



Instruction manual

Callintake

Introduction

In this instruction manual describes the basic functionality of Callintake.

Step 1:

Start an internet browser and open <https://start.pcamobile.com>

AUTHENTICATE

Company:	<input type="text"/>
Username:	<input type="text"/>
Password:	<input type="password"/>
Remember me:	<input type="checkbox"/>

[Password forgotten?](#)

Step 2:

Log in and open the Callintake application.



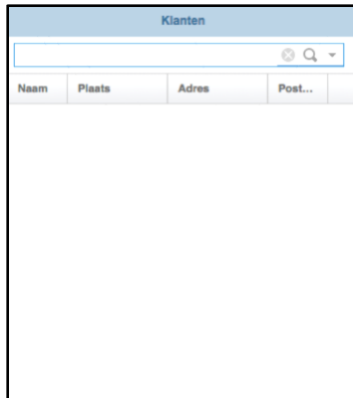
Callintake

With Callintake, tasks can be created manually.

Customer

In the left-hand column "customers" you fill the customer name. Then you click on the relevant customer and this will automatically become visible in the middle column "customer data".

A customer file can be read in by PCA, so that the customers do not have to be created manually.



Customer information

The just selected customer is visible in the middle column customer data.

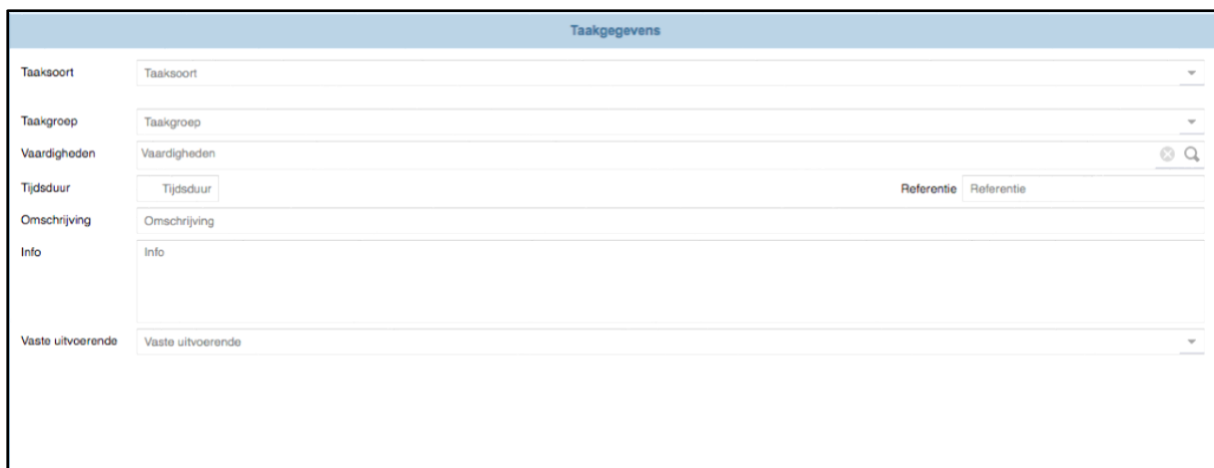
Then click the contact person at the customer if it already exists or add the contact person.

A screenshot of a web application interface titled "Klantgegevens". The form contains several input fields: "Naam" with a sub-field "Achternaam"; "Postcode" with sub-fields "Postcode", "Huisnummer", and "Toev"; "Straat"; "Plaats"; "Telefoon" with sub-fields "Telefoon" and "Mobiel"; "Email"; and "Contactpersoon" with a dropdown menu and a "Toevoegen" button.

Task data

On the right-hand side of the page you can enter the task details. The following can be described in the task data:

- Task type
- Task group
- Skills for performing the task
- Plan range type
- Reference
- Description
- Info
- Time duration



The screenshot shows a form titled 'Taakgegevens' with the following fields:

- Taaksoort**: A dropdown menu with 'Taaksoort' selected.
- Taakgroep**: A dropdown menu with 'Taakgroep' selected.
- Vaardigheden**: A dropdown menu with 'Vaardigheden' selected, accompanied by a search icon.
- Tijdsduur**: A dropdown menu with 'Tijdsduur' selected.
- Omschrijving**: A text input field with 'Omschrijving' entered.
- Info**: A text input field with 'Info' entered.
- Vaste uitvoerende**: A dropdown menu with 'Vaste uitvoerende' selected.
- Referentie**: A field with 'Referentie' entered, appearing twice.

Documents

At the bottom of the page you can, if desired, add documents to the task.

Scheduled items

In addition to documents, a task can also indicate which materials are required.

Capture and schedule

Finally, the task can be recorded and scheduled. If you choose not to schedule the task immediately, it will appear in the unscheduled task box in the Marlin planning board.