



Client App

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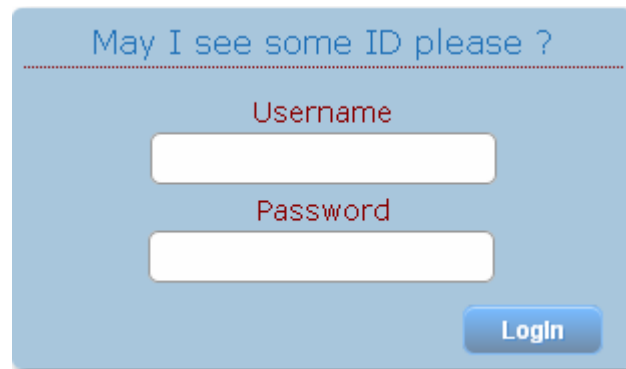
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Logging In

Go to the Client App website <http://ccs-host.net/client>

Enter your username and password credentials.

A screenshot of a login form with a light blue background. At the top, it says "May I see some ID please ?" in blue text. Below this, there are two white input fields. The first is labeled "Username" in red text, and the second is labeled "Password" in red text. At the bottom right, there is a blue button with the word "Login" in white text.

Add a New Contact

Go to the Contacts tab.

Enter the name of the contact or group that you wish to add and select whether the contact is an individual or a group contact.

Click SAVE.

Further options are now available by selecting EDIT.

Here, you will be able to enter the contacts information, such as their title, specific call handling instructions, their cell number, cell provider, e-mail and message delivery.

Select SMS if the client wishes to receive text and select email if they wish to be emailed.

If the contact requires their calls to be transferred to them directly, you may choose from the following options available under the transfer section of where to transfer their calls to.

For Web Access, you may set the contact up with *User Access* – so the agent can view their own messages and update their own status and contact information. *Staff* access will allow the contact to view all messages with no editing capabilities. *Client* access will allow the contact to send and view all messages, Add & Delete contacts, Schedule aways and on calls.

If the contact has a team partner, you may click Copy All Messages To and select the name of their partner who is to receive their messages as well.

Click SAVE.

The screenshot shows a contact form for 'Rachel K'. At the top right are buttons for 'delete', 'cancel', and 'save'. The form is divided into two columns. The left column contains: 'name: Rachel K', 'title: Senior Managing Director', 'instructions: Only Emergency Calls.', and 'copy all messages to: Rob E'. The right column contains: 'cell: *****', 'cell provider: Unknown', 'home:', 'alternate: (888) 986-8571', 'email: rachel@callcentrehosting.com, info@callcentrehosting.com', 'message delivery: SMS and Email', 'transfer: office', 'web access: Super', 'username: rachel', and 'password: *****'.

Your new contact has been created.

Update an Existing Contact

Click on the contact that is to be updated.

Select EDIT.

Enter the new number, service provider, or email.

Update the message delivery (if required).

Click SAVE and the contact will be updated.

Delete a Contact

Click on the contact that is to be deleted.

Select EDIT.

Click DELETE.

Create a Group page

Go to the Contacts tab.

Select Group.



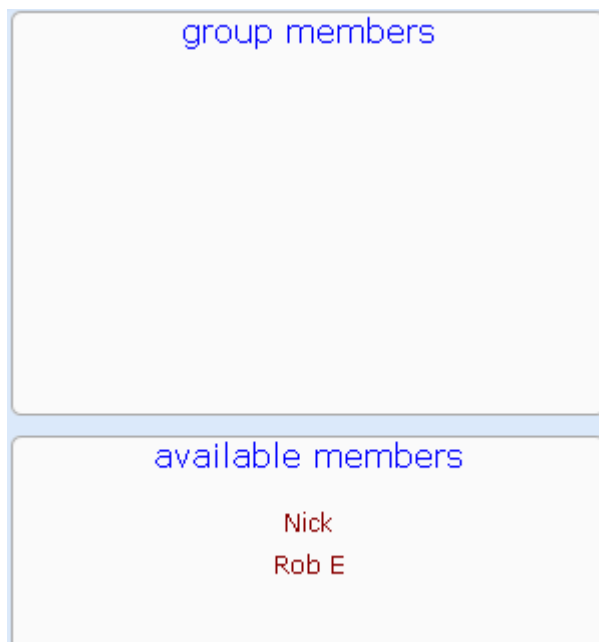
A dropdown menu with a white background and a blue border. The current selection is "individual" in bold black text. Below it, two options are listed: "individual" and "group", both in bold black text. The "group" option is highlighted with a blue background.

In the box below, enter a name for the group.

Click SAVE.

Press EDIT.

To add members to group, click on the contact names listed under available members.



The interface consists of two stacked rectangular boxes with light gray backgrounds and blue borders. The top box is titled "group members" in blue text and is currently empty. The bottom box is titled "available members" in blue text and contains two names, "Nick" and "Rob E", listed vertically in red text.

The selected names will now appear under group members.



The interface is the same as the previous one, but the "group members" box now contains the name "Rob E" in red text. The "available members" box now contains only the name "Nick" in red text.

Delete a group member

Click on a contacts name and they will be removed from the group and show up in available members.

Press SAVE.

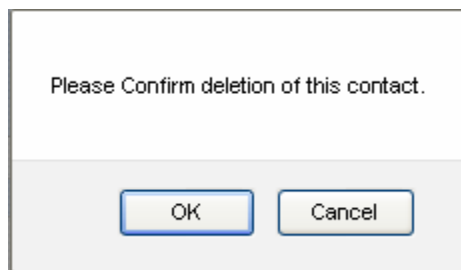
Delete a Group Page

Search and select the group page that is to be deleted.

Go to the contacts tab.

Click EDIT.

Press delete.



Click OK to confirm deletion.

Updating Contact Availability

Click the On Calls tab.

In the first drop down box, select the name of the contact you wish to update.

contact:

select a contact

select a contact
Agent 1
Agent 2
Nick
Rachel K
Rob E

Change the status to Away.

status change:

On Call
Duty Mgr
On Call Sales
On Call HVAC
On Call Plumber
Available
Away

Select the contact name of who the calls will be transferred to.

forward away messages to:

Nick
Rachel K
Rob E

Choose the date and time this will be effective from – You can even enter this weeks in advance.

date from:	Thu, Jul 23 2015 9:53 am
date to:	Thu, Jun 30 2016 9:16 am

June 2016						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Time 9:16 am

Hour

Minute

A note may also be entered.

note:	Gone Fishing.
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Click SAVE and the contact status will be changed to away.

Away from now until forever...	Rob E
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Rachel K Available
Rob E CCh Support Away

Updating Contact Status to On Call

Go to the account.

Click the On Calls tab.

In the first drop down box, select the name of the contact you wish to update.

Change the status to On Call.

Select the date and time this will be effective from – You can even enter this weeks in advance.

Click SAVE and the contact status will be changed to on call.



Rachel K On Call

Delete a Contact Status

Go to the account.

Click the On Calls tab.

Select the contact from the list on the right.

Press DELETE.

Send a Message

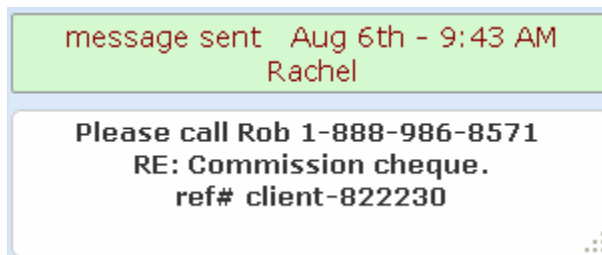
Select a contact.

A message box will automatically pop up.

Fill out the fields.

Press SEND.

At the top of the message, there is now a green box which confirms that the message has been sent, displays the date & time stamp and the name of the representative that sent the message.



Message Search and Re-Send

Go to the Messages tab.

In the search bar, search by typing a name or number etc.

Click on the message when it appears.

You can update the information and press resend.

To send the same message to a different contact.

Select the message.

Search for the contact name (in the right hand side search bar) and click on their name when it appears.

Press SEND.

Add a Listing

Click on the Listings Tab.

In the address field, enter the address of the listing.

You may choose to enter the MLS # or you may leave it blank.

address:

123 Call Centre Street

mls:

N123456

Check off Confirm Appts if you are to confirm showing appointments for this listing.

If not, leave it blank.

confirm appointments:

Listings that you are to confirm showing request for are highlighted green. Whereas, Listings where you are not to confirm showings are blue.

123 Call Centre Street
N123456

4321 Demo Drive
M9856745

Enter confirmation details.

lockbox:

confirmation instructions:

Vacant property, Confirm all appointments, All the usuals.

In the agent field, select the name of the agent who is listing the property.

agent / account manager:

no one

no one

Fred P

Rachel

Click SAVE.

Delete a Listing.

Go to the Listings Tab.

Next, in the Search bar, search for the listing address.

Click on the listing when it appears.

Select DELETE.

Click OK, to confirm the deletion of this listing.

