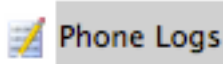


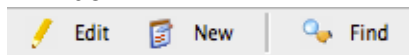
How to enter a Phone Log

Procedure

1. After you have taken a phone call, go to the “Phone Logs” tab on SQLWorks which is under the heading “SQLWorks CRM”



2. Click on “New” at the top of the page which opens the “Phone Log” box in another window



3. Start typing in the company name in the “Company Name” box and select from the drop down list

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4. Double click on the contact name in the box below the company name
5. Type in the information from the phone call into the “Subject” and “Details” box
6. In the “Staff Name” box, start typing in the staff members name, you will then see a drop down box appear with the names which you just click on
7. In the “Staff Group” box, start typing in the department name and you will see the drop down box and you select the department

8. Click “Save & Close” to save the Phone Log

