

Customer Relationship Management System with 4Trunk CID

Coustomer Relationship Management **Unical/CRM** User's Manual

Korea MutalTech, Inc

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## 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				
	-Program CD: 1				
Draduat	-CID Device:1				
Pioduci	-RJ11 6P2C Phone line : 4				
Composition	-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 ( <u>www.mutaltech.com</u>), e-mail(<u>Webmaster@mutaltech.com</u>), 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.

🖉 Setup		
Unicall/	Office Versio	n 1.1(USB)
		Installing Main Program
Korea MutalTech	, Inc.	Installing Client Program
	5	Skip

Step 2 Click <<u>N</u>ext>.



Step 3 Input user name(PC ID) and product number, Click <<u>N</u>ext>.

InstallShie	ld Wizard				
Enter use	r information.				
Enter you	ir name and serial n	umber.			
	r				
Name:	1.				
S / N:	<u>l</u>				
InstallShield -					
			< <u>B</u> ack	<u>N</u> ext >	Cancel



Step 4 Select Browse... and Click <<u>N</u>ext>.



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 3 Input user name(PC ID) and product number, Click <<u>N</u>ext>.

InstallShield Wizard		
Enter user information.		
Enter your name.		
Name:		
InstallShield -		
	<u> &lt; B</u> ack <u>N</u> ext > □	Cancel

Step 4 Select Browse... and Click <<u>N</u>ext>.



Step 5 installing in progress. Please wait till completed.

nstallShield Wizard	Þ
Setup Status	
Unicall-Office_C Setup is performing the requested operations.	
Installing:	
72%	
stal/Shield	
	Cancel

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 Unicall/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 <Unicall/Quick uninstall> from the Windows screen<Start -> Programs -> Unicall/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.

InstallShield Wizard	
Setup Status	
Unicall-Office Setup is performing the requested operations.	
C:\Program Files\KMT\Unicall-Office\Excel\	
7.4%	
(est-JChinda	
Havdivrijen	Cancel

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 Butto	n Me	nu Screen
Unicall/Office		
CUSTOMER CALL LIST SMS	E-MAIL SETTING	
Customer Information General Information Name Resist Phone Mobile Address E-mail Post No New Save Mod	on Detailed Information Prone Fax URL URL Memo Diary Group Unspecified  Key No.	Phone 1 No. Name SN Addr. Phone 2 No.
Option Name Pe Keyword Pe Cus: No. Name Phone	rod 1/ 1/2008	ile Addr. Addr. Phone 3 No. Name SN Name SN No. Name S
	Call Screen	Addr.
		06-16-2009 01:51:03

#### 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 Unicall-Office 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 Unicall/Office is run properly.

### 3.3 Environment Setting

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

🗑 Unicall/Office	e						
CUSTOMER	CALL LIST	SMS	E-MAIL	SETTIN	G		
	CALLUST	SMS Registering Organization Name Phone Address E-mail URL OK Setting ID Password	E-MAIL	Biz Re No.   Fax	G Cancel Subsorbine Ein		Phone 1           No.           Addr.           Phone 2           No.           Name           Addr.
							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

la. 🗍	0428252535			No.	0428252535		
¦ ame∫	New Cus	SN	1	Name	gildong	SN	1
lame	New Cus	SN	1	Name	gildong	SN	

#### <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.

OMEN	CALL LIST	SMS	E-MAIL	SETTING				
Gustomer	Information						Dhaves 1	
Name				E-mail			Phone I	
Phone		Mobile		Time			No.	
		-					Name	SN
Address				Memo			Addr.	
Call List				10 ava 1			Phone 2	
	1.0000	D	Save File	SIMS Send	Delete	Whole	No.	
Cus. No.	Name	Phone	Address		Time	State	Name	SN
							Addr.	
_								
							Phone 3	
							No	
								SN
							Name	UN
							Addr.	
							Phone 4	
							No.	
							Name	SN
							Addr.	

<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.

STOMER	CALL LIST	SMS	E-MAIL	SETTIN	NG				
Customer In	formation Ge	neral Information			Detailed In	formation		Ph	one 1
Name Phone Address	gildong 8252535 5F, Fine B, Daejeon	Mobile ( 7D, 479-8, Kung-Don	)1012345678 g. Yuseong-Gu,	Organizr Phone URL	n mutaltech 8252535 www.mutaltech.	Duty Fax 82	52537	No. Nan Add	ne SN
E-mail	gildong@mu	italtech.com		Memo					
Post No.	305-335	_		Diary					
New	1 Save	Modify	Delete	Group	Unspecified	•	Key No.	Ph	one 2
								No.	
Customer S	aarch							Nan	SN SN
									10 011
Option	Name	-	C Day C 1	Week C Ma	onth 💽 Whole	Search	Get File	Add	r. [
Option Keyword	Name	- Period	C Day C 1	Week C Mc	onth • Whole /16/2009 👤	Search Whole	Get File Save File	Add	r.
Option Keyword Cus. No.	Name	Period     Phone	C Day C 1 1/ 1/2008 • Organization	Week C Mc	onth  Whole (16/2009	Search Whole	Get File Save File	Add	r. [
Option Keyword Cus. No. 1	Name sildong	Period Phone 8252535	C Day C 1 1/ 1/2008 • Organization mutaltech	Week C Mc ] 1 [6/ Group Unspeci	onth	Search Whole 3, Kung-Dong,	Get File Save File Yuseone-Gu,	Add	one 3
Option Keyword Cus. No. 1	Name Rildong	Period Phone 8252535	C Day C 1 1/1/2008 • Organization mutaltech	Week C Mc 1 1 6/ Group Unspeci	onth  Mhole (16/2009 Address 5F, Fine B/D, 479-6	Search Whole 3, Kune-Done,	Get File Save File Yuseong-Gu,	Add 	one 3
Option Keyword Cus. No. 1	Name eildong	Period Phone 8252535	O Day C 1 1/ 1/2008 - Organization mutaltech	Week C Mc ] 1 6/ Group Unspeci	Address 5F, Fine B/D, 479-8	Search Whole 3, Kune-Done,	Get File Save File Yuseong-Gu,	Add Ph No.	one 3
Option Keyword Cus. No. 1	Name gildong	Period Phone 8252535	C Day C 1 1/ 1/2008 • Organization mutaltech	Week C Mc 1 6/ Group Unspeci	Address 5F, Fine B/D, 479-8	Search Whole	Get File Save File Yuseong-Gu,	Add Ph No: Nan Add	ne one 3
Option Keyword Cus. No. 1	Name eildong	Period Phone 8252535	Organization mutaltech	Week C Mc	Address 5F, Fine B/D, 479-6	Search Whole	Get File Save File Yuseong-Gu	Add Ph No. Nan Add	one 3
Option Keyword Cus. No. 1	Name Name ¢ildong	Period Phone 8252535	Organization mutaltech	Week Mo	Address 5F, Fine B/D, 479-6	Search Whole	Get File Save File Yuseong-Gu,	Add Ph No. Nan Add	one 3
Option Keyword Cus. No. 1	Name gildong	Period Phone 8252535	Organization mutaltech	Week Mc	Mhole 116/2009 Address 5F, Fine B/D, 479-8	Search Whole	Get File Save File Yuseong-Gu	Add Ph No. Nan Add	one 3
Option Keyword Cus. No. 1	Name eildong	Period Phone 8252535	Organization mutaltech	Week Mc	onth         ● Mhole           /16/2009         _           Address	Search Whole	Get File Save File Yuseong-Gu	Add Ph No. Nam Add Ph No.	one 3
Option Keyword Tus. No. T	Name gildong	Period Phone 8252535	Organization mutaltech	Week C Mc	Onth         Whole           /16/2009	Search Whole	Get File Save File Yuseong-Gu,	Add Ph No. Nan Add Ph No.	one 3
Option Keyword Cus. No. 1	Name gildong	Period Phone 8252535	Organization mutaltech	Week C Mc	Mhole 115/2009 Address 5F, Fine B/D, 479-5	Search Whole	Get File Save File Yuseong-Gu,	Add Ph No. Nam Add No. Nam Add	one 3
Option Keyword	Name rildong	Period Phone 8252535	Organization mutaltech	Week C Mc	Mhole 116/2009 → Address 5F, Fine B/D, 479-5	Search Whole	Get File Save File Yuseong-Gu,	Add Ph No. Nan Add Ph No. Nan Add	one 3

<Customer Screen>

### ♦ Customer Search

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

### ♦ Customer Information

No,	Name	Address	Phone	Mobile	E-mail	Organizat,	[ P
•		410 					•
Ctm No. Li	st Name	Phone I		Merno	Date	Time	r
							-
							-
aet CSV F	ile		Get DB				
					I		
	Una	ange CLID	Hes No,		laet		
Get							
Get					1	Companyourgane	ionico d

### 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.

иято		ALLIST	CHC	E-MAIL SETTING		
5310		ALL LIST	51415	E-MAL SETTING		-
	Oranta and Ing		Descion			Phone 1
	Content		Receiver			No.
	Hello		1	gildong U1U12345678	Delate	Name
					Delete	Addr.
					Send	1
	No. of	Character				
		5 Bytes				Phone 2
	Re	ewriting E	Base No.	Used No. Sender	8252536	No
						Name
C	Oustomer Sear	rch				Adda
	Option	Name		C Day C Week C Month @ Whole Se	lect Search	nuur.
	Keyword		Preiod	1/ 1/2008 • 1 6/16/2009 •	Whole	
	Cus. No.	Name	Phone	Address	Reg. Date	Phase 2
	1	gildong	01012345678	5F, Fine B/D, 479-8, Kung-Dong, Yuseong-Gu, Dae.	. 06-16-2009	Priorie 3
						Name 5N
						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.

### Contents and Sending

You can enter message in content box not exceeding 80 bytes. You can re-enter any new massage by pressing rewrite button. You can enter your phone number in the sender box and send the message by pressing 'Send' button.

### (4) E-mail Sending

If Outlook is installed on your PC, you can use E-mail with your account. Press 'E-MAIL' button to see the 'E-mail Screen'.

🖉 Unical	II/Office					
CUSTO	MER C	ALL LIST	SMS	E-MAIL SETTING		
E	-mail Sendin Re Co-rece Co-rece	e ceiver gildon siver1 siver2 Title Title	g@mutaltech.com	Select Select Select	Sending New Address Rewriting	Phone 1 No. Name SN Addr.
c	iustomer Sear Option	rch Name		C Day C Week C Month C Whol	e Search	Phone 2 No. Name SN Addr.
	Keyword Cus. No. 1	Name gildong	Pre Phone 8252535	iad 1/1/2008 • 1 6/16/2009 • E-mail ¢ildong@mutaltech.com	Whole Reg. Date 06-16-2009	Phone 3
						Phone 4 No Name SN Addr
						06-16-2019 02:00:00

<E-mail Screen>

### ◆ Receiver Search

Input e-mail addresses in receiver section by either manually inserting them or searching them through customer search. Sending an e-mail to several people at the same time, input each e-mail address in co-receiver 1.2 section.

### ◆ 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.

No.	Name	Address	Phone	Mobile	E-mail	Organizat	P
< ∢ (eu No, Lie	at		Merror	liet			*
Ctrn No,	Name	Phone		Merno	Date	Time	
							-
Det COVE			Get DR				
Get	Cho		Bac No		Get		
		Inge Chib	nes No.	·	Ger		
						[	

### ♦ Excel Portability

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



# Customer Relationship Management



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