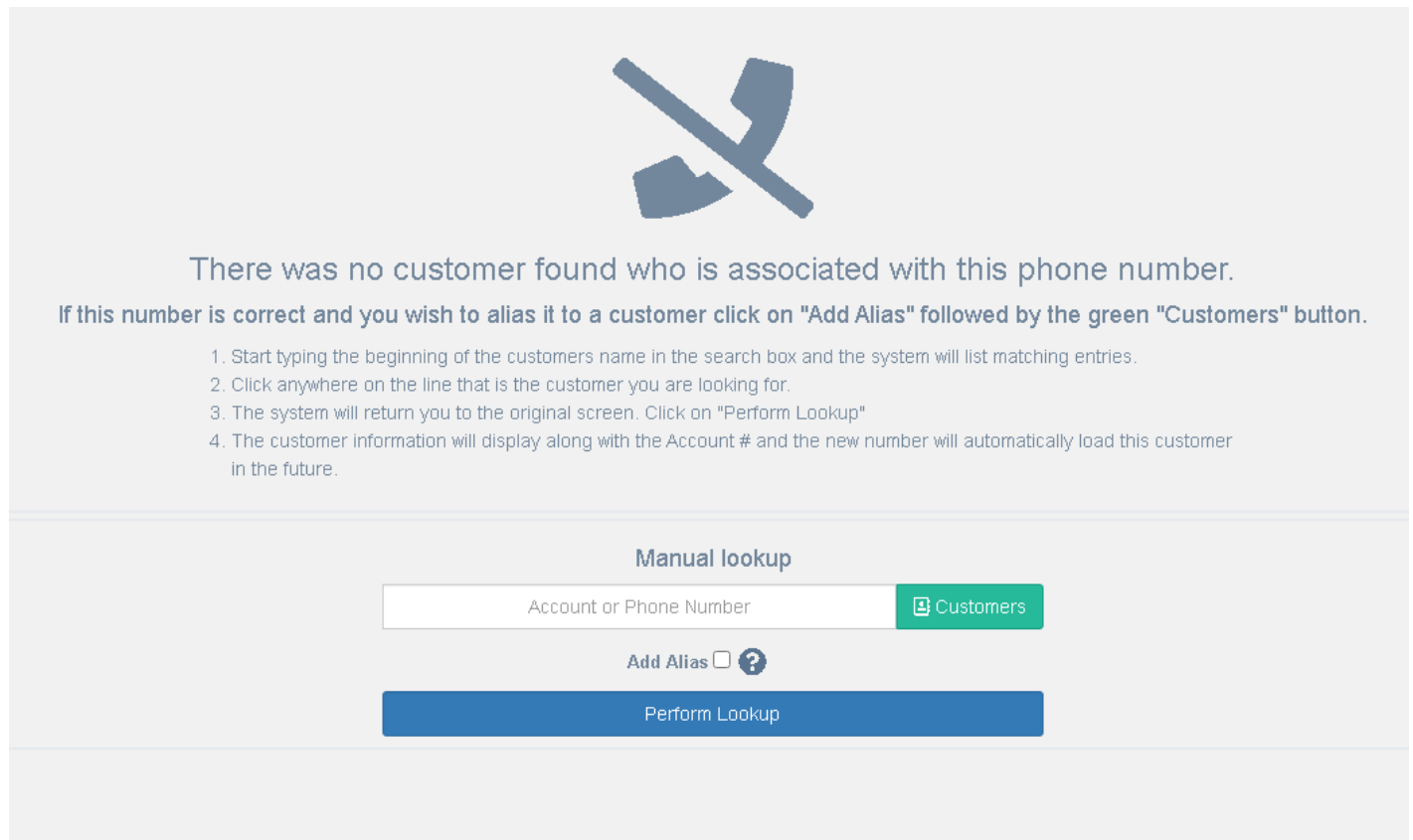


Adding an Alias

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 shows a system message with a blue icon of a crossed-out telephone handset. The message text reads: "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." Below the message is a numbered list of 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. At the bottom of the screenshot is a "Manual lookup" form with a text input field labeled "Account or Phone Number", a green "Customers" button, an "Add Alias" checkbox with a help icon, and a blue "Perform Lookup" button.

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

Account or Phone Number

Add Alias ?

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.

Revision #2

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