

# QuickDial

QuickDial is the module of the Counterpoint Cloud platform designed for call centers, and provides full integration to the user Point-Of-Sale

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# QuickDial Requirements

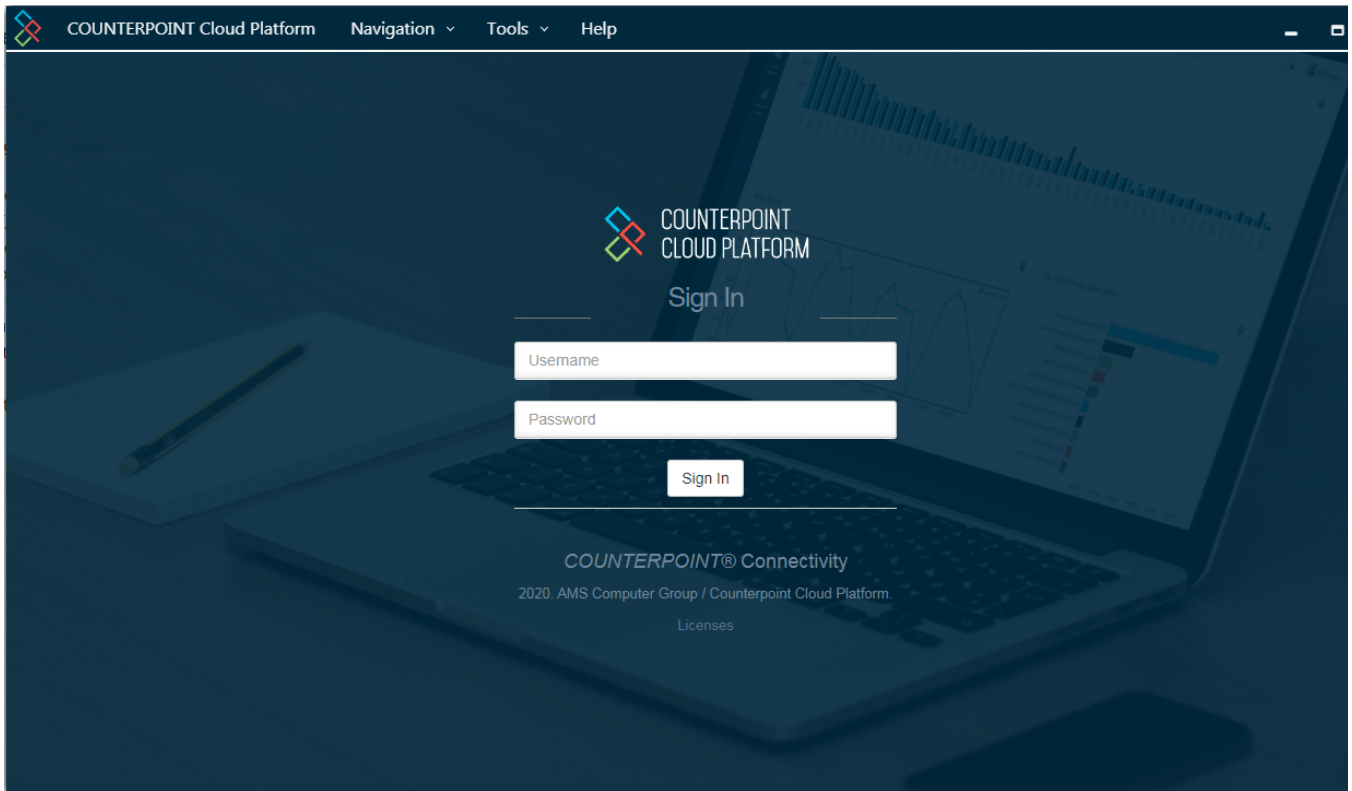
Before being able to access QuickDial, there are a few requirements that need to be met

1. Download the Counterpoint Cloud Platform App from <https://counterpoint.cloud/app.php>



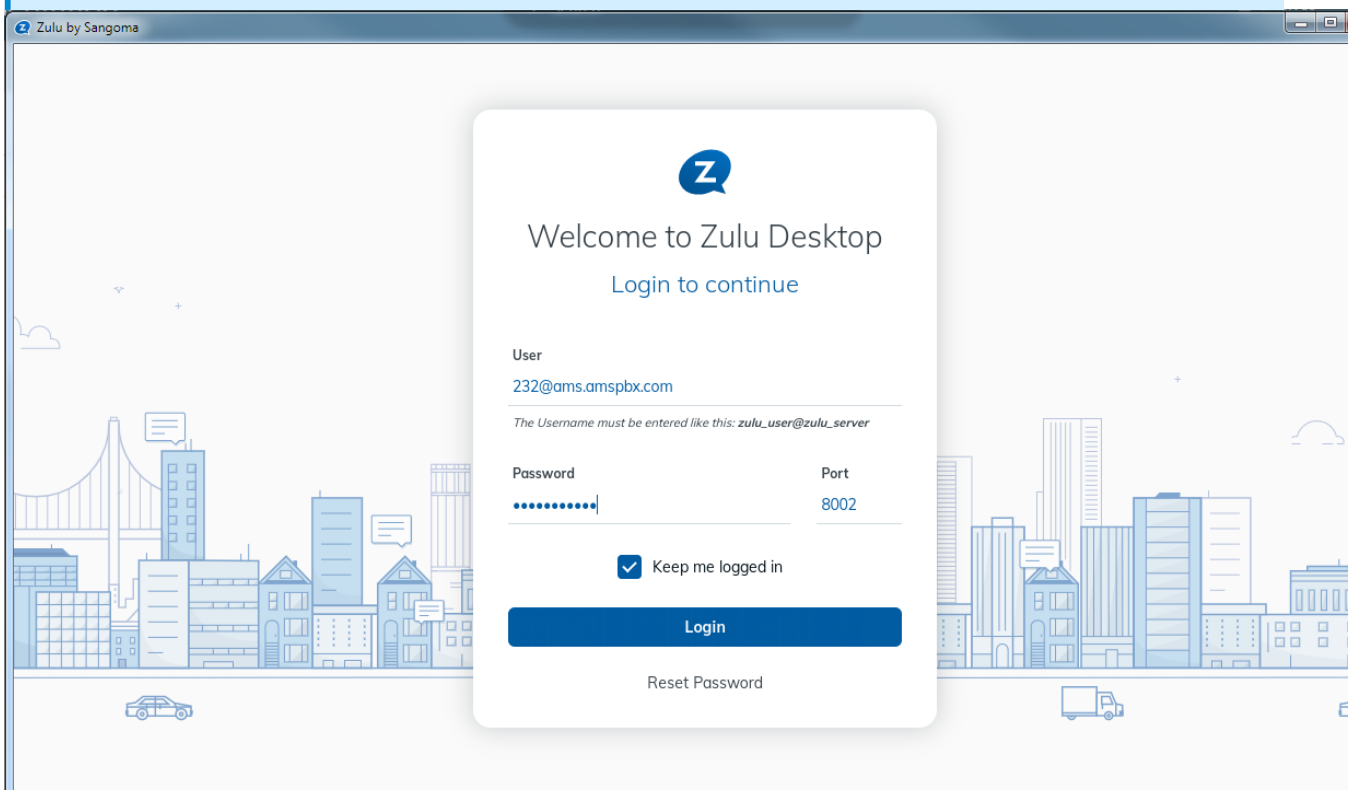
2. Download the current Zulu softphone app from <https://zulu-updater.sangoma.com/releases/stable>
3. Get Counterpoint Cloud Platform Credentials
  - These can be created by a Counterpoint Cloud Platform admin, or your AMS Support Team
4. Get Zulu Credentials
  - These can be provided by your AMS Support Team
5. Open the Counterpoint Cloud Platform Desktop App and log in with your credentials

Once logged into the Counterpoint Cloud Platform, you will stay logged in indefinitely



6. Log into the Zulu Desktop App - AMS will provide all required information

When logging into the Zulu App, your username should be the same as your extension



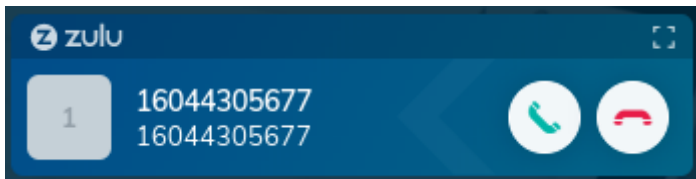
7. Once you have successfully signed into both of these applications, you can begin to take calls with the QuickDial application

# Answering Calls

## Zulu Caller ID

Once you have signed into both the Counterpoint Cloud Platform and Zulu Apps, you can begin taking calls that will automatically launch the QuickDial application.

The first thing you may notice once you have signed into Zulu is that the caller ID of the incoming call will pop up in the top right corner of your screen

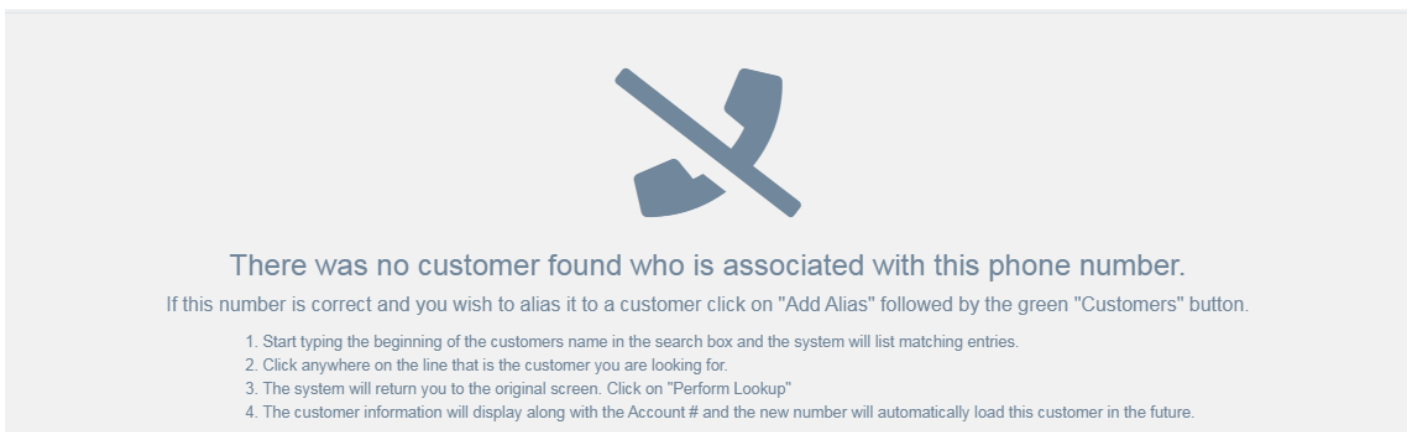


Seeing this indicates that you are successfully registered with the Zulu App. If you do not see this when your phone rings, then there may be an issue with the Zulu registration, or the credentials are pointing to the incorrect extension. Your Zulu username should match your phone extension

## QuickDial Pop-Up

Now, when you pick up your phone, the QuickDial application will pop up using the caller ID phone number to try and access the customer's information. This pop-up is where you pick which customer you want to launch and can show 1 of 3 different scenarios

### Unknown Customer



In the case of an unknown number, you will be presented with a message indicating that the system could not find the number in the system, but will give you the option to add an alias for that account.

Aliases are relationships between phone numbers and accounts that are contained within the Counterpoint Cloud Platform and there is no limit to the number of Caller IDs assigned to a customer.

You can find a full document on adding an alias [HERE](#)

## Known Number Assigned to Many Accounts



There were multiple customers found with this phone number.

Select an account from the following list to pull up their QuickDial profile.

In some scenarios, the call may be from a number that is assigned to many accounts. In this scenario, you will be presented with a screen showing all of the available accounts. In this screen, the accounts are classified based on their status as well as their A/R standing.

### Primary Account



This is the main account for this customer

### Secondary Account



This is an active account for this customer, but not the primary account. In scenarios where you see this icon, you will also be able to find a primary account as well.

### Inactive Account



This is a valid account number, but the account is no longer active. You cannot click on this account

## Hold Account



This account is valid, but the customer is currently on hold

## Known Number For Single Customer

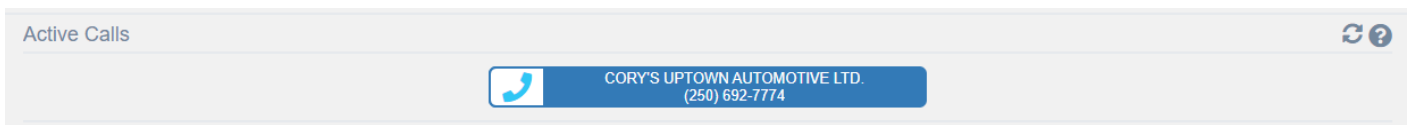
If the callerID that is passed is that of a single customer whom the system knows about, you will be passed into the caller's main QuickDial Screen right away

## Picking up a Parked / Active call

In cases where you are pulling a call off of park, the QuickDial screen will not already be active for that customer. However, you can recall a QuickDial screen for a currently active call is possible with only a few clicks.

First, click **Navigation > CP2 > Quickdial** in the navigation bar.

Once you are back to the main QuickDial page, you will see a listing of any currently open calls (This is defined as a call that has been picked up, but not yet hung up.)

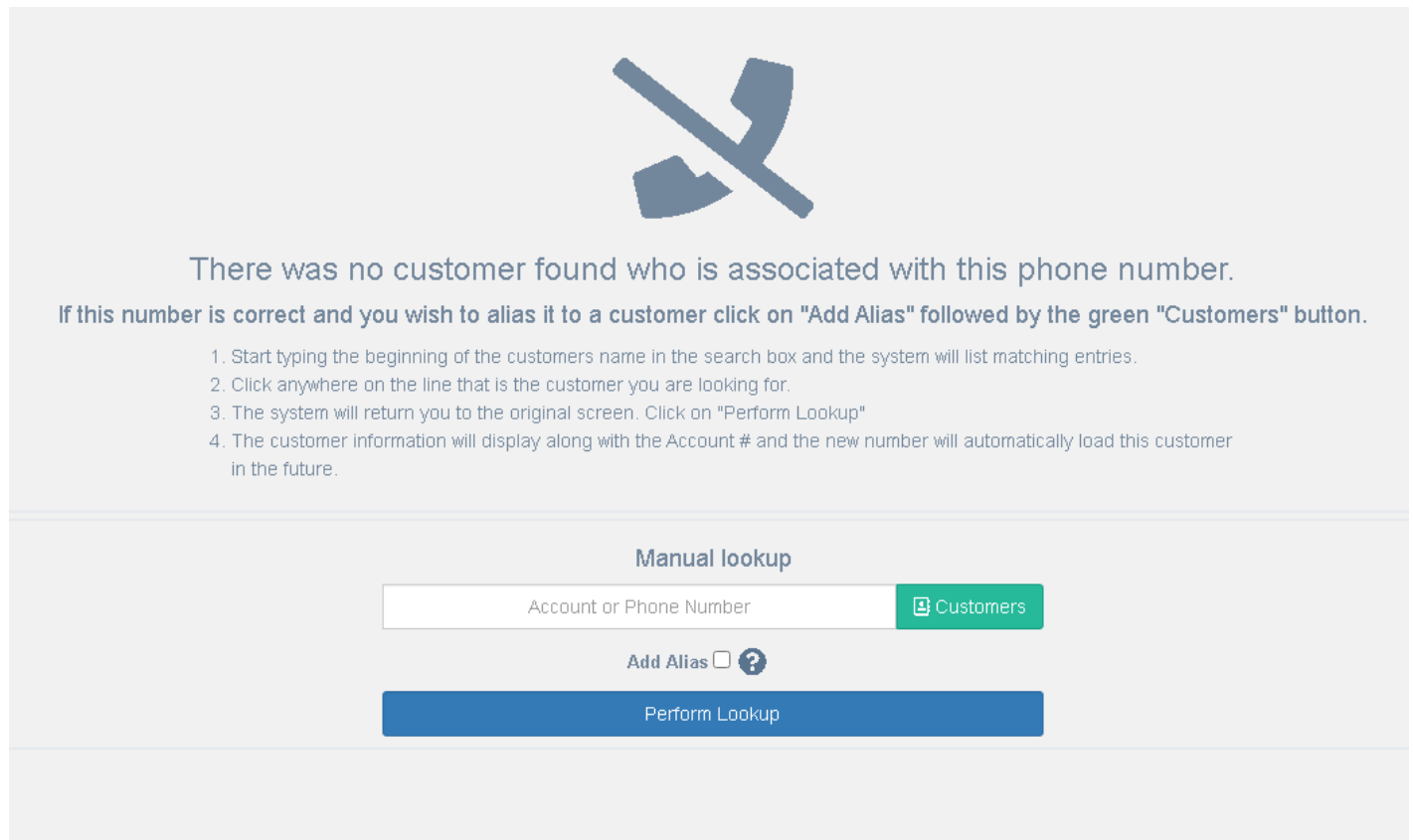


Simply click on the call you have answered (you can use your phone's callerID to validate the caller) and you will be brought to the QuickDial summary page for that customer.

# Adding an Alias

Customers may call from numbers that have not yet been entered into your main ERP, or added into the cloud platform. In these cases, you will be given an opportunity to add them when the QuickDial page launches.

When an unknown number calls in, you will get a screen indicating such



The screenshot displays a user interface for adding a customer alias. At the top, there is a large blue icon of a telephone handset with a diagonal line through it. Below this icon, a message states: "There was no customer found who is associated with this phone number." This is followed by a bold instruction: "If this number is correct and you wish to alias it to a customer click on 'Add Alias' followed by the green 'Customers' button." A numbered list provides four steps: 1. Start typing the beginning of the customers name in the search box and the system will list matching entries. 2. Click anywhere on the line that is the customer you are looking for. 3. The system will return you to the original screen. Click on "Perform Lookup" 4. The customer information will display along with the Account # and the new number will automatically load this customer in the future.

Below the instructions is a form titled "Manual lookup". It contains a text input field labeled "Account or Phone Number", a green button labeled "Customers" with a person icon, a label "Add Alias" followed by a checkbox and a question mark icon, and a blue button labeled "Perform Lookup".

Click on the 'Customers' button to bring up a customer search screen. Use the "Search" field to find the customer you wish to associate with this number. When you have found the customer, click on the customer number.

## Customer Search



Show  entries

Search:

Customer Number	Company Name	Address Line 1	Address Line 2	Address Line 3	Phone Number	Assigned Salesperson
01-0000110	Minit Tune c/o ABC Auto Centre	1940 Main St.	Vancouver	British Columbia	6049840007	01-099
01-0000437	Desert Auto Parts	750 Fortune Dr., Un. 1a	Kamloops	British Columbia	2503766252	01-099
01-0000460	RG Auto Part Distributors Inc.	12388 Pattullo Pl., Un. 118	Surrey	British Columbia	6045806310	01-099
01-0001011	Blue Mountain Auto Center Ltd.	823 Tupper Ave.	Coquitlam	British Columbia	6045268222	01-099
01-0003364	Future Auto Sales Ltd.	4290 Halifax St	Burnaby	BC	6045693364	01-011
01-0006021	Overdrive Autotuning(LD Mall)	5300 no.3 rd, unit 976	Richmond	BC	6043321021	01-009
01-0006021	Overdrive Autotuning(Shell Rd)	Unit 180 - 4631 Shell Road	Richmond	BC	6043321021	01-009
01-0007309	RG Auto Parts (Use 460)	12388 Pattullo Pl., Un. 118	Surrey	British Columbia	6045806310	01-099
01-0008814	Tunnex Auto - SW Marine	970 Marine Dr. SW, Un. 20	Vancouver	British Columbia	6042639533	01-009
01-0009020	Turn 3 Auto Sport(NOW#27-9020)	101A - 5947 - 206A St.	Langley	British Columbia	6043133494	01-099

Showing 1 to 10 of 212 entries (filtered from 33,315 total entries)

[Previous](#)
[1](#)
[2](#)
[3](#)
[4](#)
[5](#)
[...](#)
[22](#)
[Next](#)

Close

Once you click on the customer number, you will be returned to the original 'unknown number' page, but the account number field will be populated with the account number of the customer you just searched for. You can now click 'Perform Lookup' to look the customer up this one time, OR, check the 'Add Alias' box and click 'Perform Lookup' to create a relationship between the phone number and account so that the system will recognize the caller next time





There was no customer found who is associated with this phone number.

If this number is correct and you wish to alias it to a customer click on "Add Alias" followed by the green "Customers" button.

1. Start typing the beginning of the customers name in the search box and the system will list matching entries.
2. Click anywhere on the line that is the customer you are looking for.
3. The system will return you to the original screen. Click on "Perform Lookup"
4. The customer information will display along with the Account # and the new number will automatically load this customer in the future.

#### Manual lookup

01-0000437

 Customers

Add Alias ☒ ?

Perform Lookup







Once you click on the Perform Lookup button, you will be redirected to that customer's QuickDial page.

# QuickDial Summary Page

## Overview

Whether the page opens automatically on call pickup, or you need to select the account due to multiple accounts being available, the first QuickDial page you will see is the QuickDial summary page. This page contains high-level information on the account as well as action buttons to create orders

## Customer Quick Statistics

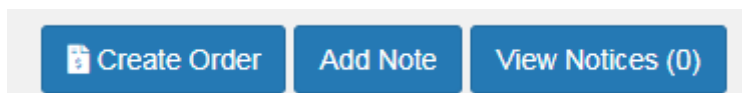
 Customer [01-0000105] AMS Computer Group	 Sales Rep House Account	 Main Number (604) 430-5677	 Main Contact Bob	 Time at Servicing Branch 12:19:27	 Next Run None Scheduled
--	--	---	---	--	--

The customer quick statistics just cover some of the basic information on the account, the customer number, sales rep, main number, and main contact are all the current values from your system

The Time at servicing branch is the current local time at the servicing branch for this customer

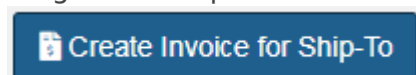
The Next Run is the next scheduled delivery run (in local time) for this customer, if they are set up with a delivery run.

## Action Buttons



The action buttons are quick access to a few things:

**Create Order:** Clicking this button will launch an order entry screen to create an order for this customer. If there are multiple ship-to addresses, you will see a different 'Create Order' button and be given the option to select the ship-to for which to create an order:









When launching an order screen, the order will be created in the servicing branch selected. This will save you needing to select a branch once you begin creating the order

**Add Note:** This button will allow you to create a specific note on the account that will show when using the CounterCRM module of the Counterpoint Cloud Platform. Additionally, if the note type is

set to the default 'pop-up' note type, the note will show as a pop-up any time the QuickDial screen opens for this account.

**View Notices:** This will display any outstanding CounterMessage tickets on the account.

## Current Deliveries

Current Deliveries					
Invoice	Driver	Ordered	Dispatched	Delivered	Status
25064244	Darcy Parmham	2020-09-08 10:13:00	2020-09-08 10:42:47	2020-09-08 11:37:26	Delivered 
25063888	Darcy Parmham	2020-09-02 12:37:00	2020-09-08 09:30:23	2020-09-08 10:34:07	Delivered 
25064056	Darcy Parmham	2020-09-03 13:47:00	2020-09-08 09:30:23	2020-09-08 10:34:07	Delivered 
25064057	Darcy Parmham	2020-09-03 13:49:00	2020-09-08 09:30:23	2020-09-08 10:34:07	Delivered 
25064160	Darcy Parmham	2020-09-04 11:15:00	2020-09-08 09:30:23	2020-09-08 10:34:07	Delivered 
25064193	Bonito Basa	2020-09-04 16:32:00	2020-09-08 08:11:29	2020-09-08 08:59:50	Delivered 

Current Deliveries section relies on JDispatch. If you are not currently using JDispatch, this section will be blank

This section is a current status of invoices for this account for today. This will include invoices received, in transit and delivered as well as the timestamp for each of the stages. For any delivered invoices, the signature will be available by clicking on the status button. If you are using JDispatch Premium, you will also be able to see the location of the driver for in transit orders, and the location of signature capture for any delivered invoices.

## Customer Call History

Customer Call History						
Show <input type="text" value="10"/> entries		Search: <input type="text"/>				
From	To	Talk Time	Wait Time	Disposition	Date	Replay
2725	(604) 430-5677	3 Minutes 21 Seconds	1 Second	ANSWERED	2020-07-27 11:11:54	
(604) 430-5677	2123	1 Minute 19 Seconds	52 Seconds	ANSWERED	2020-07-23 11:23:33	
(604) 430-5677	2122	7 Minutes 15 Seconds	55 Seconds	ANSWERED	2020-07-23 11:07:05	
2725	(604) 430-5677	1 Minute 19 Seconds	1 Second	ANSWERED	2020-07-20 08:56:03	
2725	(604) 430-5677	5 Minutes 28 Seconds	0 Seconds	ANSWERED	2020-07-20 08:30:24	
937	(604) 430-5677	2 Minutes 45 Seconds	0 Seconds	ANSWERED	2020-07-07 09:28:22	
922	(604) 430-5677	1 Minute	1 Second	ANSWERED	2020-07-03 09:43:12	
929	(604) 430-5677	44 Seconds	0 Seconds	ANSWERED	2020-07-02 20:02:11	
929	(604) 430-5677	36 Seconds	1 Second	ANSWERED	2020-07-02 20:00:42	
Showing 1 to 9 of 9 entries						<a href="#">Previous</a> <a href="#">1</a> <a href="#">Next</a>

Customer call history is a listing of all calls to and from this customer. This can include any of the numbers associated with this account. This will show who called, whether it was inbound or outbound, how long the call lasted and, optionally, offer a recording download if you have configured your AMS PBX to record phone calls.

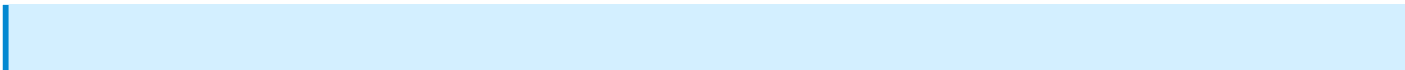
## Invoice History

Invoice History												
Show <input type="text" value="25"/> entries		Search: <input type="text"/>										
Invoice	PO	Invoice Date	Time	Product Line	Part	Description	Net	Core	Qty	Stocked	Branch	
25064193	62066853	2020-09-04	16:32:00	BMW	23 12 1 222 677	Shifter Seal	\$4.58	\$0.00	1	I	25	
25064192	62066833	2020-09-04	15:58:00	BMW	32 41 1 097 164	Power Steering Reservoir	\$20.69	\$0.00	1	I	25	
25064184	62066761	2020-09-04	14:52:00	VW	4513	Sway Bar Link	\$16.13	\$0.00	2	I	25	
25064181	62066725	2020-09-04	14:31:00	BMW	B-9519	O-Ring	\$1.47	\$0.00	1	I	25	
25064178	62066674	2020-09-04	13:57:00	OEM	B12603	Valve Timing Solenoid	\$189.38	\$0.00	2	I	25	
25064160	62066265	2020-09-04	11:15:00	VW	8E0 121 403	Reservoir	\$15.85	\$0.00	1	I	25	
25064157	62066194	2020-09-04	10:49:00	BMW	B70038	Cabin Filter	\$34.74	\$0.00	1	I	25	
25064146	62066055	2020-09-04	09:50:00	BMW	33 52 1 092 3HD	Shock Mount	\$17.33	\$0.00	2	I	25	

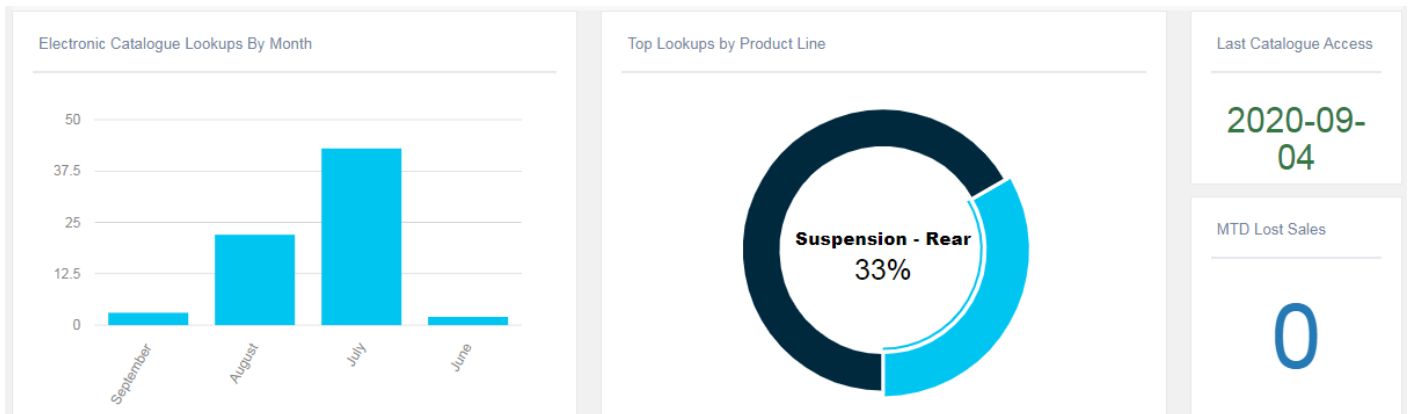
The invoice history section shows detailed history of invoices prior to today. This entire listing can be searched by any of the information in any columns. To search, simply start typing into the 'Search:' field and the results will begin filtering automatically.

A future release of QuickDial will contain the ability to email a .pdf copy of the invoice to an email assigned to the account.

## E-Catalogue Statistics



These statistics are loaded on a nightly basis, so they do not include today's data



The last of the summary info on the QuickDial summary page is a snapshot of some basic e-cat statistics. These are:

**Lookups by month:** Total lookups by month, for up to the past 6 months.

**Lookups by product line:** Lookups by catalogue product group for the current month-to-date

**Last Catalogue Access:** The last date (not including today) this customer logged into the catalogue