



Version 2.0

Software Operation Manual

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The screenshot shows the 'Remote Phone Log' application window. At the top, it indicates 'Connected to Server at 67.164.33.151'. The main interface includes a 'Phone Log' table with one entry for Call ID 2. Below this is a detailed view for Call ID 2, including fields for Date Called (3/18/2007), Caller (My Phone Call), Internal Contact (my local sales person), and Company (My Customer). There are also buttons for 'New Call', 'Close Call', 'Update', 'E-mail', and 'Text Mesg'. A 'Follow up Comment' table shows a recent update on 3/18/2007 at 2:01 PM.

| Call ID | Company | customerID | Closed | Logged Call | Assigned to | Product Line | Caller | Called | Date Sok |
|---------|-------------|------------|--------------------------|--------------|---------------|--------------|-----------------------|-----------|-----------|
| 2 | My Customer | 1 | <input type="checkbox"/> | Default Admi | Default Admin | | my local sales person | 3/18/2007 | 3/18/2007 |

Open Calls for All customers (my Calls)

Call ID: 2

Date Called: 3/18/2007 2:01:00 PM Closed

Caller: My Phone Call

Internal Contact: my local sales person

Company: My Customer ID#: 1

Phone: 888-222-3333

Model: _____ SN: _____

Product Line: _____

Category: _____

Problem: My Problem Call

Advice: My Advice

Call Closed: 3/18/2007

Call Taken By: Default Admin

Call Assigned to: Default Admin

Charge Type: Unknown

Customer E-mail: _____

Sent CC

| Date | Follow up Comment |
|-------------------|-------------------|
| 3/18/2007 2:01 PM | Ann Update |
| * | |

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Overview

Remote Phone Log

The remote phone log is a program to help remote users share phone calls. Users log into a common database where contact lists, customers, and phone call information can be shared.

Installation

Overview

The Installation Tracking software installation consists of multiple parts, all handled automatically by the installation engine.

Microsoft .NET Framework 2.0

MDAC 2.7

Database installation

Requirements

Computer requirements:

- Pentium II Processor or faster
- 256 MB memory
- 200 MB free disk space

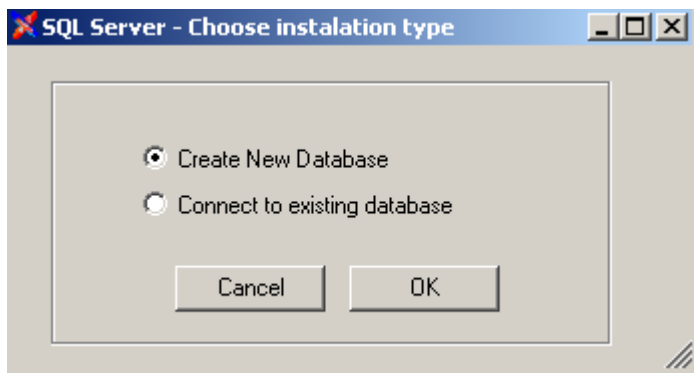
Operating System requirements:

- Window 2000 SP2-4 or Windows XP SP 1-2
- Windows Server 2003

SQL Server

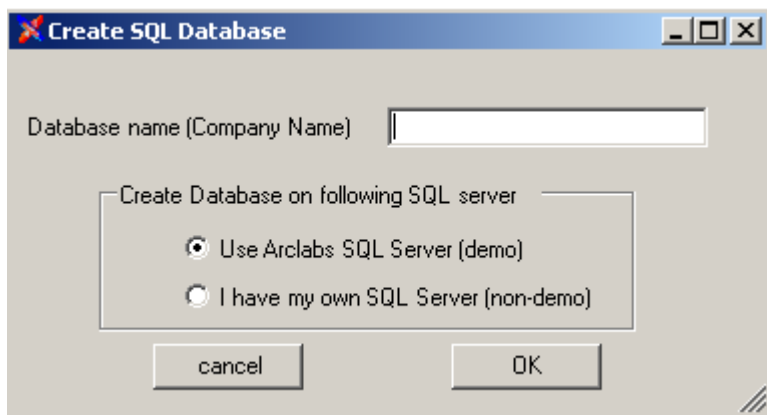
- MS SQL Server 2000
- MS SQL Server 2005

Installation and Setup



After installing the program you will be prompted to create a new database or connect to an existing one.

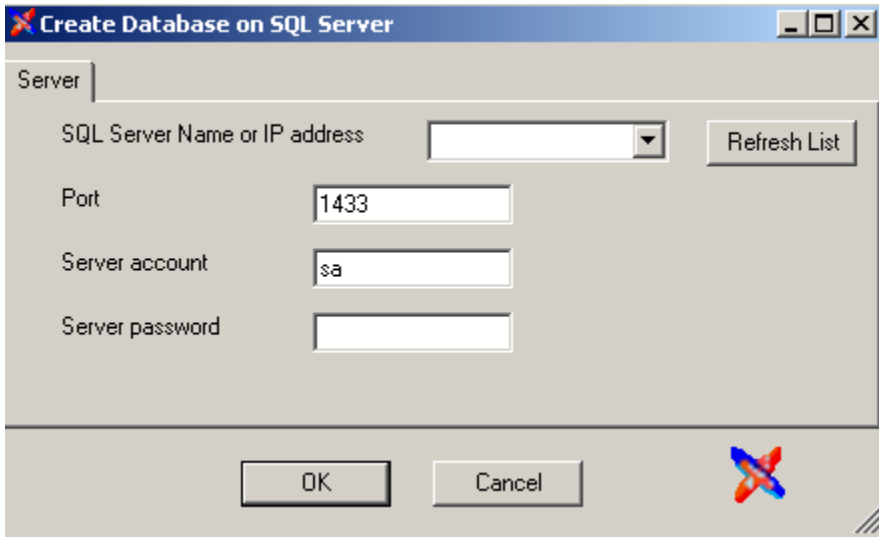
If you select to create a database



Type in the name of your company. A SQL database by this name will be created on the target server.

If you choose the Arclabs Server the database will be created on a remote Arclabs Server. Use this if you wish to just try the software. It is highly recommended that you install the database on your managed SQL server

if you are running the non-demo version. Arclabs reserves the right to charge for use of the SQL databases if you are running the non-demo version.



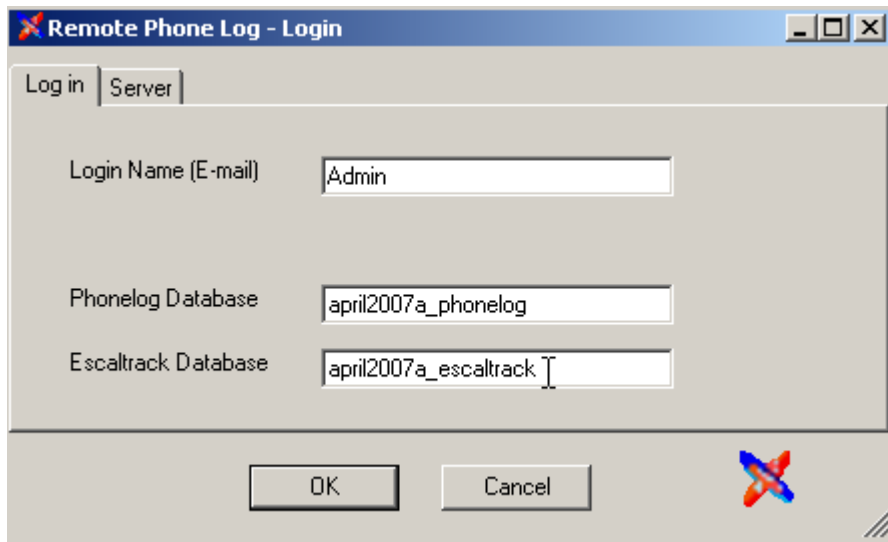
If you choose to create a database on your server you will be prompted for the following:

- Name or IP address of the server
- TCP/IP port the SQL server is running.
- Server account with administrator permissions (ability to create tables, stored procedures)
- Password..

TCP/IP must be available to the SQL Server as part of the named pipes.

Note – The Remote Phone Log uses the “mixed authentication” rather than “windows authentication”. If you wish to use “windows authentication” please contact Arclabs.

Logging in for the first time



After restarting the Remote Phone Log when prompted, the login prompt appears.

For the first log in, use the values entered. You can add additional users/change Admin user later.

Your Ready!

You can now start using the Remote Phone Log. However to optimize the power of the Remote Phone log, please read the next sections.

Configuration

Adding users

Go to the following screen to add a new user

The screenshot shows the 'New Phone User information' dialog box with the following fields:

- User Name
- E-mail
- Home/Cell number
- Primary Product Line
- Connection Type
- Work Ext
- Password
- Confirm Password
- Admin Rights (checkbox)

The background application window shows the 'Phone Log Users' table with the following data:

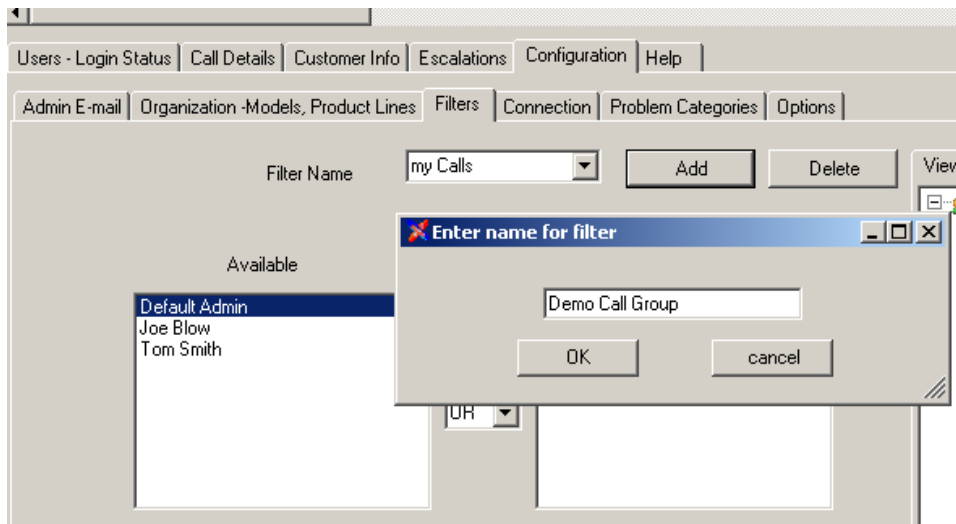
| Name | E-mail Address |
|---------------|-------------------------|
| Default Admin | admin |
| Tom Smith | tom.smith@mycompany.com |

The 'Add New User' button is highlighted with a mouse cursor.

Go to the Users – Login Status, Phone users Tab. Then click on “Add New User” and fill out the form.

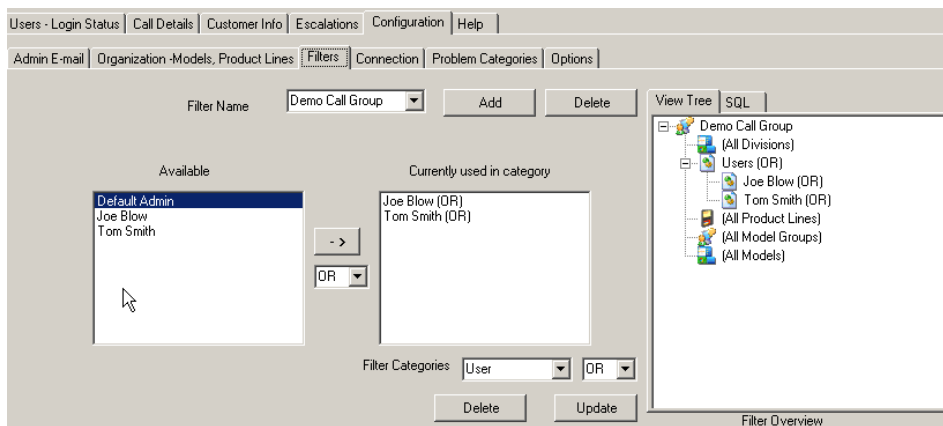
Creating a Call Group Filter

Go to “configuration”, “Filters” tab. Click on “add” and enter the name of your call group.



Set the Filter Categories to “User”

Highlight the users you wish to add for this call group and click on the -> “arrow”.



Setting up E-mail and Text Messaging

Go to Configuration -> Admin Email

Enter the POP account information to your E-mail server

Note – DO NOT USE THE values shown below!

The screenshot shows a software interface with a menu bar at the top containing 'Users - Login Status', 'Call Details', 'Customer Info', 'Escalations', 'Configuration', and 'Help'. Below the menu bar, there is a sub-menu bar with 'Admin E-mail', 'Organization -Models, Product Lines', 'Filters', 'Connection', 'Problem Categories', and 'Options'. The 'Admin E-mail' sub-menu is active, displaying the following configuration options:

- Use SQL Server as Mail Server
- Use Default Mail Smtplib Service or Mail account on this computer
- Use Following settings

Below these options, there are several input fields:

- Admin E-mail:
- Smtplib Server:
- Port:
- Send Using:
- Authenticate Method:
- User Name:
- Password:

An 'Apply / Save' button is located to the right of the 'Port' field.

General Operations

Creating a phone log entry

Click on the “New Call” icon and fill out the form. Note you can enter minimal information or fill out every field.

The screenshot shows a web application window titled "Remote Phone Log - Connected to Server at 67.164.33.151". The interface includes a top navigation bar with icons for "New Call", "Close Call", "Update", "E-mail", and "Text Mesg". A "Call Group" dropdown menu is set to "Demo Call Group". Below this is a "Phone Log" table with columns for "Call ID", "Company", and "custom". A "Users - Login Status" section is visible, with "Admin E-mail" and "Organization -Models, Produ" as sub-sections. The main focus is the "CSB Phone Log Entry Form", which contains the following fields:

- Caller: Text input field
- Internal Contact: Dropdown menu
- VM ext: Text input field
- Cell: Text input field
- Company: Dropdown menu
- ID#: Text input field
- Phone: Text input field
- Model: Dropdown menu
- Product Line: Dropdown menu
- SN: Text input field
- Category: Dropdown menu
- Problem: Large text area
- Advice: Large text area
- Call Closed: Date dropdown menu (set to 3/18/2007)
- Call Taken By: Dropdown menu (set to Default Admin)
- Call Assigned to: Dropdown menu (set to Default Admin)
- Charge Type: Dropdown menu (set to Unknown)
- Customer E-mail: Text input field
- Checkboxes: Voice Mail, Service Call
- Buttons: "Submit new Call" and "Cancel"

Editing the call

You can edit the call after creating it by clicking on the call in the upper region and typing in the information in the “Call Details” in the lower screen region.

The screenshot shows the 'Remote Phone Log' application window. At the top, it displays 'Connected to Server at 67.164.33.151'. Below this is a toolbar with icons for 'New Call', 'Close Call', 'Update', 'E-mail', and 'Text Mesg'. A 'Call Group' dropdown menu is set to 'my Calls'.

The main area contains a 'Phone Log' table with the following data:

| Call ID | Company | customerID | Closed | Logged Call | Assigned to | Product Line | Caller | Called | Date Solv |
|---------|-------------|------------|--------------------------|--------------|---------------|--------------|-----------------------|----------|-----------|
| 2 | My Customer | 1 | <input type="checkbox"/> | Default Admi | Default Admin | | my local sales person | 3/18/200 | 3/18/200 |

Below the table is a navigation bar with tabs: 'Users - Login Status', 'Call Details', 'Customer Info', 'Escalations', 'Configuration', and 'Help'. The 'Call Details' tab is active, showing 'Call ID 2'.

The 'Call Details' form includes the following fields and options:

- Date Called:** 3/18/2007, 2:01:00 PM, Closed
- Caller:** My Phone Call
- Internal Contact:** my local sales person
- Company:** My Customer, **ID#:** 1
- Phone:** 888-222-3333
- Model:** [Dropdown]
- Product Line:** [Dropdown]
- Category:** [Dropdown]
- Problem:** My Problem Call
- Advice:** My Advice
- Call Closed:** 3/18/2007
- Call Taken By:** Default Admin
- Call Assigned to:** Default Admin
- Charge Type:** Unknown
- Customer E-mail:** [Text Field]
- Sent, CC,

There are also navigation arrows and a button labeled 'Add this Customer to database'. A 'Follow up Comment' table is visible on the right side of the form:

| | Date | Follow up Comment |
|---|-------------------|-------------------|
| ▶ | 3/18/2007 2:01 PM | Ann Update |
| * | | |

E-mailing the Call

Highlight the record in the upper window. Click on the E-mail icon to bring up the E-mail dialog box.

Click on the “Send” button to email the recipient list.

