

Call/OLS

Call/OLS is for Customer Service personnel calling out and TeleMarketers (Users) to:

- Increase productivity by displaying a User's Daily Schedule of Prospects and Customers to be called.
- Allow monitoring of User's activity.
- Provide a seamless interface to OLS Order Entry.

Call/OLS can be used by a company that regularly calls Prospects to solicit new business, or calls Customers to take orders over the telephone. It is designed to help your Users make more calls, and be more effective when calling Prospects or Customers. Users can concentrate on calls rather than spending hours maintaining the data in a traditional contact management system.

A *Normal* User can display and change only Prospects and Customers assigned to him/her. Users can be assigned to a *Supervisor* User, who can display and change only Prospects and Customers assigned to the Users under his/her supervision. A *Manager* User can change all Prospects and Customers. A *Customer Maintainer* or *Accounts Receivable* User converts Prospects to Customers.

The Daily Schedule Screen displays the Prospects and Customers to be called for today. If Call time is included in the schedule, the Prospects and Customers are displayed in Call time sequence. Those without scheduled Call times are displayed after so that the User can make other calls between scheduled times. For each Prospect and Customer, the last Call and Order Date are included, as well as the sales and gross profit dollars of the last Order. If a User is unable to make all his/her calls or is absent, one or multiple Prospects and Customers can be moved for today only to another User or a Backup, or the *Manager* or *Supervisor* can make calls for the User.

The Daily Schedule Screen also shows the actual no. of contacts, no. of orders, sales dollars, and gross profit dollars for all calls made today, plus the goals for the User so that progress can be tracked. The Summary Screen shows the same information for today and previous days. This is a measurement of how well the User is performing relative to previous days. For *Managers* and *Supervisors*, the same information is displayed for all Users on a particular day.

Notes in free format can be kept on each Prospect and Customer to assist the User with essential information used when making calls. This could include the type of Customer, his needs, personal information, etc. The User can easily change, add, delete, and re-sequence **Notes** for maximum efficiency.

Calls are records of the disposition of any calls or attempted calls made; it can also record any action taken on a Prospect or Customer. For example, a Prospect or Customer may be referred to a Manager or Supervisor for additional attention, as identified in the **Call**; the Manager or Supervisor could then record the results in a Call and refer the Prospect or Customer back to the User for further action.

Templates can be setup for Notes and Calls so that Users do not have to key repeatedly the same information. For **Notes**, a **Template** might include information requested from the Prospect or Customer so that future calls can be more specific to his/her needs. For Calls, a **Template** may be setup for a common action; several keystrokes could access the Template that loads "Can't Talk today; call tomorrow" into the call. System **Templates** may be setup for all Users, or all or selected Users can have his/her own User **Templates**.

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Call/OLS, *continued*

Specials are Items that may be displayed based on the Category of the Prospect or Customer. This is primarily used for convincing Prospects to setup an account and buy merchandise. Any Items in the Item Master File can be displayed on the **Specials** Screen by keying the appropriate Synonym.

Scripts can be displayed as well based on the Category of the Prospect or Customer. Responses can be coded into the Scripts so that the User can go through a tree of responses, similar to options in an automated phone system.

With a single keystroke, **Order Entry** in the OLS Order Processing System can be initiated for Customers only. The Customer is already selected, and the Item Synonym screen is displayed, ready to accept the first Item to be ordered. After the Order is accepted, the User is automatically returned to the Add Call screen in **Call/OLS**.

Prospects are stored in a separate Prospect Master File; Customers are stored in the Customer Master File used by the Order Processing System. Prospects can be changed, added, or deleted, and all fields except User assigned are accessible by the *Normal* User. Customers cannot be deleted, nor can critical information changed. A Prospect can be changed into a Customer by either a *Manager*, *Customer Maintainer*, or *Accounts Receivable*.

Each Prospect and Customer can have a call frequency of either Daily (up to 5 times per day), Weekly (up to 5 days per week), or Monthly (up to 5 days per month). For Weekly or Monthly, all days can have different or the same call times. The Next Call Date and Time are automatically determined and displayed on the Add Call screen; it may be overridden.

Times for Next Call Date can be required for all Users or selected Users.

At the end of day, a **Call/OLS** procedure determines the Next Call Date if the Prospect or Customer has a Call Frequency but has a blank Next Call Date. It then creates the Daily Schedules for all Users for the next business day. If a User is out of the office, his/her Prospects and Customers are moved for that day to a Backup User that is assigned to the Prospect/Customer or to the User.

Display of multiple Prospects and Customers is based on any of the following options:

- Description (Customer Synonym)
- User, or no User assigned (neither allowed for *Normal* User)
- Prospect or Customer
- Refer to Manager, Supervisor, Customer Maintainer, or any of the above
- Category
- Salesman Field and Management
- Scheduled yes, no, or today
- State
- Zip Code (complete or partial)
- Area Code of phone no.

A group of Prospects and Customers on the multiple display screen can be changed by entering a From and a To, and a Next Call Date/Time and/or a User to reassign the Primary or Backup.

Call/OLS is written in RPG ILE for the IBM AS/400 with external screens and files and structured programming. Source code is included for all programs.