



Efficiency

Client Management Manual

Version 4.5

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Client Management Module – Set up

First Steps

Before using the Client Management Module, please check that the following areas of Efficiency are already set up.

Supervisor

- Operating Divisions
- Branches
- Executives
- Security
- Users
- Functional Security

Campaign

- Header
- Splits

Now you can set up the Client Management Specific codes and Flags. These areas are explained in full detail within this manual. For any other set-ups required, please refer to the relevant manual.

- Contacts
- Company and Organisations
- Activities
- User and Shared Options

The following code and flag tables should be set up during the initial set up. Each table requires at least one record. The system will provide a default record of

Code: 00000

Description: Default record of

It is recommended to keep at least one default record in each table.

These tables (listed with their descriptive names, the database names are given on the detailed section for each item) are grouped in three categories. Some of the data in the tables relate to the whole corporation and some may be maintained at the operating division levels.

- Mandatory/Strongly Recommended
- Optional
- Site Specific

Contact Codes and Flags

1. Mandatory or Strongly Recommended

Address Type	Corporate Level
Best Time	Corporate Level
Contact Position (Occupation)	Corporate Level
Contact Sensitivity	Corporate Level
Contact Suffix	Corporate Level
Contact Title	Corporate Level
Lead (Source)	Operating Division Level
Marital Status	Corporate Level

2. Optional i.e. Default value may be used

Contact Type	Corporate Level
Relation Type	Corporate Level
Relation Cross Reference	Corporate Level
Profiles	Corporate Level
Centre of Influence	Corporate Level
Religion	Corporate Level
Interests	Corporate Level
Hobbies	Corporate Level
Contact Transaction Category	Corporate Level
Contact Transaction Type	Corporate Level
Contact Transaction Status	Corporate Level
Contact Defaults	Operating Division Level

Company and Organisation Codes and Flags

1. Mandatory or Strongly Recommended

Account Status	Corporate Level
Site Type	Corporate Level
Status Rating	Corporate Level

2. Optional i.e. Default value may be used

Company Type	Corporate Level
SIC Codes	Corporate Level
Profiles	Corporate Level
Company Transaction Category	Corporate Level
Company Transaction Type	Corporate Level
Company Transaction Status	Corporate Level
Company Defaults	Operating Division Level

Activities Codes and Flags

1. Mandatory or Strongly Recommended

Activity Reason	Corporate Level
Activity Result	Corporate Level
Activity Status	Corporate Level
Activity Type	Corporate Level
Next Action	Corporate Level
Activity Class	Corporate Level
Activity Defaults	Operating Division Level

User and Shared Options

1. Mandatory or Strongly Recommended

Shared Options	Corporate Level
User Options	User Level

Codes and Flags

In this manual the set up details of the Contacts, Company and part of the Activity codes and flags are included.

All the codes and flags other than the Contact and Company are also detailed in the Activity Management module. The specific sections of the Activities such as Work Flow and To Do set up are detailed in the Activity Management Module.

All the maintenance windows are accessed from the Module Codes – Prepare drop down menu of the related module main bar menu.

Best Contact Time

It is much easier to pick a value from the pick list to indicate when is the best time to contact to our clients. This may be a literal definitions such as In the morning or Weekdays etc or a time range, eg 9:00 - 11.00 am etc.

Best Contact Time Tables and Fields

The Best Contact Time data is maintained in the (besttime) Table.

The data in this table should be designed to address the needs of the **entire corporation**.

Best Contact Time in table BESTTIME

<u>Field Name</u>	<u>Field Description</u>
Description	A unique identification code and description.

This is a single column table. Only the best contact time itself is maintained.

Best Contact Time Hints and Tips

- The Best Contact Times should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Best Contact Time Data Example

Contact Best Time Codes

Code Description

- After Hours
- Afternoon
- Morning
- Saturday
- Sunday

Address Type

Each contact may be related to one or more addresses depending on the business relations between the contact and your organisation, eg: Residential Address, Business Address, and Mailing Address etc.

There is no limit for how many addresses can be attached to a contact with a definition of the type of that address. Since the same address may be attributed to more than one contact, the same address may be a residential address for one and Business address to the other contact.

Address Type Tables and Fields

The Address Type data is maintained in the Address Type (addrtype) table.

The data in this table should be designed to address the needs of the entire corporation.

Address Type fields in table ADDRTYPE

<u>Field Name</u>	<u>Field Description</u>
Type Id	A unique identification code.
Description	The description of the Type

Address Type Hints and Tips

- The Address Type IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Address Type Data Example

You may add more address types to the table, but the existing records should not be changed.

Address Type Codes

<u>ID</u>	<u>Description</u>
00000	Default Address Type
P	Main Residential Address
M	Mailing Address
R	Other Residential Addresses
B	Business Address.

Key

Abc: These are the typical recommended records.
Abc: These are the mandatory or system dependant records.

Contact Position (Occupation)

The Contacts' positions as their functional positions in their work places are defined in the Contact Positions and Position Category tables. For example all managerial positions can be grouped under the Managers Group

The sales, marketing and customer service modules also extensively use these values.

Important Note: The contact positions should represent the global (functional) definition of the position. For Example: Sales Manager, Financial Controller, and General Manager etc. These values are used to group the employees and contacts by their functional positions for marketing and service purposes. The exact descriptions of the positions are entered at the employee details window.

Contact Position Tables and Fields

The contact position codes are maintained in the Position Items Code Table (contposi) i.e. General Manager, Production Supervisor etc. The data in this table is usually designed to reflect the requirements of each Operating Division.

These codes are grouped in the Position Category Table (contposc).

The data in this table should be designed to address the needs of the entire corporation.

Position Category fields in table CONTPOSC

<u>Field Name</u>	<u>Field Description</u>
Position Category Id	A unique identification code.
Description	The description of the position category

Position Item Codes fields in table CONTPOSI

<u>Field Name</u>	<u>Field Description</u>
Position Id	A unique identification code for the position
Description	The description of the position
Position Category Id	A unique identification code for the position category

The data in the Position Category Table must exist before entering data in the Position Items Code Table.

Contact Position Hints and Tips

- The Position IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Contact Position Data Example

Position Category Codes

<u>Position Cat Id</u>	<u>Description</u>
00000	Default Category
MNG	Managers
SUP	Supervisors
CON	Consultants

Position Item Codes

<u>Pos Cat Id</u>	<u>Position Id</u>	<u>Description</u>
00000	00000	Default Position
MNG	GM	General Manager
MNG	MRMNG	Marketing Manager
SUP	PRSP	Production Supervisor

Key

Abc: These are the typical recommended records.
Abc: These are the mandatory or system dependant records.

Contact Sensitivity

During our relation with our clients, the flavour of the relation between the contact and us may change depending on many reasons. Client is 'happy with our services', there is 'a problem' etc are typical examples.

The sensitivity of these types of situations can be entered in this table so that when the occasion comes we can simply pick the relevant item and attach it to the client. This will enable the current sensitivity level to be known by the members of our organisation.

Contact Sensitivity Tables and Fields

The Contact Sensitivity data is maintained in the (contsens) Table.

The data in this table should be designed to address the needs of the **entire corporation**.

Contact Sensitivity in table CONSENS

<u>Field Name</u>	<u>Field Description</u>
IID	A unique identification code for the Sensitivity
Description	The description of the Sensitivity.

Contact Sensitivity Hints and Tips

- The Sensitivity IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Contact Sensitivity Data Example

Contact Sensitivity Codes

<u>Id</u>	<u>Description</u>
00000	Default Sensitivity
SAT	Satisfied
PRB	Problems
UNS	Unsatisfied

Key

Abc: These are the typical recommended records.
Abc: These are the mandatory or system dependant records.

Contact Title

System is provided with a wide range of common titles, i.e. Mr. Ms. Dr. etc.

Contact Title Tables and Fields

The titles are maintained in the Contact Titles (titles).

Contact Titles in table TITLES

<u>Field Name</u>	<u>Field Description</u>
Title	A unique identification code and description.

This is a single column table. Only the title itself is maintained.

Contact Title Hints and Tips

- The Contact Title records should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Contact Title Data Example

Contact Title Codes

Code Description

- Mr
- Mrs

Contact Suffix

The contact suffix is the general name for the abbreviations attached to the name usually to announce the person's qualifications such as MSc, PhD etc.

System is provided with a wide range of commonly known suffixes. You may add or delete to this table as required.

Contact Suffix Tables and Fields

The titles are maintained in the Contact Suffixes (contsfxx).

Contact Suffixes in table CONTSFFX

<u>Field Name</u>	<u>Field Description</u>
Suffix	Commonly known format of the abbreviation (suffix).
Description	Description of the suffix

This is a single column table. Only the title itself is maintained.

Contact Suffix Hints and Tips

- The Suffix IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Contact Suffix Data Example

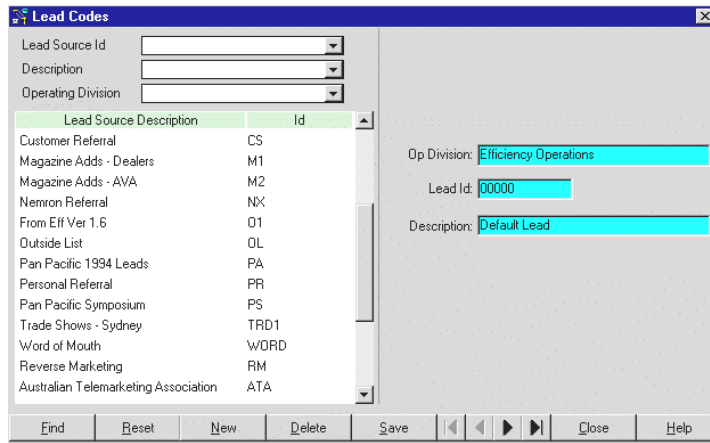
Contact Suffix Codes

<u>Suffix</u>	<u>Description</u>
B.Sc.	Bachelor of Science
M,Sc,	Master Of Science
D.C.L	Doctor of Civil Law

Lead (Source)

We usually want to know the reason that caused the entry of the contact's record (or company's in that matter) in the database. It was imported from a CD Rom, or an interest was shown after an exhibition or it was due to a referral

As the Lead Source codes are used to classify both the Companies and the Contacts the values should be selected to serve both purposes.



Lead Source Tables and Fields

The Lead Source code is maintained in the Lead Source (leadsrc) table.

The data in this table should be designed to address the needs of the **each operating division**.

Lead Source Code fields in table LEADSRC

<u>Field Name</u>	<u>Field Description</u>
Lead Id	A unique identification code for the lead source
Operating Division	Lead codes are grouped by the operating divisions
Description	The description of the lead

Lead Source Hints and Tips

- The Lead Source IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Lead Source Data Example

Lead Source Codes

<u>Lead Id</u>	<u>Operating Division</u>	<u>Description</u>
00000	00000	Default Lead
YP	00000	Yellow Pages
REF1	00000	Referral Client
REF2	00000	Referral Personal
MAG1	00000	Marketing Magazine

Key

Abc: These are the typical recommended records.
Abc: These are the mandatory or system dependant records.

Marital Status

The marital status data is entered in the system for look up purpose during data entry.

Marital Status Tables and Fields

The Marital Status data is maintained in the Marital Status (marital) table.

The data in this table should be designed to address the needs of the entire corporation.

Marital Status fields in table MARITAL

<u>Field Name</u>	<u>Field Description</u>
Status Id	A unique identification code.
Description	The description of the Marital Status

The marital status table is provided with the most commonly known status data, you may add, edit or delete these records

Marital Status Hints and Tips

- The Marital Status IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Marital Status Data Example

Marital Status Codes

<u>Status Id</u>	<u>Description</u>
M	Married
D	Divorced

Contact Type

The Contact Type record is used to assign a type attribute to each contact record, so that the contact data can be grouped based on the type for reporting, mail merge and call list generation purpose.

This is usually used to group the contacts as employees.

Contact Type Tables and Fields

The Contact Type codes are maintained in the Contact Type Code Table (conttype), i.e. Private Contact, Business Contact

The data in this table is usually designed to reflect the requirements of **all Operating Divisions.**

Contact Type Code fields in table CONTTYPE

<u>Field Name</u>	<u>Field Description</u>
Type Id	A unique identification code for the type
Description	The description of the type

Contact Type Hints and Tips

- The Type IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Contact Type Data Example

Contact Type Codes

<u>Type Id</u>	<u>Description</u>
00000	Default Type
B	Business Contact
P	Private Contact

Key

Abc: These are the typical recommended records.

Abc: These are the mandatory or system dependant records.

Relation Type

The Relation Type is used to define the basic relations that are going to be attributed to the Contact and Company relations by means of the Relation Cross Reference (Relation Groups) table.

Relation Type Tables and Fields

The Relation Type codes are maintained in the Relation Type Code Table (relatype).

The data in this table is usually designed to reflect the requirements of **all Operating Divisions.**

Relation Type Code fields in table RELATYPE

<u>Field Name</u>	<u>Field Description</u>
Type Id	A unique identification code for the type
Description	The description of the type

Relation Type Hints and Tips

- The Type IDs should be created manually.
- The Table must contain at least one record.
- Each record must have a corresponding relation record.
- Default records with the IDs of '00000' is recommended

Relation Type Data Example

Relation Type Codes

<u>Type Id</u>	<u>Description</u>
00000	Default Type
WIFE	Wife
HUSBAND	Husband
CLIENT	Client
BANKER	Banker

Key

Abc: These are the typical recommended records.

Abc: These are the mandatory or system dependant records.

System is provided a set of typical data.

Relation Cross Reference

The Relation Cross Reference (relagrps) table holds the relation cross-reference information for each relation type pair.

For example: If we have WIFE and SON relations, actually we should also be looking the HUSBAND and MOTHER relation types. In order to establish just the WIFE and SON relations we need to have the following cross references to be established.

The process is almost creating a double-sided balance book the sides being the Relation and the Related types.

<u>Relation</u>	<u>Related</u>
WIFE	HUSBAND
HUSBAND	WIFE
SON	MOTHER
MOTHER	SON

Relation Cross Reference Tables and Fields

The data is maintained in the Relation Cross Reference (relagrps) table.

The data in this table should be designed to address the needs of the entire corporation.

Relation Cross Reference fields in table RELAGRPS

<u>Field Name</u>	<u>Field Description</u>
Relation Type	The description of the Relation Type.
Related type	The description of the Related Type

The relation cross reference table is provided with the most commonly known data, you may add, edit or delete these records

Religion

Although the religion is a very private matter for each contact, the purpose of keeping this information may be useful in certain special circumstances. For example, we may need to know the eating and drinking habits of our contact due to the religious beliefs.

Religion Tables and Fields

The data is maintained in the Religions (religion) table

The data in this table should be designed to address the needs of the entire corporation.

Religion fields in table RELIGION

<u>Field Name</u>	<u>Field Description</u>
Religion Id	A unique identification code.
Name	The name of the religion

The religion table is provided with the most commonly known data, you may add, edit or delete these records

Religion Hints and Tips

- The Religion IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Religion Data Example

Religion Codes

<u>Religion Id</u>	<u>Name</u>
00000	Default Religion
ATHEIST	Atheist
BUDIST	Budist
ISLAM	Islam

Key

Abc: These are the typical recommended records.

Abc: These are the mandatory or system dependant records.

Contact Interest

If we wish to maintain the information about our contacts' interests in various subjects and fields we need to maintain a table for them. For example, Politics, Aviation, Religion, Environment may be typical interest entries.

The more specific interests such as sport, games etc are maintained in the Hobbies table.

Contact Interest Tables and Fields

The Contact Interests Maintenance window is used to maintain the Contact Interest (contintr) table.

The data in this table is usually designed to reflect the requirements of **all Operating Divisions**.

Contact Interest fields in table CONTINTR

<u>Field Name</u>	<u>Field Description</u>
Interest Id	A unique identification code for the interest
Description	The description of the interest

Contact Interest Hints and Tips

- The Interest IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Contact Interest Data Example

Contact Interest Codes

<u>Interest Id</u>	<u>Description</u>
00000	Default Interest
F	Finance
P	Politics

Key

Abc: These are the typical recommended records.

Abc: These are the mandatory or system dependant records.

Hobby

Contact Hobbies are more specific than the contact interests. We may want to know the sports that they participate in or the card games they prefer to play.

The more specific an specialised interests, attributes and profiles for the contacts can be created as Profile Items under the Profile Groups by the user.

Hobby Tables and Fields

The Contact Hobby Maintenance window is used to maintain the Contact Hobby (hobby) table.

The data in this table is usually designed to reflect the requirements of **all Operating Divisions**.

Contact Hobby fields in table HOBBY

<u>Field Name</u>	<u>Field Description</u>
Hobby Id	A unique identification code for the hobby
Description	The description of the hobby

Hobby Hints and Tips

- The Hobby IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Hobby Data Example

Contact Hobby Codes

<u>Interest Id</u>	<u>Description</u>
00000	Default Hobby
GOLF	Golf
FISH	Fishing
POKE	Poker

Key

Abc: These are the typical recommended records.

Abc: These are the mandatory or system dependant records.

Centre of Influence

The centre of influence data is used to mark the contacts to establish where their business, social or political influences may be located.

Centre of Influence Tables and Fields

The Centre of Influence codes for the contacts are maintained in the Centre of Influence (perpinfl) table.

The data in this table should be designed to address the needs of the entire corporation.

Contact Centre of Influence fields in table PERPINFL

<u>Field Name</u>	<u>Field Description</u>
Id	A unique identification code.
Description	The description of the Centre of Influence

Centre of Influence Hints and Tips

- The Centre of Influence Codes should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Centre of Influence Data Example

Contact Centre of Influence Codes

<u>Id</u>	<u>Description</u>
00000	Default Centre of Influence
LIB	Liberal Party
LAB	Labour Party
GOV	Government

Key

Abc: These are the typical recommended records.

Abc: These are the mandatory or system dependant records.

Contact Transaction Category

The Contact Transactions Category code is used to group the Contact Transactions records within the Category Groups

If the transactions are used for varying data as a data warehouse and presented in different data window objects (forms) then the Transaction Type and/or the Transaction Category are the main grouping methods. The Transactions Pick List and the Transaction Forms can be developed either during the implementation process or later by using the Development Kit.

Contact Transaction Category Tables and Fields

The Contact Transaction Category data is maintained in the Contact Transaction Category (conttrnc) table.

The data in this table should be designed to address the needs of the entire corporation.

Contact Transaction Category fields in table CONTRNC

<u>Field Name</u>	<u>Field Description</u>
Transaction Category Id	A unique identification code.
Description	The description of the Transaction Category

Contact Transaction Category Hints and Tips

- The Category IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Contact Transaction Category Data Example

Contact Transaction Category Codes

<u>Type Id</u>	<u>Description</u>
00000	Default Type
C1	Category One
C2	Category Two

Key

- Abc*: These are the typical recommended records.
- Abc**: These are the mandatory or system dependant records.

Contact Transaction Status

The Contact Transactions Status code is used to group the Contact Transactions records within the Status Groups

Contact Transaction Status Tables and Fields

The Contact Transaction Status data is maintained in the Contact Transaction Status (contrtns) table.

The data in this table should be designed to address the needs of the entire corporation.

Contact Transaction Status fields in table CONTRNS

<u>Field Name</u>	<u>Field Description</u>
Transaction Status Id	A unique identification code.
Description	The description of the Transaction status

Contact Transaction Status Hints and Tips

- The Status IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Contact Transaction Status Data Example

Contact Transaction Status Codes

<u>Status Id</u>	<u>Description</u>
00000	Default Call Status
C	Closed
A	Active

The basic data values for the Contact Transaction Status is provided with the software

Key

- Abc*: These are the typical recommended records.
- Abc**: These are the mandatory or system dependant records.

Contact Transaction Type

The Contact Transaction Type code is used to group the Contact Transaction records within the Type Groups. If the transactions are used for varying data as a data warehouse and presented in different data window objects (forms) then the Transaction Type and/or the Transaction Category are the main grouping methods. The Transactions Pick List and the Transaction Forms can be developed either during the implementation process or later by using the Development Kit.

Contact Transaction Type Tables and Fields

The Contact Transaction Type data is maintained in the Contact Transaction Type (conttrnt) table. The data in this table should be designed to address the needs of the entire corporation.

Contact Transaction Type fields in table CONTRNT

<u>Field Name</u>	<u>Field Description</u>
Transaction Type Id	A unique identification code.
Description	The description of the Transaction Type

Contact Transaction Type Hints and Tips

- The Type IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Contact Transaction Type Data Example

Contact Transaction Type Codes

<u>Type Id</u>	<u>Description</u>
00000	Default Type
T1	Type One
T2	Type Two

Key

Abc: These are the typical recommended records.

Abc: These are the mandatory or system dependant records.

Account Status

The Account Status is used to mark the contact and the company records with a current account status value such as Prospect, Active client, On Hold etc.

Account Status Tables and Fields

The Account Status data is maintained in the Account Status (accnstat) table.

The data in this table should be designed to address the needs of the entire corporation.

Account Status fields in table ACCNSTAT

<u>Field Name</u>	<u>Field Description</u>
Account Status Id	The Company or Contacts Account Status Id.
Description	The description of the Account Status Id.
B/Group Colour	Double Click on this field to assign a background colour which is displayed for the account status fields of the company and contact records
Text Colour	Double Click on this field to assign a text colour which is displayed for the account status fields of the company and contact records

Account Status Hints and Tips

- The Status IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended
- The data should be designed for the entire corporation

Account Status Data Example

Status Id	Description	Background colour code	Text Colour colour code
A	Active Account		
D	Delete Requested		
H	Account on Hold		
I	Internal Use		
L	List Only		
M	Miscellaneous		
N	Not Active Record		
P	Prospect		
S	Suspect		
U	Unassigned		
XC	Ex Client		
XD	Ex Dealer		

XD Ex Dealer
Z Pending Account

Key

Abc: These are the typical recommended records.

Abc: These are the mandatory or system dependant records.

Rating

The values in the Contact or Company Account Status table usually require a further categorisation.

For example the clients with the Active Account status may also be grouped as

- VIP Clients
- Regular Clients
- Once Only Client etc.

The Account Status Rating table (statrate) is designed to hold these second level details.

Status Rating Tables and Fields

The Account Status Rating data is maintained in the Status Rating (statrate) table.

The data in this table should be designed to address the needs of the operating division

Status rating fields in table STATRATE

<u>Field Name</u>	<u>Field Description</u>
Account Status Id	The Company or Contacts Account Status Id.
Status Rating Id	Account Status Rating Identification Code
Operating Division	Operating Division Identification Code
Description	The description of the Status Rating.
B/Group Colour	Double Click on this field to assign a background colour which is displayed for the status rating fields of the company and contact records
Text Colour	Double Click on this field to assign a text colour which is displayed for the status rating fields of the company and contact records

Status Rating Hints and Tips

- The Rating IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended
- The data should be designed for the operating division

<u>Account Status Id</u>	<u>Status Rate Id</u>	<u>Status Rate Description</u>	<u>Operating Divs</u>
P	P	Prospect Mild	00000
P	P	Prospect Good.	00000
P	P	Prospect Excellent	00000
A	A	Standard Account	00000
A	A	VIP Account	00000
U	U	Unassigned	00000

Key

Abc: These are the typical recommended records.

Abc: These are the mandatory or system dependant records.

Site Type

The Company Site Type code is used to group the Company Site records for their types, i.e. Head Office, Delivery Address, and Warehouse etc.

Site Type Tables and Fields The Company Site Type code is maintained in the Company Site Type Code Table (sitetype), i.e. Head Office, Delivery Address etc.

The data in this table should be designed to address the needs of the **entire corporation**.

Site Type Code fields in table SITETYPE

<u>Field Name</u>	<u>Field Description</u>
Type Id	A unique identification code for the type
Description	The description of the type

- Site Type Hints and Tips**
- The Type IDs should be created manually.
 - The Table must contain at least one record.
 - Default records with the IDs of '00000' is recommended

Site Type Data Example **Site Type Codes**

<u>Type Id</u>	<u>Description</u>
00000	Default Site Id
DLV	Delivery Address
PLNT	Plant Site
BILL	Billing Address
HO	Head Office

The basic data values for the Site Type is provided with the software

Key
Abc: These are the typical recommended records.
Abc: These are the mandatory or system dependant records.

Company Type

The user-defined types within each Operating Division use the Company Type Codes to group the Company Site records, i.e. Dealer, OEM, End User, and Supplier.

The Company Type codes can be assigned to the Company - Site - Operating Division combinations in order to create a "**Company Type Profile**". This information is kept in the Company Types table (comptyps).

The Company type values are more meaningful than the Standard Industry Codes (SIC) as they reflect the grouping of the companies to suit your design and needs. Company Type value is used to establish the special pricing matrix at the company type level.

Company Type Tables and Fields The Company Type code is maintained in the Company Type Table (comptype). The data in this table should be designed to address the needs of each operating division.

Company Type Code fields in table COMPTYPE

<u>Field Name</u>	<u>Field Description</u>
Type Id	A unique identification code for the type
Description	The description of the type

- Company Type Hints and Tips**
- The Type IDs should be created manually.
 - The Table must contain at least one record.
 - Default records with the IDs of '00000' is recommended

Company Type Codes

<u>Type Id</u>	<u>Description</u>
00000	Default Company Type
DEAL	Dealer
EU	End User
GOV	Government
IT	IT Industry

Key
Abc: These are the typical recommended records.

Abc: These are the mandatory or system dependant records.

SIC Codes

The following screen is used to maintain the Standard Industry Classification Groups and Codes.

SIC Codes Tables and Fields

The SIC codes are maintained in the SIC Code Table (sicode). The data in this table is usually designed to reflect the requirements of the entire corporation.

These codes are grouped in the SIC Group Table (sicgrp). The data in this table should be designed to address the needs of the entire corporation.

SIC group fields in table SICGRP

<u>Field Name</u>	<u>Field Description</u>
SIC group Id	A unique identification code.
Description	The description of the SIC Group

Activity Reason Code fields in table CALLRSN

<u>Field Name</u>	<u>Field Description</u>
SIC Group Id	A unique identification code for the SIC group
SIC Code	Sic Code
Description	The description of the SIC Code

SIC Codes Hints and Tips

- The SIC Groups and IDs should be entered manually.
- The Tables must contain at least one record.
- The codes should be copied from the existing standard codes.

SIC Codes Data Example

<u>SIC Group Id</u>	<u>SIC Code</u>	<u>Description</u>
ASIC	2190	TOBACCO PRODUCTS
ASIC	2341	COTTON GINNING
ASIC	2342	WOOL SCOURING
SIC	3331	PRIMARY COPPER
SIC	3334	PRIMARY ALUMINIUM

Key

Abc: These are the typical recommended records.

Abc: These are the mandatory or system dependant records.

Company Transaction Category

The Company Transactions Category code is used to group the Company Transactions records within the Category Groups

If the transactions are used for varying data as a data warehouse and presented in different data window objects (forms) then the Transaction Type and/or the Transaction Category are the main grouping methods. The Transactions Pick List and the Transaction Forms can be developed either during the implementation process or later by using the Development Kit.

Company Transaction Category Tables and Fields

The Company Transaction Category data is maintained in the Company Transaction Category (comptrnc) table.

The data in this table should be designed to address the needs of the entire corporation.

Company Transaction Category fields in table COMPTRNC

<u>Field Name</u>	<u>Field Description</u>
Transaction Category Id	A unique identification code.
Description	The description of the Transaction Category

Company Transaction Category Hints and Tips

- The Category IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

**Company Transaction
Category Data Example**

Company Transaction Category Codes

<u>Type Id</u>	<u>Description</u>
00000	Default Type
C1	Category One
C2	Category Two

Key

Abc: These are the typical recommended records.

Abc: These are the mandatory or system dependant records.

*Company
Transaction Status*

The Company Transactions Status code is used to group the Company Transactions records within the Status Groups

**Company Transaction
Status Tables and Fields**

The Company Transaction Status data is maintained in the Company Transaction Status (comptrns) table. The data in this table should be designed to address the needs of the entire corporation.

Company Transaction Status fields in table COMPTRNS

<u>Field Name</u>	<u>Field Description</u>
Transaction Status Id	A unique identification code.
Description	The description of the Transaction status

**Company Transaction
Status Hints and Tips**

- The Status IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

**Company Transaction
Status Data Example**

Company Transaction Status Codes

<u>Status Id</u>	<u>Description</u>
00000	Default Call Status
C	Closed
A	Active

The basic data values for the Company Transaction Status is provided with the software

Key

Abc: These are the typical recommended records.

Abc: These are the mandatory or system dependant records.

*Company
Transaction Type*

The Company Transaction Type code is used to group the Company Transaction records within the Type Groups

If the transactions are used for varying data as a data warehouse and presented in different data window objects (forms) then the Transaction Type and/or the Transaction Category are the main grouping methods. The Transactions Pick List and the Transaction Forms can be developed either during the implementation process or later by using the Development Kit.

**Company Transaction Type
Tables and Fields**

The Company Transaction Type data is maintained in the Company Transaction Type (comptrnt) table.

The data in this table should be designed to address the needs of the entire corporation.

Company Transaction Type fields in table COMPTRNT

<u>Field Name</u>	<u>Field Description</u>
Transaction Type Id	A unique identification code.

Description The description of the Transaction Type

Company Transaction Type Hints and Tips

- The Type IDs should be created manually.
- The Table must contain at least one record.
- Default records with the IDs of '00000' is recommended

Company Transaction Type Data Example

Company Transaction Type Codes

<u>Type Id</u>	<u>Description</u>
00000	Default Type
T1	Type One
T2	Type Two

Key

Abc: These are the typical recommended records.

Abc: These are the mandatory or system dependant records.

Activity Reason

When an Activity Transaction is initiated between the Executive and the Contact there is always a reason for it. This reason usually becomes the definition of the Activity Transaction, i.e. Telemarketing, Quotation, Order, Cold Call, Follow Up etc.

The Activity Reason and the Next Call Action codes are very similar in their concept and definitions. In fact, usually they are interchangeable.

A well designed Activity Reason Code structure allows the Supervisor can group and analyse all the Activity Transactions and Activities in a very meaningful and useful fashion

Activity Reason Tables and Fields

The Activity Reason codes are maintained in the Activity Reason Code Table (callrsn) i.e. Follow Up Quotation, Demonstration, Inbound Telemarketing, etc.

These codes are grouped in the Activity Reason Category Table (callrsnc). The data in these tables should be designed to address the needs of the entire corporation.

Activity Reason Category fields in table CALLRSNC

<u>Field Name</u>	<u>Field Description</u>
Reason Category Id	A unique identification code.
Description	The description of the activity reason category

Activity Reason Code fields in table CALLRSN

<u>Field Name</u>	<u>Field Description</u>
Activity Reason Id	A unique identification code for the activity reason
Description	The description of the call reason
Reason Category	A unique identification code for the reason category

The data in the Activity Reason Category Table must exist before entering data in the Activity Reason Code Table.

Activity Reason Hints and Tips

- The Activity Reason IDs should be created manually.
- If you are using the automatic <Follow Up> creation function of the call transaction maintenance, then it is necessary to ensure that the codes in the Next Call tables are also available in the Activity Reason tables.
- Each Table must contain at least one record.
- Default records with the IDs of '00000' are recommended.

Activity Reason Data Example

Activity Reason Category Codes

<u>Category Id</u>	<u>Description</u>
00000	Default Call Reason Category
NOTE	Notes entry
MAINT	Maintenance
HELP	Help Desk
SUPP	Support

SUPP	Support
SERV	Service
OR	Orders
QT	Quotations
MM	Mail marketing
TM	Tele marketing
CALL	Cold Call
TRAIN	Training
INSTALL	Installation

Activity Reason Codes

Category Id	Reason Id	Description
00000	00000	Default Call Reason
CALL	FC	Follow Up Call
CALL	CC	Cold Call
MM	MM	Mail Marketing
QT	QT	Quote
SETC	SERV	Service
SUPP	SUPP	Support
TM	TM	Telemarketing
TRAIN	TRAIN	Training

Key

Abc: These are the typical recommended records.

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Activity Result

When an Activity Transaction is performed between the Executive and the Contact **system must register a Call Result** for the current activity, i.e. Interested, Call Later, Not Interested, and Demonstration Arranged etc.

The Next Activity Action code usually complements the meaning of the Activity Result code in a activity transaction.

The Budget and History or Score Card values may be generated from the occurrences of the selected Activity Result Codes of the activity transactions.

A well designed Activity Result Category and Code values will enable the users to obtain the History, Result,

Performance and Analysis values for any activities of the corporation.

Activity Result Tables and Fields

The Activity Result codes are maintained in the Activity Result Code Table (callrslt) i.e. Quotation, Order, Not Interested, Demonstration Arranged, etc. The data in this table is usually designed to reflect the requirements of all the Operating Divisions.

These codes are grouped in the Activity Result Category Table (callrslc).

The data in this table should be designed to address the needs of the entire corporation.

The data in the Activity Result Category Table must exist before entering data in the Activity Result Code Table.

Activity Result Category fields in table CALLRSLC

<u>Field Name</u>	<u>Field Description</u>
Result Category Id	A unique identification code.
Description	The description of the activity result category

Activity Result Code fields in table CALLRSLT

<u>Field Name</u>	<u>Field Description</u>
Activity Result Id	A unique identification code for the activity result
Description	The description of the activity result
Activity Result Category	A unique identification code for the activity result category

Activity Result Hints and Tips

- The Activity Result IDs should be created manually.
- Each Table must contain at least one record.
- Default records with the IDs of '00000' are recommended.
- The data in the Activity Result Category table must exist before entering data in the Activity Result Code table

Activity Result Data Example

Activity Result Category Codes

<u>Result Cat Id</u>	<u>Description</u>
00000	Default Activity Result Category
AINT	Maintenance Record
ORDER	Orders
QUOTE	Quotation Cycle
DEMO	Demonstration
SERVICE	Service
TRAIN	Training
CALL	Cold Call
HELP	Help Desk
SUPPORT	Support
DOCUMENT	Letters and Documents
INTEREST	Interested
NOTINT	Not Interested
NOTAVAIL	Not Available
CALLBACK	Call Back

Activity Result Codes

<u>Result Cat Id</u>	<u>Result Id</u>	<u>Description</u>
00000	00000	Default Call Result Code
CALLBACK	CL	Call later
DOCUMENT	BR	Brochure sent
DOCUMENT	BRM	Brochure Sent - Mild Interest
DOCUMENT	BRC	Brochure Sent - Cold Interest
DOCUMENT	DOM	Document Sent - Maintenance
DOCUMENT	DOW	Document Sent - Warranty
DOCUMENT	DS	Diskette Sent - Software
DEMO	DA	Demo arranged
DEMO	DR	Demo required
INTEREST	IN	Interested
INTEREST	FI	Interest - Future
NOTINT	WC	We Call you Later
NOTAVAIL	NA	No answer
NOTAVAIL	UM	Unavailable Message Left
NOTAVAIL	UCL	Unavailable Follow up Later
QUOTE	QR	Quotation Requested
QUOTE	FQ	Quotation Follow up
ORDER	OE	Order received
SERVICE	MR	Request Service
SERVICE	SR	Support Requested
TRAINING	TR	Training Requested

Key

Abc: These are the typical recommended records.

Abc: These are the mandatory or system dependant records.

Activity Status

The Activity Status code is used to group the Activity Transaction records by their status, i.e. Open, Closed etc.

Activity Status Tables and Fields

The Activity Status data is maintained in the Activity Status (callstat) table.

The data in this table should be designed to address the needs of the entire corporation.

Activity Status fields in table CALLSTAT

<u>Field Name</u>	<u>Field Description</u>
Activity Status Id	A unique identification code.
Description	The description of the activity status

Activity Status Hints and Tips

- The Codes for the Activity Status records should be created manually.
- The "C=closed", "O=open" and 'K=keep' codes must exist in the table at all times.

Activity Status Data

Example

Activity Status Codes

<u>Status Id</u>	<u>Description</u>
00000	Default Call Status
K	Keep
C	Closed
O	Open

Key

Abc: These are the typical recommended records.

Abc: These are the mandatory or system dependant records.

Activity Type

An Activity Transaction between an Executive and a Contact can take place in many forms (types) and in many places, i.e. Inbound Phone Call, Meeting at Site, Written Communication,

It is always useful to be able to analyse how and where the calls (activities) have taken place. This analysis will help to devise the new methods of marketing, sales and customer service or to refine the existing methods.

Activity Type Tables and Fields

The Activity Type codes are maintained in the Activity Type Code Table (calltype), i.e. Phone Inbound, Site Meeting etc. The data in this table is usually designed to reflect the requirements of all Operating Divisions.

These codes are grouped in the Activity Type Category Table (calltypc). The data in this table should be designed to address the needs of the entire corporation.

The data in the Activity Type Category table must exist before entering data in the Activity Type Code table.

Activity Type Category fields in table CALLTYPC

<u>Field Name</u>	<u>Field Description</u>
Type Category Id	A unique identification code.
Description	The description of the activity type category

Activity Type Code fields in table CALLTYPE

<u>Field Name</u>	<u>Field Description</u>
Activity Type Id	A unique identification code for the activity type
Description	The description of the activity type
Activity Type Category	A unique identification code for the activity type category

Activity Type Hints and Tips

- The Activity Type IDs should be created manually.
- Each Table must contain at least one record.
- Default records with the IDs of '00000' are recommended.
- The data in the Activity Type Category table must exist before entering data in the Activity Type Code table

Activity Type Data Example

Activity Type Category Codes

<u>Type Cat Id</u>	<u>Description</u>
00000	Default Call Type Category
WRITE	Written Communications
MEET	Meetings
PH	Phone

Activity Type Codes

<u>Type Cat Id</u>	<u>Type Id</u>	<u>Description</u>
00000	00000	Default Call Type
PH	PI	Phone Inbound
PH	PO	Phone Outbound
MEET	MS	Meeting, Site

MEET	MO	Meeting, Office
WRITE	WR	Written Communications
WRITE	FAX	Fax

Key

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Abc: These are the mandatory or system dependant records.

Next Action

When an Activity Transaction is initiated between the Executive and the Contact there is almost always a Next Call Action (Follow up) for it, i.e. Follow up a Letter, Demonstration, Follow up a Quotation, etc.

The Activity Reason and the Next Call Action codes are very similar in their concept and definitions. In fact, usually they are interchangeable.

When a follow up is performed, as the existing call transaction is closed, usually the Next Call Action becomes the Activity Reason for the new Activity Transaction

The Next Activity Action code usually complements the meaning of the Activity Result code in a call transaction.

There are two very specific uses of the Next Action codes.

1. Update the Sales Cycle Fields on the related Contact and Company records
2. Allow the Escalation process to escalate the related activities.

Checking the related check boxes against the Activity Next Action Codes activates these functions.

Activity Next Action Tables and Fields

The Activity Next Action codes are maintained in the Activity Next Action Code Table (callnact), i.e. Follow Up Quotation, Demonstration, etc. The data in this table is usually designed to reflect the requirements of all the Operating Divisions.

These codes are grouped in the Activity Next Action Category Table (callncat).

The data in this table should be designed to address the needs of the entire corporation.

Activity Next Action Category in table CALLNCAT

<u>Field Name</u>	<u>Field Description</u>
Next Action Cat Id	A unique identification code.
Description	The description of the Activity Next Action Category

Activity Next Action Code in table CALLNACT

<u>Field Name</u>	<u>Field Description</u>
Next Action Id	A unique identification code.
Description	The description of the Activity Next Action
Next Action Cat Id	Next Action Cat Id
Update Contact/Company	Check the box if this code is going to update the sales cycle fields in the contact or company site records.
Escalate Sales / Support Activity	Check the box if this code is going to escalate the related activities

The data in the Activity Next Action Category Table must exist before entering data in the Activity Next Action Code Table.

Activity Next Action Hints and Tios

- The Activity Next Action IDs should be created manually.

and Tips

- Each Table must contain at least one record.
- Default records with the IDs of '00000' are recommended.
- The data in the Activity Next Action Category Table must exist before entering data in the Activity Next Action Code Table.
- If you are using the automatic <Follow Up> creation function of the call transaction maintenance, then it is necessary to ensure that the codes in the Next Action Call table are also available in the Activity Reason table.

Activity Next Action Data Example

Activity Next Action Category Codes

<u>Category Id</u>	<u>Description</u>
00000	Default Next Call Action Category
NOTE	Notes entry
MAINT	Maintenance
HELP	Help Desk
SUPP	Support
SERV	Service
OR	Orders
QT	Quotations
MM	Mail marketing
TM	Tele marketing
CALL	Cold Call
TRAIN	Training
INSTALL	Installation

Activity Next Action Codes

<u>Category Id</u>	<u>Next Action Id</u>	<u>Description</u>
00000	00000	Default Next Call Action
CALL	CR	Call Return
MM	FM	Follow up Mail
SERV	SR	Service Call
SUPP	SP	Support Call
FUP	FC	Follow up Call
FUP	FB	Follow up Brochure
FUP	FQ	Follow up Quote
QT	QT	Quote
TM	TM	Telemarketing
TRAIN	TR	Training
DEMO	DA	Demo Arranged
DOCUMENT	SC	Contract Sent
FUP	FMEET	Follow up Meeting

Key

- Abc*: These are the typical recommended records.
Abc: These are the mandatory or system dependant records.

Activity Class

The Activity Class code is used to group the activity and executive availability records within the activity class, i.e. Standard, Compliance, Private, Sales etc

Activity Class Tables and Fields

The Activity Class code is maintained in the Activity Class Code Table (actvtype).
 The data in this table should be designed to address the needs of the entire corporation.

Activity Class fields in table ACTVTYPE

<u>Field Name</u>	<u>Field Description</u>
Activity Type (Class) Id	A unique identification code.
Description	The description of the Activity Type (Class)

Activity Class Hints and Tips

- The Codes for the Activity Class records should be created manually.
- The 0000, COMP and PRVT codes are mandatory and must not be deleted from the table.
- The Compliance Class Activities can be stopped from deletion by setting the appropriate values in the System Shared Options > Activity section.

Activity Class Data Example

Activity Class Codes

<u>Class Id</u>	<u>Description</u>
0000	<i>Standard Activity</i>
COMP	Compliance
PRVT	Private
SALES	Sales Activity

Key

Abc: These are the typical recommended records.

Abc: These are the mandatory or system dependant records.

Contact Management Module Tab

The Contact Management Module is presented on a Tab Folder, which has the following 4 tab sheets:

- Contacts
- Companies (Organisations)
- Contact
- Profiles (Value Added Information)

Although each tab performs various different functions, they are fully integrated.

When you open the tab folder, only the Contact and Company tab sheets will be active.

When you find an existing contact record or immediately after saving a new record the Contact Details tab sheet and the Profiles tab sheet will become active.

The data for the Company is also maintained in the Company Module pop up window.

Contact Management

Contact Maintenance

The contact tab is used to create a new record or to locate the existing contact record in order to change the data or to perform various functions on the tab folder.

There are 5 visible sections on this tab sheet.

The section at the very top is dedicated to maintain the basic details of the contact.

The two sections immediately below towards the left side are for maintaining the address (s) Details.

On the middle section, also the most preferred contact methods are displayed. The address section displays the current address type. The number in red tells you the number of addresses, which have been assigned to the contact. If there is more than one address, you can scroll through them by pressing the right, left, outer right or the outer left arrow buttons just underneath this section.

You cannot enter a new address here or select an existing address. Pressing the <Add Address> button performs this function. However, you can edit the address, which is being displayed on this section.

The middle section on the right is always presented in grey colours indicating that you are not allowed to edit the data on this section. Actually, this data is maintained on the "Profiles" tab and very important information such as the account manager (adviser, sales person or consultant depending on the nature of the business that your organisation is in), the status of the contact, the ratings etc are displayed here.

Click On the <Show...> button to display the Contact Profiles and the Contact types.

The right bottom section displays all the current Relations, which are currently available for the contact.

Command Buttons

The command buttons at the bottom of the window will perform the following functions;

Add Address

The address maintenance window is displayed. On this window, you can select an existing address for the contact, edit an existing address or create a new one.

Remove Address

Click on this button to remove the displayed address from the contact's addresses. If you want to delete the address from the address table, you may do so when maintaining the address on the pop up window. You will be warned if the address is being used by another contact and the deletion process will be reverted.

Add Relation

Click on this button to activate the Relations Maintenance pop up window. On this window, you can create double-sided relations (Father, Son and Son, Father) or delete both by just deleting only one of the relations. For specific membership family relations this function is performed from the Details tab and automatically displayed on this screen.

Arrow Buttons

If there is more than one address for the contact these buttons become active. Press the directional arrow to display another address.

Clear

Clears the entire window so that a new search can be initiated. If this button was pressed during the new record creation or editing, the "Save, Yes-No?" dialogue box will require a confirmation of the action.

New Contact

Creates a unique system number for the contact and sets the cursor on the Last Name field so that the new data can be entered.

Reset

This is a 'Bail Out' button. If you are not happy with what you have been entering on the window, this button will reset the data back to the original state. You must respond to the confirmation dialogue box for save or reset.

Save

Press here to save the values on the screen (temporary) to the database (permanent)

Delete

If you click on this button one of many things may happen depending on the configuration of your system and your current privileges.

1. Nothing happens, you do not have enough privileges to delete the record.
2. Systems response to request with a confirmation dialogue box. When confirmed one of many things may happen:
 - a. If the "Soft Delete" option was put on by the supervisor, a dialogue box will capture your reason for requesting the deletion of the record and sets the colour red on the text so all other users will know this record is going to be deleted by the supervisor.
 - b. If the standard delete function was enabled, based on your privileges system will attempt to delete the record and all of its children records.

If the contact record was used by any other system, such as membership, order entry etc, the deletion will be rejected.

Search

This button activates the Search Engine Window.

Exit

Closes the complete tab folder after the confirmation.

Show

Toggles between the profiles, types and details windows.

How to Find an Existing Contact Record?

There are three ways of finding an existing record:

1. On Screen Search
2. Search by Standard Search Engine
3. Search by Enhanced Search Engine

On Screen Search

You can find the existing contact record using any combination of the following fields:

- Last Name
- Full Name
- Club and Member No or Member Id

You should always type in at least 2 or 3 letters of the search name. Click on the drop down arrow or press the <F4> key.

The pre-keyed in letters will act as an instant filter and the system will display you a drop down pick list of the contacts starting with the entered letters. The more you had typed in the field before attempting the search will make the list presented so much more precise.

Highlight the required name and either click on it or press the <Tab> key. If you had used the tab key, the empty spaces on the window will be filled with the contact's data. On the other hand, if you had clicked on the pick list then the selected data will be displayed on the field. Now either clicks on any other field at the top section of the window or simply press the tab. The contact's data will be displayed as a previous selection.

Note: Your access to some contacts may be limited by your current access privileges

Search by Standard Search Engine

When the Search button was clicked the following search engine window is displayed:

The screenshot shows a 'Find Contact' window with the following search criteria:

- L Name: [Empty]
- F Name: [Empty]
- Cont Id: [Empty]
- Suburb: [Empty]
- Postcode: [Empty]
- Bus Ph: [Empty]
- Club: Carlton Football Clk
- Card: [Empty]
- Cat: [Empty]
- MembRec: [Empty]
- Memb No: [Empty]
- Opt Tick1: [Empty]

The results table is as follows:

Contact Id	Memb Rec Id	Member No	Club	Suburb	Card	Category	PCode	Preferred Phone	Status	Season
Berzani	3000094	153	Mal	HALLIDAYS POINT	CFC	SILVER	ADL	2430	02 3456 7890	00/00/
Blackman	3000392	365	Honour	GREEN FIELDS	CFC	GOLD	ADL	5107	02 2345 6789	01/06/1999
Brown	3000179	297	Hale	CROW'S NEST	CFC	GOLD	ADL	2065	02 9806 5566	11/11/
Brown	3000180	302	Honey	PARRAMATTA	CFC	GOLD	ADL	2150	Non Financial	12/12/2000
Brown	3000205	296	Jane	GRAB BEN GULLEN	CFC	BLUE	ADL	2583	02 9806 8888	01/02/2000

At the bottom of the window, there are radio buttons for 'Standard' (selected), 'Profiles', and 'Transactions'. Below these are buttons for 'Find', 'Reset', 'New', navigation arrows, 'OK', 'Close', and 'Help'.

There are two sections on this window. You can enter any selection criteria in the top Query section. When the Find button is clicked the matching results set will be displayed in the second window. Highlight the required record and click on the OK button to return to the Membership window with the selected member record.

If a contact last name fully or partially was entered, in the contact screen before clicking on the search button the search engine will be seeded with this value and the corresponding result set will be displayed automatically.

Search by Enhanced Search Engine

If the Contact Search Engine Stays Open' entry was set to Yes in the Contact section of the user options system will change the standard behaviour of the search engine to a continuous pick list.

The Search Engine window is now resizable and movable on the screen to a suitable location.

Make your query and selection as usual and click on the Find button. Double click on the selected line or click on the OK button will display the details of the selected record on the Contact Entry Tab Sheet.

This allows the user to search the database and freely move up and down on the selected list.

How to Edit an Existing Contact Record?

You can alter any information on the window, which is also regulated by the edit privileges, which had been granted to you.

Once the editing is finished simply click on the <SAVE> button.

How to Create a New Contact Record?

Before attempting to create a new contact record, you must first search the database to find out if the record is already on the system. It should be always kept in mind that many other users use the database for many different purposes. The possibility of eliminating the duplicate data entry is the responsibility of all the users of the system.

The drop down table on the last and the full name contain various data such as suburb and phone number in order to assist you to make a judgment about the existing record.

When you are ready to create a new record click on the <NEW CONTACT> button. Your cursor will be moved to the Last Name field so that you can start entering the new data.

Data Field Attributes

The data fields may carry various attributes:

Key Fields

The labels for these fields are presented in dark blue.

Mandatory Fields

You must enter a value in such fields and they are presented with a very distinctive colour (usually in light blue).

Functional Fields

The point will change from "Arrow" to a "Cross" when the cursor is on such a field. Double clicking on these fields will usually pop up a related utility, such as the calendar, clock or link to another module by using values obtained from the clicked field (or even the whole row).

Audited Fields

There is no visual attribute to tell you that the field is being audited. However, if you have such a field, simply double click on it. You will see a detailed table showing the complete change audit for the values that had been altered in this field.

No Enter fields

Displayed in grey colour. The grey colour indicates that the data entry on the field is disabled. In some cases, this is a temporary situation, such as entering an address for the very first time; in other cases, it is permanent, such as the profile details of a contact on the main tab.

Contact Main Data Fields

Contact Id: a unique identification code for the contact.

Last Name: The last name (surname) of the contact

First Name: The first name (given name) of the contact.

Title: The title of the contact, i.e. Mr. Ms etc.

Initials: The initials of the contact.

Full Name: The Full Name of the Contact, Last Name, First Name and Title.

For example: If the following details were entered:

Surname: James

First Name: Jesse

Title: Mr

The full name will be built up as: James Jesse Mr

This field can be used to register entities other than the contacts. For example you may wish to create a group mailing contact record for Mr and Mrs Jessie James. In this case enter all the other details for the main contact (i.e. Mr Jessie James) and enter here:

James Jesse Mr and Mrs

Preferred Phone: The preferred contact phone number for this member. When a new record was created, the residential phone number populated this field. If you wish to change the preferred phone to some other number or maintain the other means of communications double click on this field, this window will be displayed

	Preferred
Private Phone No:	<input type="checkbox"/>
Private Fax No:	<input type="checkbox"/>
Mobile Phone No:	<input type="checkbox"/>
Pager Phone:	<input type="checkbox"/>
Pager No:	<input type="checkbox"/>
Modem No:	<input type="checkbox"/>
E-mail:	<input type="checkbox"/>
Business Phone No: 02 9321 5698	<input checked="" type="checkbox"/>
Business Fax No: 02 9321 8888	<input type="checkbox"/>

Suffix: Double click on the field to display the suffix selection window. Multiple suffixes can be added.

Suffix	Description	Active
Abp.	Archbishop	<input type="checkbox"/>
B.A.	Bachelor of Arts	<input checked="" type="checkbox"/>
B.Litt.	Bachelor of Letters	<input type="checkbox"/>
B.Sc.	Bachelor of Science	<input type="checkbox"/>
Bart.	Baronet	<input checked="" type="checkbox"/>
Bp.	Bishop	<input type="checkbox"/>
Brig.	Brigadier	<input type="checkbox"/>
Brig. Gen.	Brigadier General	<input type="checkbox"/>
Capt.	Captain	<input checked="" type="checkbox"/>
Card.	Cardinal	<input type="checkbox"/>
Cmdr.	Commander	<input type="checkbox"/>

Salutation: The salutation is how you address your contact in the written communications after the 'Dear'.

As the First Name is entered, this field is populated with the first name. You can overwrite this with the appropriate value. Mr and Mrs James, Annie or Sir John are typical examples.

Family: In this display only field, the word 'MAIN' means this record is the main member of a family (group) membership.

If you double click on this field the Family Maintenance window is displayed.

Contact Addresses Data Fields

A contact may have more than one address. Furthermore, different contacts may use the same address details. For this reason the details of the physical addresses are maintained separately and attached to the contact record as appropriate. The same address may be a residential address for a contact and a business address for another.

Address Type: Each address for a contact is selected with an address type identifier. The main ones are

- Main Residential
- Other Residential

- Mailing Address
- Business Address

When a new contact address is created, this field must be entered with an appropriate address type.

When an additional address is to be attached this field is entered after the address details have been selected.

It is usually recommended to create the residential or the business address first. The mailing address can be created from any one of these automatically.

Best Time: This field contains a number of selection options to indicate which is the best time to make contact with this contact at this address.

The following three check boxes indicates the allowed methods of contacts:

O.K Phone Call: This indicates that this contact may be contacted by phone at this address.

O.K Telemarketing: This indicates that this contact may be contacted for a telemarketing campaign at this address.

O.K Mail: This indicates that this contact may be contacted for a mailing campaign at this address.

Mail Address Same: If the current address is also the mailing address you should check this box. System will automatically create a mail address from this address.

Group: If this address is to be used as a group mailing address then check this box.

Important Note: This box must be checked if the contact is the main member of the family (group) membership.

Address Details

The address details displayed here are editable. It should be remembered that when any changes are made on this window it would change directly the address details for the other contacts that are also using this address.

Phone: The phone number of the contact at this address.

Mobile Ph: The mobile phone of the contact. This number will be displayed regardless of the address type.

Double click on the phone number field will pop up the Auto Dial dialogue box.

Fax: The fax number of the contact at this address.

E-Mail: The E-mail address of the contact at this address.

Company: Only available if the address type is of a business type.

The drop down pick list will allow you to pick the company name, which is the business location for this contact. If the company does not exist in the system, click on the Company Tab and create it first.

It is recommended to enter a few letters of the Company's name then click on the drop down arrow press on the F4 key.

Address: There are three lines, which are allocated to the street address. These lines must be used for what they have been intended for.

The suburb, Postcode etc. details must be entered into the appropriate fields.

Suburb: Enter a few letters of the Suburb and click on the drop down arrow or press on the F4 key. Once the suburb is highlighted, either click on it or press the Tab key.

The other address details such as postcode, state and country will be populated by the system.

Postcode: Enter a few digits of the Postcode and click on the drop down arrow or press on the F4 key. Once the postcode is highlighted, either click on it or press the Tab key.

The other address details such as suburb, state and country will be populated by the system.

State: Enter state if it was not populated by one of the above selections.

City: This is not a mandatory field, may be populated for information only or for the addresses that do not have valid postcode etc.

Country: The Country Id.

How to Create or Select an Address?

When a new contact is being created, after selecting an address type press on the Save button. The following Address maintenance window is displayed.

If you want to remove an address from the contact click on the <Remove Address> button. The system will not allow the user to delete the last address. If this is required, the users should create/add a new address and then remove the old address.

If you wish to attach a new address to the contact click on the <Add Address> button. The following window will be displayed with the Contact's Last Name on the query section of the window.

The screenshot shows the 'Contact Address' window. It is divided into three main sections:

- Query Section:** A table with columns 'Address Line 1/ Contact Name', 'Suburb/Address Type', and 'Suburb/Address Type'. The table contains several rows of address data.
- Selection Section:** Fields for 'Last Name', 'Co Name', 'Addr Type', 'Suburb', and 'P Code' with dropdown menus.
- Data Entry Section:** Fields for 'Address', 'Suburb', 'Postcode', 'State', 'City', 'Country', 'Phone', and 'Fax'.

At the bottom of the window is a control bar with buttons: Find, Reset, New, Delete, Save, navigation arrows, Cancel, Accept, and Help.

Address Line 1/ Contact Name	Suburb/Address Type	Suburb/Address Type
12 South Drive	CROMER	
Hawks Bill	Residential Main	
12 South Drive	CROMER	
Hawks Bill	Mail	
12 Gigtree St	CROW MOUNTAIN	
Gerty Mary	Residential Main	
12 Gigtree St	CROW MOUNTAIN	
Gerty Mary	Mail	
101 Greenhill Rd	CROWDY HEAD	
Kissenger Henry	Residential Main	
101 Greenhill Rd	CROWDY HEAD	
Kissenger Henry	Mail	

There are three sections on this window:

- Query Section
- Selection Section
- Data Entry Section.

Query Section

You may enter any selection criteria to drill down to the address selections.

For an address table with lots of addresses it is advisable to make a pre-selection such as Postcode or Address type to reduce the number of records to be retrieved

from the server database. This will speed the search and the selection process.

You can enter complete or partial data as query criteria:

- Last Name
- Company Name
- Address Type
- Suburb
- Post Code
- Address 1

Important Note: The last name of the original contact may be carried forward to the Last Name field of the query window by setting the appropriate field in the User Preferences utility. This can be set for each user.

Selection Section

Once the query criteria are entered, click on the Find key. The left side of the window will be populated with the addresses, their current owners that match the selection criteria.

As the address is highlighted on this window, the details are also displayed on the right side of the window, which is allocated for entering the data.

Data Entry

The right side of the window is used to enter a new address or edit the existing one.

Command Buttons

Find

After entering the query criteria click on this button to display the selected addresses.

Reset

Resets the selection criteria.

New

Click on this button if you wish to create a new address detail.

Delete

Click on this button to delete the address. Remember, you can only delete an address if it had not been used by any contact.

Save

You can save the details of the edited record.

Cancel

Cancels the process.

Accept

If you want to select the address for the contact, press on this button. System will return to the main contact tab with the selected data.

Important Note: Wherever possible the ACCEPT button should be used instead of the SAVE button.

Data Fields

Address: There are three lines, which are allocated to enter the street address. These lines must be used for what they have been intended for.

The suburb, postcode etc. details must be entered into the following fields.

Suburb: Enter a few letters of the Suburb and click on the drop down arrow or press on the F4 key. Once the suburb is highlighted, either click on it or press the Tab key.

The other address details such as postcode, state and country will be populated by the system.

Postcode: Enter a few digits of the Postcode and click on the drop down arrow or press on the F4 key. Once the postcode is highlighted, either click on it or press the Tab key.

The other address details such as suburb, state and country will be populated by the system.

State: Enter state if it was not populated by one of the above selections.

City: This is not a mandatory field, may be populated for information only or for the addresses with invalid postcodes etc.

Country: The country code.

Phone: The phone number of the contact at this address.

Fax: The fax number of the contact at this address.

Contact Profiles and Types Displayed

This section is not editable by the user unless they double click on any of the items being displayed. The Show command button will toggle between the following displays.

Contact Profiles

Double click on the list to pop up the profiles maintenance window.

Contact Types

Double click on the list to pop up the contact types maintenance window.

Contact Details

It displays typically the following information about this contact and cannot be edited here.

- Executive Code
- Access Group
- Branch
- The Contact Status
- The Rating within the status
- Lead Source (How this contact heard about your organisation)

Contact Profile Information (Value Added Information)

On this tab, three types of profiles information are maintained.

1. Contact Profile Standard Details, which relate directly to the contact record.
2. Contact Profiles, which are the various assigned user, defined attributes, such as hobbies and interests.
3. Contact Types

The screenshot shows a software window titled "Contact Manager - Helene Jerns". It has a tabbed interface with four tabs: "Contact 1", "Company 2", "Details 3", and "Profile 4". The "Details 3" tab is active, displaying various fields for contact information. On the left side, there are dropdown menus for "Executive" (Arnot Ajea), "Access Group" (ADMN), "Branch" (Head Office), "Contact Status" (Active Account), "Rating" (VIP Account), "Set Up Date" (14/02/01), "Lead Source" (Adv In Australian), "Support Executive" (Arnot Ajea), and "Area (Tasky)" (Sydney). There are also checkboxes for "Privacy Lifted" and "Privacy Remarks". On the right side, there are sections for "ContactType" (Business Contact), "Profile Group", and "Long Term Investments". At the bottom, there are buttons for "Print", "Save", "Exit", "Help", "Show Interests", "Groups...", and "Items...".

Standard Details

The standard and vital profile for the contact is maintained in this section.

Executive: The executive who is assigned to the contact record (account manager).

Depending on the security restrictions the user may have one or many of the following options:

- You may not assign any other executive to this record, or
- You may assign some executives to this record, or
- You may assign any executive to this record.
- Executive From Postcode Area

The Postcodes/Suburbs can be assigned to executives for the locations that they will be covering.

The postcode assignment can be done for the individual suburbs or assigning globally from an existing Postcode-Area matrix.

If the 'Use Executive Postcode Area' flag in the User Shared Options was set to 'Yes' then system will display the Account Executive and Support Executive Labels on command buttons.

Click on the button to display the Select Executives Window. If there is only one matching executive found data will be populated without displaying the window.

The screenshot shows a dialog box titled "Select Executive". It has two tabs: "Skill" and "Area". The "Area" tab is active, displaying a table with the following data:

Executive	Id	Phone	Mobile Phone
Viking, Erik Mr	21	02 3456 7890	0414 345 234

At the bottom of the dialog box, there are buttons for "OK", "Schedule...", "Close", and "Help".

Access Group: The executive's access group is displayed. The user can assign a new access group from his or her access groups.

new access group from his or her access groups.

This feature is available only if the system's security is operating under the access group security method.

Please refer to the Supervisor and the Security manuals for details.

Branch: The executive's branch will be displayed.

Current Status: Enter here the status of the contact. The information here may be changed as the status of the contact changes from a lead to a client and anything in between (suspect, prospect) and after (x client) etc.

Usually this field is attached to the Audit function, which means every change on this field, has been recorded. To view the Audit table double click on this field.

Rating: The contact status is further detailed by the value in this field. For example if the contact status was a Prospect, you may select a Hot Prospect value in this field.

Set up Date and Time: The set up date and time of the contact's record will be displayed by the system.

Lead Source: This field allows you to determine the origin (source) of the contact record. Yellow Pages, Seminar or a Referral are the typical Lead Source types that you may use in this field.

Contact Sensitivity: You may use the pick list to assign a special sensitivity code against this contact record. The change date will be stamped automatically.

Support Executive: This is the second executive (usually with a support role) who is assigned to this contact.

Executive From Postcode Area

If the label was displayed on a command button user may click on it to select the executive by skill or by Area-Postcode matrix.

Area Territory: This is the Area or Location information for this contact, which is usually used for the marketing and reporting purpose.

Postcode Area

If the 'Use Postcode Area' flag in the User Shared Options was set to 'Yes' then system will automatically populates the Area field from the Post Area table.

Note: The data on this section can be different for each user as set by the supervisor.

Privacy

The following three fields are designed to maintain the privacy of the contacts.

<u>Column</u>	<u>Function</u>
Privacy Lifted	Checked if the private information disclosure consent is given by the contact.
Privacy Date	The date when the privacy consent status was changed
Privacy Remarks	The details of the privacy status change, source etc. This field is audited

Profile and Types

The Show. Command button will toggle between the Contact Types and Interests display list at the top right side of the window.

Double click on the displayed window to pop up the related maintenance window.

The Profile Group and Item buttons will allow the user to maintain the related profiles.

Contact Family Maintenance

The following screen will be presented when double clicked on the Family Box on the Contacts Tab;

There are two main sections on this window.

1. The list of the Related Family Members.
2. Contact details for the family members

List of the Related Family Members

This section displays a list of all family (group) members connected to the Family (group). The main family member is in bold. The user may click on any family member and the system will display this family members details in the Members Details section just below the list.

Contact Details for the Family/Group Members

The data fields should contain the information explained under the Contact Maintenance section.

Relation: Select from the drop down list what this members relationship to the main member is. Please refer to the section How to Enter Non Family/Group Relations for further details on how to perform this function.

Command Buttons

Add

Click on this button to activate the selection screen from the contacts database in order to include the selected member into the family (group).

Enter any selection criteria in the top query section and click on the FIND button. Once the selection is made by highlighting the row, click on the OK button.

The selected contact will be connected to the family (group) automatically.

Important Note: This process will not check the address compatibility between the new member of the group and the existing group address.

Remove

Click on this button to remove the current family member from the family.

Important Note: This process will not remove the current relations which should

be maintained manually.

Details

Starts the Family Details window.

Accounts

Starts the Family Accounts window.

Family Details

This window contains the additional details to the family data that is usually specific to site requirements. The following is just an example to indicate the type of information that can be customised on this window.

The screenshot shows a window titled "Family Details - James Jessie Mr". The fields are as follows:

- Family Id: 3000008
- Family No: [empty]
- Period: Monthly
- Months: 12
- Family Name: James Jessie Mr
- Inv Rev Mnths: [empty]
- Family Type: New
- Contact Mnths: [empty]
- Family Title: Mr
- FP Rev Mnths: [empty]
- Salutation: James
- PRS Rep Mnths: [empty]
- Address: 11 North R
- Invoice Mnths: [empty]
- Suburb: GRABBen GULLEN
- PCode: 2583
- Fee Level: [empty]
- State: NSW
- Country: Australia
- Spcl Instructions: [empty]
- Remarks: [empty]
- Groups: 1: [empty], 2: [empty], 3: [empty], 4: [empty], 5: [empty]
- Start Date: [empty]
- End Date: [empty]
- Adviser: Viking Erik
- Old Data: [empty]

Buttons at the bottom: Reset, Delete, Save, Close, Help.

Contact Relations

A contact can be related to another contact or to a company.

(Please Note: The creating of Family Relations is performed from the Details Tab Sheet or from the Maintain Family Relations window)

The right bottom side of the window displays all the current relations for the contact. The contact-to-contact relations are displayed in bold letters.

The relations are maintained under a cross referenced environment. The Relation Cross Reference table holds the relation cross-reference information for each relation type pair.

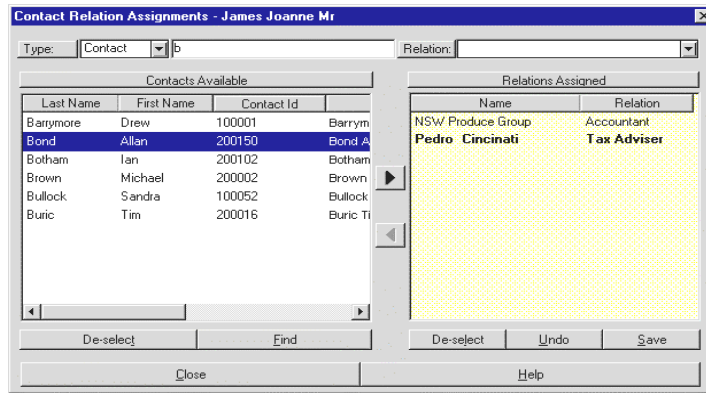
For example: If we have WIFE and SON relations, actually we should also be looking the HUSBAND and MOTHER relation types. In order to establish just the WIFE and SON relations we need to have the following cross references to be established.

The process is almost creating a double-sided balance book the sides being the Relation and the Related types.

Relations		Related
WIFE	x	HUSBAND
HUSBAND	x	WIFE
SON	x	MOTHER
MOTHER	x	SON

If you double click on any one of displayed relations, the related details will be displayed either on the contact tab folder or on the Company Tab.

To enter a new relation or to maintain the existing ones click on the <Add Relation> button.



Type: Select either a Contact or Company Type. When this window is initiated from a contact screen, this value is set to a Contact.

Select the appropriate type for your session.

Relation: The contact's last name is displayed here. If you want to find out all the contacts with the same last name press the <Find> key. Otherwise, enter a few letters of the Contact's last name or the company's name and press the <Find> key.

Contacts Available

This selection window will display the selected contacts or companies.

If the selection was contacts, here the following fields are displayed:

- Last Name
- First Name
- Full Name
- Suburb

If the selection was for the companies here the following fields are displayed

- Company Name
- Suburb

Select a record, which is to be related to the contact.

Relations Assigned

On the right side of the window, all the current related records to the contact are displayed.

Here the Name and the relation types are listed.

How to Create a New Relation?

The top right side is the place for you to select the relations' pair. The first item relates to the contact and the second item relates to the related contact or the company.

Once the relation is established, click on the right arrow. Now you will see that two relations records are being created at the right side, one for the relation and the other for the related.

For the same contact or company pair the same relation cannot be created more than once.

How to Remove an Existing

Highlight the relation(s) on the right side and click on the left arrow. As the record(s) is

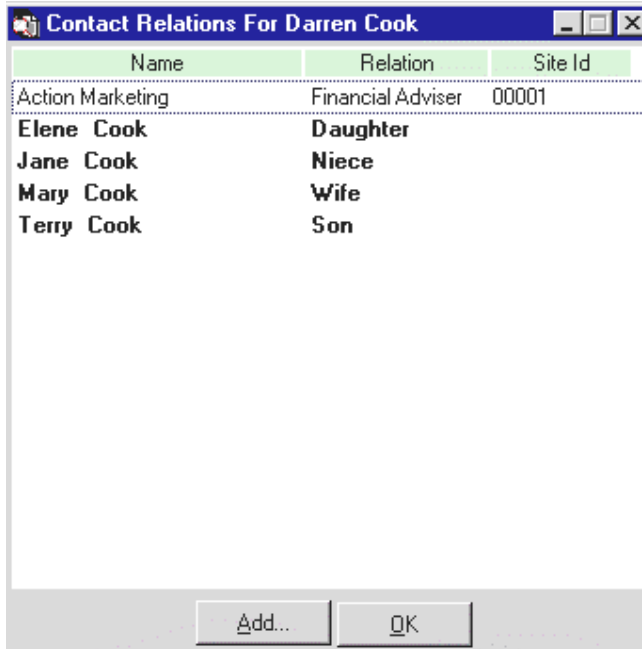
Relation? removed, their counterpart relations are also removed from the system.

Reset: Clears the selections.

Undo: Undo the save or delete.

Save: You must save the new or deleted relations before leaving this window.

Display Contact Relations This window displays all the contact relations from the pop up menu.



Double click on the selected item to start the Company or Contact Module which relates to.

Click on Add button to create a new relation.

Contact Activity Summary Contact activity summary values are updated when an activity was created or updated in the system.

The Contact Query option from the contact related Pop Up Menu will display the contact activity summary window.

Contact Donations Contact donations are updated during Call Centre Raffle and Payment maintenance functions. The Contact Query option from the contact related Pop Up Menu will display the following summary window.

Contact Donations				
Contact Name: Mr JessieJames			Id: 3000008	
Operating Division: Efficiency Operations				
	Date/Qty	Amount	Campaign Split	Last Update
First Donation		120.00		02/11/2000
Last Donation	07/01/2000	120.00	00000	
Max Donation	07/01/2000	120.00	00000	
Total Donations	1	120.00		
First Raffle		0		
Last Raffle		0		
Max Raffle		0		
Total Raffles	0	0		
Raffle Trans	0			
Total Pledges	2	240.00		
Close			Help	

Contact Loyalty

Contact loyalty values is updated by one or all of the following functions

- Event Management
- Membership Renewal and Sales
- Membership Proposer and Seconder
- Sales History Update from External Sources
- Order Entry (Contact based)

The Contact Query option from the contact related Pop Up Menu will display the following summary window.

Contact Loyalty					
Period	Points	Value	Prev Month	Points	Value
Day Updated	0	0	1	0	0
MTD	0	0	2	0	0
YTD	0	0	3	0	0
Previous Year			4	0	0
1	673.00	2531.90	5	0	0
2	0	0	6	0	0
3	0	0	7	0	0
Total Available			8	0	0
	0	0	9	0	0
			10	0	0
Last Updated	06/04/2001 17:21:27		11	0	0
			12	0	0
Close			Help		

Contact Events History

This screen displays the events that were attended by the contact.

Event	Event Split	Date
New Member Lunch	Lunch	26/03/00

Contact Sales History

Contact sales history values is updated by one or all of the following functions

- Event Management Payments
- Membership Renewal and Sales Payments
- Sales History Update from External Sources

The Contact Query option from the contact related Pop Up Menu will display the following enquiry window.

Product Id	Line Desc	Sale Date	Sale Qty	Sale
7402_1001	Guest Ticket	04/04/01	1.00	
7402_1001	Guest Ticket	20/09/00	1.00	
7402_1002	Ladies Ticket	20/09/00	1.00	
7402_1003	Junior Ticket	20/09/00	1.00	
7402_1013	Joining Fee	20/09/00	1.00	
7402_1017	Carpark Pass	20/09/00	1.00	
ADL	CFC	20/09/00	1.00	
ADL	CCFSC	20/09/00	1.00	
ADL	CFC	01/07/99	-1.00	
ADL	CFC	01/07/99	-1.00	
ADL	CFC	01/07/99	-1.00	
ADL	CFC	01/07/99	-1.00	

There are two sections on this window, Query and Result. Enter selection criteria and click on the Find button .

Client Accounts Maintenance

This window contains the financial account details, which are usually specific to site requirements. The following is just an example to indicate the type of information that can be customised on this window.

Client Account No	Source	Client Account Name	Value	
3000008	CHESS	Locomotive Development Funds		Ahmet Aji
3000008	BRIDGE	Viva Banks	\$120,000.00	Ahmet Aji
3000008	FISH	Jessie James Fund		Erik Viking

Family No:	3000008	Family Name:	SSSSSSSS
Source:	CHESS	Adviser:	Ajara Ahmet
Accnt No:	3000008	Prepared By:	Erik Viking
\$ Received:		Completed By:	
		Date:	26/06/2000
Memb Name:	Locomotive Development Funds		
Remarks:			

New Delete Save < < > > Close Help

Company and Organisation Management

Company and Organisation Maintenance

The company tab is designed to maintain the company, site, employee and relation details.

The company records here are not directly related to the contact record unless a contact to company or company to contact relation was created.

The employees of the companies may or may not be the same contacts, which are related to the company.

Some or all of the employees can be members in your organisation. The creating of a membership for an employee and the listing of all the member employees are also maintained on this tab folder.

There are four main sections on the company tab.

- Company header details
- Company site addresses
- Company Site details display
- Employee, Relations and Members display

Last Name	First Name	No	Position
Brook	Martin		Admin
Drill	Joe		Consultant
Faults	Hillary		
Franko	Francis		Office Manager
Girth	Prude		Consultant
Golding	Merry		
Just	Justin		Admin

If the Company Module is to be maintained, the Company maintenance window can be accessed from the menu or from any position where the company record was available.

Both methods display the same data and functionality.

Command Buttons

Arrow Buttons

If there is more than one site for the company these buttons become active. Press the directional arrow to display another site.

As a new site is displayed, the employee and the relations will display the related records.

New Company

Creates a unique system number for the company and sets the cursor on the Alpha so that the new data can be entered.

New Site

A new site can be added to the company

Delete Site

Deletes the site. The main site record can not be deleted here.

Details

Allows entering more details for the company. This data is displayed on the details display section.

Reset

This is a 'Bail Out' button. If you are not happy with what you have been entering on the window, this button will reset the data back to the original state. You must respond to the confirmation dialogue box for save or reset.

Clear

Clears the entire window so that a new search can be initiated. If this button was pressed during the new record creation or editing, the "Save, Yes-No?" dialogue box will require a confirmation of the action.

Save

Press here to save the values on the screen (temporary) to the database (permanent).

Employee and Relation Radio Buttons

Toggle between these two to change display mode on the right button window.

Depending on which radio button is active, the following command button is displayed.

New Employee

Allows of entering new employees for the site of the company.

Exit

Closes the complete tab folder after the confirmation.

More Comp

Expands to Company window to display additional details such as company registration number and size of the company etc.

Show

Click on this button to display the following in succession.

- Company Details
- Company Types
- Company Profiles

Double click on the displayed list to pop up the assignment window.

How to Find an Existing Company Record?

There are three ways of finding an existing record:

- On Screen Search
- Search by Standard Search Engine
- Search by Enhanced Search Engine

On Screen Search

You can find the existing company record at four fields which labels are distinguished by a deep blue colour. You should always type in at least 2 or 3 letters of the field of the company. Click on the drop down arrow or press the <F4> key.

The pre-keyed in letters will act as an instant filter and the system will display you a drop down pick list of the company starting with the entered letters.

The more you had typed in the field before attempting the search will make the list presented so much more precise.

Highlight the required company and either click on it or press the <Tab> key. If you had used the tab key, the empty spaces on the window will be filled with the company's data. On the other hand if you had clicked on the pick list then the selected data will be displayed on the field. Now either click on any other field at the top section of the window or simply press the tab. The company's data will be displayed as a previous selection.

Search by Standard Search Engine

When the Search button was clicked the search engine window is displayed:

There are two sections on this window. You can enter any selection criteria in the top Query section. When the Find button is clicked the matching results set will be displayed in the second window. Highlight the required record and click on the OK button to return to the Membership window with the selected member record.

If a company name fully or partially was entered in the contact screen before clicking on the search button the search engine will be seeded with this value and the corresponding result set will be displayed automatically.

Search by Enhanced Search Engine

If the Company Search Engine Stays Open' entry was set to Yes in the Company section of the user options system will change the standard behaviour of the search engine to a continuous pick list.

engine to a continuous pick list.

The Search Engine window is now resizable and movable on the screen to a suitable location.

Make your query and selection as usual and click on the Find button. Double click on the selected line or click on the OK button will display the details of the selected record on the Company Entry Tab Sheet.

This allows the user to search the database and freely move up and down on the selected list.

How to Edit an Existing Company Record?

You can alter any information on the window, which is also regulated by the edit privileges, which had been granted to you. Once the editing is finished simply click on the <SAVE> button.

How to Create a New Company Record?

Before attempting to create a new company record, you must first search the database to find out if the record is already on the system. It should be always kept in mind that many other users use the database for many different purposes. The possibility of eliminating the duplicate data entry is the responsibility of all the users of the system.

The drop down tables contain various data such as suburb and phone number in order to assist you to make a judgment about the existing record.

When you are ready to create a new record click on the <NEW> button. Your cursor will be moved to the Alpha field so that you can start entering the new data.

You may skip the alpha field and get into the Name field first. As you enter the company name, the first 20 characters will automatically be printed in the alpha field. This may be overwritten to a more meaningful search field.

Data Fields

Company Id: The Company Id is usually created by the system as a sequential number. Your supervisor may set the system so that manual Id creation might be possible.

Alpha: During the new company record creation, the first 20 digits of the company name will be automatically printed in this field. You should change this into a more meaningful search code.

For example, if you are dealing with many branches of ABC Banking Corporation there will be no use of having the ABC BANKING CORP as an alpha code for all the entries. More meaningful and useful entry would be:

- ABC-BANK-CITY
- ABC-BANK-PARR
- ABC-BANK-NSYD

Name: The name of the company.

Name 2: Usually some additional information such as Trading As or Formerly, etc.

If it was a new company entry, at this point the <Save> button must be clicked on. As the new company record is being saved, a new site (the first site for the company) is also created.

Site Id: For the new first company site, the site id of '00001' is being created and this must be accepted. For the subsequent sites, the user as a unique alphanumeric identifier within the company structure will enter the site id.

Type: Use the drop down pick list to select an appropriate site type for the site record.

Name: The company name is defaulted and it may be overwritten to represent the

name of the site itself.

For example, The Company name may be ABC Banking Corporation and the site name may be ABC Banking Corporation Data Processing Centre.

Phone: The phone number of the site.

Double click on the phone number field to pop up the Auto Dial dialogue box.

Fax: The fax number of the site.

The other communication details such as E-mail etc can be entered at the Company Details pop up window.

Email: The sites email address.

Web: Companies Web Site Address.

Address: There are three lines, which are allocated to enter the street address. These lines must be used for what they have been intended for.

The suburb, postcode etc. details must be entered into the following fields.

Suburb: Enter a few letters of the Suburb and click on the drop down arrow or press on the F4 key. Once the suburb is highlighted, either click on it or press the Tab key.

The other address details such as postcode, state and country will be populated by the system.

Postcode: Enter a few digits of the Postcode and click on the drop down arrow or press on the F4 key. Once the postcode is highlighted, either click on it or press the Tab key.

The other address details such as suburb, state and country will be populated by the system.

State: Use the drop down list box to select a state

Country: The Country Id.

City: This is not a mandatory field, may be populated for information only or for the addresses that have invalid postcodes etc.

Postal Address Same: If the postal address is the same as of the visiting address then you should tell it to the system by clicking on this check box. The postal address related fields would be disabled.

If you leave this field unchecked then you must enter the values in the postal address fields.

Mail Address: There are two lines, which are allocated to enter the postal address. These lines must be used for what they have been intended for.

The suburb, postcode etc. details must be entered into the following fields.

Suburb: Enter a few letters of the Suburb and click on the drop down arrow or press on the F4 key. Once the suburb is highlighted, either click on it or press the Tab key.

The other address details such as postcode and state will be populated by the system.

Postcode: Enter a few digits of the Postcode and click on the drop down arrow or

press on the F4 key. Once the postcode is highlighted, either click on it or press the Tab key.

The other address details such as suburb and state will be populated by the system.

State: Use the drop down list box to select a state

When you finish entering all the site details click on the <Save> button.

Company Site Details

The additional details on the company site are entered in the following pop up window.

Account Executive:	Katherine Marshal	Support Executive:	Erik Viking
Account Status:	Prospect	00/00/00	Branch: Head Office
Status Rating:	Prospect Mild		
Lead Source:	Pan Pacific 1994 Leads		
Territory/Area:	Melbourne - South	Billing Address Id:	Action Marketing

Account Executive: The executive (adviser, consultant) who is assigned to the company site record (account manager).

Executive From Postcode Area

The Postcodes/Suburbs can be assigned to executives for the locations that they will be covering.

The postcode assignment can be done for the individual suburbs or assigning globally from an existing Postcode-Area matrix.

If the 'Use Executive Postcode Area' flag in the User Shared Options was set to 'Yes' then system will display the Account Executive and Support Executive Labels on command buttons.

Click on the button to display the Select Executives Window. If there is only one matching executive found data will be populated without displaying the window

Executive	Id	Phone	Mobile Phone
Viking, Erik Mr	21	02 3456 7890	0414 345 234

Account Status: Enter here the status of the company site. The information here may be changed as the status of the site changes from a lead to a client and anything in between (suspect, prospect) and after (x client) etc.

Status Rating: The company site status is further detailed by the value in this field. For example if the company status was a Prospect, you may select a Hot Prospect value in this field.

Lead Source: This field allows you to determine the origin (source) of the company site record. Yellow Pages, Seminar or a Referral are the typical Lead Source types that you may use in this field.

Territory (Area): Use the drop down list box to select an area (location) code to indicate the marketing location of this company site.

Postcode Area

If the 'Use Postcode Area' flag in the User Shared Options was set to 'Yes' then system will automatically populates the Area field from the Post Area table.

Support Executive: The executive (adviser, consultant) who is assigned to support and service the company site.

Executive From Postcode Area

If the label was displayed on a command button user may click on it to select the executive by skill or by Area-Postcode matrix.

Branch: The executive's branch.

Billing Address Id: If the billing address of this site is different, you may select it from the other site addresses of the same company.

Note: The data on this section can be different for each user as set by the supervisor.

Company Contacts (Employees)

Each company site can have many employees. These are the contacts that you wish to record in the system with details so that the business relations between your organisation and the company can be maintained on personal levels.

The contacts as employees and the contacts in the contact management are conceptually quite different. The same person can be recorded as an employee of the company as well as a contact in the contact management system.

The relations between the company and the employee are limited to just that. The relations between the contacts in the contact management to other contacts and to companies are limitless.

To create a new employee for a company site click on the Employee radio button and click on the >New Employee> command button.

To edit an existing employee double click on the employee on the list.

Data Fields

In the edit mode, simply change the required fields.

If you wish to enter a new employee record, first click on the <New> button. System will automatically assign a contact (employee) id, which is used internally by the system.

Title: The title of the contact (employee) Mr. Ms etc.

Initials: Initials of the contact (employee).

Last Name: The last name of the contact

First Name: The first name (given name) of the contact.

Salutation: The salutation is how you address your contact in the written communications after the 'Dear'.

Type: Use the drop down list box to nominate the type of the employee (contact).

DOB: Contact's Date of Birth. OPTIONS: Calendar.

Remarks: Enter here any remarks for this person.

After all the data is entered or edited press on the <Save> button to save the record.

The further details of the employee in relation to his or her employment, the communication addresses and numbers and profiles can be added by clicking on the appropriate command buttons.

The employee details must also be entered in the following fields.

Employee Status: Each company contact (employee) must have an employee status which is used same as the executive status.

The active status is 'ACT' and the Ex Employee status is 'EXE'

The Employee status has AUDIT function and the 'status date' is automatically stamped.

Normally all employees are Active. If they are no longer are part of the company or moved from one company to another their employee status become 'EXE'.

The look up lists will sort the EXE employees at the end of the list and changes the

text colour to blue.

When a company contact is moved to another company the status for the previous company is set to 'EXE' and all the other company related data is set to null.

Contact Position: Use the drop down pick list to select the position of the employee (contact) in the company. This is a generic title and usually used for the marketing purposes.

Position Description: System will default to the above value and you may edit it. For example if the Contact Position was the General Manager but the real title is the "Assistant General Manager" you may enter it here.

This field is used on the letters and labels.

Contact No: Enter here a number to indicate the level of contact between the employee and your organisation to conduct the business.

For example No 1 and 2 may indicate the most important contacts whose are regularly called or may be invited to seminars and No 5 may indicate the lesser important contacts you still wish to know their details in the company.

This field is used to select the employees for mail outs and telemarketing.

Decision Level: Enter here a number to indicate where this employee stands on the decision making process in the company.

Reports To: Enter here the name of the person (free text) whom the employee reports to.

Personal Assistant: Enter here the name of the personal assistant (free text).

Location: Enter here the physical location of the employee at the site i.e. Room No 2, or behind the counter.

Mail To: If the private address details for this employee is maintained, you should click on the appropriate radio button **Company or Private** as which address is going to be used when the letters and labels are printed for this employee.

The company address is the default.

Allowed For: Clicking on the following check boxes to indicate that the employee allows your organisation contact him or her by the same means controls some of the privacy issues.

- Telemarketing
- Phone Call
- Bulk Mail

The mail shot and the telemarketing list selections must include these criteria to respect the contact's privacy.

Command Buttons

Link Contact

Click on this button to create a contact (contact as client) from this employee record.

Move

Click on this button if employee is no longer with this company and may be moved to another company.

Private

Enter Private details for the contact.

Show.

Toggle on this button to display Contact Profiles or the Contact Types.

Double click on the list displayed will pop the related maintenance window.

Privacy

The following three fields are designed to maintain the privacy of the company contacts' private details.

Column	Function
Privacy Lifted	Checked if the private information disclosure consent is given by the contact.
Privacy Date	The date when the privacy consent status was changed
Privacy Remarks	The details of the privacy status change, source etc. This field is audited

Move an Employee to Another Company

Company Contact (Employee) Status

Each company contact (employee) must have an employee status which is used same as the executive status.

The active status is 'ACT' and the Ex Employee status is 'EXE'

The Employee status has AUDIT function and the status_date is automatically stamped.

Normally all employees are Active. If they are no longer are part of the company or moved from one company to another their employee status become 'EXE'.

The look up lists will sort the EXE employees at the end of the list and changes the text colour to blue.

When a company contact is moved to another company the status for the previous company is set to 'EXE' and all the other company related data is set to null.

Move Company Contact to another Company

When the MOVE button is pressed the status for the previous company is set to 'EXE' and all other company related data are set to null.

The existing contact-company-Employee relations are deleted.

A company search window is displayed to select a new company.

After selecting a company and site the contact and the details can be entered in the Contact New Employee Details screen.

Create Contact from an Employee

If an employee of a Company is to be recorded in the system as Contact (person as a client) the following steps are to be taken.

- Start up the Employee maintenance window from the company-employee structure.
- Ensure the private address of the employee was entered.
- Click on the <Link Contact> button.

If the 'Create Contact Company Relations' value of the User Shared Options was set to Yes contact-company-employee relations for the new employee record will be created

Company Relations Maintenance

A company can be related to another company or to a contact.

The right bottom side of the window displays all the current relations for the company.

The relations are maintained under a cross referenced environment. The Relation Cross Reference table holds the relation cross-reference information for each relation type pair.

The screenshot shows a software window titled 'Company - Hold Down Fasteners'. It contains various input fields for company and contact information, such as Co. Id, Name, Alpha, Site Id, Name, Phone, Fax, E Mail, Address, Suburb, State, Country, City, P/Code, and Mail Add. On the right side, there is a table of relations with columns 'Name' and 'Relation'. The table lists several contacts and their relation types.

Name	Relation
Action Marketing	Client
Cluney George Mr	Client
Flare Hudson	Client
Saxelby	Client

At the bottom of the window, there are buttons for 'Search...', 'New Comp', 'New Site', 'Delete Site', 'Reset', 'Clear', 'Delete', 'Save', 'Exit', and 'Help'. A tabbed interface at the bottom right shows 'Details..', 'Contact', 'Relations', and 'New Relations...'.

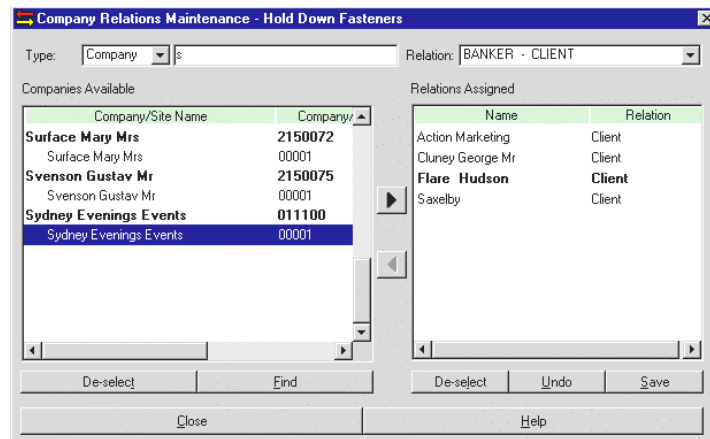
For example: If we have BANKER and CLIENT relations actually we should also be looking the CLIENT and BANKER relation types. In order to establish just BANKER and CLIENT relation we need to have the following cross references to be established.

The process is almost creating a double-sided balance book the sides being the Relation and the Related types.

<u>Relation</u>		<u>Related</u>
BANKER	X	CLIENT
CLIENT	X	BANKER

If you double click on any one of displayed relations the related details will be displayed either on the contact tab folder or on the Company Tab.

To enter a new relation or to maintain the existing one click on the <Add Relation> button.



Type: Select either a Contact or Company Type. When this window is initiated from a contact screen this value is set to a Contact.

Select the appropriate type for your session.

Relation: The contact's last name is displayed here. If you want to find out all the contacts with the same last name, press the <Find> key. Otherwise, enter a few letters of the Contact's last name or the company's name and press the <Find> key.

Contacts Available

This selection window will display the selected contacts or companies.

If the selection was contacts, here the following fields are displayed:

- Last Name
- First Name
- Full Name
- Suburb

If the selection was for the companies, here the following fields are displayed.

- Company Name
- Suburb

Select a record that is to be related to the contact.

- Relations Assigned

On the right side of the window, all the current related records to the company are displayed.

Here, basically, the Name and the relation types are listed.

How to Create a New Relation

The top right side is the place for you to select the relations' pair. The first item relates to the company and the second item relates to the related contact or the company.

Once the relation is established, click on the right arrow. At this moment, you will see that two relations records are being created at the right side, one for the relation and the other for the related.

For the same contact or company pair, the same relation cannot be created more

than once.

How to Remove an Existing Relation

Highlight the relation(s) on the right side and click on the left arrow. As the record(s) being removed their counterpart relations are also removed from the system.

Command Buttons

Reset

Clears the selections.

Undo

Undo the save or delete.

Save

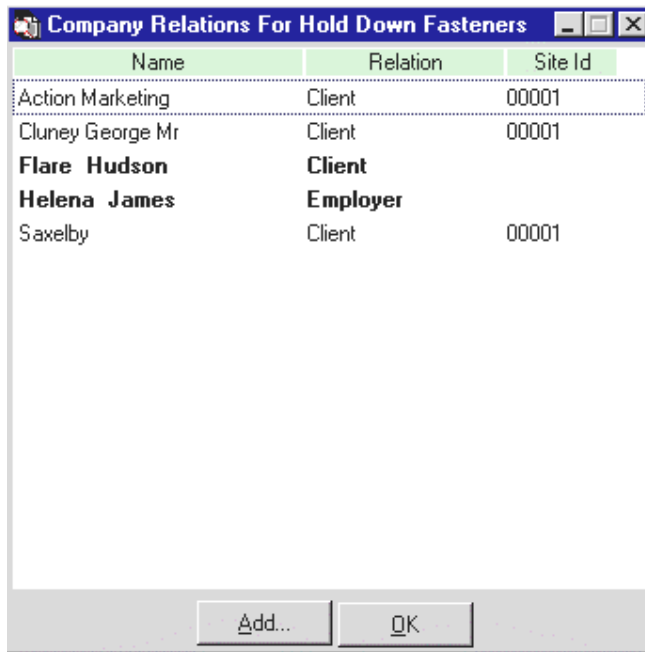
You must save the new or deleted relations before leaving this window.

Display Company Relations

This window displays all the company relations from the pop up menu.

Double click on the selected item to start the Company or Contact Module which relates to.

Click on Add button to create a new relation.

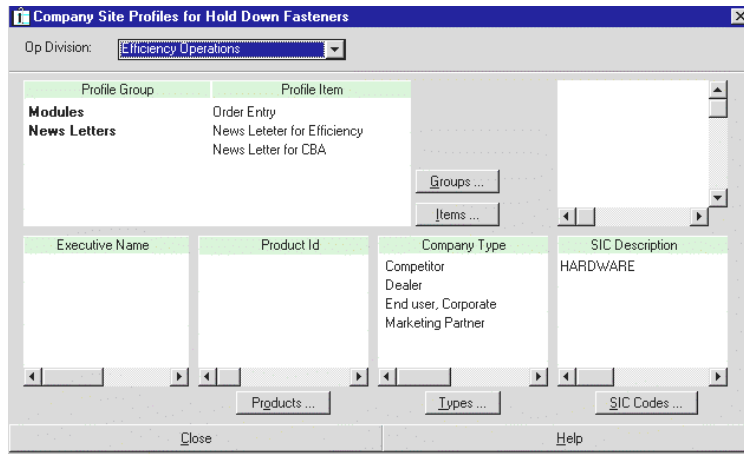


Name	Relation	Site Id
Action Marketing	Client	00001
Cluney George Mr	Client	00001
Flare Hudson	Client	
Helena James	Employer	
Saxelby	Client	00001

Company Profiles

Company Site record in relation to your organisation's operating division may require many types of attributes. The following attributes can be assigned to the company site record on the following window.

- Profile Group
- Profile Item
- Product Interests
- Company Types
- SIC Codes



Profile Group

Each company site record can be marked by any number of Profile Items within the pre defined Profile Groups.

Profile Item

If you wish to add another Profile Item to an existing profile group, highlight the profile group .

Product Interests

The products in which the company was expressed interest can be recorded against the company site for a future reference.

Company Types

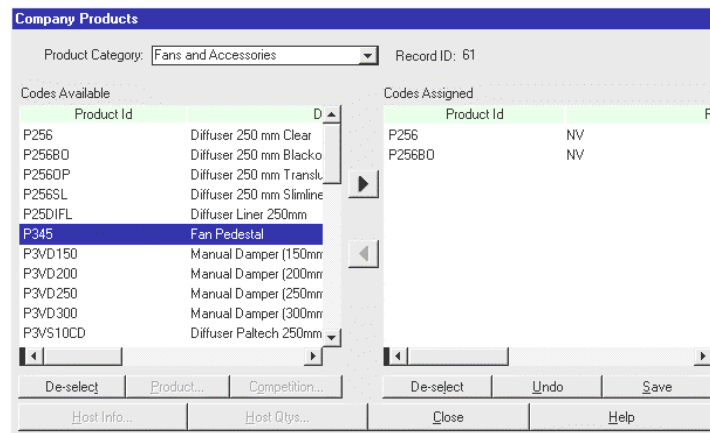
Each company site may have one or more "Type" attributes to define the relations between the site and your operating division.

SIC Codes

Each company site may have one or more "Standard Industry Code or SIC Code" attributes to define the organisations industrial activities.

Company Product Interests

Other than the products which may have been quoted or purchased by the company site, the products in which the company was expressed interest can be recorded against the company site for a future reference



First select a suitable Product Category at the Category Drop Down window. The products which belong to this category will be displayed automatically on the <Available> list.

The <Assigned> list displays the products which were already attached to this company site.

The selected Products from the <Available> list can be transferred to the <Assigned> list. The items from the <Assigned> list also can be transferred back to the <Available> list.

If any error is made, click on the <Reset> or the <Undo> buttons to undo the actions.

Other Functions

Use the following command buttons to start up the related functions.

Product

Click on this button to start up the Product Tab Folder for the details of the product which is already highlighted on the <Available> list.

Competition

Click on this button to start up the Product References window to display the information from the vendors and competitors for the product which is already highlighted on the <Available> list.

Host Info

If your system is linked to a Host System, click on this button to start up the Host Information window to display the general information from the Host Inventory System for the product which is already highlighted on the <Available> list.

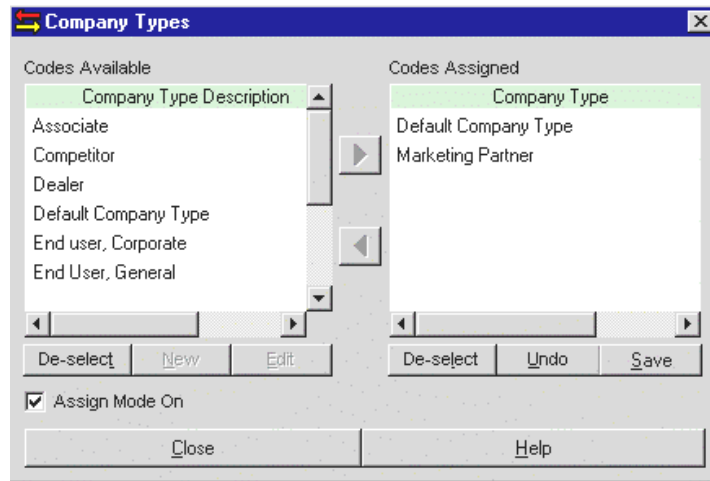
Host Qtys

If your system is linked to a Host System, click on this button to start up the Host Information window to display the Quantity information from the Host Inventory System for the product which is already highlighted on the <Available> list.

Company Types

Each company site may have one or more "Type" attributes to define the relations between the site and your operating division.

The company types will be displayed automatically on the <Available> list.



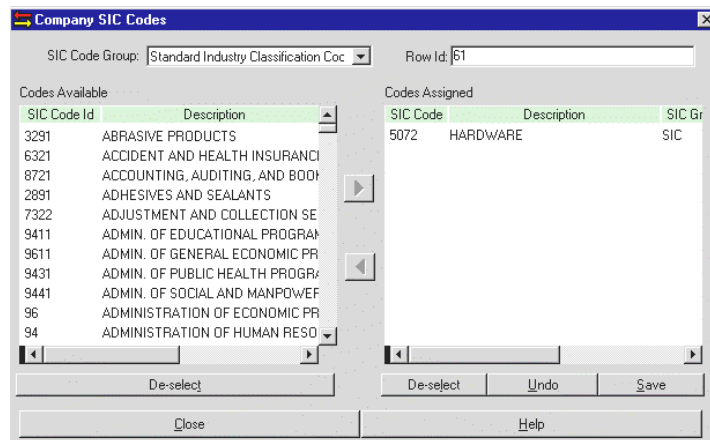
The <Assigned> list displays the types which were already attached to this company site.

The selected types from the <Available> list can be transferred to the <Assigned> list. The items from the <Assigned> list also can be transferred back to the <Available> list.

If any error is made, click on the <Reset> or the <Undo> buttons to undo the actions.

Company SIC Codes

Each company site may have one or more "Standard Industry Code or SIC Code" attributes to define the organisations industrial activities.



First select a suitable SIC Group at the SIC Group Drop Down window. The SIC Codes which belong to the selected group will be displayed automatically on the <Available> list.

The <Assigned> list displays the SIC Codes which were already attached to this company site.

The selected SIC Codes from the <Available> list can be transferred to the <Assigned> list. The items from the <Assigned> list also can be transferred back to the <Available> list.

If any error is made, click on the <Reset> or the <Undo> buttons to undo the actions.

Company Contacts Pick List

This pick list lists the contacts (employees) at the company site for your Operating Division. Depending the initiation point of the window the pick list may be presented in two slightly different formats.

Last Name	First Name	No	Direct Phone	Position
Alter	Chris	5		Financial Manager
Carson	Reginald	8		Managing Director
Dragon	George	14		Divisional Manager
Jones	Tracy	15		Operations manager
Keel	Damian	9		Sales Executive
Kins	Andrew	4		Accountant- Accts. Pay
Kissenger	Henry	1	02 3456 6789	Consultant
Loughs	Paul	13		Support Person
Orson	Frank	1		Director
Osten	Peter	12	02 9444 4455	Sales Consultant
Straight	Stuart	10	02 9444 7244	Technical Services

New Contact

Click on the <New> command button to create a new contact record for this company site.

Edit Existing Contact

Click on the <Edit> command button or double click on the highlighted line to edit the selected Company Contact record on the company site.

OK

Select (highlight) a Contact and click on this command button. The selected contact details will pass back to the initial window.

Select

Select (highlight) a Contact and click on this command button. The selected contact details will pass back to the initial window.

Company Site Activity Summary

Company activity summary values are updated when an activity was created or updated in the system.

The Company Query option from the company related Pop Up Menu will display this summary window.

Action	Description	Date	Time	Missed Calls
Last Call:	Order, Received	04/04/01	20:47:51	8 Days
Next Call:	Follow up, Phone Call	04/04/01	00:00:00	8
Last Marketing:	MM	11/11/00	16:09:55	152
Next Marketing:	Follow up, Phone Call	18/11/00	00:00:00	145
Last Support:	Call, Standard	07/01/99	15:23:07	826
Next Support:	Call Meeting	13/01/99	00:00:00	820
Event:	Last Invited	28/03/01		
Event:	Last Attended	01/01/00		

Company Events History This screen displays the events that were attended by the company members.

Event	Event Split	Date
New Member Lunch	Lunch	26/03/00

Company Site Loyalty Company loyalty values are updated by one or all of the following functions

- Event Management
- Membership Renewal and Sales
- Membership Proposer and Seconder
- Sales History Update from External Sources
- Order Entry (Company based)

The Company Query option from the contact related Pop Up Menu will display the following summary window.

Company Site Loyalty					
Period	Points	Value	Prev Month	Points	Value
Day Updated	0	0	1	0	0
MTD	0	0	2	0	0
YTD	0	0	3	0	0
Previous Year			4	0	0
1	232.00	3422.00	5	0	0
2	1111.00	2222.00	6	0	0
3	777.00	7777.00	7	0	0
Total Available			8	0	0
	10.00	100.00	9	0	0
Last Updated			10	0	0
08/04/2001 17:17:37			11	0	0
			12	0	0

This Site All Sites

Close Help

Company Plants

The Plants that were recorded against this company site are displayed on the following enquiry window.

There are two sections on this window, Query and Result. Enter selection criteria and click on the Find button.

Company Plants Enquiry					
Company Id	010066	Plant Id		Plant Type	
Comp Name	Hold Down Fastene	Serial No		Status	Active
Site Id	00001	Asset No		Warranty	
Op Division	00000	Model		Vendor	
Site Name	Plant Id	Serial No	Site Asset No	Plant Model	Warranty
Hold Down Fasteners	100001	100-1001		FAN_ROOF	New Product 1 year
Hold Down Fasteners	3000002	12345		FAN_KITCHEN	
Hold Down Fasteners	3000002	12345		FAN_KITCHEN	
Hold Down Fasteners	3000003	NP123-4567		FAN_ROOF	New Product 2 year
Hold Down Fasteners	3000004			FAN_KITCHEN	Default Warranty
Hold Down Fasteners	3000010			FAN_KITCHEN	
Hold Down Fasteners	3000303	100-1001		FAN_ROOF	New Product 1 year
Hold Down Fasteners	TEST	1234		FAN_KITCHEN	New Product 2 year

Rows: 8

Find Reset < > Close Help

Company Sales History

Company sales history values are updated by one or all of the following functions

- Event Management Payments
- Membership Renewal and Sales Payments
- Sales History Update from External Sources

The Company Query option from the company related Pop Up Menu will display the following enquiry window.

Company Sales History Enquiry

Co. Id: 010066 Product Id: Op Division: Efficiency Operal
 Co. Name: Hold Down Fasteners Prod Cat: Warehouse:
 Site Id: 00001 Line Desc: Camp Split:
 Reference: Branch: Executive:

Product Id	Line Desc	Sale Date	Sale Qty	Sale Price	Line Extension
HM74932LTR	SATIN FINISH 2 LITRE HOME BRAND	11/07/94	15.00	9.00	135.00 PA
GLASS002	SECOND GRADE GLASS	11/07/94	95.00	35.00	3325.00 SA
GLASS001	FIRST GRADE GLASS	11/07/94	100.00	50.00	5000.00 SA
DU10004LTR	GLOSS FINISH 4 LITRE DULLUX	11/07/94	12.00	17.00	204.00 PA
BR19084LTR	SATIN FINISH 4 LITRE BRISTOL	11/07/94	10.00	20.00	200.00 PA
BEADINGGLD	GOLD BEADING	11/07/94	10.00	10.00	100.00 SA
3.5DISCS	3.5 INCH DISKETTES	11/07/94	100.00	1.50	150.00 SA
ARROW	ARROW MODULES - SINGLE	09/07/94	1.00	750.00	750.00 SP
5.25DISCS	5.25 INCH DISKETTES	09/07/94	100.00	1.25	125.00 SA

Find Reset Close Help

Company Contracts

This enquiry provides information on all Contracts this company has. (Only available if the Contracts Management Module is being used).

The following screen will be presented when the user right clicks – Enquiries – Contracts of the Client and Contact Management Module

Company Contracts Enquiry

Comp Id: 010317 Site Id: 00001 Cntr Stat:
 Company: AVA Systems Pty Limited Cntr Type:
 Op Divs: 00000 Cntr ID: Cntr Cat:
 Cntr Desc: Charge:

Contract Id	Company	Site	Contract Expiry	Contract Start	A:
Contract Description	Contract Status	Contract Type			
3000011	AVA Systems Pty Limited	AVA Systems Pty Ltd	10/01/02 00:00	25/08/98 09:36	
Supply and Install	Active Contract	Support Contract			
3000013	AVA Systems Pty Limited	AVA Systems Pty Ltd	02/09/99 00:00	02/09/98 09:44	Sup
Maintenance	Closed	Support Contract			
3000014	AVA Systems Pty Limited	AVA Systems Pty Ltd	01/11/01 00:00	20/10/98 13:44	Sup
Prepaid Maintenance	Active Contract	Support Contract			

Find Reset Close Help

Company Special Prices

Company Special Prices are maintained Type and Company Levels.

Company Type Special Prices

If the major and Sub Price groups are to be attached to the Company Type(s) the following window is used.

Each record is assigned to a Campaign Split.

This window is accessed via Company Module Codes and Flags maintenance menu.

During the price access at the quotations, orders or spare parts maintenance functions If there are more than one type that meets the criteria a selection list is displayed to select the appropriate company.

Company Special Prices

In order to assign product special prices to a company one of two methods can be used.

- Assign Special Prices to a Company Type to which the company belongs to.
- Assign Special Prices to the Company itself.

The following window is used to assign the Major and Sub Price Groups to the Company record so that any special price matrix that use these major and sub price groups will apply the nominated prices from the special prices table.

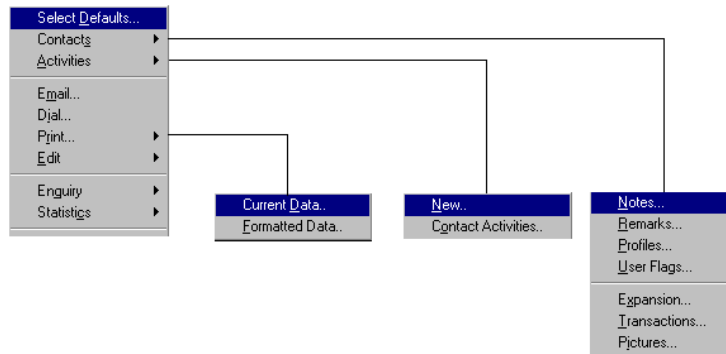
Right Click Options – Pop Up Menu

When the right mouse was clicked on the Contact or Company Module Tab on any editable field a pop up menu is displayed.

The content of the menu varies based on the tab or window, site licence and user access rights.

The following are typical.

Contact and Pop-Up Menus



Pop Up Menu Items

The most of the common functions are detailed in the Common Features manual.

Select Defaults

Information as set up in the selected default will be updated into the current member record automatically during a new member record creation as detailed under the Module Defaults topic.

Contacts Sub Menu

Attach Notes

Unlimited number of secured, date time stamped and sorted notes can be attached to each Contact Record as described under the Module Notes topic.

Edit Remarks

Remarks attached to each Contact Record can be edited, added or deleted as described under the Module Remarks topic.

Attach Profiles

Each contact and member record can have many profile items attached to it.

Maintain User Flags

Up to 5 User Flags can be added to each Contact record as generally described under the topic of the User Flags Maintenance.

Record Expansions

An unlimited quantity of data can be stored in customised screens called expansion screens as described under the Module Expansions topic.

Attach Transactions

Each contact record can have many transactions attached to it as described under the Module Transactions topic.

Attach Pictures

Each contact record can have pictures, documents, audio and video objects as described under the Pictures topic.

Activities Sub Menu

The creation of a new contact activity and maintenance of a workflow for the selected contact record as well as accessing the previous activity history are available here.

New

This option starts the Standard Activity Maintenance window to create a new activity.

Workflow

This option starts the Workflow Application Maintenance window.

Contact Activities

This option activates the Contact Activities window to display the previous contact activities.

Email

This will activate the Email facilities.

Dial

This will activate the auto dial

Print Sub Menu

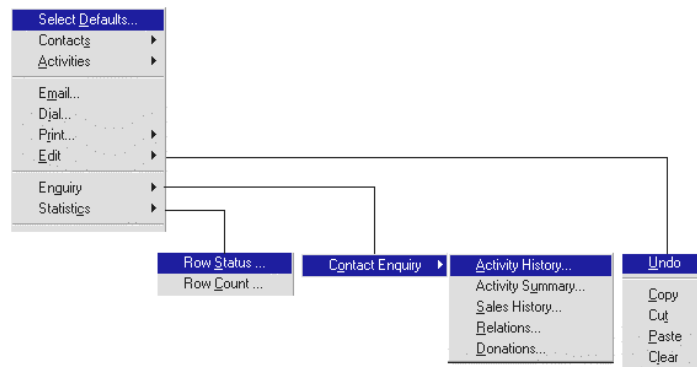
The screen print or to print a pre-designated report can be processed here.

Print Current Data

Click on this to print the active data window.

Print Formatted Data

Click on this to print a pre-determined format (which should have been set up by the supervisor) using the current contact record.



Edit Sub Menu

Selecting the appropriate option can perform the Undo, Copy, Cut, Clear and Paste functions at the field level.

Attach Yellow Sticky Notes

Yellow Sticky Notes that can be automatically displayed when finding the record can be attached to each campaign record as described under the

Yellow Sticky Notes section.

Enquiry Sub Menu

This sub menu may display various enquiry options based on the site settings. The following are the typical examples.

Contact Enquiry Sub Menu

Various contact enquiries may be accessed here.

Activity Summary

The Contact Activity Summary screen is accessed.

Sales History

The Contact Sales History Query and Result window is accessed.

Relations

The Contact Relations Selection window is accessed.

Donations

If the Call Centre Module is available the contact donations summary screen is accessed.

Loyalty

The contact loyalty points summary is displayed.

Statistics Sub Menu

The following record statistical data is displayed.

Statistics – Row Status and Row Count

Click on one of the above menu entries display the current status of the record.

Company Pop Up Menus

From the Company Tab the user may right mouse click in any grey area on any Tab to obtain a list of additional functions or enquiries available;

Select Defaults

Information as set up in the selected default will be updated into the current company record automatically during a new company record

Select Site

This option will allow you select a specific site for a company.

Record Expansions

An unlimited quantity of data can be stored in customised screens called expansion screens as described under the Module Expansions topic.

Attach Transactions

Each contact record can have many transactions attached to it as described under the Module Transactions topic.

Attach Pictures

Each contact record can have pictures, documents, audio and video objects as described under the Pictures topic

Profiles

Profiles and various attributes are attached to the company site.

Activities Sub Menu

The creation of a new company activity and maintenance of a work flow for the selected company record as well as accessing the previous activity history are available here.

New

This option starts the Standard Activity Maintenance window to create a new activity.

Workflow

This option starts the Workflow Application Maintenance window.

Company Activities

This option activates the Company Activities window to display the previous contact activities.

Edit Remarks

Remarks attached to each Company Record can be edited, added or deleted.

Attach Notes

Unlimited number of secured, date time stamped and sorted notes can be attached to each Company Record.

Attach Yellow Sticky Notes

Yellow Sticky Notes that can be automatically displayed when finding the record can be attached to each company site record.

Company Enquiry Sub Menu

This sub menu may display various enquiry options based on the site settings. The following are the typical examples.

Account Balance

Activates account balance screen for the company

Sales Summary

Activates sales summary screen for the company

Sales History

Activates sales history for the company.

Activity Summary

Activates company activity summary screen.

Plant Register

Activates the company plant registry search screen.

Relations

Activates company relation screen

Web

Activates Internet explorer screen.

Client Management Defaults

Company Defaults

The screenshot shows the 'Company Defaults' dialog box with the following fields and values:

- Default Id: 00001
- Desc: Default Company
- Op Division: Efficiency Operations
- Branch: Sydney
- Department: Default Department
- Company Type: Default Company Type
- Site Type: Default Site Types
- Area: Sydney CBD
- Account Exec: Bruce Lee
- Support Exec: Bruce Lee
- New Act. Dflt: Call Centre Default
- Fup Act. Dflt: Call Centre Default
- Account Status: Active Account
- Status Rating: Standard Account
- Credit Limit: (empty)
- Pay Terms: (empty)
- Default Discount: (empty)
- Default Currency: (empty)
- Access Group: Access to All Cust
- Lead Source: (empty)
- User Flags table:

	Company	Site	Division
1:			
2:			
3:			
4:			
5:			
- VAD Character Values table:

	1:	2:	3:	4:	5:	6:	Date	Numeric
1:							00/00/00	
2:							00/00/00	
3:								

Data Fields

Default Id: The company default template id.

Description: The description of the company default.

Op Division: The operating division identification code.

Branch: The branch identification code.

Department: The department identification code.

Company Type: The company type identification code.

Site Type: The site type id.

Area: The area (location) identification code.

Account Exec: The account executive id.

Support Exec: The identification code of the support exec.

New Act Default: New Activity Default.

Follow Up Act. Default: Follow up Activity Default.

Account Status: The account status id for this record.

Status Rating: The account status rating for the record.

Credit Limit: The amount of the credit limit.

Pay Terms: The payment terms.

Default Discount: The default discount rate used for the quotations order entry and support charges.

Default Currency: The default currency code used for the quotations and order entry.

Access Group: The default access group.

Lead Source: The default lead source.

VAD Character Values 1-6: A VAD Char field reserved for a site-specific use.

Date: A VAD date field reserved form a site-specific use.

Numeric: A VAD numeric field reserved for a site-specific use.

User Flags

Company 1-5: A user defined flag selected from the profiles table.

Site 1-5: The site user flag.

Division 1-5: A user defined flag selected from profiles table.

Contact Default

The contact defaults are maintained on the following window.

The screenshot shows the 'Contact Defaults' window with the following fields and values:

- Default Id: 1
- Description: Default Contacts
- Contact Type: Default Contact Type
- Op Division: Efficiency Operations
- Branch: Sydney
- Department: Default Department
- Accnt Exec: Richie Beno
- Supp Exec: Brett Lee
- Accnt Status: Active Account
- Stat Rating: Standard Account
- Area: Default Location
- Access Group: Access to All Contacts
- New Act Default: Order Default
- FLUp Act Default: Call Centre Default
- Payment Terms: (empty)
- Default Discourt: (empty)
- Credit Limit: (empty)
- Best Time: Afternoon
- Currency: US Dollar
- User Flags:

	Contact	Employee	Contacts
1:			
2:			
3:			
4:			
5:			
- VAD String Date Numeric table:

VAD	String	Date	Numeric
1:			00/00/00
2:			00/00/00
3:			
4:			
5:			
6:			

Buttons at the bottom: New, Clear, Delete, Save, Copy, Print, Close, Help.

Data Fields

Default Id: The contact default template id.

Description: The description of the contact default.

Contact Type: The contact type identification code.

Op Division: The operating division identification code.

Branch: The branch identification code.

Department: The department identification code.

Account Exec: Account Executive.

Support Exec: Support Executive.

Account Status: Account Status.

Stat Rating: Account Status Rating.

Area: The area of the contact.

Access Group: The access group identification code.

New Activity Default: New Activity Default.

Follow Up Activity Default: Follow Up Activity Default.

Payment Terms: Default Payment Terms.

Default Discount: Default discount rate used during quotations and orders.

Credit Limit: Credit Limit.

Best Time: Best Contact Time.

Currency: Default Currency.

VAD 1-6: A VAD char field reserved for a site-specific use. **Date:** A VAD date field reserved for a site-specific use.

Numeric: A VAD numeric field reserved for a site-specific use.

User Flags

Contact 1-5: A user defined flag selected from the profiles table.

Employee 1-5: A user defined flag selected from the profiles table.

Contacts 1-5: A user defined flag selected from the profiles table.

Client Management Reports

Refer to the Common Modules Manual - Utilities section for details regarding reports.

List of Reports

The following is a list of Standard Reports available from the Client Management Module

Contact List

- By Profiles
- By Relations
- By DOB
- By Status
- By Postcode
- By Name

Activities

- Executive Missed Calls
- Executive Future Activities (Next Call)
- Executive Activities (Calls Made)
- Company Activities (Calls Made)
- Contact Activities

Company List

- By Leads
- By Account Status
- By Profiles
- By Type
- By Executive
- By Name
- By Id