ERM User Manual

I received a call from the receptionist, what do I do now?

When you receive a sales, marketing or events call from Iconic's receptionist team or administration team, before taking the call, ask the receptionist for the name of the customer or company.

If the receptionist **provides you with the customer name or company** do the following:

1. With the receptionist on the phone, ask her to wait, while you find the customer details.
2. Do a search for the customer on the ERM in the **Search / Look up Customer** page so that you have the customer details in front of you.
3. Click on the customer name to load the **Customer Detail Page**.
4. Ask the receptionist to transfer the call to you.
5. When the call is transferred to you ...
    1. Introduce yourself to the customer and ask them how you can help them today.

If the receptionist says the customer is a New Customer or do the following:

1. Ask the receptionist to transfer the call to you.

2. When the call is transferred to you ...

    1. Introduce yourself to the customer and ask the customer if they are an existing customer or a New Customer.

        1. If they are an existing customer, Search for the customer

        2. If the customer says they are a new customer and a new company then proceed to adding them as a **New CustomerÂ** (read more onÂ FAQÂ Add a New Customer with a New Company)**.Â But make sure you still assist them with their enquiry.**

        3. If the customer says they areÂ a new customer, but is with an existing company, then proceed to add them as a **New Customer to an Existing Company**. **But make sure you still assist them with their enquiry.**

3. Once you are able to find the customer or Add the Customer into the System, ask the customer how you may help them with their enquiry today.

Attached files:

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URL: https://staff.iconic.productions/KB/content/0cat=34/169/en/i-received-a-call-from-the-receptionist-what-do-i-do-now.html