

Contact Management

Procedure/Function	Where Accomplished	How Accomplished
Electronic Document Filing	Word Manager and Document Manager	When printing a document through the Word Manager, single click on SAVE COPY. An electronic copy of the document will be saved and attached to the record it was printed to or for. The document may be viewed and/or printed at a later date by accessing the Document Manager and selecting the desired document for viewing or printing.
Tracking Returned Calls	Call Manager	Access Call Manager and display a call that came in for you. Return the call and enter that it has been "COMPLETED." Enter any notes regarding the call. AGENCY EXPERT will record the date and time of the returned call.
Tracking Incoming Calls and Entering Phone Messages	Call Manager	Access Call Manager and enter new calls as they come in. Enter who the call is from and who it is to and any notes or messages. Enter a Call Back date if you wish (which will automatically enter a "to do" item in the Daily Planner). You may also alert the employee or agent to which the call message has been placed through your intra-office e-mail (accessed with a single click on the e-mail button).