Call Centre Systems inc

Client App

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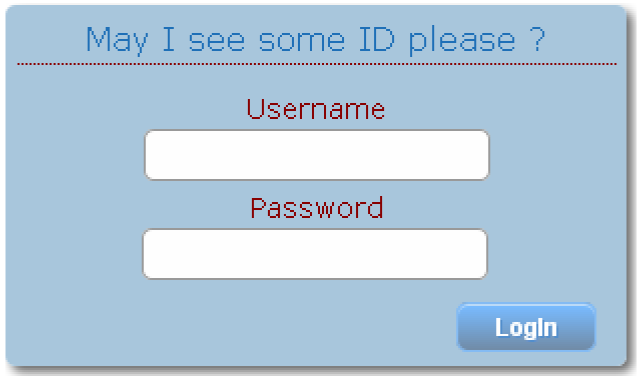
Logging In

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

Enter your username and password credentials.



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.

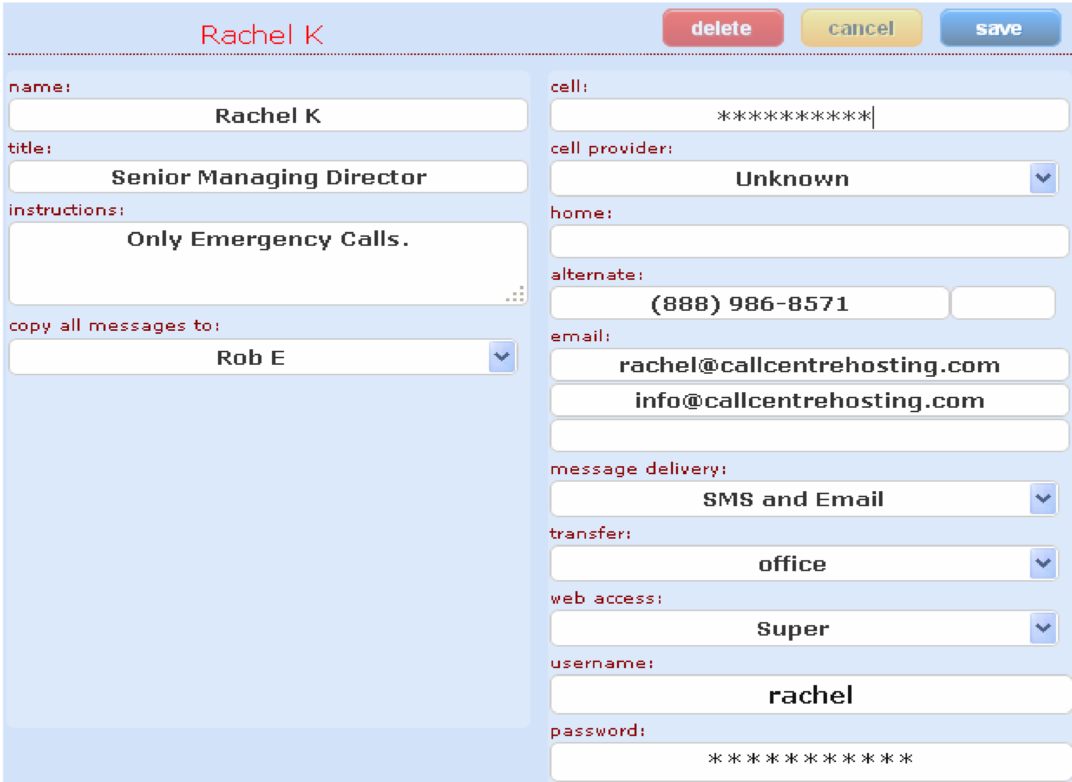
Select SMS if the client wishes to receive text and select email if they wish to be emailed.

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.



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.

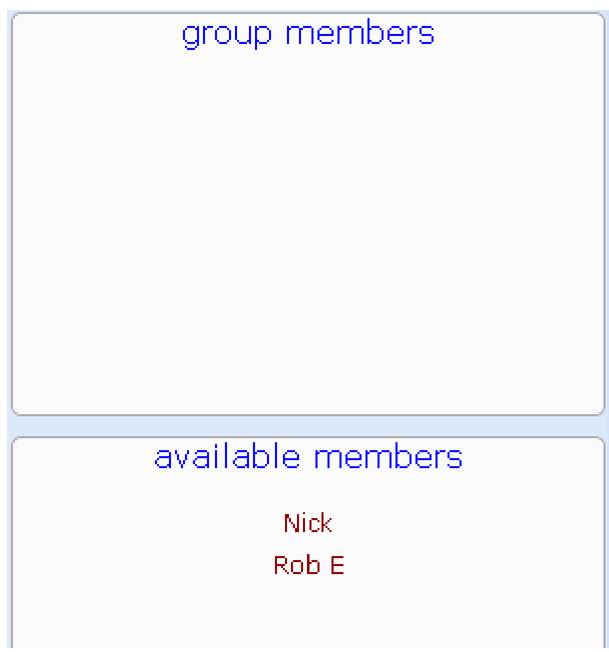
Select Group.

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 selected names will now appear under group members.

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.

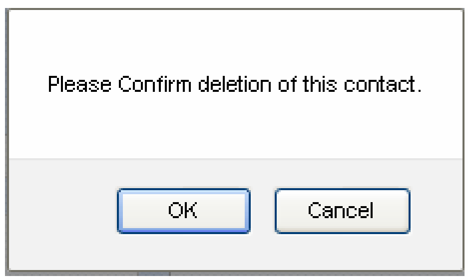
Delete a Group Page

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

Go to the contacts tab.

Click EDIT.

Press delete.

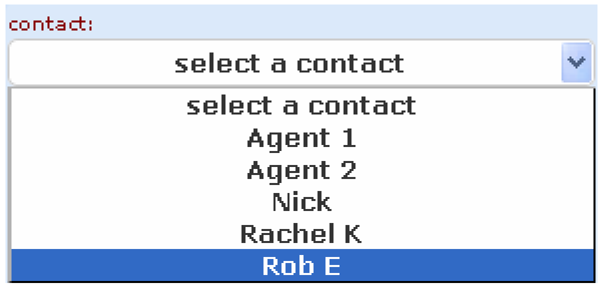


Click OK to confirm deletion.

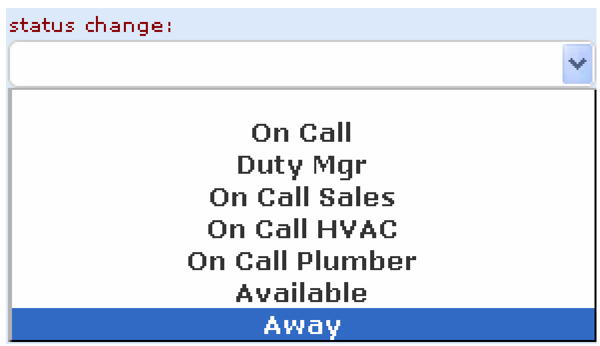
Updating Contact Availability

Click the On Calls tab.

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

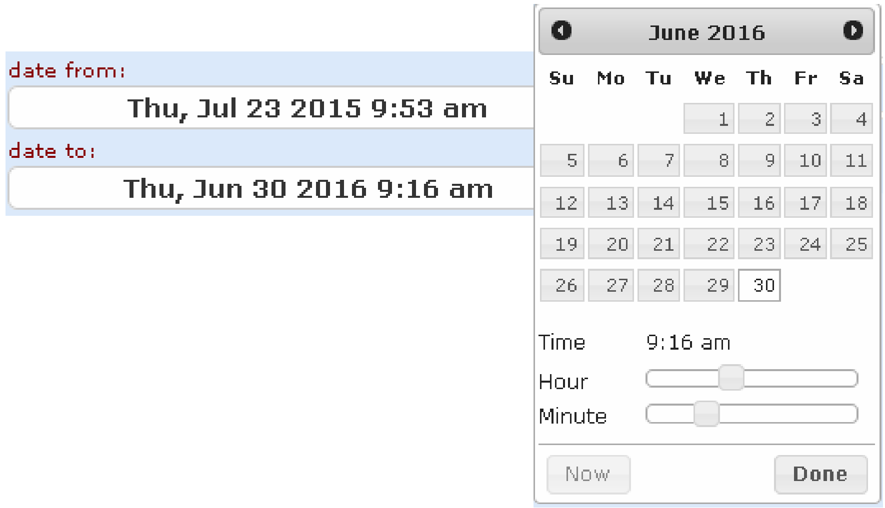


Change the status to Away.



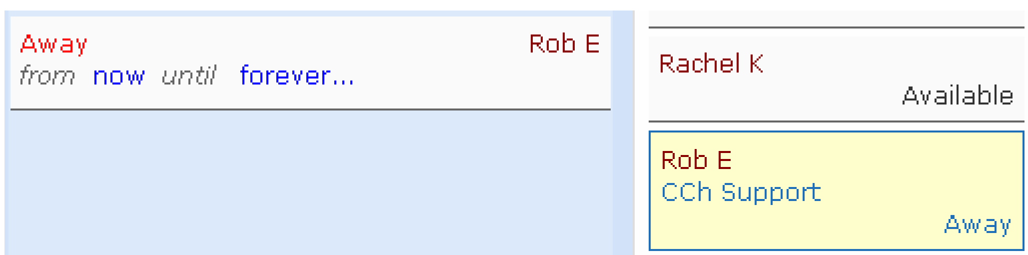
Select the contact name of who the calls will be transferred to.

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



A note may also be entered.

Click SAVE and the contact status will be changed to away.



Updating Contact Status to On Call

Go to the account.

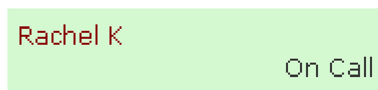
Click the On Calls tab.

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.



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

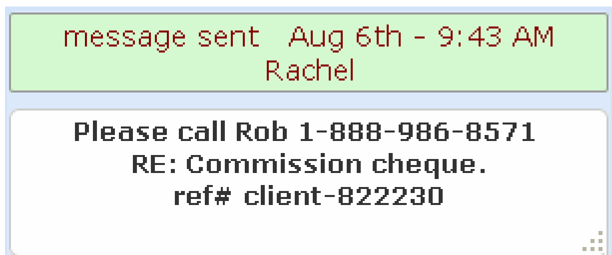
Select a contact.

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.

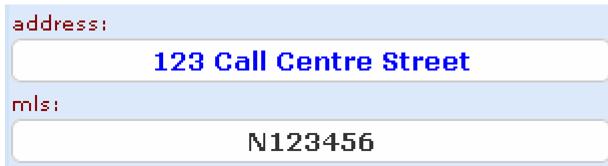
Press SEND.

Add a Listing

Click on the Listings Tab.

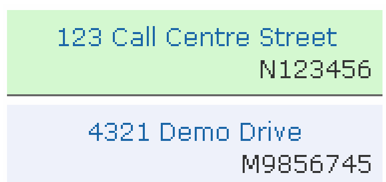
In the address field, enter the address of the listing.

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

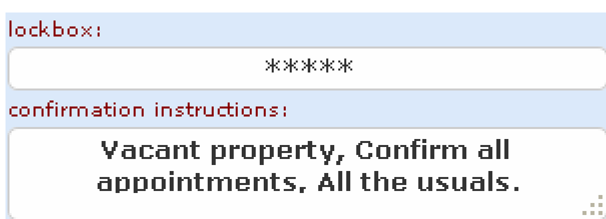


Check off Confirm Appts if you are to confirm showing appointments for this listing.
If not, leave it blank.

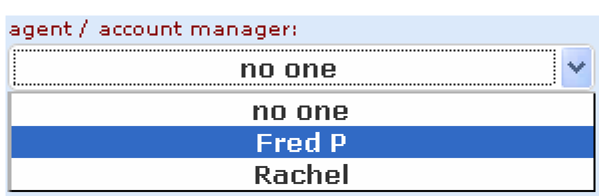
Listings that you are to confirm showing request for are highlighted green. Whereas, Listings where you are not to confirm showings are blue.



Enter confirmation details.



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



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.