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Slide notes: In this tutorial we are explaining the options for 'On Demand Contact Call'. This option is available on the Contact Dashboard, and operates independently of any Call List. In other words, we select a Contact, and then we can call the Contact or simply perform some follow up work on the Call Contact record, whether that be Order follow up, Commentary, or other.

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Slide notes: The DIRECT or ON DEMAND option is actually also available at CRM, AP Creditors and AR Debtors. Here we see a CRM Master Record, and if we select CONTACT MANAGE, that leads to an 'on demand' call scenario.

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Slide 4 Slide notes:



Slide notes: Next, we consider an AP Creditor Master screen. Here we can also select CONTACT MANAGE and link directly to an 'on demand' Contact Call screen. Even if there is no Contact Master entry yet for this Account, the system will generate it automatically.

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Slide notes: So this means that we can Contact Manage any AP Creditor Account on demand.

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Slide notes: For AR Debtors it is quite the same. Just choose CONTACT MANAGE and immediately we enter a Call Contact screen.

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Slide notes: Now back to the Contact Dashboard, where we have the same 'on demand' option. The only difference here is that we still have to select the Contact, because in this case it can be any Contact, and we need to select which Contact it is we wish to work with.



Slide 11 Slide notes:



Slide 12 Slide notes:



Slide 13 Slide notes:

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Slide notes: So we select or lookup the Contact and choose NEXT.

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Slide 15 Slide notes:

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Slide 16 Slide notes:

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Slide notes: The DIRECT option for the Contact Call offers the same functions to dial, add commentary, and usage of the other functions. It is only the final event that is different here. Since we are not operating from a Call List in this situation, we have no DEFER, GIVE UP and PAUSE functions.

In fact, in many cases we will not even be making a call, instead we may simply be performing some administrative follow up action. Nevertheless, we have 2 options to 'finish up'. We can finish with a Call being logged, and we can finish without a Call being logged.



Slide 18 Slide notes:





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Slide notes: So we have now seen the operation and usefulness of the "On Demand" option.