

## Adding sites to a caller profile.

When a caller has more than one site, the caller profile may be set up in advance. This may help for future assistance to the client.

Under Real help, you may select caller management. This screen will bring up a search for caller. Enter the First and last name in the appropriate field and select search, select the appropriate profile. (see below).

SEARCH FOR A CALLER

Search On	Search Text
First Name	<input type="text"/>
Last Name	<input type="text"/>
Phone	<input type="text"/>
Email	<input type="text"/>
Business Name	<input type="text"/>
Building ID/Name	<input type="text"/>

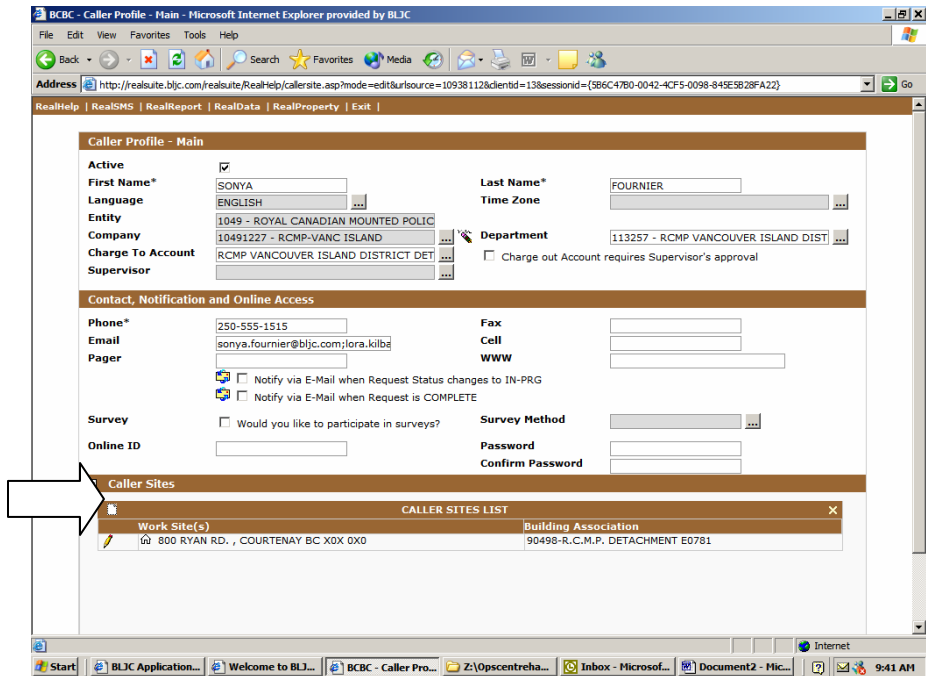
Search Quick Setup Reset Cancel

Select a caller

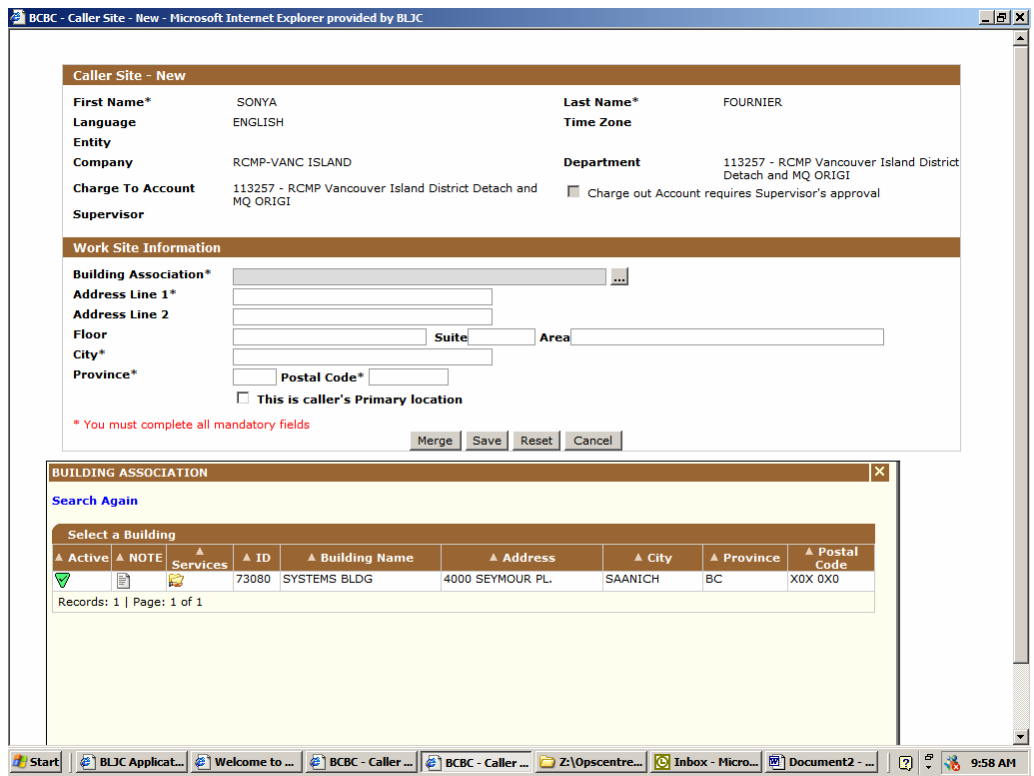
Active	First Name	Last Name	Phone	Fax	Cell	Pager	Email	WWW
	SONYA	FOURNIER	250-377-4306				sonya.fournier@bjc.com	
	SONYA	FOURNIER	250-555-1515				sonya.fournier@bjc.com;lor...	

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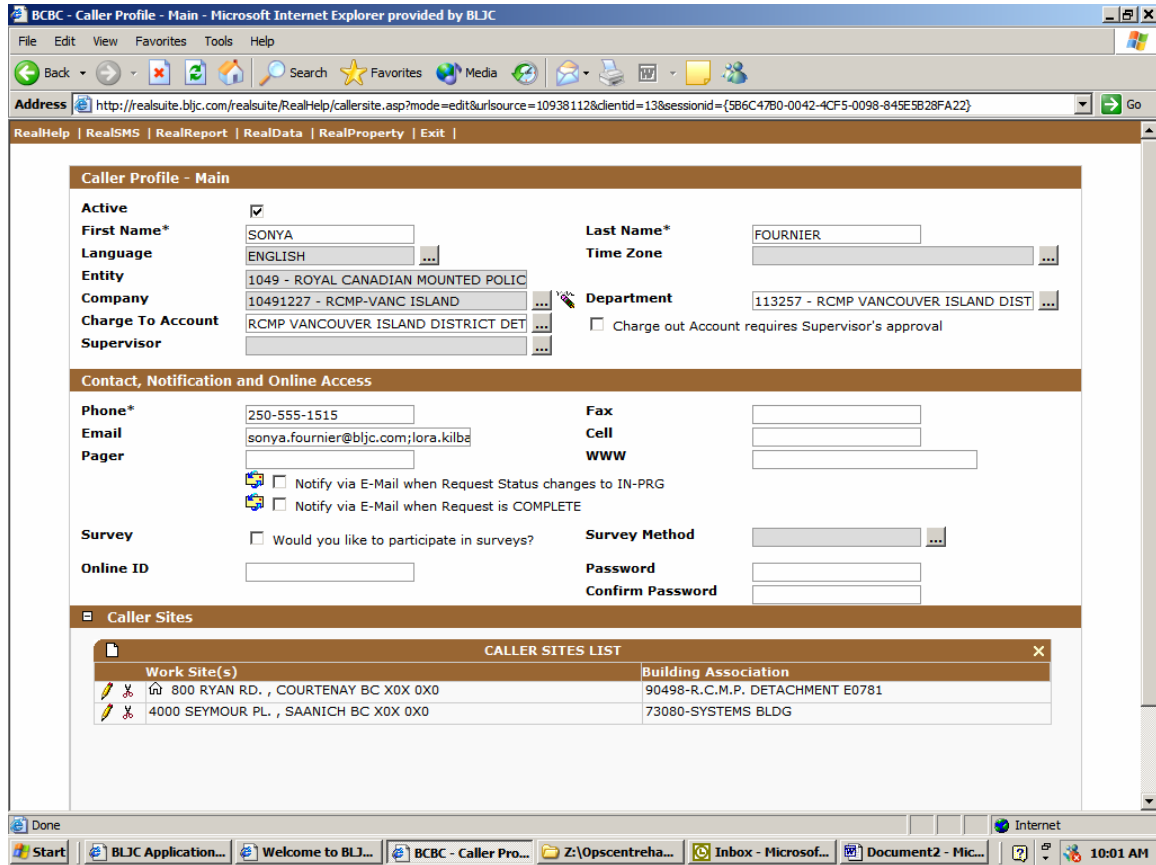
At the bottom of the page, you will see a (+) sign followed by Caller Sites. Click on the (+) sign to view the sites associated to the caller. To add sites, click on the small icon on the right top corner of the list. This icon looks like a sheet of paper with a folded corner.



You will now see a new screen called: "Caller Sites-New". Click on the dotted square box highlighted in gray beside the building association\* field. Another new screen will appear and allow you to insert the building ID or address of the site you wish to add. Once you have selected the appropriate building, select save. (See below)



You have now added the new site to the caller profile and you may repeat this action as many times as necessary. You also can delete sites by clicking on the scissors on the right side of the site; however, if a request has already been created for this site, it will disable this action. See picture below to see the added site.



If you have any questions, feel free to contact me at (250) 851-2275 ext 4014.  
 Thank you,  
 Sonya Fournier