Version 2.0

Software Operation Manual

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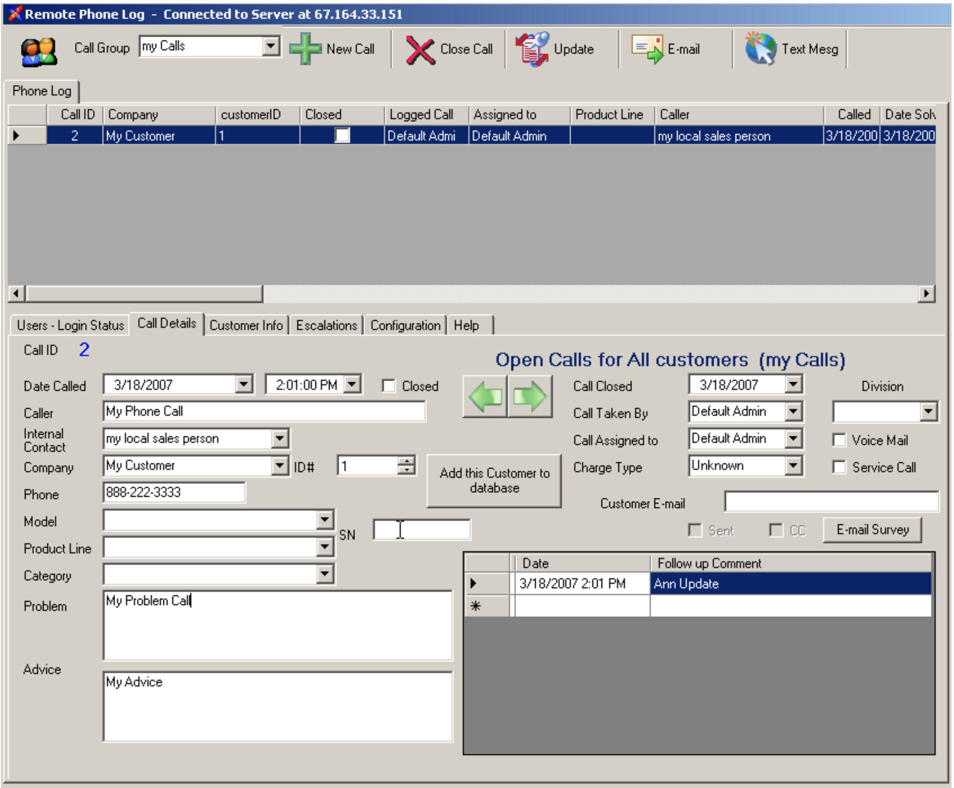
Remote Phone Log - Connected to Server at 67.164.33.151
Call Group
my Calls
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Default Admin
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Add this Customer to database
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CC
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Product Line
Category
Date
Follow up Comment
3/18/2007 2:01 PM
Ann Update
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My Problem Call
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My Advice

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

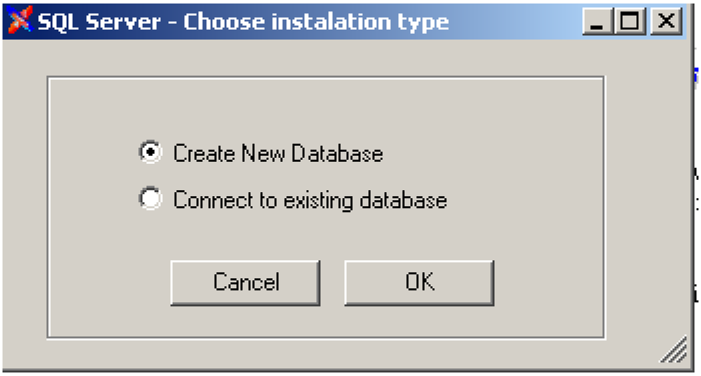
Operating System requirements:

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

SQL Server

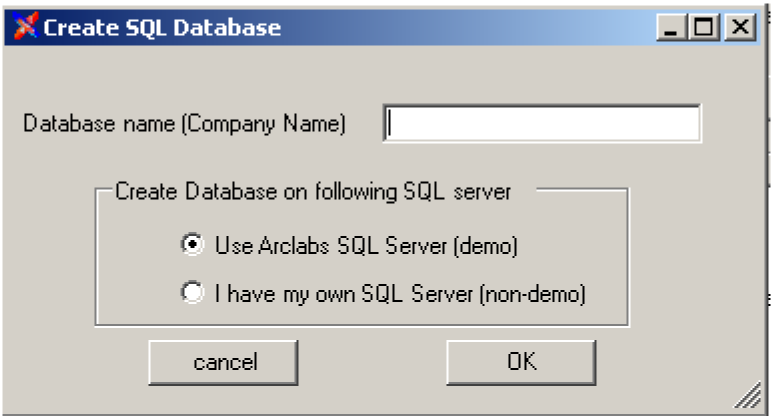
- MS SQL Server 2000
- MS SQL Server 2005

Installation and Setup



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

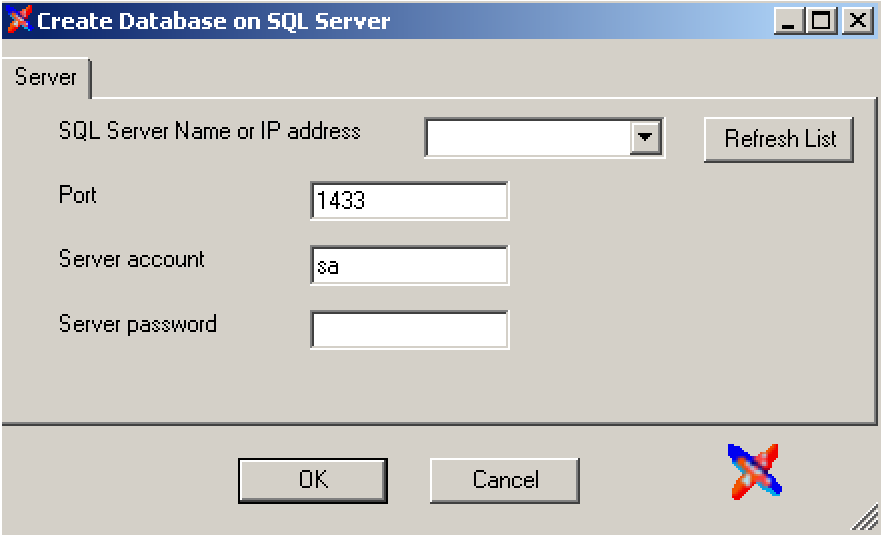
If you select to create a databse



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.



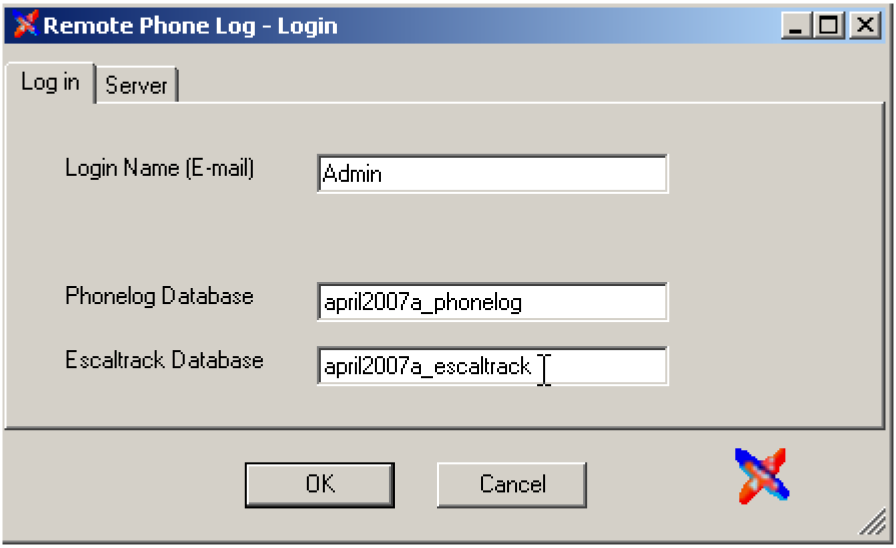
If you choose to create a database on your server you will be prompted for the following:

- 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 then "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.

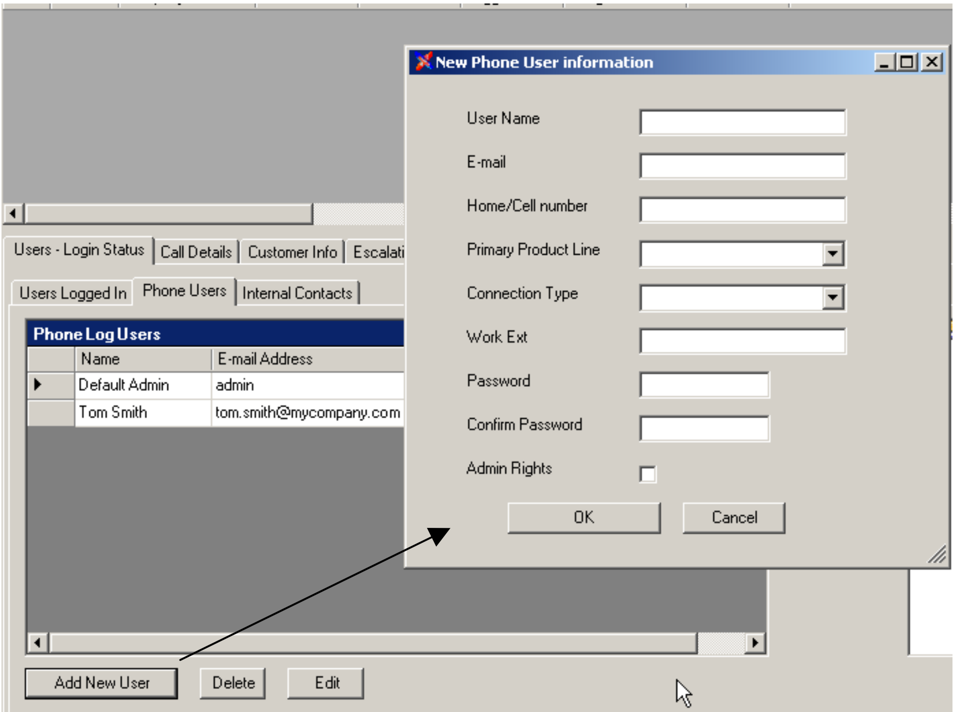
Your Ready!

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

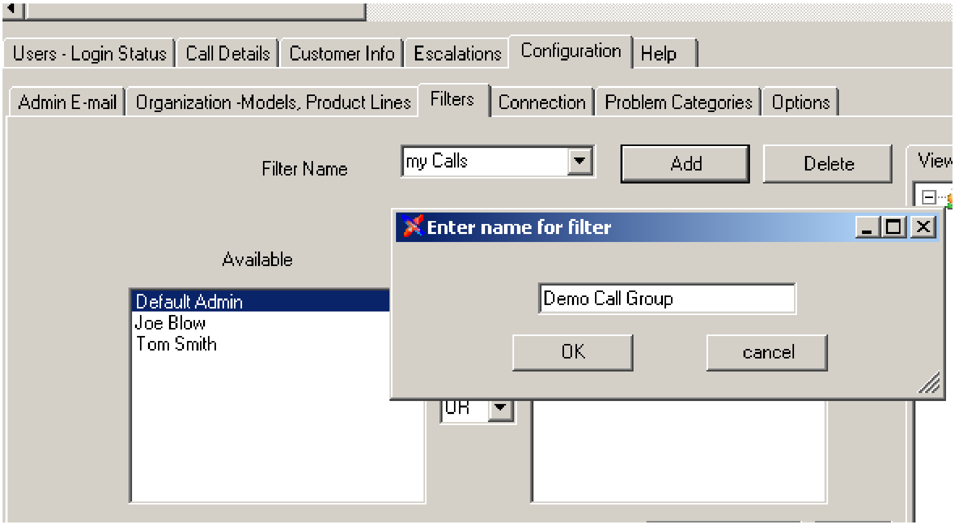
Go to the following screen to add a new user



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

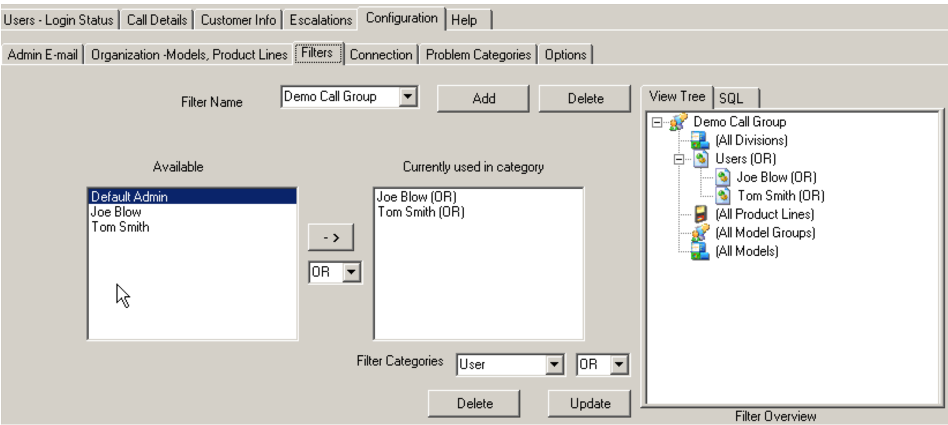
Creating a Call Group Filter

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”.

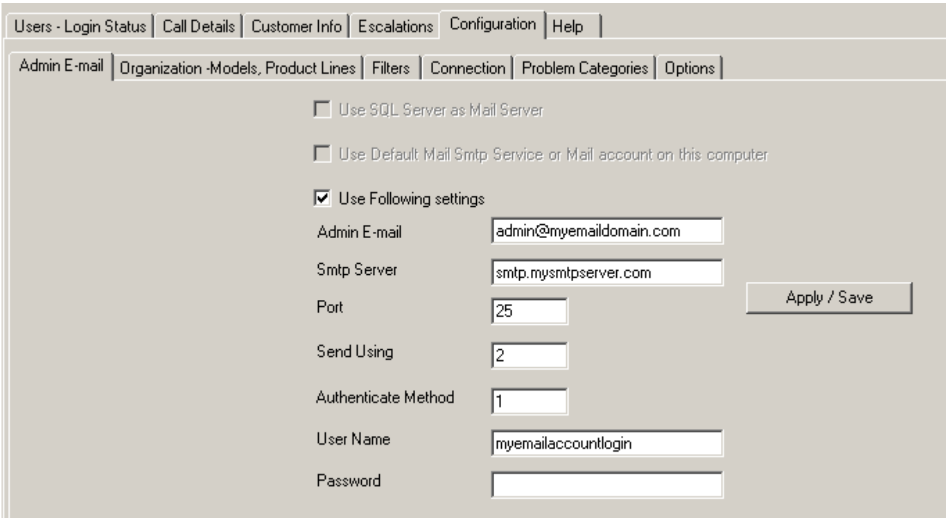


Seting up E-mail and Text Messaging

Go to Configuration -> Admin Email

Enter the POP account information to your E-mail server

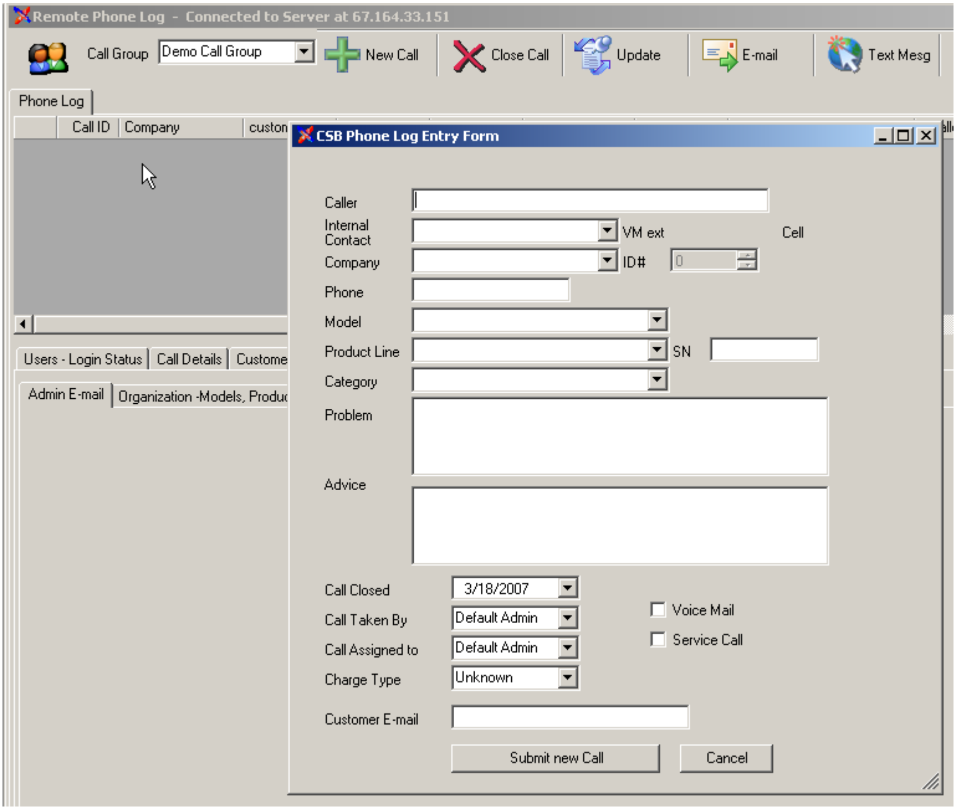
Note – DO NOT USE THE values shown below!



General Operations

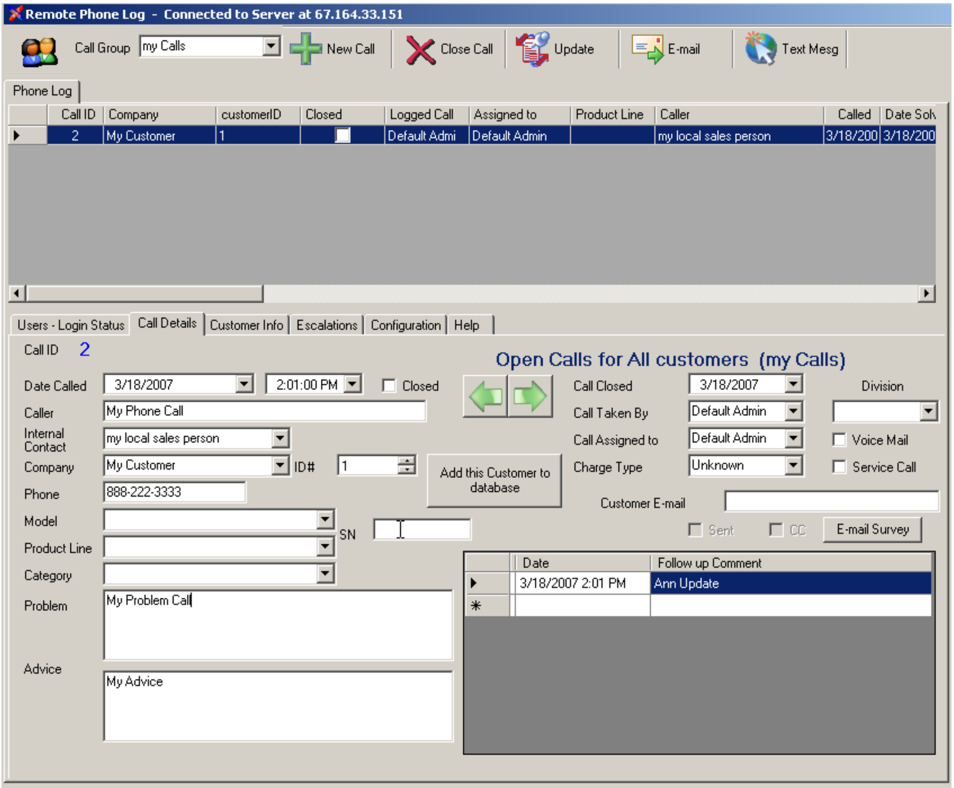
Creating a phone log entry

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



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.



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.