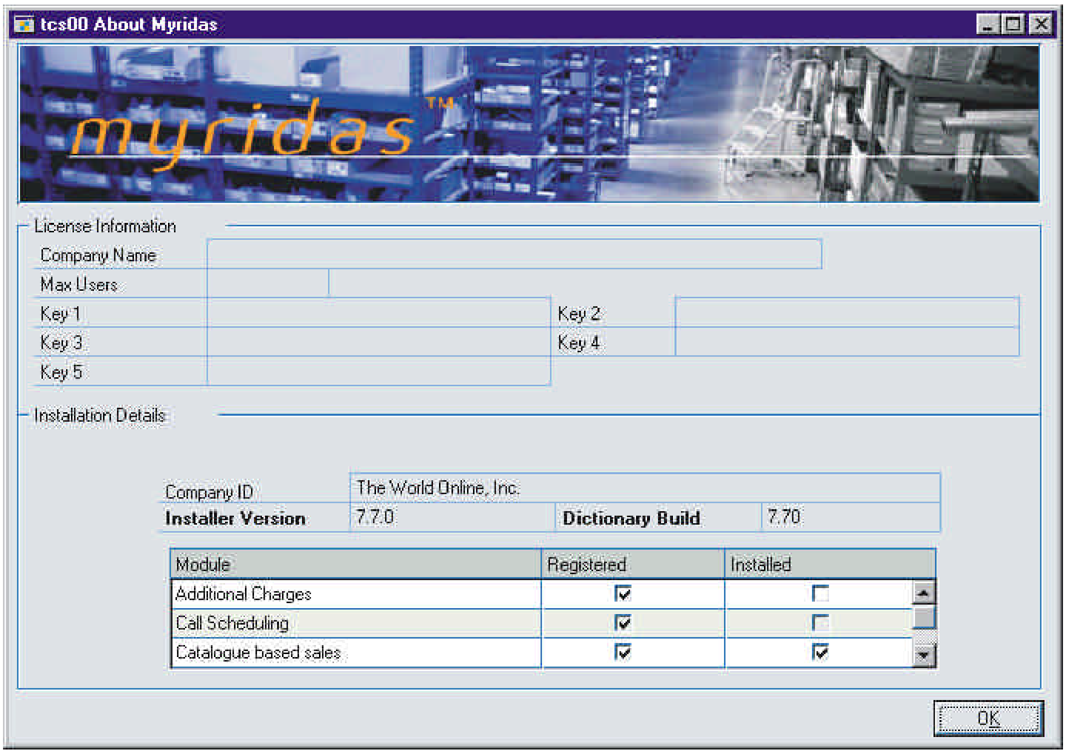
A full range of tutorials is also available on our website, http://www.trinitypartner.com.

About Myridas

Cards >> Myridas Setup >> About Myridas

Use the About Myridas window to check your license information and installation details. The window will tell you which Myridas modules you are registered to use and which have been installed on your system.

The About Myridas window



Customer Call Scheduling

The Myridas Customer Call Scheduling module provides the functionality to present a telesales operator, for example, with a list of customers to call. The operator (or user) is presented with the details of the customer to call – contact name, address, phone number, call date and call time etc – in the Call Processing window.

The main features of Call Scheduling are:

- A facility to create call schedules that can be assigned to customers and addresses individually or in groups
- The facility to define call schedules as main call schedules
- The optional specification of a call day, call date, call time and call frequency for each customer/address
- The ability to allocate call schedules to users or groups of users
- A call processing window which provides users with a list of calls to be placed on a specific date, or a range of dates
- A link to sales order entry from call processing for telesales operators
- The facility to respond to incoming calls and correspondingly update the appropriate call schedule
- A facility to record responses to calls with next call date and time
- A call back facility for failed calls
- A facility to request a follow up call by another operator
- Access to the call history of a customer being processed
- A supervisor's enquiry window which reports on future calls
- A historical enquiry window which shows all calls that have been made for a range of dates, customers, users and call schedules

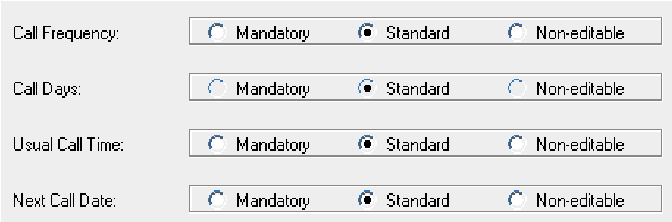
Call schedules

A call schedule is a list of customers or addresses to be contacted. A schedule might be a telesales operator's daily call list, or a list of prospects to be contacted following a marketing mailshot about a new product or a special offer. If required, calls can be logged to take place on a specific day of the week, on a specific date and at a specific time with a call frequency that can range from daily to annually. The specifications of the scheduled call time are determined by the call type. In addition, specific users or groups of users can be allocated to different call schedules. Use the Call Schedule Maintenance window to create and edit call schedules, and the Call Schedule Users window to allocate users to call schedules.

Call types

A call type determines which call frequency, call day, usual call time and next call time options are available for a call schedule. You can create multiple call types to match different call schedules, such as marketing call types where call frequency may not be required, or telesales call types where most fields will be mandatory, or annual subscription call types where the date, and not the call day, is important.

Section of the Call Scheduling Type Maintenance window



When a call type is created in the Call Scheduling Type Maintenance window, each call frequency, call days, usual call time and next call date option can be specified as mandatory, standard or as non-editable. However, not all option combinations are possible - the combination of options available is dependent on the call frequency selection:

Call frequency selection	Effect on other options
Mandatory	Locks call days, usual call time and next call date to mandatory.
Standard	Locks call days to standard. Usual call time and next call date can be set to mandatory or standard.
Non-editable	Locks call days to non-editable. Usual call time and next call date can be set to mandatory, standard or non-editable.

Your final call type selection will affect the way data can be entered in the call frequency, call days, call time and call date fields in the scrolling window of the Call Schedule Maintenance window:

Option	Effect on field
Mandatory	A value is required
Standard	A value can be entered but is not required
Non-editable	Locked

User groups

A user group is a selection of users who have been assigned to the same group, which means that task specific groups such as telemarketing and telesales groups can be established. The use of groups simplifies the allocation of call schedules to users, in the Call Schedule Users window. Use the User Group Maintenance window to create and edit user groups.

Main Call Schedules

You can select to define your call schedule as a main call schedule in the Call Schedule Maintenance window. A main call schedule will be updated by any sales order transactions for the relevant debtor and debtor address, whether or not the transaction is implemented through the Call Processing window. This could be useful, for example, when a sales transaction is created as a result of an incoming rather than outgoing call.

Note that you can create multiple main call schedules, but you can only assign a Debtor to one main call schedule.

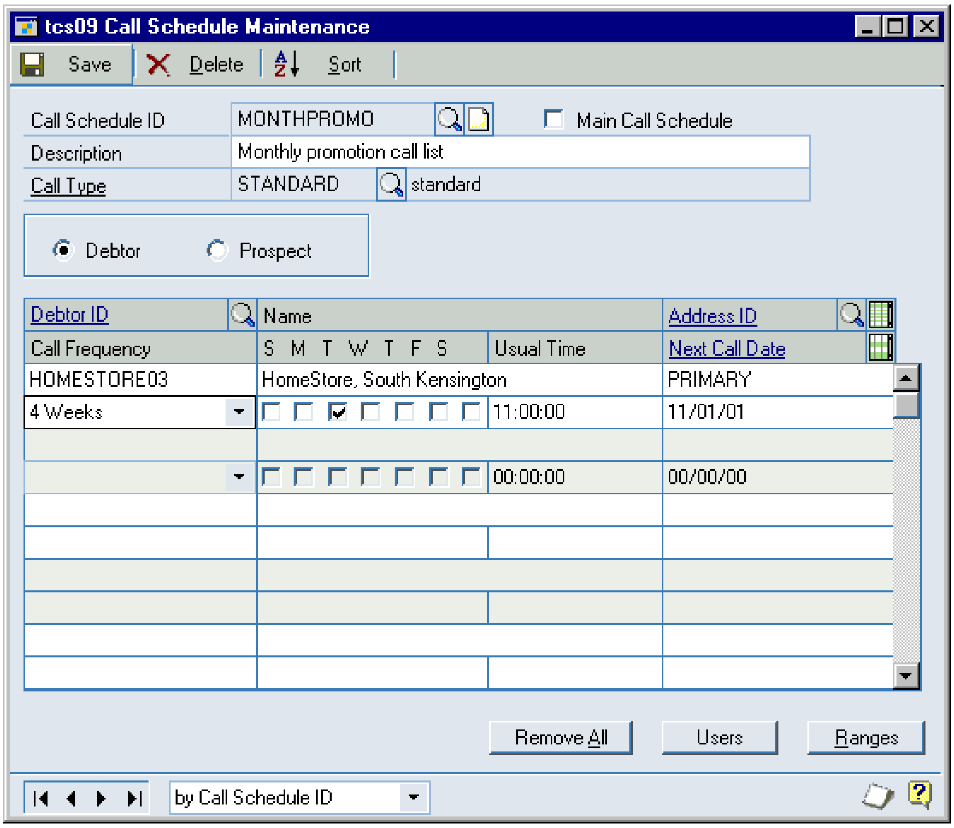
1. Call Schedule Maintenance Window

Cards >> Myridas Cards >> Call Scheduling >> Call Schedule Maint.

Use the Call Schedule Maintena nce window to:

- Create call schedules
- Assign call schedules to debtors and prospects

The Call Schedule Maintenance window



1.1 Creating and editing call schedules

A call schedule is a list of customers or customer addresses to be contacted.

To create or edit a call schedule in the Call Schedule Maintenance window:

1. Enter a Call Schedule ID or click the lookup to select one from the Call Schedule Lookup window. If you select an existing call schedu le, its details will be displayed in the window.
2. Click the check box if you want the call schedule to be a Main Call Schedule.

Note that if you attempt to assign a debtor to a main call schedule that has already been assigned to a main call schedule the n you will receive a warning.

3. Enter a Call Schedule description.
4. Enter a Call Type or click the lookup to select one from the Call Scheduling Type Lookup window. If you enter a new call type, you will be asked if you want to create it in the Call Scheduling Type Maintenance window .
5. Click the Save button.

Click the Users button to open the Call Schedule Users window where users and user groups can be allocated to a call schedule.

Deleting call schedules

Click the Delete button to delete a call schedule. You will not be able to delete a call schedule if there are outstanding forwarded calls allocated to it.

1.2 Assigning call schedules to debtors and prospects

Call schedules can be assigned to debtors or prospects in both the Call Schedule Maintenance window and the Call Schedule Allocate window. Use the Call Schedule Maintenance window to assign a call schedule to multiple debtors and prospects. Use the Call Schedule Allocate window to assign multiple call schedules to a debtor or a prospect.

To assign call schedules to debtors and prospects in the Call Schedule Maintenance window:

1. Create or open a call schedule as described in Section 1.1.
2. For each Debtor or Prospect you allocate to your call schedule:
    2.1. Choose to add a Debtor or a Prospect by selecting the appropriate option button.
    2.2. Enter a Debtor/Prospect ID in the scrolling window, or click the lookup to select one from the Debtors and Prospects window.
    2.3. If you are adding a Debtor to your call schedule, enter an Address ID in the scrolling window, or click the lookup to select one from the Addresses window (optional). If you do not enter an Address ID, the primary address from the debtor record will be used. Note that this field will be locked if you are adding a Prospect.

    Note that if you attempt to assign a debtor to a main call schedule that has already been assigned to a main call schedule then you will receive a warning.

    2.4. If required, enter Call Frequency, Call Days, Usual Call Time and Call Date details in the second line of the scrolling window. Some of these fields will be locked, depending on the call type you have selected (see Call Types).
3. Click the Sort button to sort entries in the scrolling window by Debtor or Prospect ID (optional).
4. Click the Save button.

Click the Ranges button to open the Call Schedule Ranges window where ranges of debtors and prospects can be assigned to a call schedule.

Deleting debtor or prospect allocations

Click the Remove All button to de-allocate all debtors or prospects from the selected call schedule. Your debtor or prospect allocations will be deleted, depending on whether the Debtor or Prospect option button is selected.

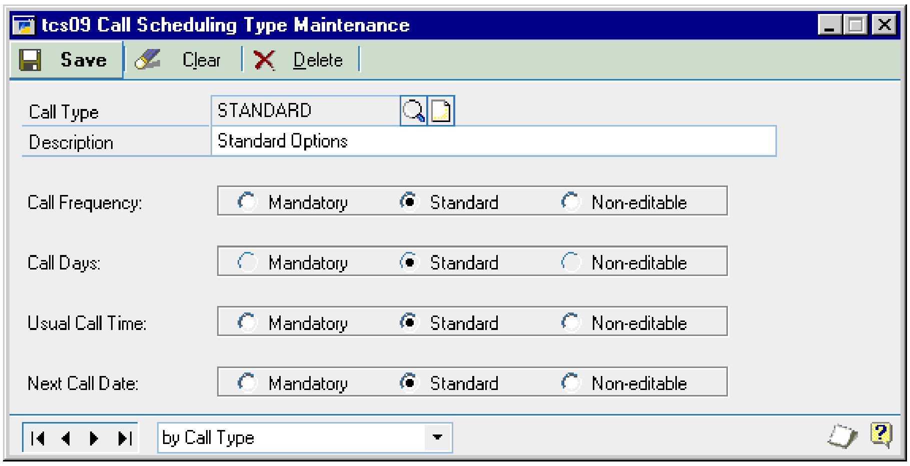
2. Call Scheduling Type Maintenance Window

Cards >> Myridas Setup >> Call Scheduling >> Call Type Maint.

Use the Call Scheduling Type Maintenance window to:

- Create and edit call types

The Call Scheduling Type Maintenance window



2.1 Creating and editing call types

A call type determines which call frequency, call day, usual call time and next call time options are available for a call schedule.

To create and edit call types in the Call Scheduling Type Maintenance window:

1. Enter a Call Type or click the lookup to select one from the Call Scheduling Type Lookup window. If you select an existing call type, its details will be displayed in the window.
2. Enter a Call Type description.
3. Select your Call Frequency, Call Days, Usual Call Time and Next Call Date options. See Call types.
4. Click the Save button.

Deleting call types

Click the Delete button to delete a call type record.

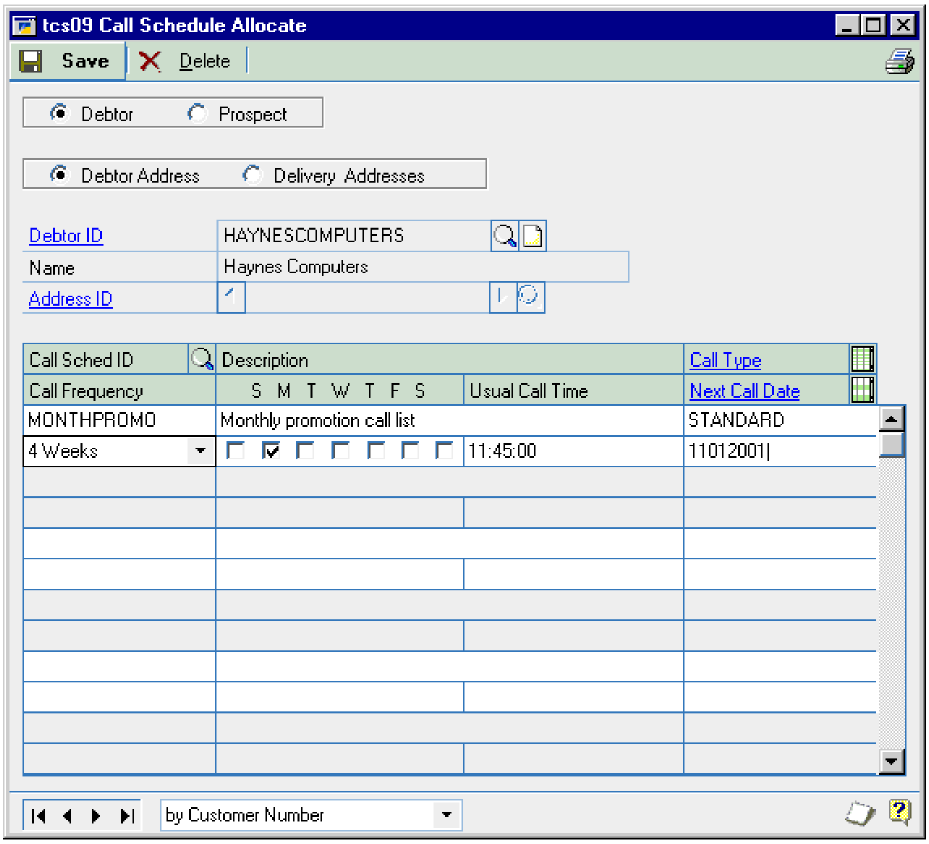
3. Call Schedule Allocate Window

Cards >> Myridas Cards >> Call Scheduling >> Call Schedule Alloc.

Use the Call Schedule Allocate window to:

- Assign multiple call schedules to a debtor or prospect

The Call Schedule Allocate window



3.1 Assigning call schedules to debtors or prospects

In addition to using the Call Schedule Maintenance window to allocate call schedules to customers and addresses, you can also use the Call Schedule Allocate window. This method is useful if you want to allocate multiple call schedules to a customer.

To assign a call schedule to a debtor or prospect in the Call Schedule Allocate window:

1. Choose to assign call schedules to debtors or to prospects by selecting the appropriate option button.
2. For debtors, choose to associate call schedules with the primary address or a specific delivery address by selecting the appropriate option button.
3. Enter a Debtor/Prospect ID or click the lookup to select one from the Debtors and Prospects window.
4. For debtor delivery addresses, enter an Address ID or click the lookup to select one from the Addresses window, or use the browse buttons to scroll through available addresses.

Any call schedules that are already assigned to the selected debtor or prospect will be displayed in the scrolling window.

5. For each call schedule to be allocated to the selected debtor or prospect:
   5.1. Enter a Call Schedule ID or click the lookup to select one from the Call Schedule Lookup window.
   5.2. Enter Call Frequency, Call Day, Usual Call Time and Next Call Date options that are appropriate to the call type.
6. Click the Save button.

Deleting call schedule allocations

Click the Delete button to de-allocate all call schedules from the selected debtor address or prospect.

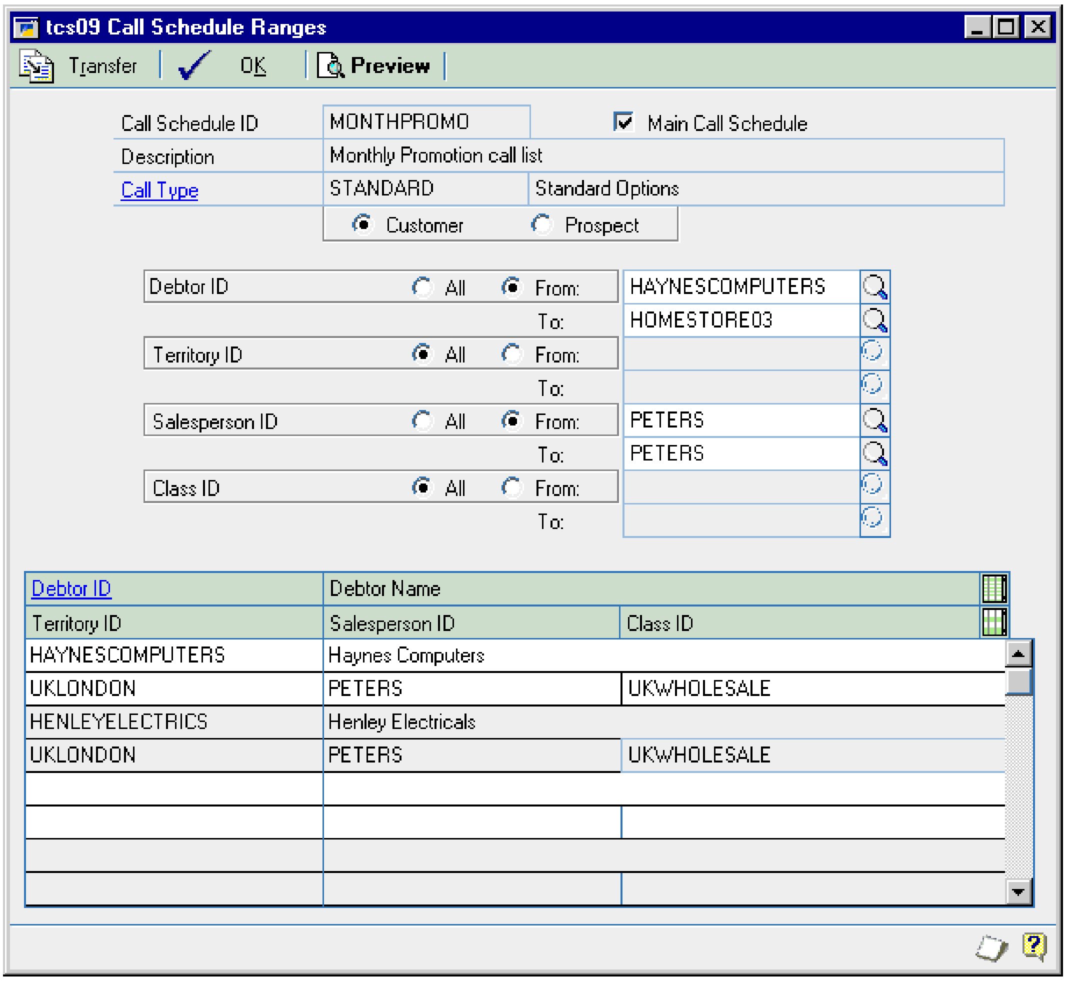
4. Call Schedule Ranges Window

Call Schedule Maintenance window >> Click the Ranges button

Use the Call Schedule Ranges window to:

- Assign a call schedule to a range of debtors or prospects

The Call Schedule Ranges window



4.1 Assigning call schedules to a range of debtors or prospects

To assign a call schedule to a range of debtors or prospects in the Call Schedule Ranges window:

The Call Schedule Ranges window will open with details of the current call schedule selection. Debtor ranges can be assigned by debtor ID, territory ID, salesperson ID and by class ID. Prospect ranges can be assigned by prospect ID and by class ID.

1. Choose to assign ranges of debtors or prospects by selecting the appropriate option button.
2. Click All to assign all records or From to assign a selection of records for Debtor/Prospect, Territory, Salesperson and Class ID. If you select From, enter To and From values to specify a range, or use the lookups.
3. Click the Preview button to verify your selection in the scrolling window. The ID and name of each debtor or prospect to be transferred will be listed. Click the Show button to display the territory, salesperson and class IDs.
4. Click the Transfer button to assign the call schedule to your debtor/prospect selection. Click OK to close the Transfer Completed Successfully dialog box.
5. Click OK to return to the Call Schedule Maintenance window.

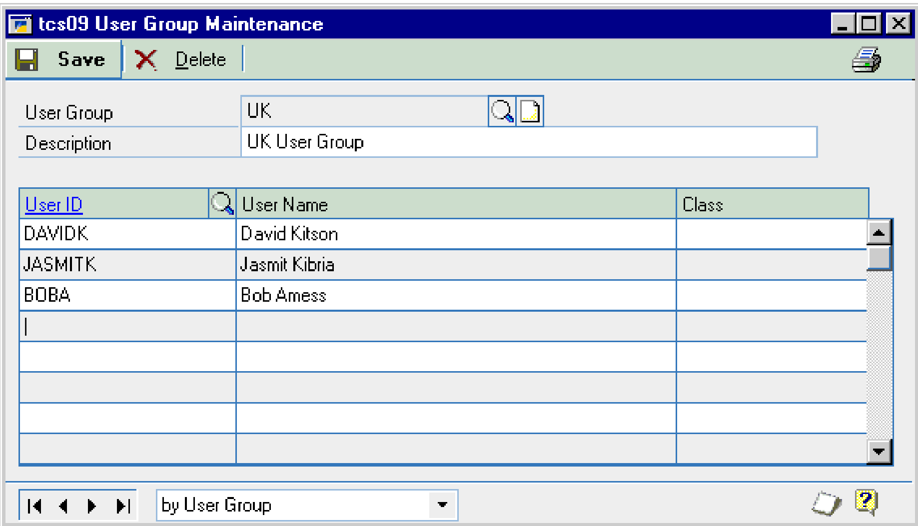
5. User Group Maintenance Window

Cards >> Myridas Setup >> Call Scheduling >> User Group Maint.

Use the User Group Maintenance window to:

- Create and edit user groups

The User Group Maintenance window



5.1 Creating and editing user groups

A user group is a selection of users who have been assigned to the same group.

To create or edit a user group in the User Group Maintenance window:

1. Enter a User Group or click the lookup to select one from the User Group Lookup window. If the group already exists, its details will be displayed in the window.
2. Enter a User Group Description.
3. For each user to be added to the group:
   3.1. Enter a User ID in the scrolling window or click the lookup to select one from the Users window.
4. Click the Save button.

Deleting user groups

Click the Delete button to delete a user group.

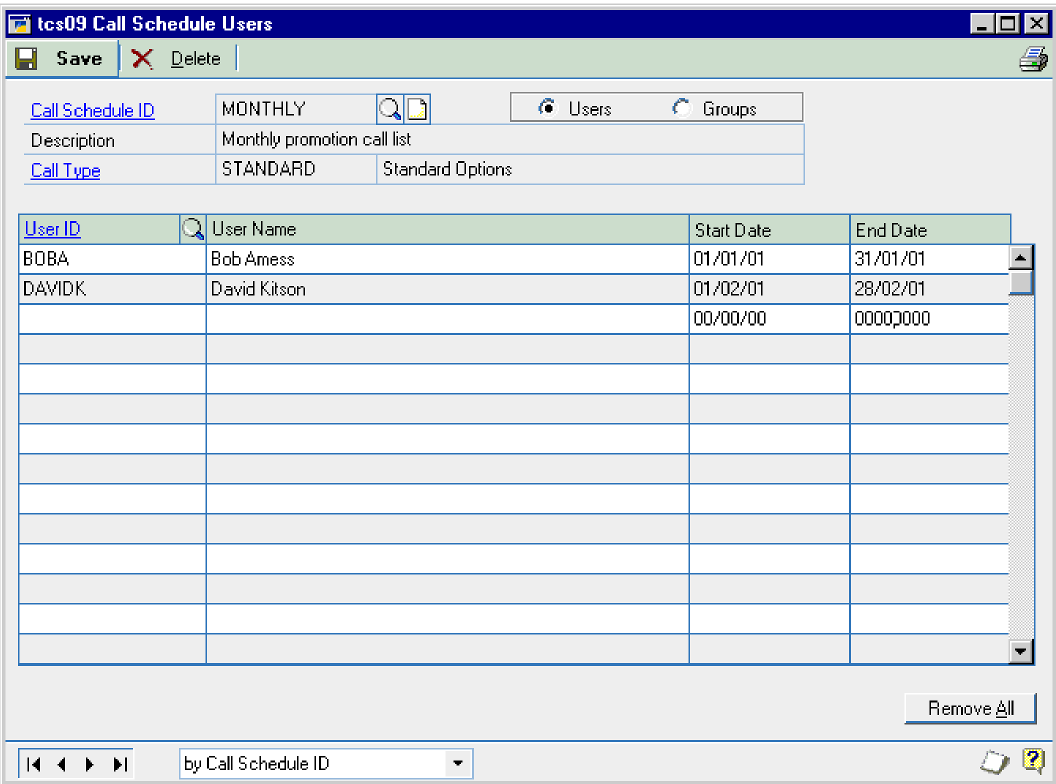
6. Call Schedule Users Window

Cards >> Myridas Cards >> Call Scheduling >> Call Schedule Users

Use the Call Schedule Users window to:

- Assign a call schedule to users and user groups

The Call Schedule Users window



Clicking the Users button in the Call Schedule Maintenance window will also open the Call Schedule Users window.

6.1 Assigning call schedules to users and user groups

The Call Schedule Users window allows the allocation of call schedules to specific users or user groups – only the allocated users will have access to the selected call schedule in the Call Processing window. Any call schedules that have not been allocated to a user or group, will be accessible to all users.

To assign a call schedule to a user or a user group in the Call Schedule Users window:

1. The Call Schedule Users window will open with details of the current call schedule selection. Accept these defaults or use the Call Schedule ID lookup to select a different call schedule.
2. Choose to assign users or user groups by selecting the appropriate option button.
3. For each user or user group to be assigned to the call schedule:
   3.1. Enter a User ID/ User Group or use the lookups.
   3.2. Enter a Start Date and an End Date (optional). The allocated user or group will only have access to the call schedule between these dates. This is useful if you need to allocate additional users to call schedules during busy periods, for example.

Note, if dates are not entered in the Start Date and End Date fields, the allocated user or group will have access to the call schedule indefinitely.

4. Click the Save button.

Deleting user or group allocations

Click the Remove All button to de-allocate users or user groups from a call schedule. User or user group allocations will be deleted, depending on whether the Users or Groups option button is selected.

Deleting user allocations

Click the Delete button to delete all user and user group allocations from a call schedule.

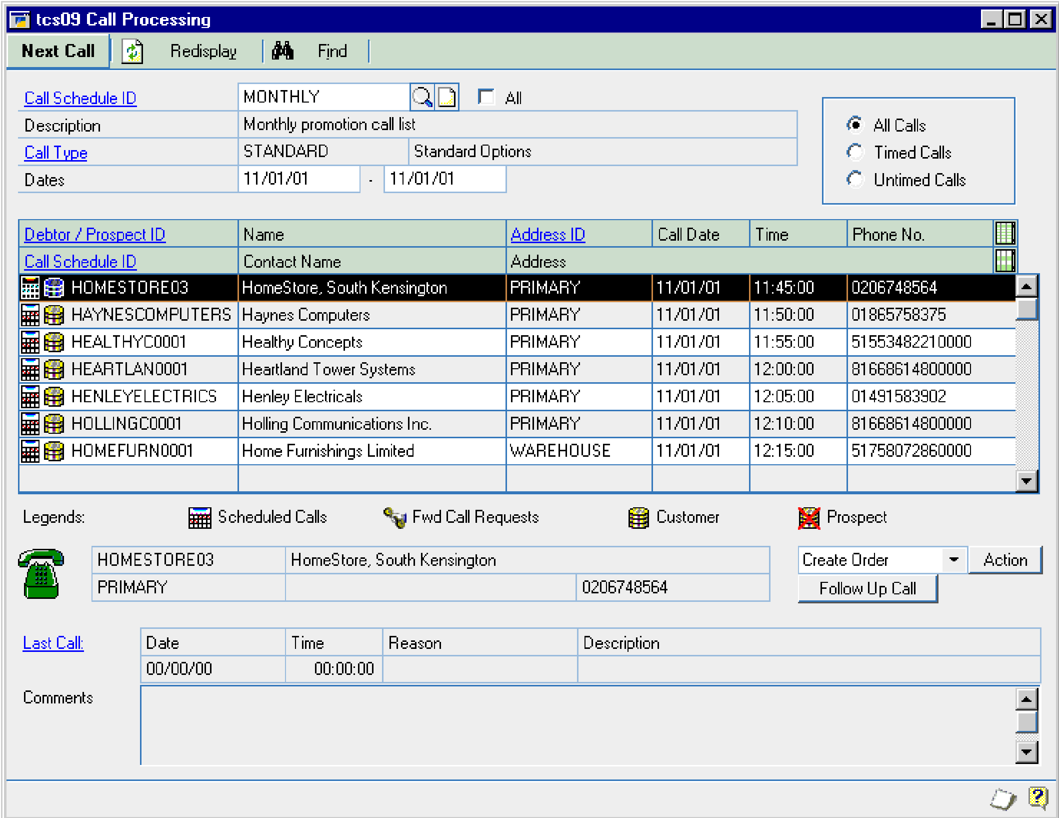
7. Call Processing Window

Transactions >> Myridas Transactions >> Call Scheduling >> Call Processing

Use the Call Processing window to:

- Process calls on a call schedule

The Call Processing window



7.1 Processing calls on a call schedule

To process calls in the Call Processing window:

1. The window will open displaying details of all the call schedules you have access to. If required, clear the All check box and select a specific Call Schedule ID.
2. Enter dates in the Dates fields that cover the call period you are interested in.
3. Choose to display All Calls, Timed Calls or Untimed Calls. Timed Calls will display calls scheduled for a specific date, and Untimed Calls will display calls that have not been scheduled for a specific date.
4. Click the Redisplay button to display the call list in the scrolling window.
5. The debtor or prospect ID, customer name, address ID, call date, scheduled call time and phone number will be displayed. Click the Show button to display the call schedule ID, customer contact name and customer address.

The icons shown in the debtor/prospect ID field show whether the customer is a debtor or a prospect, and if the call is scheduled or a forwarded call request.

If you highlight a customer record, the customer ID, name, contact and telephone number will be displayed below the scrolling window. The telephone icon will show that the receiver is on the hook – this means that the call is not being processed and is not locked to other users.

If a history record exists for the selected customer record, it will be displayed at the bottom of the window. The history record could be details of the last call to the selected customer on the same call schedule, or details of the reason for the call (if the selected record is a follow up call). The call date, call time, reason code, reason description and any comments recorded by the user will be shown.

Note that if an incoming call from a customer has been received then this will also be detailed.

Click the Last Call zoom button to open the Call History window where the complete call history can be viewed.

6. There are several ways to take a call on the schedule:

To take the next call on the call schedule:

- Click the Next Call button

To take any call listed on the schedule:

- Highlight the required record and click the phone icon

To search for a call on the call schedule (useful for processing incoming calls):

- Click the Find button to open the Find window; enter the customer details and click the Search and Lock button

The details of the selected record will be displayed below the scrolling window, and the telephone icon will show that the receiver is off the hook – this means that the call is being processed and is locked to other users.

If you try to access a call record that is locked by another user, the telephone icon will display with a red cross through it.

7. The call can be processed in the following ways:

If you want to create a quote or an order:

a) Select Create Quote or Create Order from the Action drop-down list and click the Action button.
b) The Sales Transaction Entry window will open. Enter details of the quote or order as normal and click the Save button.
c) The Current Action window will open, showing details of your action. Enter any additional information and click the Save button.
d) Close the Current Action window to return to the Call Processing window, or click the Follow Up Call button to open the Follow Up Calls window.

If you want to take another action:

a) Select Other from the Action drop-down list and click the Action button.
b) The Current Action window will open. Enter the details of your action and click the Save button.
c) Close the Current Action window to return to the Call Processing window, or click the Follow Up Call button to open the Follow Up Calls window.

When you return to the Call Processing window, the call record will no longer be listed in the call schedule.

8. If you want to schedule a follow up call:
    a) Click the Follow Up Call button.
    b) The Follow Up Calls window will open. Enter the details of the follow up call and click the Save button.
    c) Close the Follow Up Calls window to return to the Call Processing window.

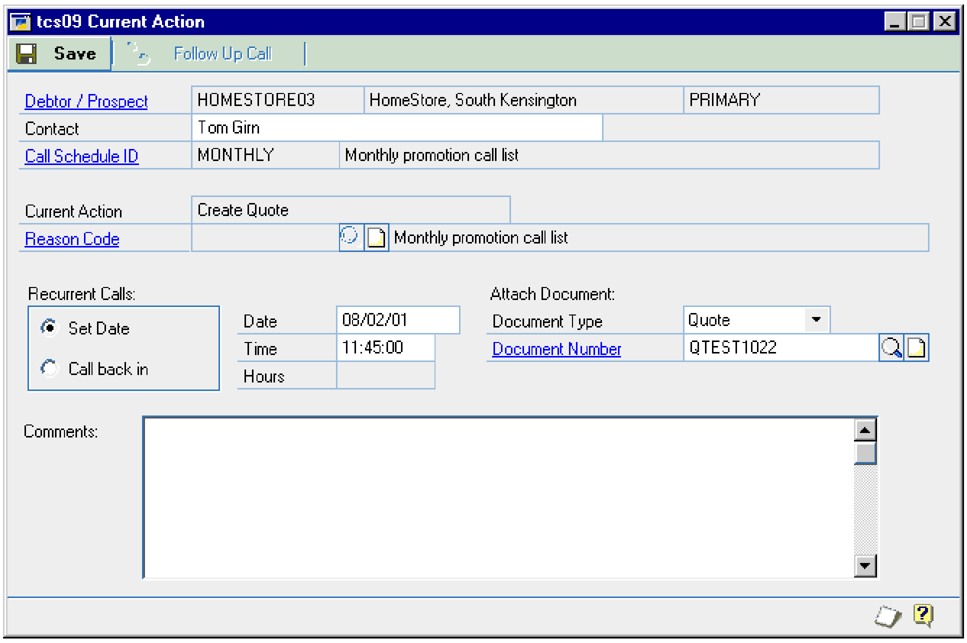
8. Current Action Window

Call Processing window >> Take an Action

Use the Current Action window to:

- Record details of a call processed from a call schedule
- Set a recurrent call date

The Current Action window



Note that if you save a sales transaction in the Great Plains Sales Transaction Entry window for a debtor that is on a main call schedule, then the Current Action window will be displayed whether or not you are working through the Call Processing window. This is of particular use when dealing with incoming calls.

8.1 Recording the details of a call and setting a recurrent call date

To record the details of a call and set a recurrent call date in the Current Action window:

1. The window will open displaying details of the current customer selection, the current call schedule and the action being taken. If required, edit the name of the contact.
2. Enter a Reason Code or click the lookup to select one from the Reason Code Lookup window. The reason code explains the reason for your action.

Note that you will not be able to enter a reason code if you have just created an order or a quote.

3. For Recurrent Calls, select Set Date or Call back in:

For Set Date:

a) The most logical date for the next recurrent call on the call schedule will be displayed in the Date edit box. If the call frequency is daily, for example, tomorrow's date will be shown. If required, edit the Date and enter a Time. This information will be updated in the call schedule.

Note that a call date must be entered for a call to remain on the call schedule. If you do not enter a date you will be asked if you want to remove the call from the schedule.

For Call back in:

a) Enter the number of hours, minutes and seconds that the recurrent call should take place in. This is useful if the initial call has failed, for example, and must be re-scheduled for later in the day.

4. If required, attach a Document Type to this action and enter or select a Document Number. If you have just created an order or a quote during call processing, the details of the order document will be displayed.
5. Enter some text in the Comments text box (optional).
6. Click the Save button.

Clicking the Follow Up Call button will open the Follow Up Calls window (see next).

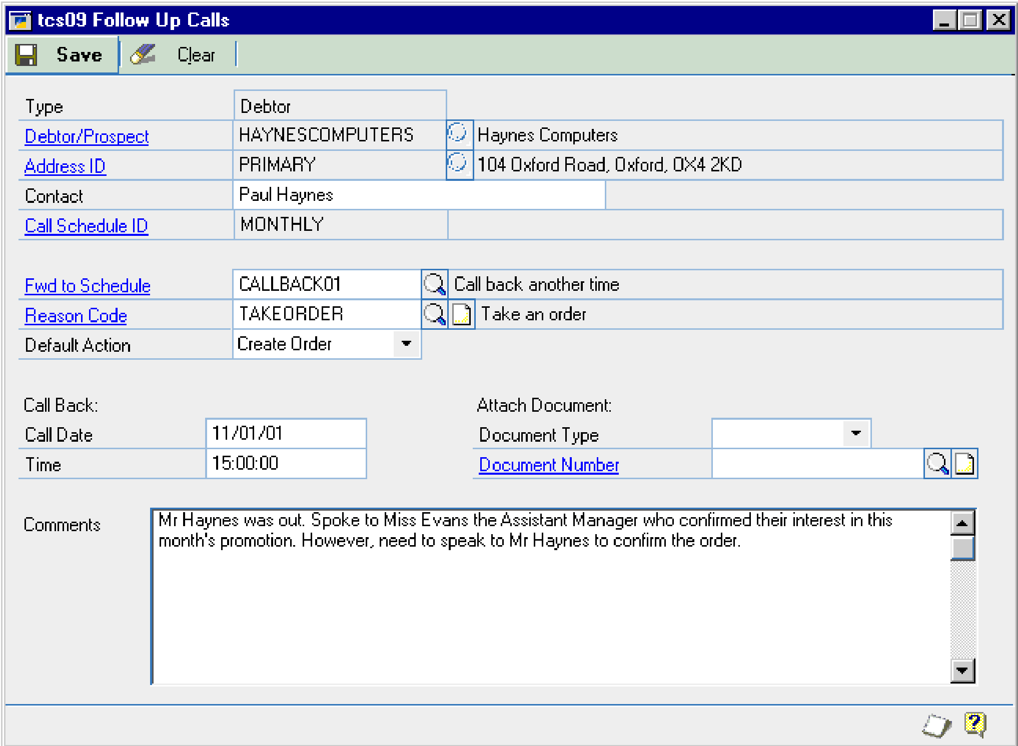
9. Follow Up Calls Window

Transactions >> Myridas Transactions >> Call Scheduling >> Call Forwarding

Use the Follow Up Calls window to:

- Arrange a follow up call to a customer

The Follow Up Calls window



Note that the Follow Up Calls window can also be opened by clicking the Follow Up Call button in the Call Processing or Current Action windows.

9.1 Arranging follow up calls to customers

To arrange a customer follow up call in the Follow Up Calls window:

1. The window will open displaying details of the current customer selection, contact and call schedule. If required, change the Contact name and Address ID.
2. Enter a Fwd to Schedule or click the lookup to select one from the Call Schedule Lookup window. The follow up call will be allocated to this call schedule.
3. Enter a Reason Code or click the lookup to select one from the Reason Code Lookup window. The reason code should explain the reason for the follow up call.
4. Select a Default Action from the drop-down list. This is the action that should occur during the follow up call.
5. Enter a Call Date. This is the date scheduled for the follow up call and will be detected by call processing.

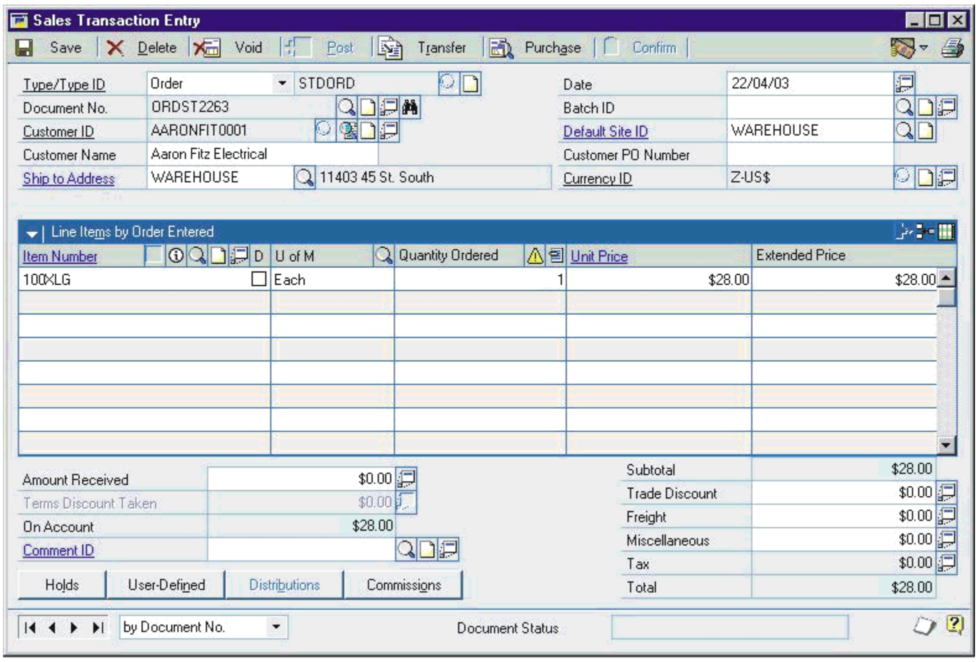
6. Enter a Time. This is the time for the follow up call and will be detected by call processing.
7. Select a Document Type from the drop-down list and enter a Document Number (optional). This may be useful, for example, if the Default Action is Amend Quote or Amend Order.
8. Enter text in the Comments text box (optional). This could contain, for example, notes about the original call to the customer.
9. Click the Save button.

10. Sales Transaction Entry - Incoming Calls

Transactions >> Sales >> Sales Trx Entry

Use the Great Plains Sales Transaction Entry window with the Myridas Call Scheduling module to:

- Process incoming calls



The Great Plains Sales Transaction Entry window

10.1 Processing Incoming Calls

To Process Calls in the Great Plains Sales Transaction Entry window:

1. Enter the appropriate details as standard into the Great Plains Sales Transaction window. If the caller/debtor and delivery address is on a main call schedule then a warning will be displayed. Click OK if you want to continue processing the order.

Note that if the caller/debtor and delivery address combination is not on a **main** call schedule then the call scheduling functionality will not be implemented, and details of the transaction will not be held in the call scheduling records.

2. When you click to Save the sales transaction the Current Action window will be displayed, showing the Debtor and Contact, Call Schedule ID, current action (e.g.: create order) and the document type and number. You may edit as required any Follow Up Calls or comments.

The next call date and time will be calculated automatically, but you can click on them to amend them as required. The call history details will also be updated automatically.

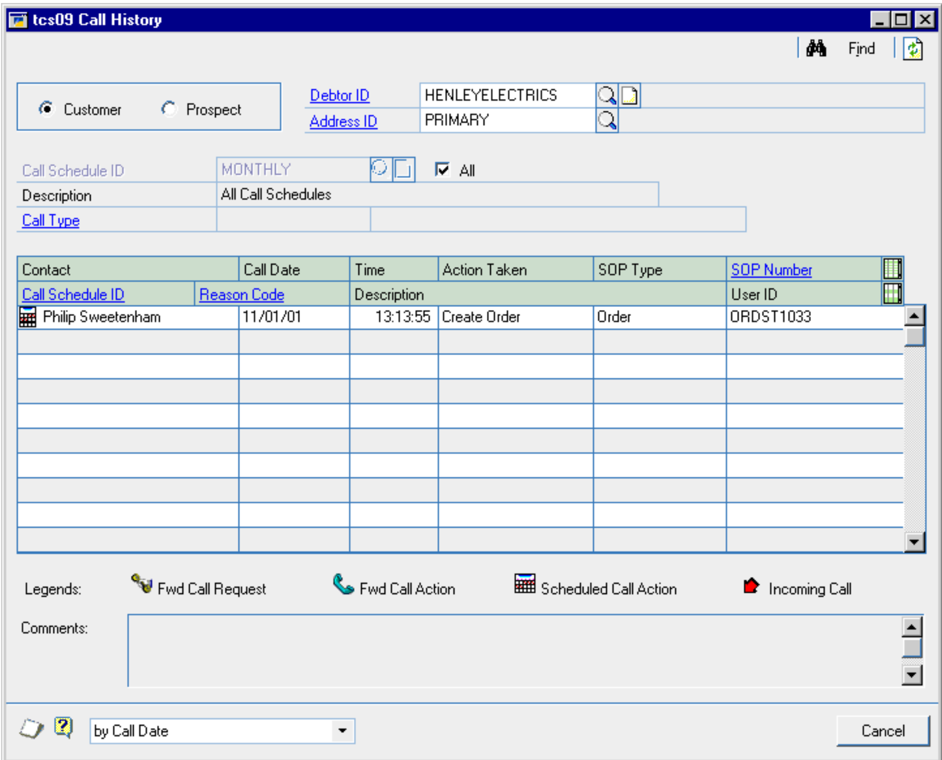
11. Call History Window

Enquiries >> Myridas Enquiries >> Call Scheduling >> Call History

Use the Call History window to:

- View historical calls for a specified debtor or prospect
- View historical calls for a specified call schedule

The Call History window



11.1 Viewing historical calls

To view historical calls in the Call History window:

1. Choose to display call history for debtors or for prospects by selecting the appropriate option button.
2. Enter a Debtor or Prospect ID or click the lookup to select one from the Debtors and Prospects window.
3. For debtors, enter an Address ID or click the lookup to select one from the Addresses window.

4. Enter a Call Schedule ID or click the lookup to select one from the Call Schedule Lookup window, or select the All check box to choose all call schedules.
5. The call history will be displayed in the scrolling window. The contact name, call date, call time, action taken, SOP type and number will be listed. Click the Show button to display the call schedule ID, reason code, reason description and user ID.

The icons shown in the Contact field show if the call was a forwarded call request, a forwarded call action, a scheduled call action or an incoming call action. If required, click the Find button to locate a specific call in the Find window. Highlight a call to display any comments made when the call was taken.

12. Reason Code Maintenance Window

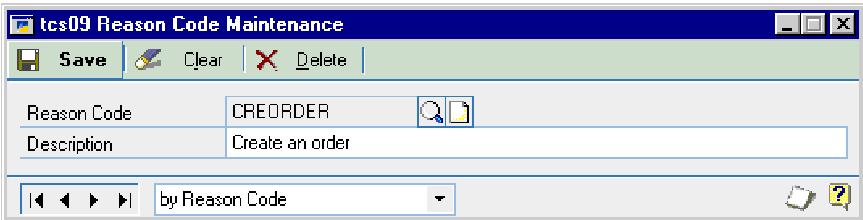
Cards >> Myridas Setup >> Call Scheduling >> Reason Code Maint.

Use the Reason Code Maintenance window to:

- Create and edit reason codes

Reason codes are used in the Current Action and Follow Up Calls windows. They provide an easy way to identify why a follow up call to a customer is required, or the purpose behind a particular action.

The Reason Code Maintenance window



12.1 Creating and editing reason codes

To create or edit a reason code in the Reason Code Maintenance window:

1. Enter a Reason Code or click the lookup to select one from the Reason Code Lookup window.
2. Enter a Reason Description.
3. Click the Save button.

Deleting reason codes

Click the Delete button to delete a reason code record.

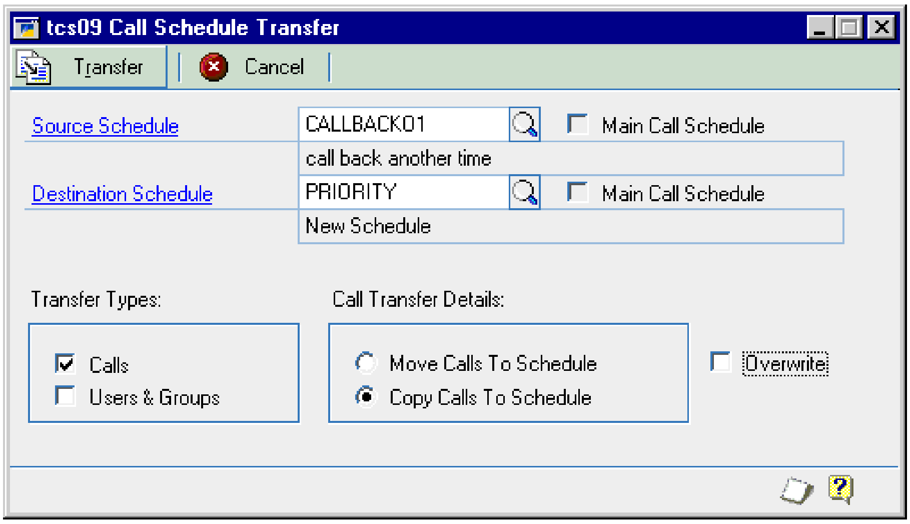
13. Call Schedule Transfer Window

Cards >> Myridas Cards >> Call Scheduling >> Call Schedule Xfer

Use the Call Schedule Transfer window to:

- Transfer calls from one call schedule to another
- Transfer users and user groups from one call schedule to another

The Call Schedule Transfer window



13.1 Transferring calls and users between call schedules

To transfer calls and users between call schedules in the Call Schedule Transfer window:

1. Enter a Source Schedule or click the lookup to select one from the Call Schedule Lookup window. Calls and/or users will be transferred from this schedule.
2. Enter a Destination Schedule or click the lookup to select one from the Call Schedule Lookup window. Calls and/or users will be transferred to this schedule.

If this is the name of a new schedule, New Schedule will be displayed in the schedule description field. The new schedule will be created when the Transfer button is clicked.

3. Select the Calls check box and/or the Users & Groups check box to transfer calls, users or both.
4. If you are transferring calls, choose to Overwrite Existing Calls or transfer New Calls Only by selecting the appropriate option button.

With Overwrite Existing Calls, all calls will be transferred regardless of whether they exist in the destination scheme. With New Calls Only, only calls that exist on the source scheme but not on the destination scheme will be transferred.

5. Click the Transfer button to run the transfer.
6. Click OK to close the Transfer Completed Successfully dialog box.

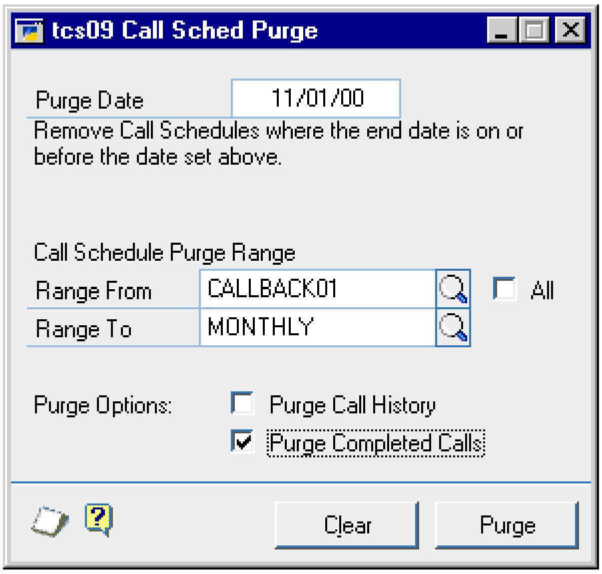
14. Call Schedule Purge Window

Routines >> Myridas Routines >> Call Scheduling >> Call Schedule Purge

Use the Call Schedule Purge window to:

- Remove completed calls that are older than a specified date
- Remove call history that is older than a specified date

The Call Schedule Purge window



14.1 Removing call history

To remove call history in the Call Schedule Purge window:

1. Enter a Purge Date. Call history that is older than this date will be deleted.
2. Enter Range From and Range To values or use the lookups to specify a call schedule purge range. Alternatively, select the All check box to select all call schedules.
3. Select the Purge Call History check box and/or the Purge Completed Calls check box to remove call history and/or completed calls.
4. Click the Purge button.

Call history that is older than the specified date will be deleted.

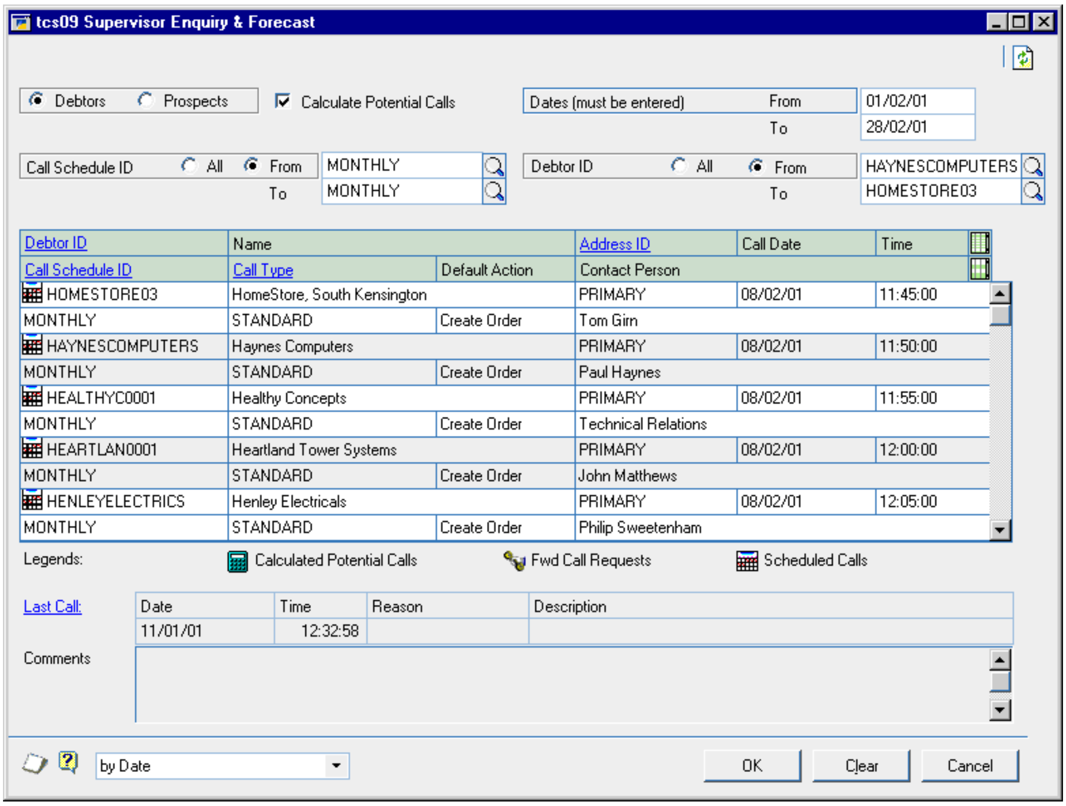
15. Supervisor Enquiry and Forecast Window

Enquiry >> Myridas Enquiries >> Call Scheduling >> Call Enq. + Forecast

Use the Supervisor Enquiry and Forecast window to:

- Report on scheduled calls
- Calculate potential calls

The Supervisor Enquiry and Forecast window



15.1 Reporting on scheduled and potential calls

The Supervisor Enquiry & Forecast window provides a method of planning ahead for supervisors and administrators, such as forecasting the number of extra staff required to cover busy periods.

To report on scheduled and potential calls in the Supervisor Enquiry & Forecast window:

1. Choose to run your enquiry on Debtors or Prospects by selecting the appropriate option button.
2. Select the Calculate Potential Calls check box to forecast potential calls. Potential calls are calculated on the basis of call frequency settings in a call schedule. For example, a call on a daily call frequency can be calculated to take place every day.
3. Enter From and To dates. Scheduled and potential calls which should be made between these dates will be displayed in the scrolling window.

4. Choose to run your enquiry on All Call Schedule IDs or a range of Call Schedule IDs by selecting the appropriate option button. If you select a range, enter From and To values or use the lookups.
5. Choose to run your enquiry on All Debtor IDs or a range of Debtor IDs by selecting the appropriate option button. If you select a range, enter From and To values or use the lookups.
6. Click the Redisplay button to display the results of your enquiry in the scrolling window. The debtor/prospect ID, debtor/prospect name, address ID, call date and scheduled call time will be shown. Click the Show button to list the call schedule ID, call type, default action and contact person for each call.

The icons shown in the debtor/prospect ID field indicate whether the call is a calculated potential call, a forwarded call request or a scheduled call.

7. If a call history record exists for a selected record, it will be displayed at the bottom of the window when the record is highlighted. The call date, call time, reason code, reason description and any comments recorded by the user will be shown. Click the Last Call zoom button to open the Call History window.

Note that if an incoming call from a customer has been received then this will also be detailed.

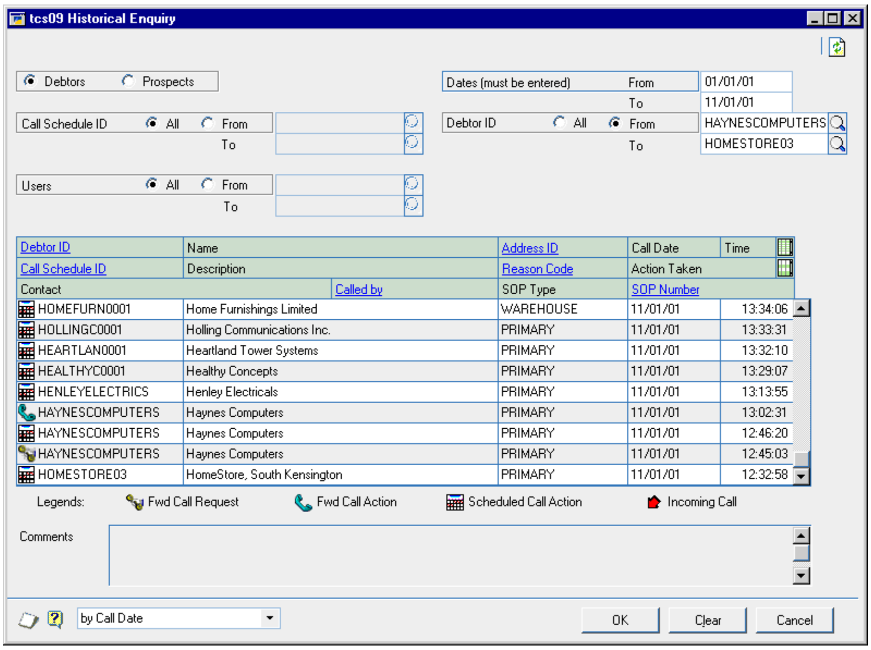
16. Historical Enquiry Window

Enquiry >> Myridas Enquiries >> Call Scheduling >> Historical Call Enq.

Use the Historical Enquiry window to:

- Report on historical calls

The Historical Enquiry window



16.1 Reporting on historical calls

The Historical Enquiry window displays records for all calls placed between a range of dates for a range of customers, users and call schedules.

To report on historical calls in the Historical Enquiry window:

1. Choose to run your enquiry on debtors or prospects by selecting the appropriate option button.
2. Enter From and To dates. Any calls made between these dates will be displayed in the scrolling window.
3. Choose to run your enquiry on All Call Schedule IDs or a range of Call Schedule IDs by selecting the appropriate option button. If you select a range, enter From and To values or use the lookups.
4. Choose to run your enquiry on All Debtor IDs or a range of Debtor IDs by selecting the appropriate option button. If you select a range, enter From and To values or use the lookups.
5. Choose to run your enquiry on All Users or a range of Users by selecting the appropriate option button. If you select a range, enter From and To values or use the lookups.
6. Click the Redisplay button to display the results of your enquiry in the scrolling window. The debtor or prospect ID, debtor or prospect name, address ID, call date and call time will be shown. Click the Show button to list the call schedule ID, schedule description, reason code, action taken, contact, user who made the call, SOP type and SOP number.

The icons shown in the debtor/prospect field indicate whether the call is a forwarded call request, a forwarded call action, a scheduled call or an incoming call.

7. Highlight a call to display any comments recorded by the user who processed the call.

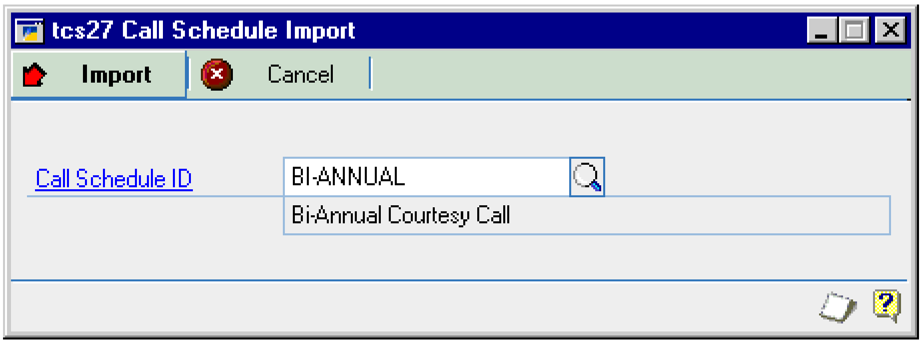
17. Call Schedule Import window

Routines >> Myridas Routines >> Call Scheduling >> Call Schedule Import

Use the Call Schedule Import window to:

- Import Debtor/Address combinations to a selected Call Schedule

The Call Schedule Import window



The Debtor/Address combinations to be imported should be saved as a .csv file. Note that a .csv file could be created from, for example, an Excel spreadsheet.

Sample .csv file

DEBTOR 1	PRIMARY
DEBTOR 2	PRIMARY
DEBTOR 3	WAREHOUSE

When creating a flatfile (.csv file) to import you should enter the two fields as shown in the example above. (The first column should contain the Debtor ID, the second column the Address ID). Do not create a header field, as this will also be imported and result in an error. The flatfile must be saved as a .csv file type.

17.1 Importing Debtor/Address combinations to Call Schedules

To import Debtor/Address combinations to Call Schedules in the Call Schedule Import window:

1. Enter the Call Schedule ID that you want to import Debtor/Address combinations to or select a Call Schedule ID using the lookup.

   You can enter a Call Schedule ID that does not currently exist on the Great Plains system. If you do this then a dialogue box will be displayed asking whether you want to create the Call Schedule ID. Click Yes to display the Call Schedule Maintenance window where you can create the Call Schedule ID.

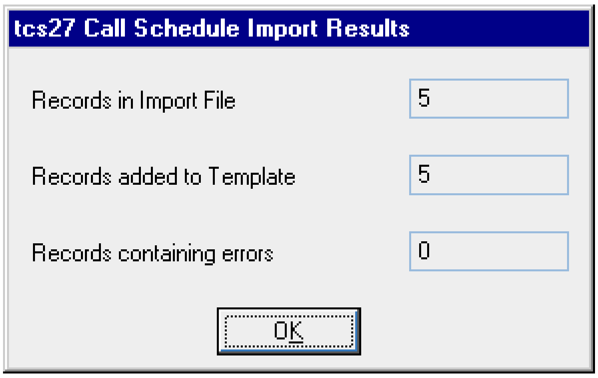
2. Click Import. A browse box will be displayed. Browse to the location of the required import file and click Open.

Note that you can only import a .csv file. If you select to import a file that is not a .csv file then a dialogue box will be displayed warning that this file cannot be imported. A warning will also be displayed if the flatfile selected for import contains lines with more than 2 fields (the Debtor ID and Address ID fields).

3. Select the location to which you want the Call Schedule Import Error Report (see below) to be sent and click OK.

4. The Call Schedule Import Results window will be displayed.

The Call Schedule Import Results window



The window will display the number of records on the flatfile, the number of records that have been added to the Call Schedule, and the number of records that contained errors.

Errors will occur where:

- A Debtor ID is invalid
- An Address ID is invalid or isn't assigned to this Debtor ID
- The selected Call Schedule Type ID is a Main Call Schedule and a Debtor/Address combination on the imported flatfile is already assigned to a Main Call Schedule
- The same Debtor/Address appears more than once on the flatfile, or was already assigned to the specified Call Schedule prior to the import

5. The Call Schedule Import Error Report will be displayed with details of any errors that have occurred during the import of the flatfile.

Appendix A

Access to Myridas Windows

Customer Call Scheduling

Window Name	**Menu Access**	**Other Access**
Call History	Enquiry >> Myridas Enquiries >> Call Scheduling >> Call History	Call Processing window >> Click the Last Call zoom
Call Processing	Transactions >> Myridas Transactions >> Call Scheduling >> Call Processing	
Call Sched Purge	Routines >> Myridas Routines >> Call Scheduling >> Call Schedule Purge	
Call Schedule Allocate	Cards >> Myridas Cards >> Call Scheduling >> Call Schedule Alloc.	
Call Schedule Import window	Routines >> Myridas Routines >> Call Scheduling >> Call Schedule Import	
Call Schedule Maintenance	Cards >> Myridas Cards >> Call Scheduling >> Call Schedule Maint.	
Call Schedule Ranges		Call Schedule Maintenance window >> Click the Ranges button
Call Schedule Transfer	Cards >> Myridas Cards >> Call Scheduling >> Call Schedule Xfer	
Call Schedule Users	Cards >> Myridas Cards >> Call Scheduling >> Call Schedule Users	Call Schedule Maintenance window >> Click the Users button
Call Scheduling Type	Cards >> Myridas Setup >> Call Scheduling >> Call	

Maintenance	Type Maint.	
Current Action	Call Processing window >> Take an Action	
Follow Up Calls	Transactions >> Myridas Transactions >> Call Scheduling >> Call Forwarding	Call Processing window >> Click the Follow up Call button
Historical Enquiry	Enquiry >> Myridas Enquiries >> Call Scheduling >> Historical Call Enq.	
Reason Code Maintenance	Cards >> Myridas Setup >> Call Scheduling >> Reason Code Maint.	
Supervisor Enquiry & Forecast	Enquiry >> Myridas Enquiries >> Call Scheduling >> Call Enq. + Forecast	
User Group Maintenance	Cards >> Myridas Setup >> Call Scheduling >> User Group Maint.	

Appendix B

Myridas Reports

Myridas provides multiple reports to increase information visibility.

Report Name	Module	Functionality
Scheduled Calls Report by *selection*	Customer Call Scheduling	Prints report containing details of calculated, scheduled and forwarded calls selected for the debtor, date or call schedule ID range selected in the Supervisor Enquiry and Forecast window
Call Schedule History Report by *selection*	Customer Call Scheduling	Prints report based containing details of all calls within the range selected in the Historical Enquiry window
Call Schedule Import Errors Report	Customer Call Scheduling	Prints report displaying any errors that have occurred during importing a flatfile through the Call Schedule Import window

Index