

Unicall/CRM



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Customer Relationship Management System with 4Trunk CID

Customer Relationship Management

Unicall/CRM[®]

User's Manual

Korea MutaTech, Inc

Contents

1. About Unicall/CRM	3
1.1 Service Type	3
1.2 Use Environment	4
1.3 After Service	5
2. Installation	6
2.1 Installing Main Program	6
2.2 Installing Client Program	8
2.3 Installing CID Device	10
2.4 Reinstallation	10
3. Starting	14
3.1 Basic Display	14
3.2 Starting	15
3.3 Environment Setting	16
4. Functions	17
4.1 Telephony Function	17
4.2 Connection Management Function	18

1. About Unicall/CRM

Unicall/Quick has telephony function and connection Management Function, and can work not only CRM but also connection management.

1.1 Service Type

① Characteristics

Unicall/Quick is CRM(Customer Relationship Management) system and displays the caller information on the screen automatically when receiving calls. You can foreknow the customer's information and give the satisfactory service to the customer, and provide services like caller display, call list, customer management, E-mail, SMS, and so on to clients effectively and store information onto user's PC.

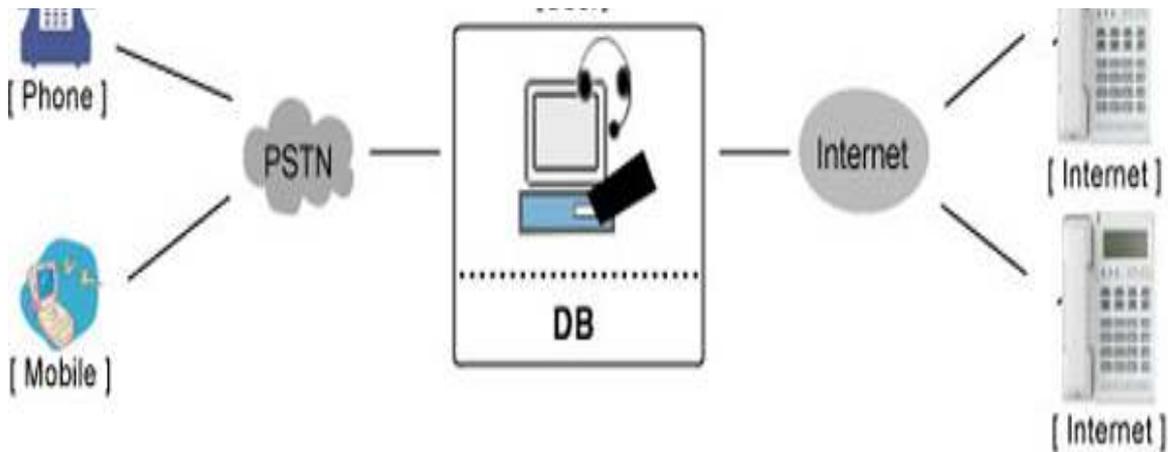
Unicall/Quick displays the caller information through the CID device and is applicable up to 4 telephone lines and is very effective in key phone, PBX, and so on.

◆ Functions and Advantages

- Caller Display
- Display All
- Call List
- Connection Management
- Member Management
- Key Number
- Memo/Diary
- Send E-mail
- Send SMS

◆ System Composition

The system composition of Unicall/Quick is shown in the figure below.



② Product Package

Open the package box and see if the composition of package is as shown in the table below and if there is any damage on the appearance.

Model	Standard
Product Composition	-Program CD : 1 -CID Device : 1 -RJ11 6P2C Phone line : 4 -USB cable A-B : 1 -User's manual : 1

1.2 Use Environment

Following PC environment must be provided to use Unicall/Quick.
Check on the box if you confirm the items.

Item	Basic Requirements	Check
CPU	Pentium 166MHz or above	
Memory	64MB or above	
OS	Windows XP, 7(32bit)	

1.3 After Service

Korea MutalTech, Inc. is doing its best to provide the best after sales service to its customers. Customers can get after sales service and customer support through Korea MutalTech, Inc. homepage (www.mutaltech.com), e-mail(Webmaster@mutaltech.com), phone, or mail.

◆ Questions and Technical Support

- If you have any questions regarding the use of Unicall/Quick, please first refer to this User's Manual and the Electronic Manual.
- If you refer to the Product Q&A on Korea MutalTech, Inc. homepage and send questions, we will reply quickly.
- For other matters, please use e-mail, phone, or mail.

◆ Electronic Manual

- To provide better services, the User's Manual contained in the product package can be partially modified.
- If you visit Korea MutalTech, Inc. homepage for the Electronic Manual, you can view the updated and detailed Electronic Manual.

2. Installation

2.1 Installing Main Program

Step 1 If you insert the program CD into CD-ROM. 'Setup' screen automatically pops up. Click < Installing Main Program> button.



Step 2 Click <Next>.



Step 3 Input user name(PC ID) and product number, Click <Next>.



Caution	<p>When user name or the IP address of Unicall/Quick Server is not input or product number is incorrect, the window below shows up.</p> <div style="display: flex; justify-content: space-around; align-items: center;">   </div>
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Caution	<p>Installing program with same product number at more than two PCs, the execution of the program is hung up because of program bomb.</p>
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Step 4 Select Browse... and Click <Next>.



Step 5 Installation is in progress. Wait till completed.



Step 6 Click <Finish>. The installation of the main program is completed.



2.2 Installing Client Program

Step 1 If you insert the program CD into CD-ROM, 'Setup' screen automatically pops up. Click <Installing Client Program> button.



Step 2 Click <Next>.



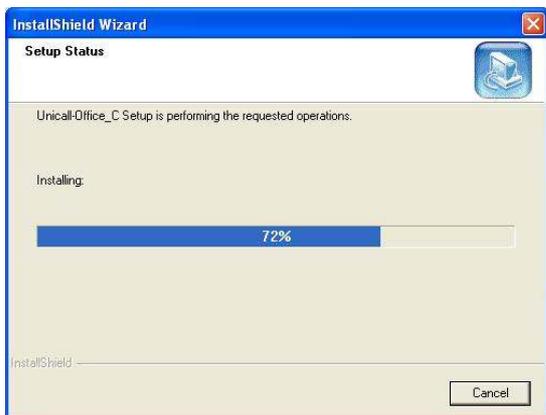
Step 3 Input user name(PC ID) and product number, Click <Next>.



Step 4 Select Browse... and Click <Next>.



Step 5 installing in progress. Please wait till completed.



Step 6 Click <Finish>. The installation of the client program is completed.



2.3 Installing CID Device

Install CID device according to the procedure of 'CID Device Installation Manual'.

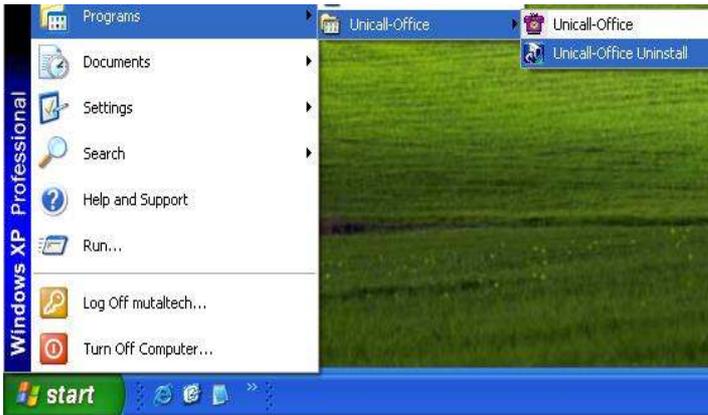
2.4 Reinstallation

Reinstallation is needed when the program is updated or the existing program is deleted for reinstallation because Unical/Quick dose not properly operate.

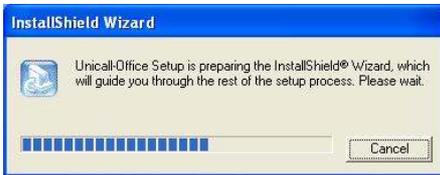
※Following is the method of deleting on Windows XP. The method is the same on Widows except some differences in windows composition.

◆ Uninstalling Main Program

Step1 Click <Unical/Quick uninstall> from the Windows screen<Start -> Programs -> Unical/Quick)



Step 2 It is preparing for uninstallation. Please wait.



Step 3 Select Remove and Click <Next>.



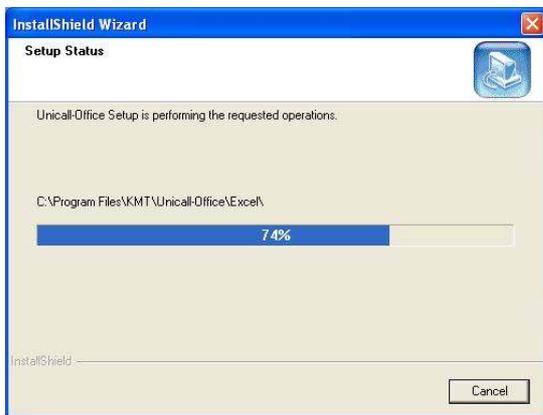
Step 4 Click <OK>.



Step 5 Click <Ignore>.



Step 6 Uninstalling in progress. Please wait till completed.



Step 7 Uninstallation is successfully completed. Click <Finish>.



Step 8 Confirm uninstallation of Unicall/Quick from the Windows screen(Start -> Programs)

◆ Reinstalling

Reinstall according to the procedure for 2.1 Installing Main Program.

◆ **Uninstalling Client Program**

Uninstall according to the procedure for **Uninstalling Main Program**

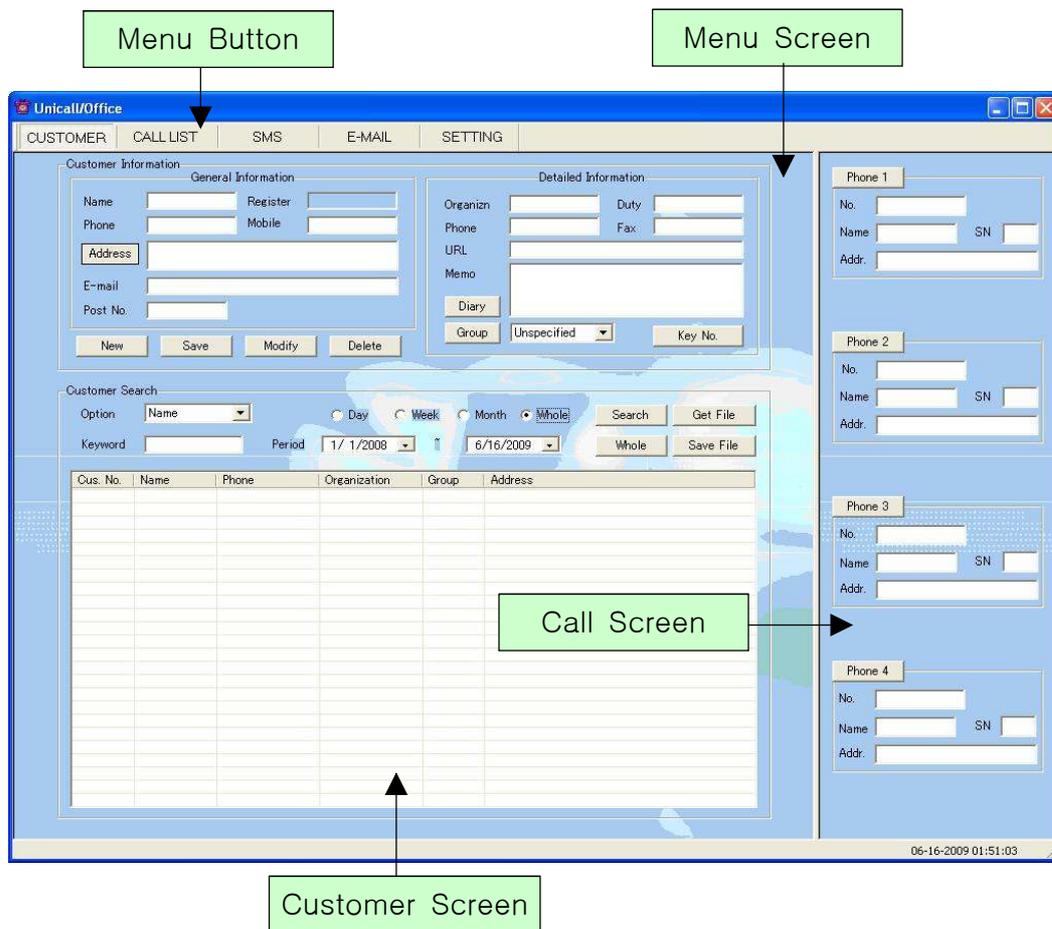
◆ **Reinstalling**

Reinstall according to the procedure for **2.2 Installing client Program.**

3. Starting

3.1 Basic Display

The following shows basic display of Unicall/Quick and its components. Getting used to basic display is very helpful in making the most use of Unicall/Quick.



◆ Menu Button and Menu Screen

The menu screen for each function is displayed if the menu button is pressed. The menu screen of the basic display is the customer screen.

◆ Call Screen

Call screen displays all of the caller information and it's sequence number.

◆ Customer Screen

Customer screen displays customer's name, phone, organization and address.

3.2 Starting

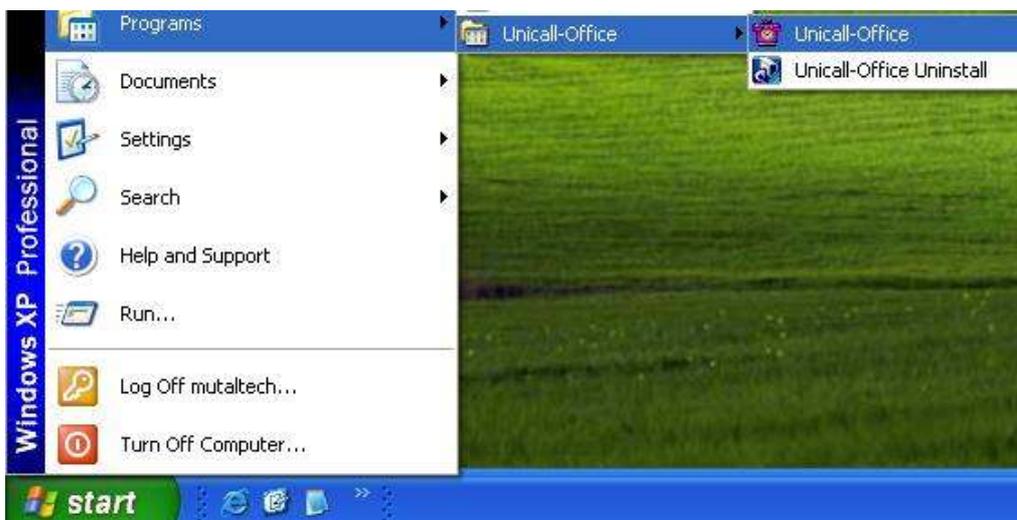
When the installation is successfully completed, double-click on the desktop



and run the program.



◆ When  icon is not on the desktop, click<Unicall/Office> from the Windows screen(Start -> Programs -> Unicall/Office) to run it.



◆ This screen is shown when Unical/Office is run properly.

3.3 Environment Setting

Before using Unical/Quick, it is necessary to make environment setting with user registration and SMS setting.

The screenshot displays the 'Unical/Office' application window with the 'SETTING' tab selected. The main area contains two primary configuration panels. The 'User Registering' panel includes input fields for Organization, Name, Biz Reg No., Phone, Fax, Address, E-mail, and URL, along with 'OK' and 'Cancel' buttons. The 'SMS Setting' panel includes fields for ID and Password, 'Subscribing' and 'Login' buttons, and checkboxes for 'Save ID' and 'Auto Login'. On the right side, there are four 'Phone' configuration sections (Phone 1 to Phone 4), each with fields for No., Name, SN, and Addr. The bottom right corner shows the date and time: 06-16-2009 01:53:53.

◆ User Registration

This part is to register the user information. Input homepage, e-mail, address, fax, phone number and name.

◆ SMS Setting

This part is to input the ID and pass word that is needed to send SMS to other person.

4. Functions

Unicall/Quick has telephony function and connection management function, and it is necessary to understand each function to use it efficiently.

4.1 Telephony Function

① Caller Display

Phone 1	
No.	0428252535
Name	New Cus SN 1
Addr.	

Phone 1	
No.	0428252535
Name	gildong SN 1
Addr.	5F, Fine B/D, Kung-Dong

<New One>

<Registered One>

◆ Display ALL

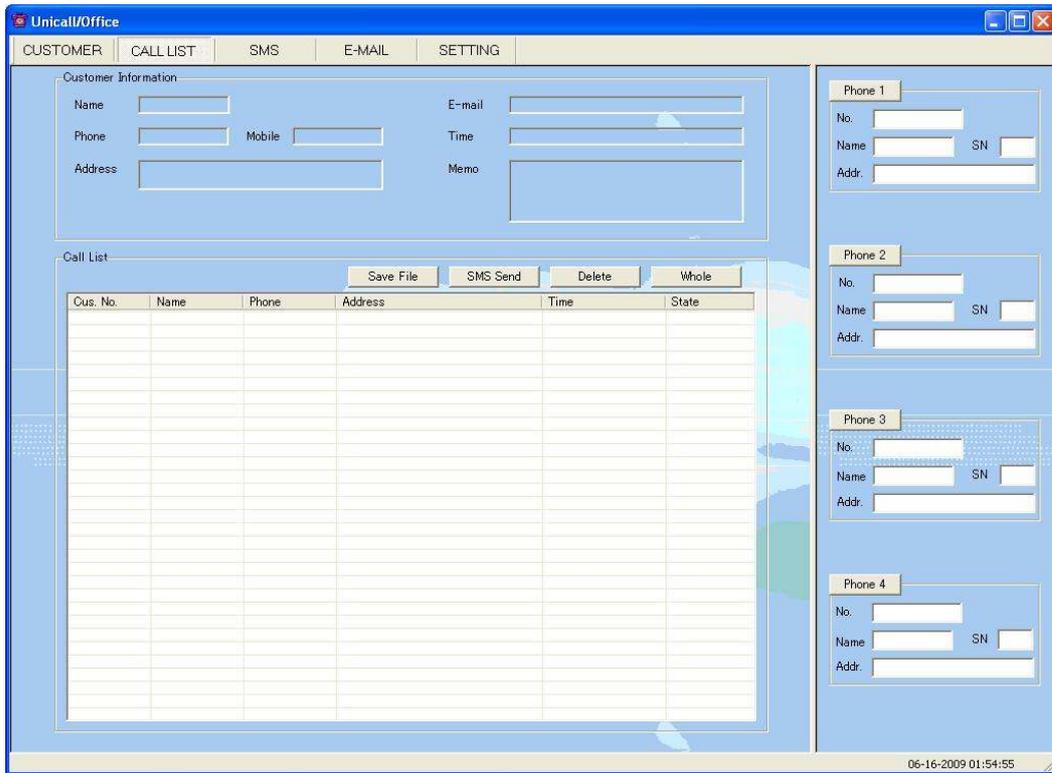
Displays caller informations for all of the four/eight lines.

◆ Display Detailed Information

Displays the detailed information of the customer if each 'Phone' button is pressed. The normal phone or the mobile may be distinguished.

② Call List

Displays the call list. The 'Call List Screen' is displayed if the 'Call List' button is pressed.



<Call List Screen>

◆ Call List Display

Displays all of the call list if 'Whole' button is pressed.

◆ Call List Deletion

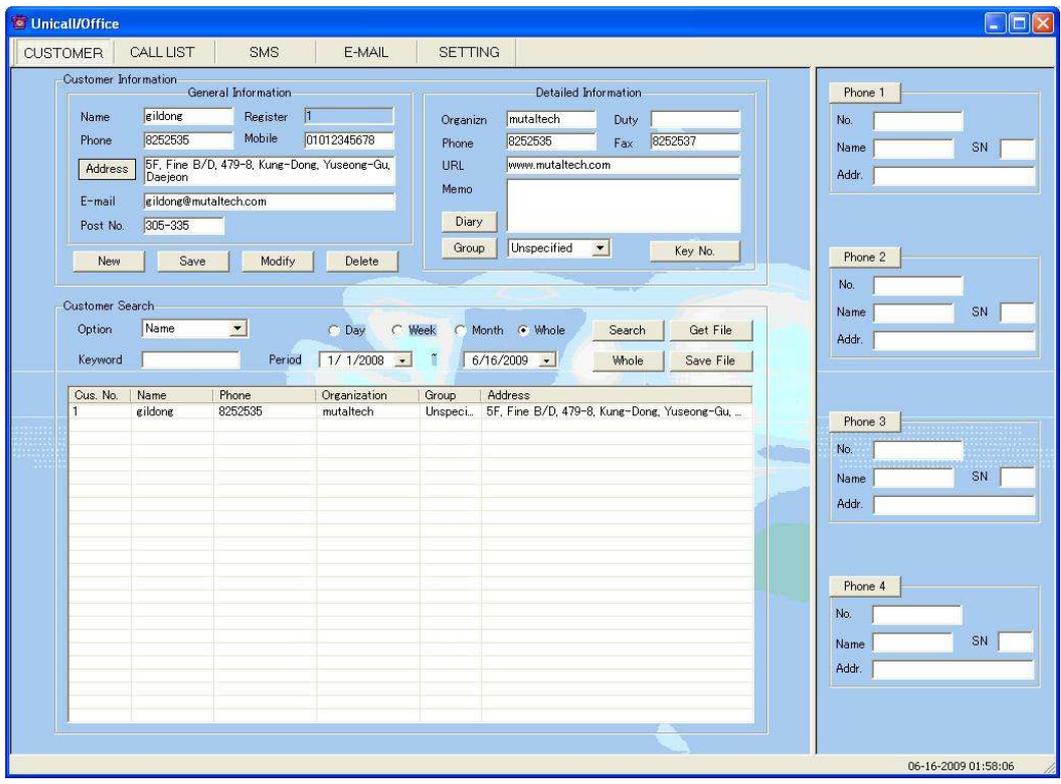
Select the item in the 'Call List' => Press the 'Delete' button.

4.2 Connection Management Function

① Customer Management

◆ Customer Information Registration

Input the general and detailed customer information respectively.

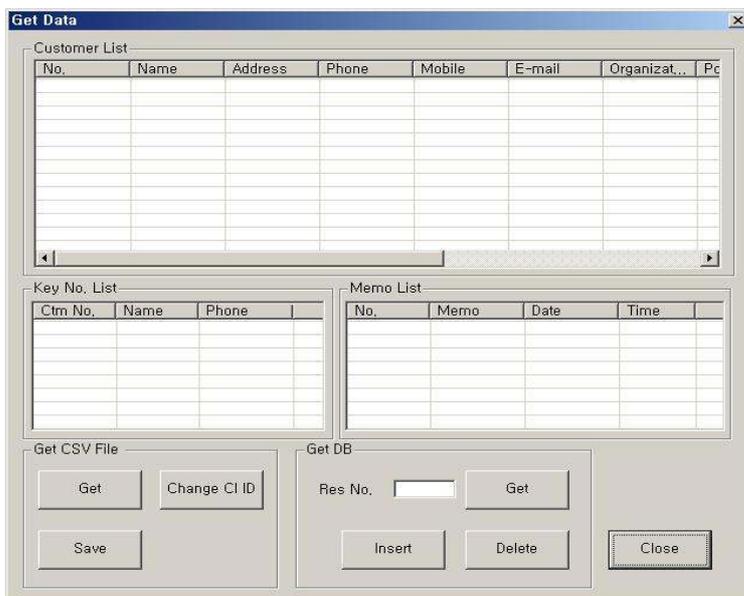


<Customer Screen>

◆ Customer Search

Search the customer according to the search options or 'Whole' button.

◆ Customer Information



② Memo/Diary

Input memo/diary for each customer. The memo/diary will be displayed with each customer.

◆ Diary Management

Press the 'Diary' button => It is possible to add note or to edit, or to delete it. The registered notes will be saved with the date and time.

③ SMS Sending

Send SMS by PC. Press 'Send' button to send SMS.

SMS Sending:

Content: Hello

No. of Character: 5 Bytes

Receiver:

No.	Name	Phone
1	gildong	01012345678

Buttons: Delete, Send

Base No.: _____ Used No.: _____ Sender: 8252636

Customer Search:

Option: Name

Keyword: _____ Period: 1/ 1/2008 - 6/16/2009

Cus. No.	Name	Phone	Address	Reg. Date
1	gildong	01012345678	5F, Fine B/D, 479-8, Kung-Dong, Yuseong-Gu, Dae...	06-16-2009

Phone 1: No. _____ Name _____ SN _____ Addr. _____

Phone 2: No. _____ Name _____ SN _____ Addr. _____

Phone 3: No. _____ Name _____ SN _____ Addr. _____

Phone 4: No. _____ Name _____ SN _____ Addr. _____

06-16-2009 01:59:14

<SMS Sending Screen>

◆ Receiver Input

Search options include the name, phone number, home address and the registered date. With each option, you can get the required information of the customer. All the selected customers will be deleted if 'Delete' button is pressed.

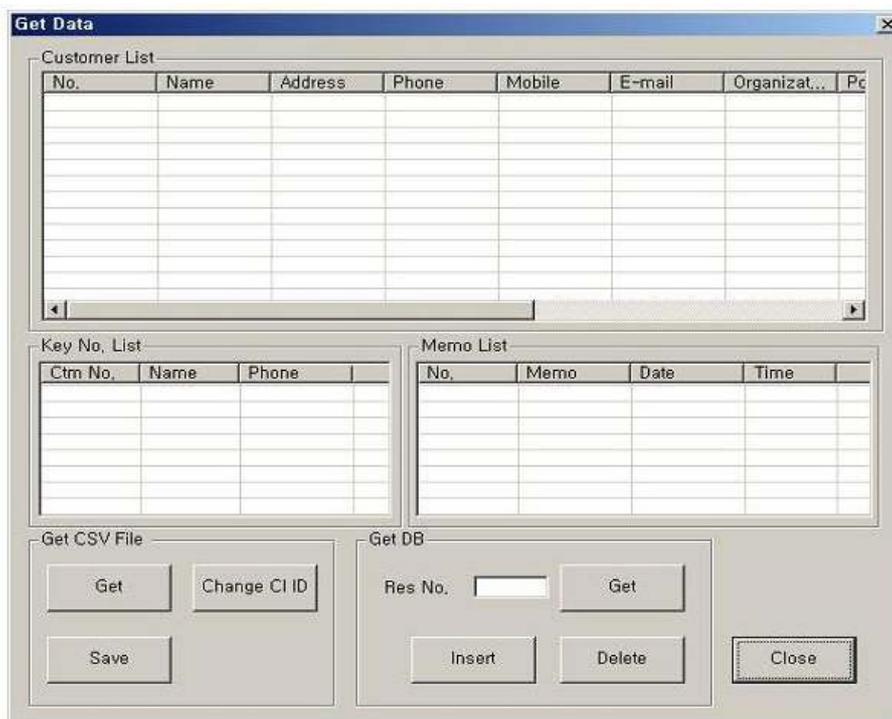
◆ **Input Address and Contents**

All e-mail addresses in the receiver selection will be deleted if 'New Address' button is pressed. You can input the new e-mail address. The contents will be deleted if 'Rewrite' button is pressed. You can input the new contents in them.

⑤ **Data Portability**

◆ **CSV File Portability**

The data of Unicall/Quick is fully compatible with CSV file.



◆ **Excel Portability**

- Saving into Excel file is possible by on-line.
- Getting the Excel data is possible by off-line.

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