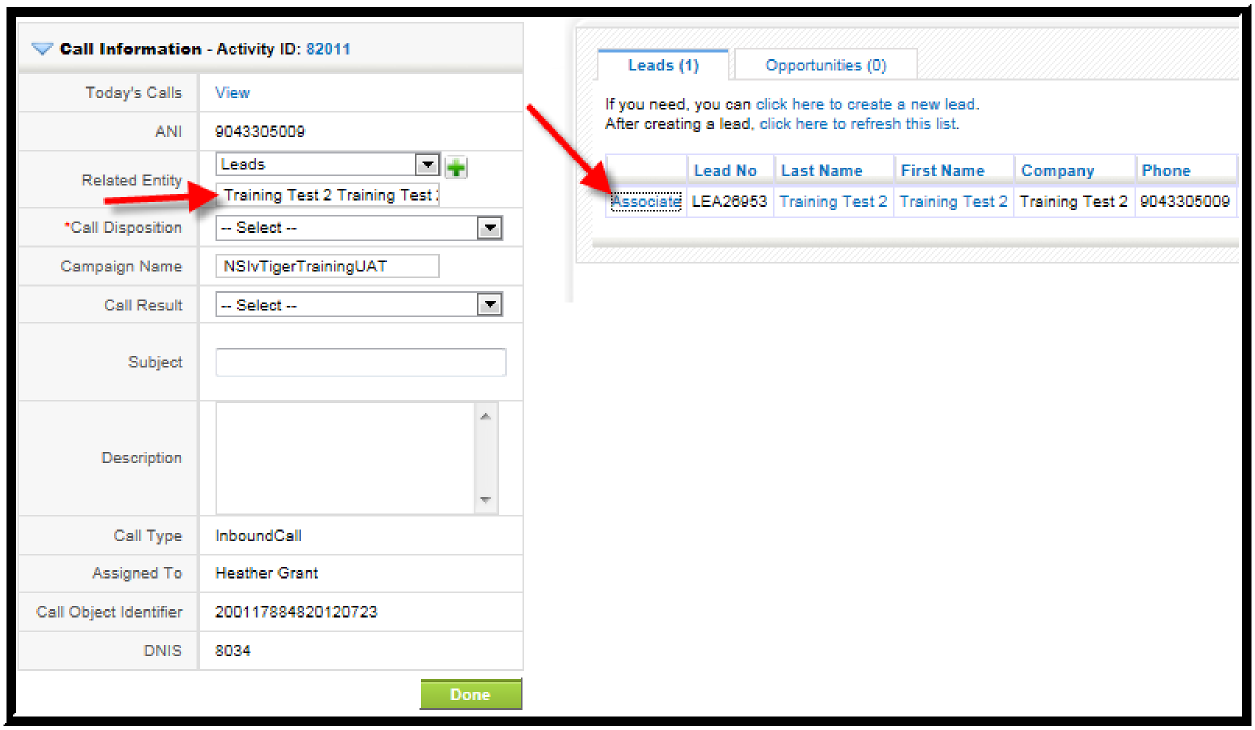
vTiger Call Dispositions

• Tying Calls to a Record

Call comes in through I3 and you will see the Call Info screen below and you will have the following scenarios:



Scenario 1

1. Call is a brand new lead and nothing is showing up as associated
2. Either while on the phone or when you get off a new lead will need to be created by clicking “click here to create a new lead”
3. Go to “WBC After Call Work” status in I3 to work on filling in the data correctly
4. Fill in all of your lead details on the new lead screen and save
5. Go back to the Disposition screen and now go to “click here to refresh this list” the lead you just created should now show up
6. Click “Associate”
7. Make sure all call info on the left is filled in
8. Click “Done”
9. Go back in “Available” status in I3 accordingly

<u>Scenario 2</u>

1. Call comes in and you know it's your Client that you have an open Lead/Opportunity/Organization for, but there is nothing associated on the right
2. Either while on the phone or when you get off you will need to go to the **(+)** to manually find your Lead/Opportunity/Organization from the search list and pull in your existing Lead/Opportunity/Organization and you will then see it pull in to the Related Entity area
3. Go to "WBC After Call Work" status in I3 to work on filling in the data correctly (NOTE: Step 5 above for Refresh will not be needed here as you are not creating a new record and you already pulled in the associated record manually).
4. Make sure all call info on the left is filled in
5. Click "Done" (You should see your logged call tied to Activity History in the specific record you pulled in from Step 2)
6. Go back in "Available" status in I3 accordingly

<u>Scenario 3</u>

1. Call comes in and it's your Lead/Opportunity and the call does show there is (1) Lead or Opportunity record associated for example; a record(s) should already show up as seen in the image above
2. Click into that lead to see the associated information
3. Go to "WBC After Call Work" status in I3 to work on filling in the data correctly
4. Click "Associate" on the Disposition screen
5. Make sure all call info on the left is filled in
6. Click "Done"
7. Go back in "Available" status in I3 accordingly