



FACTS 7.5.0 Training

Relationship Management



Pivotal Systems, LLC







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INTRODUCTION

With Relationship Management you can manage all of your key business relationships including customers, vendors, prospects and others. Being fully integrated with the FACTS application, RM provides complete access to all information relating to your contact. Through any of the work flow models you can get a 360 degree view of your contacts, customers and vendors.

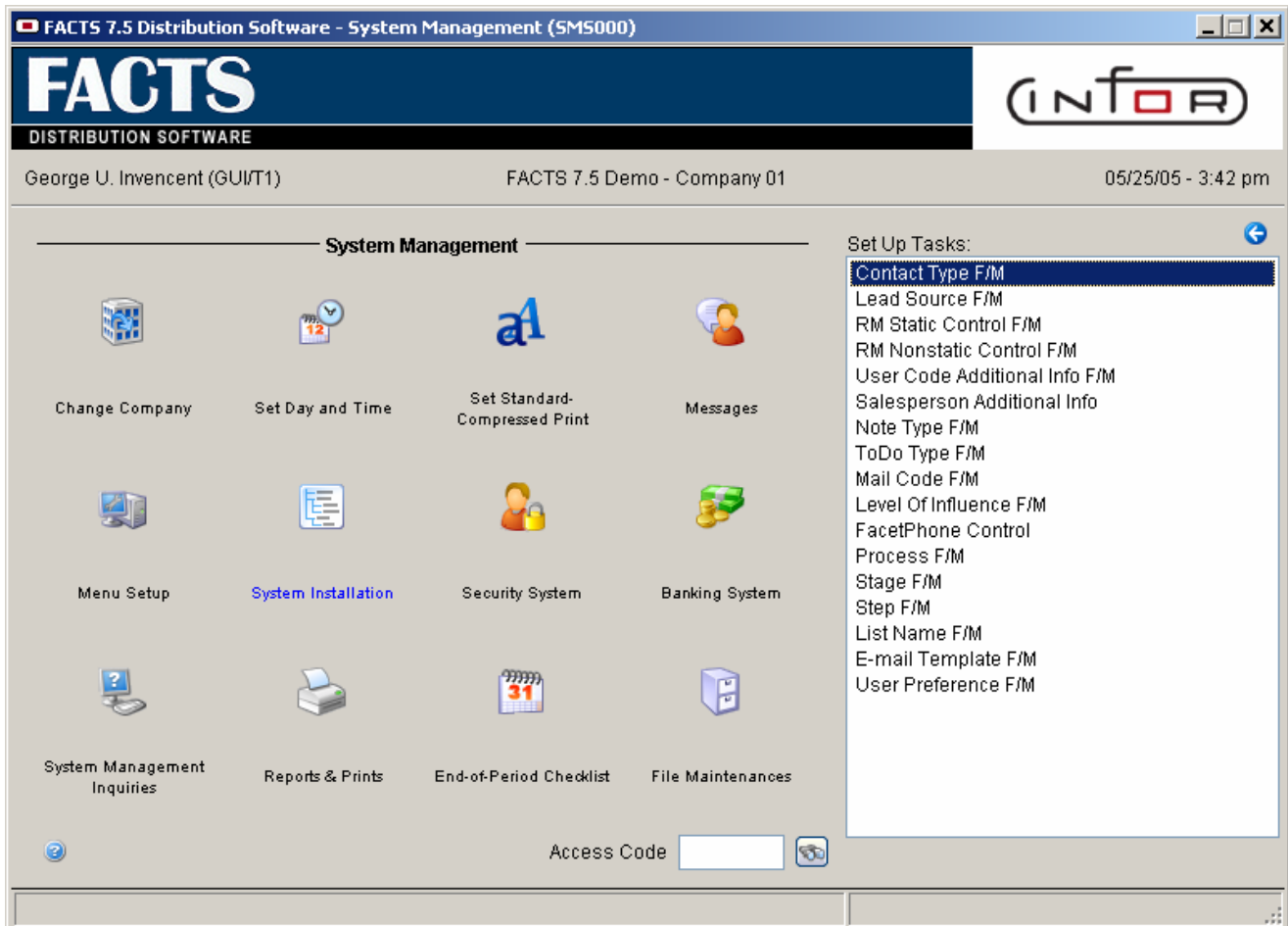
Multiple work flow models

- **Targeted lists** – Use powerful filtering capability to generate detailed lists of contacts meeting your specific criteria
- **Calendar/Task** – Work from scheduled activities that are date and time oriented
- **Filtered Queries** – Drill down from any of the queries to the source transactions
- **Customer/Vendor** – Use standard FACTS inquiries to show all associated contacts for the customer/vendor and launch the Contact Display
- **Ad-hoc** – Work with a contact directly from the file maintenance program



SYSTEM SETUP

Proper system setup is an essential component of a successful implementation of the Relationship Management module. The system setup menu is available from the System Management menu.



Make sure that you complete the following sections for every FACTS user who will use RM:

- User code Additional Info F/M
- Salesperson Additional Info
- User Preference F/M

All of the setup functions will be discussed in their respective sections.



File Maintenances

CONTACT FILE MAINTENANCE

The Contact File Maintenance screen includes the following basic areas:

Header – Displays basic contact information

Hyperlinks – Displays hyperlinks for quick access directly to RM and FACTS programs without leaving Contact File Maintenance

Copy – Allows copy of an existing contact to a new contact

Tabs – Primary Detail, Secondary Detail, Customer Information and Vendor Information

Contact 10003 Mr Ron Simonsen 507-451-4054

Help

Contact **Mr Ron Simonsen**

[Notes](#)
[To Do](#)
[Quote Entry](#)
[SO Entry](#)
[PO Entry](#)
[Returns Entry](#)
[SO Customer Inq](#)
[PO Vendor Inq](#)
[Returns Inquiry](#)
[Item Inquiry](#)
[AR Inquiry](#)
[AP Inquiry](#)
[Add Customer](#)
[Add Vendor](#)
[Commissions](#)
[Suggested PO](#)

Name: Deluxe Equipment Warehouse
3320 Jonesboro Blvd.
770-418-2000
Douglasville, GA 30301
Assoc: C101 Deluxe Equipment Warehouse

Phone: 507-451-4054
Fax:
Mobile:

ron@deluxe.com
[Letter](#) [Quick Fax](#) [Label](#)

Primary Detail Secondary Detail Customer Vendor User Defined

Title:
First:
Last:
Full name:
Job Title:
Alpha:

Created: **Changed:**

Contact Codes

Process: **Credit & Collec**
Stage: **Customer is Past Du**
Step: **Watch for payment**

Type: **Customer**
Lead Source: **Not applicable**
Time Zone:

Slsp/Terr

<input type="text" value="30"/>	<input type="button" value="Refresh"/>	Sally Furness
<input type="text" value="10"/>	<input type="button" value="Refresh"/>	Ronald Patton
<input type="text"/>	<input type="button" value="Refresh"/>	
<input type="text"/>	<input type="button" value="Refresh"/>	

Mail Codes

<input type="text" value="CRE"/>	<input type="button" value="Refresh"/>	Credit and Colle
<input type="text"/>	<input type="button" value="Refresh"/>	
<input type="text"/>	<input type="button" value="Refresh"/>	
<input type="text"/>	<input type="button" value="Refresh"/>	

Enter title of contact (Mr./Mrs.)

Header Information

The header information displays the following:

- Contact Name & Address
- Customer or Vendor Association
- Work Phone, Fax Number and Mobile Phone Number
- Email (if defined), letter, quick fax, and label hyperlinks (to be covered later)
- Auto dial feature (to be covered later)

The contacts address and phone number displays are automatically sized based on the information being displayed, scroll bars are also available if more information is available but cannot be displayed.

Primary Detail

The Primary Detail contains the following:

Title

Mr., Mrs., Ms., Dr., etc.


First Name

Enter the contact's first name.

Last Name

Enter the contact's last name.

Full Name

This field is parameterized by company and optionally by user to determine the format for the full name. The  icon to the right of the field will recalculate based on the current parameter setting if you have made changes to any of the appropriate name fields. The choices are as follows:


- First Name
- First, Last
- Title, Last
- Title, First, Last

Job Title

Enter the job title for the contact.

Alpha

This field is parameterized by company. This allows you to create some consistency in how you use this field.

The  icon to the right will automatically update if any of the appropriate fields are changed. The choices are as follows:

- Company Name
- Company (5), Last
- Company (5), First
- Last Name
- Last Name (5), First
- Last (5), Company
- None

Process/Stage/Step

RM has a fully functional Process Flow System. You can filter and sort on this feature. It can be utilized to track progress through any process such as New Sales Cycle, Telemarketing, Credit and Collections, New

Product Implementation and more. This will be covered in more detail during Contact Display. Use the Process Flow Tree view button to display all of the stages and steps within the entire process. This subject is to be covered separately. See Process/Stage/Step F/M.

Type

A file maintained field to allow you to categorize your contacts, i.e., Customer, Vendor, Prospect, or Personal. You set up and determine which types you would like for your system. A search is available to review and select existing types set up. See Contact Type F/M.

Lead Source

A file maintained field to allow you to track and filter on the source of a various lead. You set up and determine which lead sources you would like for your system. A search is available to review and select existing codes set up. See Lead Source F/M.

Time Zone

This is a reference field to track the time zone for the contact.

Personal Notes

This is a free-form text field to enter any personal or relevant notes about the contact.

Sales/User Codes

RM can be set up to either use the Salesperson Code or the FACTS User Code based on the User Preferences file. This facilitates using RM for functions other than sales. If the User Preferences is set to use the salesperson code, up to four Salesperson codes can be defined.

Mail Codes

A file maintained field to allow you to group contacts for filtering, broadcast faxing or email purposes. You set up the codes you would like, for example, newsletter, catalog, Christmas card and more. You can assign an individual contact up to 5 different mail codes. See Mail Code F/M.

Created/Changed

The system keeps track of the date a contact record is created and the date it is changed. This can be used for filtering purposes.

Secondary Detail

The Secondary Detail shows the Contact's address and other information plus an association field to the Customer or Vendor files. If this is a Prospect or Personal Contact, neither the Customer or Vendor associations will be used. The example below shows a Customer association.

Contact 10003 Mr Ron Simonsen 507-451-4054

Help

Contact: 10003 Mr Ron Simonsen

Name: Deluxe Equipment Warehouse
3320 Jonesboro Blvd.
770-418-2000
Douglasville, GA 30301

Phone: 507-451-4054
Fax:
Mobile:

Assoc: C101 Deluxe Equipment Warehouse

[Notes](#)
[To Do](#)
[Quote Entry](#)
[SO Entry](#)
[PO Entry](#)
[Returns Entry](#)
[SO Customer Ing](#)
[PO Vendor Ing](#)
[Returns Inquiry](#)
[Item Inquiry](#)
[AR Inquiry](#)
[AP Inquiry](#)
[Add Customer](#)
[Add Vendor](#)
[Commissions](#)
[Suggested PO](#)
Copy

[ron@deluxe.com](#)
[Letter](#) [Quick Fax](#) [Label](#)

Primary Detail Secondary Detail Customer Vendor User Defined

Customer Associations
Customer: C101 **Deluxe Equipment**
Ship To: S100

Vendor Associations
Vendor:
Ship From:

[Manage Associations](#)

Company: Deluxe Equipment Warehouse
Alpha: DELUXE EQU
Address 1: 3320 Jonesboro Blvd.
Work Phone: 507-451-4054
Address 2: 770-418-2000
Fax:
Address 3:
Mobile:
City: Douglasville State: GA Zip: 30301
Address 4: Douglasville, GA 30301
Country: USA

Addresses
Email: ron@deluxe.com
Alternate Email:
Web Address:

User Defined
of Emp: 53
SIC Code: 5066

Enter customer number, F2-Search

Customer/Vendor Associations

When creating a new or maintaining contact, if you select a customer or vendor association, the system will prompt you to automatically import the address information from the appropriate file. If you select a new customer or vendor the following message will appear:

File Maintenance

New customer number.
Import address information?

Yes No

Ship To/Ship From

A specific Ship-To or Ship From code can be assigned to a contact that is associated with a customer or vendor. The address will not default from that file.

If the contact is not associated with a vendor or customer or you choose not to import the address, you will be prompted for the following:

Company

Enter the company name.


Address 1, 2, 3

You have three full address lines for street address or PO box information.

City, State, Zip

Enter the City, State and Zip Code for the prospect.

Address 4

This field will pre-fill based on the City, State and Zip entered above. The  icon to the right will re-set the field if any changes have been made to City, State and Zip.

Country


Enter the country if desired for the contact

Alpha

This is the alpha sort field for the contact record. It is the same field as on the Primary Detail screen. This field is forced to upper case for consistency.

Work Phone, Fax, Mobile

Enter any phone numbers required. All phone numbers are validated and require a 10-digit entry. The number is stripped of all non-numeric data and formatted as 800-555-1212. If more than 10 numbers are entered, the additional numbers will be treated as extension numbers. For example, if you enter 80055512121234, the number will be formatted as 800-555-1212x1234. The only exception is for international numbers starting with "01". International numbers are not formatted. The length of the phone number fields is 22.

The Auto Dial button  is used with the FacetPhone® integration and will allow FacetPhone® to automatically dial the number selected. The FacetPhone® integration and auto dial will be discussed later.

Email, Alternate Email, Web Address

Enter up to two email addresses and a web address for the contact. When a field is populated, the label for the field is changed to a hyperlink. Click on the field label to launch the email system to send an email to that address. The first email address is displayed as a hyperlink in the header. If a web address is loaded, and you click on the web address file label, a web browser will be launched pointing to the specified site. The email fields are verified to ensure data is entered correctly. The email address must be in the following format: name@domain.xxx.

Filterable User-Defined Fields

Two user-defined fields can be defined in the RM Static control F/M. These fields can be used to track any information you would like on a contact and then can be used for filters.

Customer Information

Customer information is a copy of limited fields from the customer record in FACTS. This information can be edited, if you have the security clearance, and used to update the FACTS customer master file record via the Update button.

Contact 10003 Mr Ron Simonsen 507-451-4054

Help

Contact: 10003 **Mr Ron Simonsen**

Name: Deluxe Equipment Warehouse
3320 Jonesboro Blvd.
770-418-2000
Douglasville, GA 30301

Phone: 507-451-4054
Fax:
Mobile:

Assoc: C101 Deluxe Equipment Warehouse

ron@deluxe.com

Primary Detail Secondary Detail **Customer** Vendor User Defined Letter Quick Fax Label

Company: Deluxe Equipment Warehouse
Address 1: 3320 Jonesboro Blvd.
Address 2: 770-418-2000
City: Douglasville State: GA Zip: 30301
Address 3: Douglasville, GA 30301
Phone # 1: 404-331-0988
Fax #:
Alpha: DELUXE EQU
Message: CHECK "SHIP TO" ADDR
Ship Via: UPS
Slsp/Terr: 30 **Sally Furness**
Branch: 01 **Atlanta Branch**
Class: WSL **Wholesale Customer**

[Notes](#)
[To Do](#)
[Quote Entry](#)
[SO Entry](#)
[PO Entry](#)
[Returns Entry](#)
[SO Customer Ing](#)
[PO Vendor Ing](#)
[Returns Inquiry](#)
[Item Inquiry](#)
[AR Inquiry](#)
[AP Inquiry](#)
[Add Customer](#)
[Add Vendor](#)
[Commissions](#)
[Suggested PO](#)

Update

Enter customer address line #1

Vendor Information

Vendor information is a copy of the limited fields from vendor record in FACTS. This information can be edited, if you have the security clearance, and used to update the FACTS vendor master file record via the Update button.

Contact 10004 Ms. Renee Howard 320-864-5561

Help

Contact: 10004 Ms. Renee Howard

Name: Atlanta Crane & Hoists
147 S. Dekalb Drive
Doraville, GA 30341

Phone: 320-864-5561
Fax:
Mobile:

Assoc: V113 Atlanta Crane & Hoists

[Notes](#)
[To Do](#)

[Quote Entry](#)
[SO Entry](#)
[PO Entry](#)
[Returns Entry](#)
[SO Customer Ing](#)
[PO Vendor Ing](#)
[Returns Inquiry](#)
[Item Inquiry](#)
[AR Inquiry](#)
[AP Inquiry](#)
[Add Customer](#)
[Add Vendor](#)
[Commissions](#)
[Suggested PO](#)

rhoward@atlantacrane.com
[Letter](#) [Quick Fax](#) [Label](#)

Primary Detail Secondary Detail Customer **Vendor** User Defined

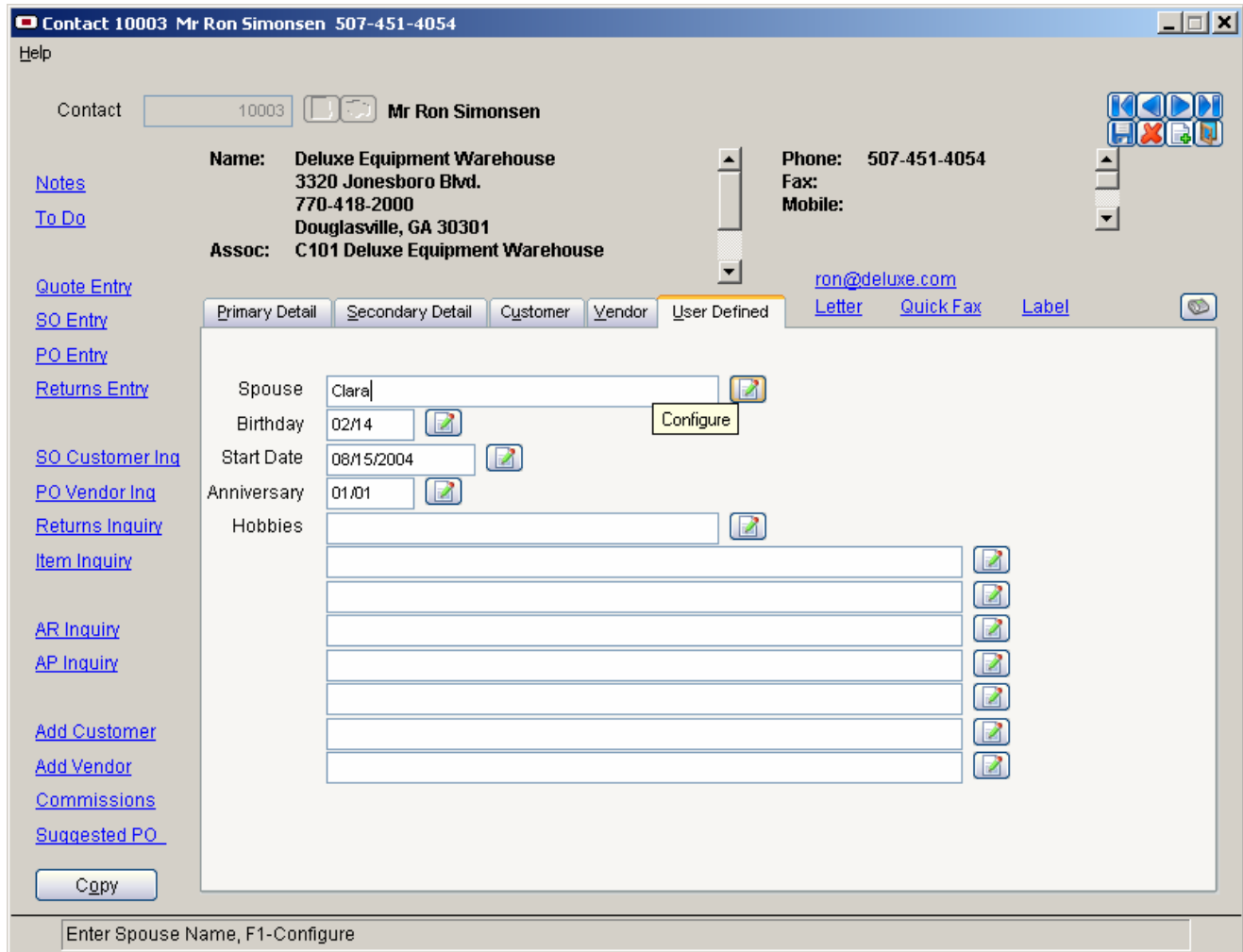
Company: Atlanta Crane & Hoists
Address 1: 147 S. Dekalb Drive
Address 2:
City: Doraville State: GA Zip: 30341
Address 3: Doraville, GA 30341
Phone # 1: 404-949-2100
Fax #:
Alpha: ATLANTA CR
Message: 2 WEEK LEAD TIME
Class: INV **Inventory Suppliers**

Update

Enter vendor address line #1

User Defined Fields

12 new user defined fields have been added to the contact file. The 2 existing user defined fields have not been changed.



Hyperlinks

Hyperlinks provide quick access to a number of tools and FACTS programs. While you could do all of your work from the Contact File Maintenance, we advise that you use one of the other workflow models. It is still a file maintenance program and will produce record locking conflicts for other users.

Email – Clicking on the email address will bring up the email screen with the contacts email address in the TO field. If the user has a default email template set up in the User Preference F/M, the subject and body will automatically fill with run time replacements applied.

Letter, Quick Fax and Label – Clicking on the any of these hyperlinks will display the default template assigned to the user in User Preference F/M. The user then has the option to print or fax the document by clicking the Print button. By clicking the Template button the user can select a different template. To copy the text to the clipboard, click the 'Clip Board' button and paste it into another application such as Microsoft Word. Text from other applications can also be pasted into your letter. Creating templates is discussed separately.

Notes – The Notes Hyperlink will access the Notes program. The Notes program is covered separately.

To Do – The To Do Hyperlink will access the To Do program. The To Do program is covered separately.

Quote Entry, Order Entry, PO Entry and Returns Entry

These hyperlinks take you right into the FACTS document Entry screen with the Customer or Vendor information already loaded. To exit without any entry, you can F4 or click Back Up to get to a screen where you can F3, or click End.

You may enter the following for customer contacts:

- Quotes
- Sales Orders
- Customer Returns

You may enter the following for vendor contacts:

- PO Entry

You may enter the following for any contact:

- Quotes

SO Customer Inquiry, PO Vendor Inquiry, Returns Inquiry, Item Inquiry

These hyperlinks take you right into the correct FACTS Inquiry screen with the customer or vendor number already pre-filled. To return to Contact Management, click the Exit button on the bottom of the Inquiry Screen.

AR Inquiry

This hyperlink takes you right into the FACTS AR Customer Inquiry with the customer information already pre-filled. To return, you can F4 or click Exit. If your contact is not a customer, you will get a message that they are not customers.

AP Inquiry

This hyperlink takes you right into the FACTS Vendor Inquiry with the Vendor information already pre-filled. To return, you can F4 or click Exit. If your contact is not a vendor, you will get a message that they are not a vendor.

Add Customer, Add Vendor


These hyperlinks will take you into the AR customer F/M or AP Vendor F/M. This will allow you to create a new customer or vendor in to FACTS, if you have the security clearance, which can then be associated with a contact.

Commissions


This hyperlink allows you to access the commission inquiry for the salesperson/territory that is logged onto the system. See commissions from the Go To menu for more detail,

Create New Contact

Manually Create Contact

You may either manually enter a contact code (10-Character Alpha-Numeric), or use the next  icon to automatically assign the next available contact number. The system will then take you through all of the fields in the contact file maintenance to create a new record.

Copy Contact

This button will create a new contact using the information from an existing contact. Go to the contact you want to use as the basis for the new contact and click the Copy button. Enter a new ID or click the  icon and click Continue. The new record will be identical to the previous record except it will say NEXT in the Contact ID. Make the necessary changes to the fields that should be different and save the new contact record.



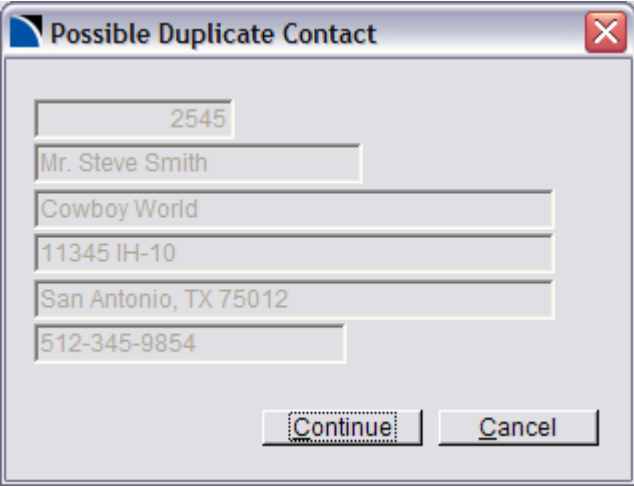
The dialog box titled "Create New Contact" has a blue header bar with a close button (X) on the right. The main area is light gray. It contains two rows of input fields. The first row is labeled "From" and contains a text box with the value "10003" and a label "Mr Ron Simonsen". The second row is labeled "To" and contains an empty text box and a copy icon (a document with a green plus sign). At the bottom right, there are two buttons: "Continue" and "Cancel".

The following fields are cleared in the new contact:

- Date created & changed
- All name and title information
- Mobile phone
- All email addresses

Duplicate Contact Check

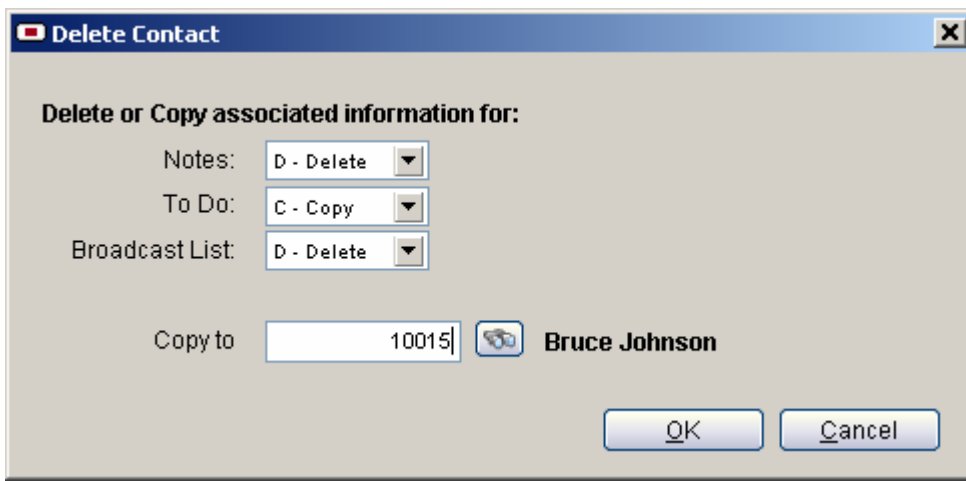
The Relationship Management software does have duplicate checking built in. If you try to add a contact that is already set up in the database you will receive a message asking if you want to continue and add this contact. You can click Continue to continue past this message and save the contact, or click cancel to go back to the information to change any fields. The system will check the following fields: Contact first and last name in relation to a customer or vendor association. The message box will display the existing contact number and customer/vendor association information.



The dialog box titled "Possible Duplicate Contact" has a blue header bar with a close button (X) on the right. The main area is light gray. It contains several text boxes with the following text: "2545", "Mr. Steve Smith", "Cowboy World", "11345 IH-10", "San Antonio, TX 75012", and "512-345-9854". At the bottom, there are two buttons: "Continue" and "Cancel".

Delete a Contact

In the contact file maintenance, select the delete icon. If there is history for the contact the following screen will appear.




Delete Contact

Delete or Copy associated information for:

Notes: D - Delete ▼

To Do: C - Copy ▼




Broadcast List: D - Delete ▼

Copy to: 10015  **Bruce Johnson**

OK Cancel

You can choose to copy notes, to-dos, broadcast list records to another contact or simply delete them.

Contact Association Manager

- After a change has been made to one of the address or association fields in the contact F/M, all associated contacts are displayed allowing changes to easily be transferred to the all contacts
- Changes note associations so that 'all notes' are available for customers, vendors and prospects
- Changes common data including company name, addresses & associations
- 3 levels of change are available:
 - Match all associated contact information to the contact that was changed
 - Toggle a single contact to match/restore all fields
 - Edit individual contact fields
- Start over button allows you to reset all contacts to their original values
- When changing or viewing individual contacts, fields that are the same are locked and dimmed. Fields that are different are open for easy visibility.
- The  button locks or unlocks individual fields allowing you to make changes to any field.
- The  button sets the field to the same value as the changed contact
- The  button restores the field to it's original value

01-FACTS 7.5 Demo, Contacts associated with: 10003 Mr Ron Simonsen (RME310)

Options Export Help

Changed Contact: 10003 Mr Ron Simonsen **Changing: 10015 Bruce Johnson**

Comparing To

Company Deluxe Equipment Warehouse

Address 1 3320 Jonesboro Blvd.

Address 2 770-418-2000

Address 3

City Douglasville

State GA Zip 30301




Address 4 Douglasville, GA 30301




Country USA Alpha DELUXE EQU




Customer C101 Deluxe Equipment Warehouse




Ship To S100







Change For Highlighted Contact




Deluxe Equipment Warehouse   







3320 Jonesboro Blvd.   




770-418-2000   




Douglasville   

GA    30301   

Douglasville, GA 30301   

USA    DELUXE EQU   

C101    Deluxe Equipment Warehouse

Change Notes

Match	Contact	Name	Phone	Time Zone	SlsP	Process	Stage	Step
Match None	2540	Mr. Steve Johnston	218-463-1781	Atlantic	30	ON-GOING		
Match None	10015	Bruce Johnson	218-463-1781	Atlantic	30	ON-GOING		

Toggle Match All Start Over Done

Enter company name, F1-Lock/Unlock, F2-Same as compare to, F3-Restore original value

The Association Manager is also available as a hyperlink from the Secondary Detail tab of the Contact F/M.

Contact 10003 Mr Ron Simonsen 507-451-4054

Help

Contact **Mr Ron Simonsen**

[Notes](#) **Name: Deluxe Equipment Warehouse** **Phone: 507-451-4054**
[To Do](#) **3320 Jonesboro Blvd.** **Fax:**
770-418-2000 **Mobile:**
Assoc: C101 Deluxe Equipment Warehouse **ron@deluxe.com**

[Quote Entry](#) [Letter](#) [Quick Fax](#) [Label](#)
[SO Entry](#) [Primary Detail](#) [Secondary Detail](#) [Customer](#) [Vendor](#) [User Defined](#)
[PO Entry](#) [Returns Entry](#) [SO Customer Ing](#) [PO Vendor Ing](#) [Returns Inquiry](#) [Item Inquiry](#) [AR Inquiry](#) [AP Inquiry](#) [Add Customer](#) [Add Vendor](#) [Commissions](#) [Suggested PO](#)

Customer Associations
Customer **Deluxe Equipment**
Ship To

Vendor Associations
Vendor
Ship From

[Manage Associations](#)

Company **Alpha**
Address 1 **Work Phone**
Address 2 **Fax**
Address 3 **Mobile**
City **State** **Zip**
Address 4
Country

Addresses
Email
Alternate Email
Web Address

User Defined
of Emp
SIC Code

Contact Search

A Contact Search can be executed. The following sort orders are available in the primary search:

- Customer Number
- Salesperson
- Phone Number
- Alpha
- Email Address

The alternate search is available in the following orders:

- Vendor
- User Defined 1
- User Defined 2
- Process
- First Name

The Contact Search has the same functionality as the other searches within FACTS, keyword filters and search preferences are available.

The screenshot shows the 'Contact Search' dialog box with the following components:

- Buttons: Options, Export, Print
- Search Criteria: Customer (selected), Salesperson, Phone Number, Alpha, Email Address
- Starts with: []
- Go To: []
- Filters: Keywords [] And [] Go []
- Table of Results:

Customer	Company	Alpha	Contact
C100	Southeastern Industrial Supply	SOUTHEASTE	1000
C101	Deluxe Equipment Warehouse	DELUXE EQU	254
C101	Deluxe Equipment Warehouse	DELUXE EQU	1000
C101	Deluxe Equipment Warehouse	DELUXE EQU	1001
C102	Roark Architectural, Inc.	ROARK ARCH	253
C103	Taggart Transcontinental	TAGGART TR	254
C103	Taggart Transcontinental	TAGGART TR	254
C104	Barnes Machinery & Equipment	BARNES MAC	254
C105	Dallas Furniture Mart	DALLAS FUR	1001
C107	Central Georgia Materials Co.	CENTRAL GE	254
C109	Southside Plumbing	SOUTHSIDE	1085



Buttons: Alt Search, OK, Cancel

Footer: Enter characters customer must start with, F2-Search


Contact Search [Minimize] [Maximize] [Close]

Options Export Print

Vendor User Defined 1 User Defined 2 Process First Name

Starts with  Go To 

Filters

Keywords **And** **Go** 

Vendor #	Company	Alpha	Contact
V100	General Industrial MFG	GENERAL IN	1002
V100	General Industrial MFG	GENERAL IN	1088
V101	Industrial Supply Distributors	INDUSTRIAL	1001
V101	Industrial Supply Distributors	INDUSTRIAL	1002
V101	Industrial Supply Distributors	INDUSTRIAL	1053
V102	S.E. Industrial Prod. & Equip.	S.E. INDUS	1077
V104	Rearden Metals, Inc.	REARDEN ME	255
V105	Warehouse Equipment Unlimited	WAREHOUSE	255
V110	Georgia Shipping Equip. Co.	GEORGIA SH	1001
V113	Atlanta Crane & Hoists	ATLANTA CR	1000
V114	Linda's Flower Shop	LINDA'S FL	1025

OK Cancel

Enter characters vendor must start with, F2-Search

Contact File Management Exercises

1. Add a new Contact with the following:
 - Select any Type
 - Select two Mail Codes
 - Enter a Primary and Secondary Salesperson
 - Select the Eastern Time Zone
2. Link that Contact to a Customer.
3. Change the contact name and see that it re-sets the full name.
4. Add another new Contact with the following:
 - A valid Type
 - One Mail Code
 - One Salesperson
5. Link that Contact to a Vendor.
6. Add another new Contact not associated with a vendor or customer with the following:
 - Add Mail Code
 - A Type
 - A Lead Source
7. Add a personal note for the spouse's name.
8. Enter address information on Secondary Detail tab.
9. Go back to the first Contact you entered:
 - Copy that Contact to create another Contact working at the same company
 - Change the Mail Codes and add the first step and stage in the collection process
 - Add an email address
10. Find Ron Martens from Cowboy World through the search.
11. Change the address on Ron Martens
12. Change all the address records for all contacts for Cowboy World



SUPPORTING FILE MAINTENANCES

User Preferences File Maintenance

01-FACTS 7.5 Demo, User Preferences (RMF935)

Help

FACTS User Code GUI George U. Invencent

Main

Preferences

Full Name Format: **TN - Title, First, Last** Skip Automatic Notes:

User Code Type: **S - Salesperson Code** Auto Start Reminders:

Skip Initial Load: To Do Delete/Complete Notify:

Defaults

Time Zone: **03 - Central** Default ToDo Scope: **P - Past Due**

Process: **NEW SALE** **New Sale to Customer**

Note Type: **FLU** **Follow up**

To Do Type: **CB** **Call Back**

Templates

Email Template: **INTRO** **Intro Email**

Letter Template: **STD LETTER** **Standard Letter**

Quick Fax Template: **QUICK** **Quick Fax**

Label Template: **LABEL** **Label Print**

Enter full name format

The User Preferences allows you to create some default settings by user. The user preferences will override corresponding fields the RM Static Control F/M. The user preferences are required for all users.

Full Name Format

Select one of the following choices:

- First Name
- First, Last
- Title, Last
- Title, First, Last

User Code Type

Select whether this user will use the FACTS Salesperson/Territory Code or the FACTS User Code in RM.

Skip Initial Load

This field is used for the Contact Display program. When checked, the last saved filter values are used and the filter screen is initially skipped. If un-checked, the system will stop at the filter screen every time.

Skip Automatic Notes

If checked, the system will not display the entry window for automatic notes in document entry programs. The note will be created with the default text.

Auto Start Reminders

If checked, the system will automatically start reminders when you first log in. If the selection is dimmed, the system administrator has not enabled this option in the RM Static Control F/M.

To Do Delete/Change Notification

If checked, the system will send an email notification indicating the user code, date and time of the action.

Defaults

Time Zone, Process, Note Type, To Do Type – These will be the default values for new contacts, notes and To Do items.

Default To Do Scope – Select from open, past due, today and completed. To Do entry will default to this scope.

Templates

Email – Select any existing Email/Letter Template to be the default email document for this user.

Letter – Select any existing Email/Letter Template to be the default letter document for this user.

Quick Fax – Select any existing Email/Letter Template to be the default quick fax document for this user.

Label – Select any existing Email/Letter Template to be the default label document for this user.

Email/Letter Template File Maintenance

Common Elements

Create Note

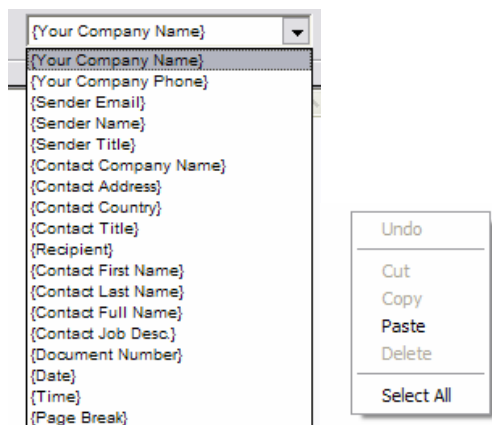
If checked, the system will create a note with the type specified in the Note Type field and the text of the subject line (email) or a message indicating what was sent.

Include Text

If the include text box is checked, the entire content is included in the note.

Active Replacements

To insert an active replacement field, select one of the fields from the pull-down. Position your cursor in the subject or message at the point where you want the field inserted and use the keyboard shortcut 'Ctrl-V' (Paste) or right click the mouse and select paste.



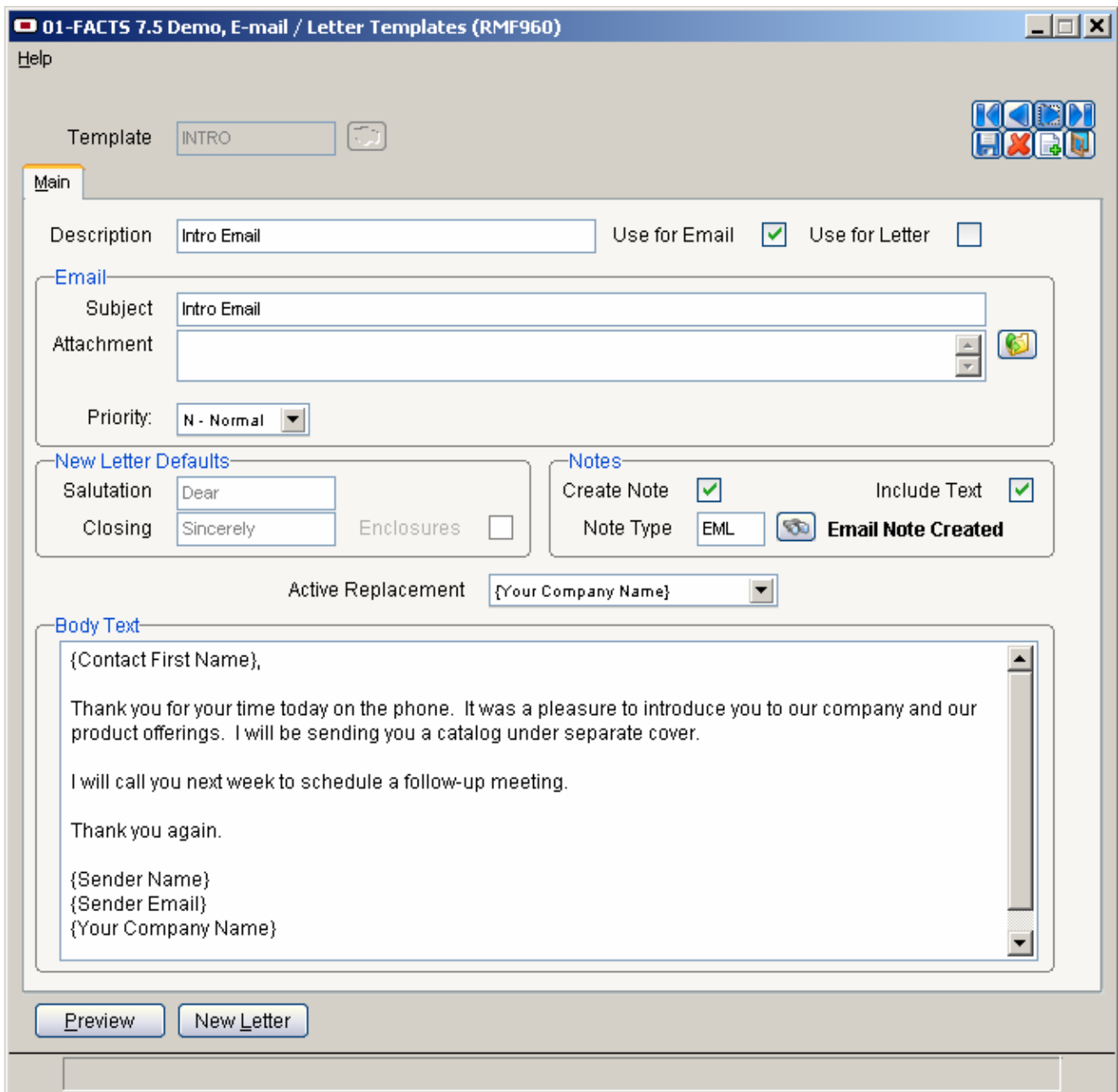
Email/Letter Template F/M is used for creating pre-defined formats for email, fax cover pages and broadcasts.

Email

If the Use for Email box is checked, you can enter a default subject line, select one or more attachments, and determine the default priority for the new email messages. You can use the Active Replacement values in both the subject and body text areas.

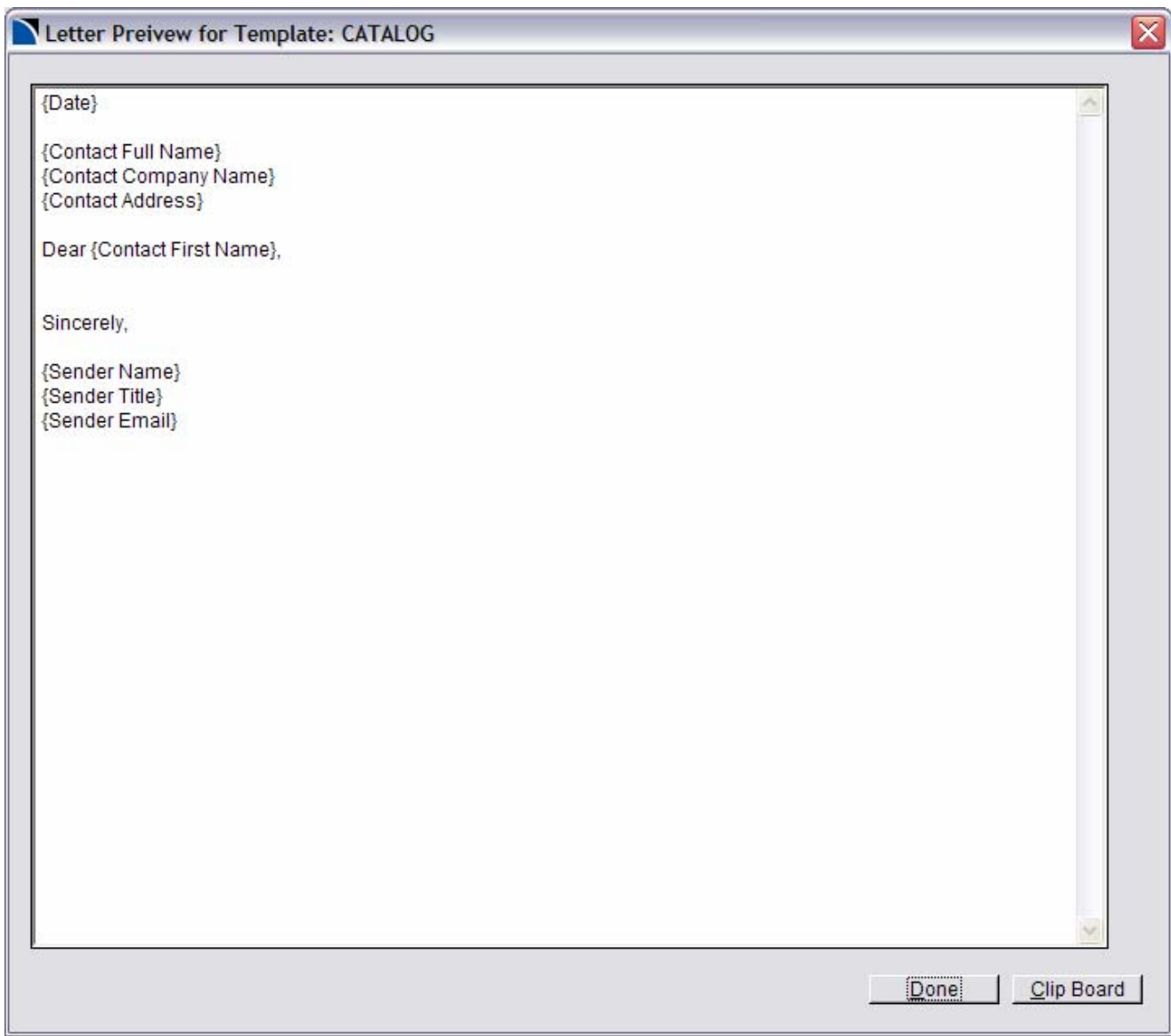
Letter

If the Use for Letter box is checked, the New Letter Defaults are active. When you are creating a new letter via the New Letter button, the values in the Salutation, Closing and Enclosures fields are pre-loaded into the default new letter format.



New Letter button – Creates a new blank letter shown in the preview screen below.

Preview Button – Display the current template in a larger window for viewing. To copy the text to the clipboard, click the 'Clip Board' button and paste it into another application such as Microsoft Word. Text from other applications can also be pasted into your letter.





Infrequent File Maintenances

Salesperson Additional Info File Maintenance

Enter a valid salesperson code and that person's correspondence title if applicable and email address. There is also a link in the Salesperson/Territory Code F/M that will allow you to add or change the email address directly from that program.

01-FACTS 7.5 Demo, Salesperson/Territory F/M (ARF935)

Help

Salesperson/Territory 10 Ronald Patton

General History

SLSP/TERR Name Ronald Patton

Region SE Southeast Region

Branch 01 Atlanta Branch

Commission % 1.00

Max Calls A.M. 10

Max Calls P.M. 20

[RM Email Address](#)

Save Delete New Exit

Enter salesperson/territory name

01-FACTS 7.5 Demo, Salesperson Additional Information F/M (RMF975)

Help

Salesperson/Territory 10 Ronald Patton

Additional Info

Correspondence Title Account Executive

Email Address rpatton@infor.com

Save Delete New Exit

Enter correspondence title

User Code Additional Info File Maintenance

Enter the FACTS user code, that person's correspondence title, and email address. There is also a link in the User Code F/M that will allow you to add or change this information directly from that program.

01-FACTS 7.5 Demo, User Code F/M (SMF410)

Help

User Code GUI **George U. Invencent**

General Security

Name George U. Invencent| [Email Address](#)

Initial Menu MMS000 **Master Menu**

Phone Number

Fax Number

Fax Suffix

Cover Page **None**

SLSP/TERR Code 30 **Sally Furness**

Call Grace Period 0

Call Code 0

Home Directory

User Interface X - Windows XP Style Theme S - Silver

Save Delete New Exit

Enter user's name

01-FACTS 7.5 Demo, User Code Additional Information F/M (RMF965)

Help

User Code GUI **George U. Invencent**

Main

Email Address ginvencent@infor.com|

Correspondence Title

Work Center Admin

Save Delete New Exit

Enter the email address

Contact Type File Maintenance

Contact Types are created and maintained in this file maintenance program. There is a three-character code to identify the Contact Type and a description that appears on screens and reports, a search is available to look up any existing Contact Types.

01-FACTS 7.5 Demo, Contact Type F/M (RMF951)

Help

Contact Type CUS

Main

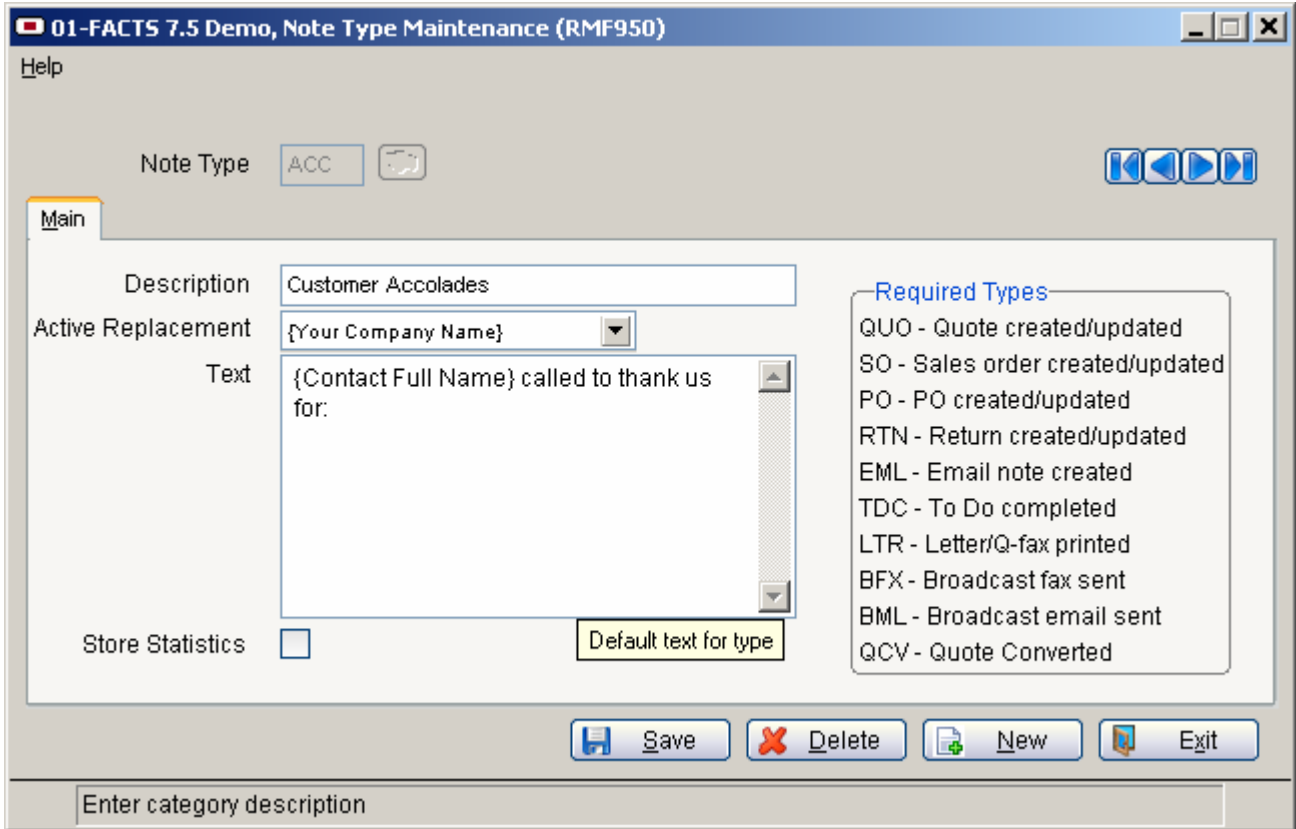
Description Customer

Save Delete New Exit

Enter contact type description

Note Type File Maintenance

All notes have a note type that is created and maintained in File Maintenance. Note Types are three characters with a description that appears on Notes and Screens; a search is available to look up any existing Note Types. There is also optional pre-fill text that is automatically added for each note along with the option to have an active replacement within the text that is entered. In the example below there is a generic beginning to prompt the user for the type of information to include.



Store Statistics

This feature is for future release

Required Types

At a minimum set up the required types listed above. These are the types of automatic notes which RM creates.

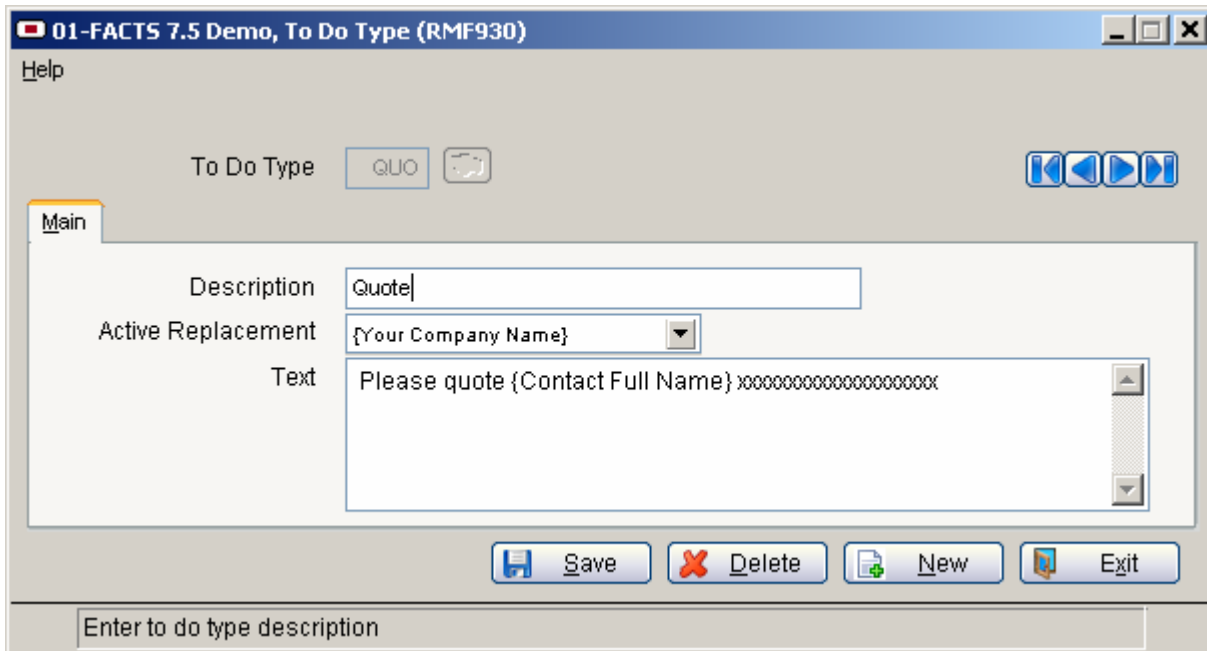
Active Replacements

To insert an active replacement field, select one of the fields from the pull-down. Position your cursor in the subject or message at the point where you want the field inserted and use the keyboard shortcut 'Ctrl-V' (Paste) or right click the mouse and select paste.



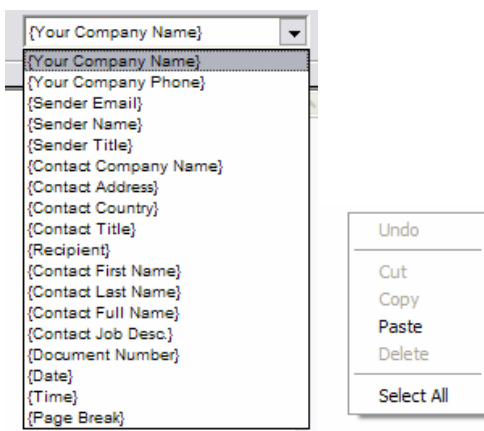
To Do Type File Maintenance

You can define different To Do Types in the File Maintenance program. This is useful for automating text descriptions and for inquiring and analysis. There is also the option to have an active replacement within the text that is entered. File Types are three alphanumeric characters; a search is available to look up any existing To Do type.



Active Replacements

To insert an active replacement field, select one of the fields from the pull-down. Position your cursor in the subject or message at the point where you want the field inserted and use the keyboard shortcut 'Ctrl-V' (Paste) or right click the mouse and select paste.



Mail Code File Maintenance

The Mail Code is used to group customers for filtering, broadcast faxing, or broadcast emailing purposes. They may also be used to merge with any ODBC compliant product i.e., Microsoft Word for a mail merge. You can have up to five Mail Codes per contact. It is a three-character alphanumeric field; a search is available to look up any existing Mail Codes.

01-FACTS 7.5 Demo, Mail Code F/M (RMF952)

Help

Mail Code DM

Main

Description Decision Maker

Save Delete New Exit

Enter contact type description

Lead Source File Maintenance

Use the Lead Source to track the source of leads for various contacts. This is a three-character alphanumeric field; a search is available to look up any existing Lead Source codes.

01-FACTS 7.5 Demo, Lead Source F/M (RMF954)

Help

Lead Source LST

Main

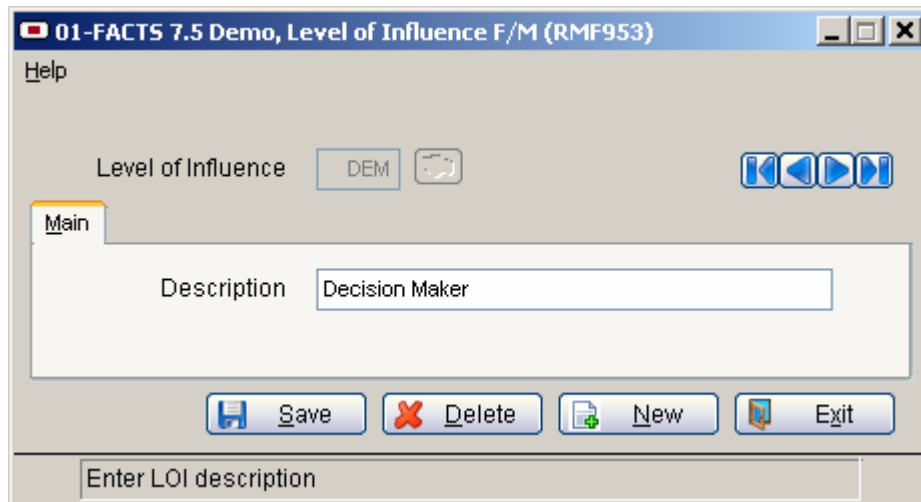
Description Telemarketing Purchased List

Save Delete New Exit

Enter contact type description

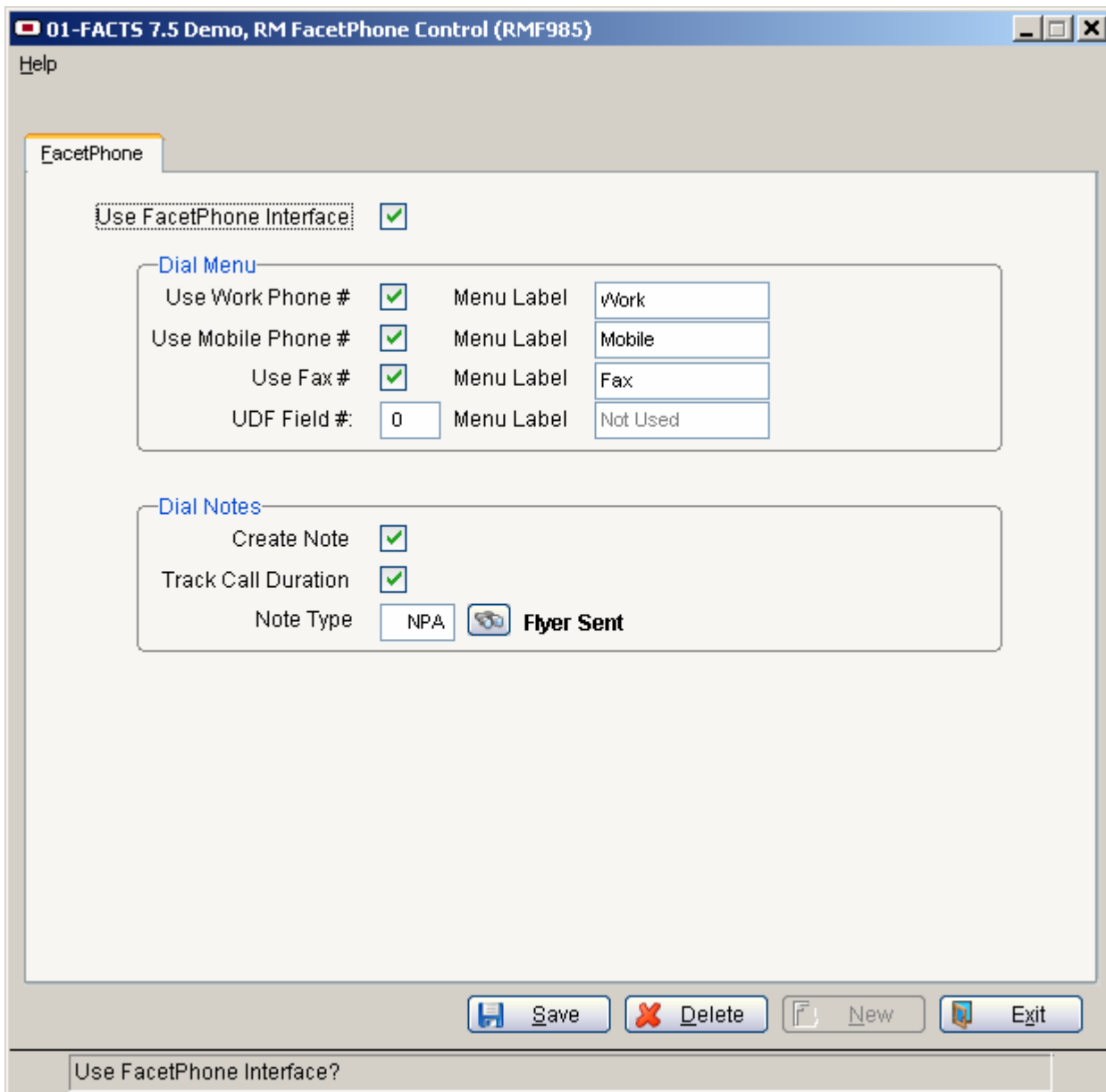
Level of Influence File Maintenance

Use the Level of Influence File Maintenance to create the level of influence codes that are used in the Opportunity Manager. This is a three-character alphanumeric field; a search is available to look up any existing Level of Influence codes.




FacetPhone Control File Maintenance

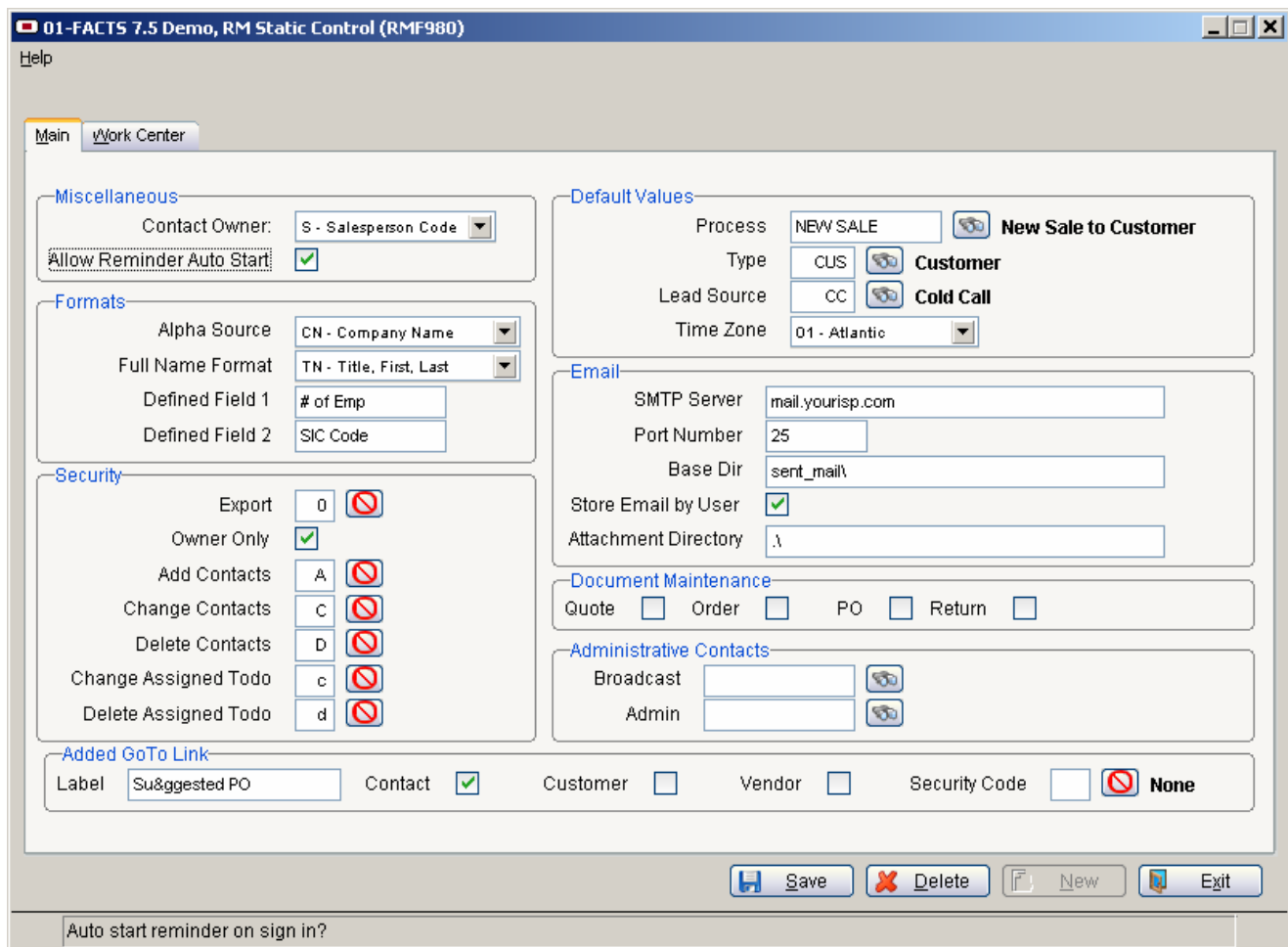
Use the FacetPhone Control to turn on and configure the FacetPhone integration with relationship management. This file maintenance allows the system administrator to define the labels that display for the phone numbers when using the auto dial button. As well as specify if they want to create a note and the default note type when a call is placed form relationship management.



When the FacetPhone interface is used the user will have the option to dial any one of the three phone numbers entered into the contact record. When the FacetPhone interface is used the auto dial button will display in the following RM programs:

- Entry programs, in the header (if configured in entry options) and header detail via a new button :
 - Quotes
 - Sales Orders
 - Purchase Orders
- Contact F/M
 - Header section
 - Secondary tab to the right of the phone number fields
- Contact Display
- Filtered notes Query, by clicking the Dial button
- To Do Entry
- Work Centers

RM Static Control File Maintenance



The Static Control provides options for:

Contact Owner - You have the option of using RM for sales purposes (sales reps, inside sales, etc.) that use the Salesperson/Territory ID in FACTS, or for non-sales purposes (collections, PO management, mailing list, etc.), which uses the FACTS User ID instead. This value is the default value in the User Preference F/M.

Allow Reminder Auto Start - Allow users to automatically start reminders when they first log in. If the box is checked, it becomes the default value in the User Preference F/M.

Formats

Alpha Source - Provides choices on how you want the alpha sort constructed. This is a company wide setting. The choices are as follows:

- Company Name
- Company (5), Last
- Company (5), First
- Last Name
- Last Name (5), First
- Last (5), Company
- None

Full Name Format – Provides choices on how you want the full name field in Contact F/M formatted. This value is the default value in the User Preference F/M. The choices are as follows:

- First Name
- First, Last
- Title, Last
- Title, First, Last

User Defined Field 1 and 2 – enter the description for user-defined field 1 and/or 2 if they are in use.

Security

Export – Enter a FACTS security code required to allow export of data to Excel.

Owner Only – Allow changes to the contact only by the contact owner which is either the user code or 1st salesperson.

Add/Change/Delete contacts – Enter the security code required to add/change/delete contacts.

Change/Delete To Do – Enter security code required to change or delete assigned To Do items.

Default Values

Enter default initial values for the following:

- Process - This value is the default value in the User Preference F/M.
- Type – This is a company wide setting
- Lead Source - This is a company wide setting
- Time Zone - This value is the default value in the User Preference F/M.

Email

The information will be entered regarding outgoing email:


- SMTP Server
- Port Number
- Base Mail Directory
- Separate stored email in user directories.
- Attachment Directory

Document Maintenance


Allow maintenance of Quotes, Orders, Purchase Orders, or Customer Returns through RM. If any of these boxes are checked, the respective document entry program will stop at the document number prompt allowing the user to call up another document, enter a new document for a different customer or vendor or tab to accept the default value. Otherwise the document number prompt is skipped.

Administrative Contacts

Broadcast

This contact is the designated contact for testing and to receive a copy of all broadcasts. Enter an existing contact number or use  icon

Admin

This contact is the designated contact for testing and to receive a copy of all broadcasts. Enter an existing contact number or use  icon

Added Go To Link

An option has been added to the RM Static Control record to provide a programmable link to the Go To Menu in RM Contact F/M, Contacts, and RM Work Centers. To implement:

1. Add a Go To Label in RM Static Control.
Note: A hot key is required, but may not be A,C,F,I,M,N,O,P,Q,R,S,T,U,V,W,X, or Y.
2. Indicate if a valid contact, customer, or vendor is required for the link.
3. Add a security code, if needed.
4. Add code to RMC99A; ADDED_LINK to perform the desired function.

The screenshot shows a software window titled "01-FACTS 7.5 Demo, RM Static Control (RMF980)". It has a "Main" and "Work Center" tab. The "Work Center" tab is selected. The window contains the following fields and controls:

- Work Center Timeout: 10
- Working File Path: .\data\RM\.
- Attachments Search Path: O:\
- Prefix Search Path With %WDX\$
- Buttons: Save, Delete, New, Exit

Work Center Timeout

If a number of minutes is entered here, Work Centers will return to the menu after the specified number of minutes.

Work File Path

This is the path to the directory where the working files are to be created. Any valid path can be entered. This is useful for Unix systems that support memory resident file systems, which can significantly improve performance.

Attachments Search Path

This provides a default search path for documents being attached through a Work Center. The Work Center driver has also been changed to remember the last path used to attach a document and use it for the duration of the session. The default value from the static control record is used the next time you run the work center from the menu.

- Attachments Search Path – The literal path name of the directory to search. No quotes are required
- Prefix Search Path With %WDX\$ - Check this box if you want the system to prefix the path with the value.

RM Non-static Control File Maintenance

This file stores the next To-Do and Note Sequence numbers and Contact number to be used. You can edit this field, but we recommend letting the computer manage it.

01-Demo Company, RM Nonstatic Control (RMF990)

Help

Next ToDo Sequence Num

Next Note Sequence Num

Next Contact

Enter a value for the next To Do sequence number

Supporting File Maintenance Exercises

1. Create two new Lead Sources.
2. Modify the User Preference File Maintenance for user 'GUI' to change the Full Name Format and the default process.
3. Change the Static Control Alpha Source.
4. Set the Default Contact Type to Customer.



PROCESS FLOW

RM includes a Process Flow Management system. A process flow contains stages and steps. A process can contain multiple stages. A stage can contain multiple steps. These can be used for tracking and filtering on any function or process within your company.

It is recommended to lay this out on paper prior to setting up on the system.

Process Flow Entry

Once you have set up all the processes, stages and steps, you need to hook them together.

The Process Flow Entry allows you to identify what stages are associated with the process and what steps are associated with each stage.

The Action field is for a future release.

01-FACTS 7.5 Demo, Process Flow Entry (RME240)

Help

Process: CREDIT Credit & Collections

Stages: CURRENT Customer is Current

- CURRENT Customer is Current
- PAST DUE Customer is Past Due
- COLLECTION Customer in Collections

Steps: CURRENT Customer Current

- CURRENT Customer Current

Action


LN#	Action
-----	--------

Done

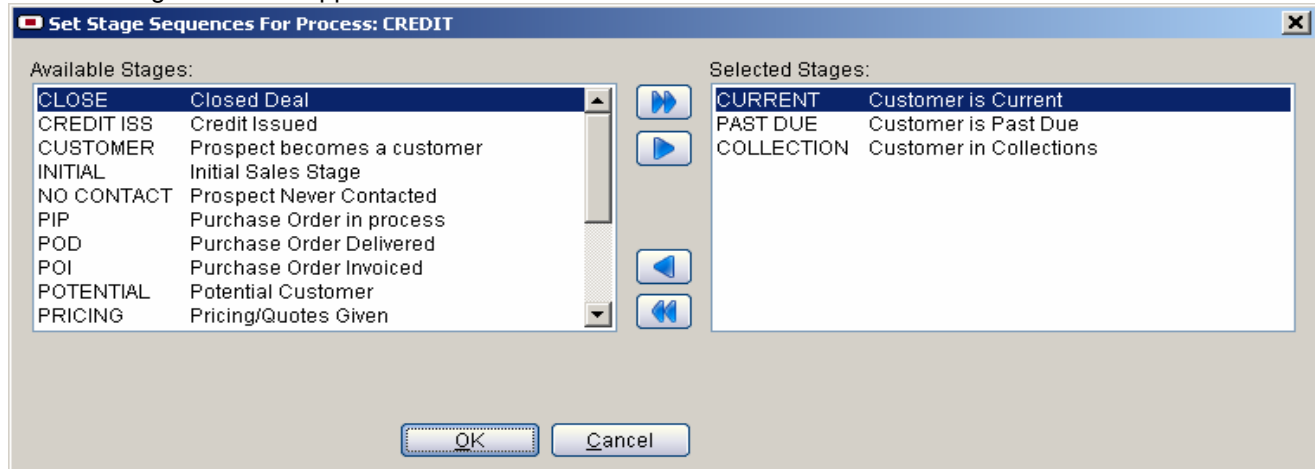
Enter step code, F2-Search, F3-Set Sequence

Assign Stages

To set up a new process flow you must set the sequence of stages and steps

1. Call up the process you want to define.
2. Click on the  icon.

The following screen will appear:



1. Select the appropriate stage and use the right arrow to move it to the right panel.
2. When all stages are in the right order in the right panel, click OK.

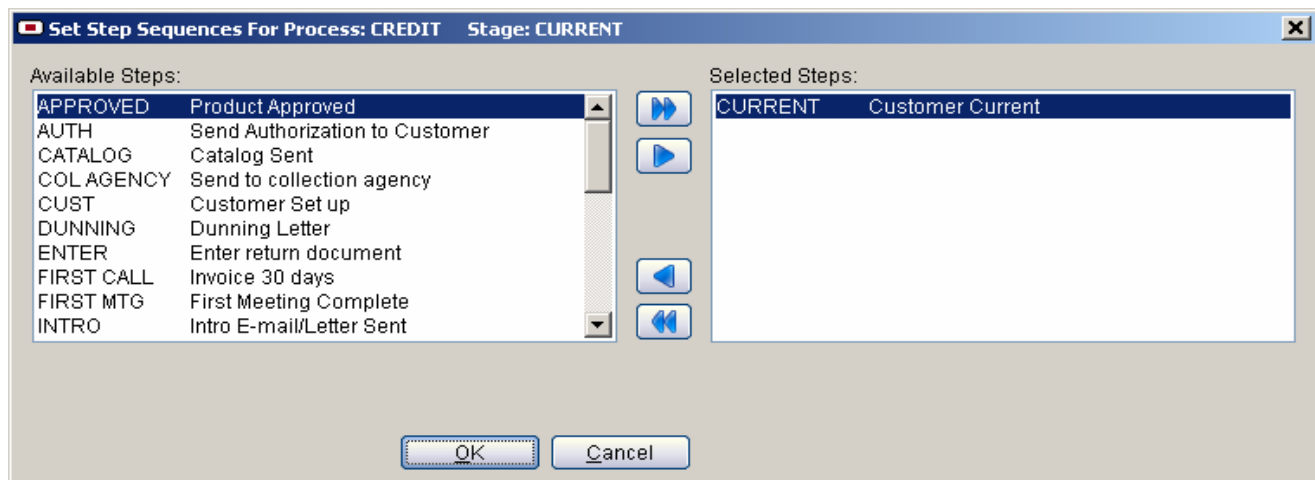
Arrow key usage

- Right arrow moves selected stage to the right panel.
- Double right arrow moves all stages to the right panel.
- Left arrow moves selected stage from the right panel to the left panel.
- Double left arrow moves all stages from the right panel to the left panel.

Assign Steps

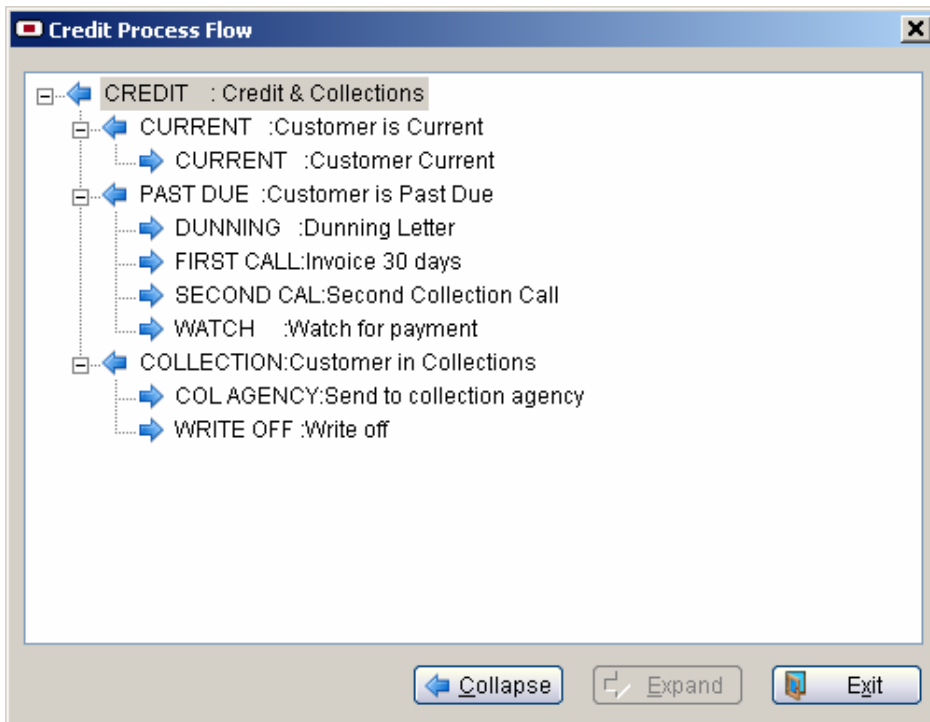
1. Call up the stage to which you want to assign steps.
2. Select the set sequence icon for the steps.

The following screen will appear:



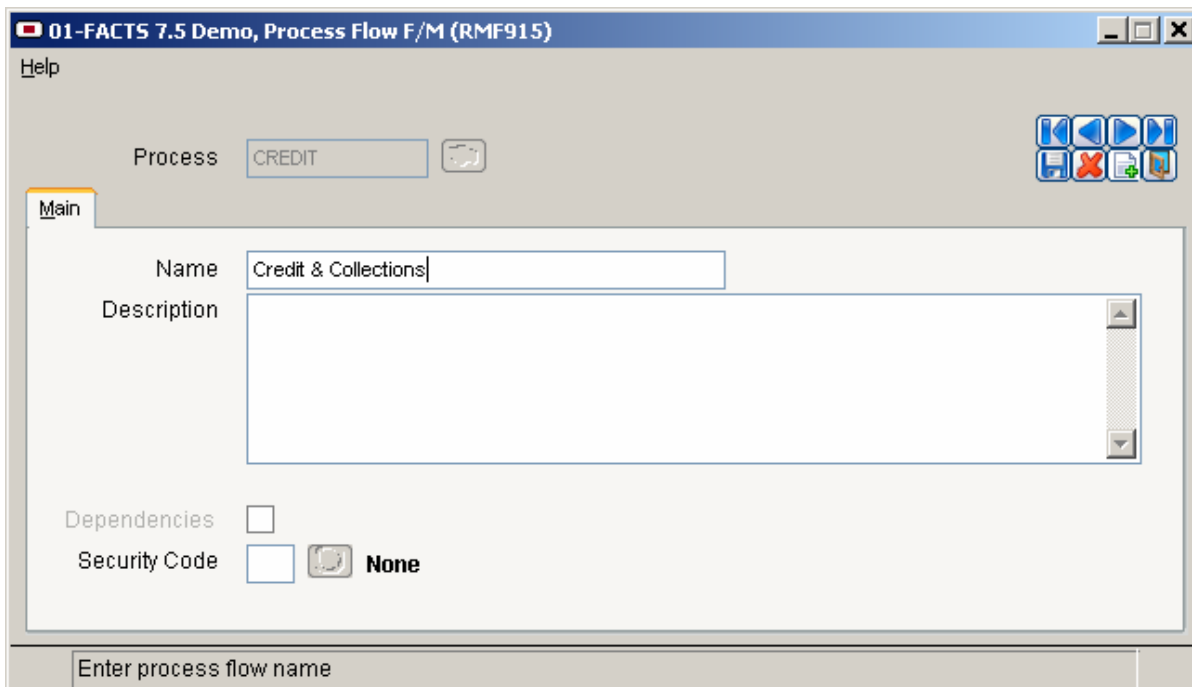
Process Flow Tree-view

You can do a Tree View display of the Process Flow by selecting a process and then clicking on the Process Display icon. This will display all stages and steps associated with the process flow the data can be collapsed or expanded by clicking on the plus or minus icons.



Process File Maintenance

Set up the process in this file maintenance. This is a 10-character alphanumeric field with a name and description. A search is available to look up any existing process codes. The Dependencies and Security Code fields are for future release.



The screenshot shows a window titled "01-FACTS 7.5 Demo, Process Flow F/M (RMF915)". The window has a "Help" menu and a toolbar with icons for navigation and actions. The "Process" field is set to "CREDIT". The "Main" tab is active, showing a form with the following fields: "Name" (Credit & Collections), "Description" (empty), "Dependencies" (checkbox), and "Security Code" (None). At the bottom of the window is a text box labeled "Enter process flow name".

Stage File Maintenance

This is a 10-character alphanumeric field. Set up any stages required for a process, a search is available to look up any existing Stage codes. The Dependent Stage field is for a future release.

01-FACTS 7.5 Demo, Process Stage F/M (RMF920)

Help

Stage

Main

Name

Description

Default Probability

Enter stage name

Process Step File Maintenance

The Step File Maintenance is a 10-character alphanumeric field with a name and description. Set up any Steps required, a search is available to look up any existing Step Codes.

01-FACTS 7.5 Demo, Process Step F/M (RMF925)

Help

Step

Main

Step

Description

Save Record

Enter step name

Process Flow Exercises

1. Create a new process for Base Sales
2. Lay it out as follows:
 - a. Stage – Pricing
 - i. Step – Quote



CONTACT DISPLAY/FILTER

The Contact Display is the home of the targeted list work flow model. The browser window contains contacts meeting the criteria you select through a filter and becomes a single location for launching any application related to the highlighted contact.

01-FACTS 7.5 Demo, Contact Display (RME210)

Go To Options Export Help

Last Note

GUI 09/21/2005 11:15 am Document SO 001905

Customer requested ship via UPS RED

Amt 1,267 % Closed .00 Close Date

Next To Do

RON 07/10/2005 10:12 am Priority Medium

Steve called to complain about a late delivery. Need to follow up ASAP.

Requested By GUI Type CB Remind NONE

Record 1 of 71 Address: 11345 IH-10 San Antonio, TX 75012

Contact	Full Name	Company	Phone	Type	Src	Sls1	# of Emp	SIC Code	Process
2537	Mr. Steve Smith	Cowboy World	952-983-0987	... CUS	CC	40	55	5903	NEW SALE
2538	Mr Bob Gannon	Roark Architectural, Inc.	651-636-0046	... CUS	CRF	30	340	5904	NEW SALE
2539	Mr. Joe Virginia	Cowboy World	952-983-0987	... CUS	CC	40	55	5903	ON-GOING
2540	Mr. Steve Johnston	Deluxe Equipment Wa...	218-463-1781	... CUS	CRF	30	500	5034	ON-GOING
2544	Mr. Dagney Taggart	Taggart Transcontine...	214-890-8498	... CUS	CRF	30	16		ON-GOING
2545	Mr. Eddie Wilers	Taggart Transcontine...	214-890-8498	... CUS	CRF	30	16		ON-GOING
2546	Mr. James Wilson	Barnes Machinery & E...	404-223-0934	... CUS	CC	30			NEW SALE
2547	Ms. Gaylene Barber	Central Georgia Mater...	404-889-3422	... CUS	CC	30			NEW SALE
2548	Mr. Philip Knutson	Equipment Handling ...	404-499-0922	... CUS	CC	30			NEW SALE
2552	Ms. Nancy Harrigan	Porsche Pieces, Inc.	404-237-4199	... CUS	ERF	30			ON-GOING
2553	Mr. Danwin Goodwin	Texas Material Handli...	214-980-4532	... CUS	VRF	30			ON-GOING
2554	Mr. Clayton Jukavich	Word Processing Syste...	404-977-9933	... CUS	CC	30			NEW SALE

Filter Find Done

Browser Window

Contacts listed can be sorted by any column heading by clicking on the column title.

Last Note

Displays the most recent note for this contact showing who entered the note, the date & time, document number (if a document was created), the text of the note along with value and projected close information. If there is more text than can be displayed in the window, a scroll bar will appear and allow you to scroll the entire text.

Next To Do

The Next To Do for this contact is displayed on the top right of the screen showing the person assigned, scheduled date & time, the user code who requested the To Do, type and reminder type. If there is more text than can be displayed in the window, a scroll bar will appear and allow you to scroll the entire text

Find

Executes the Contact Search and adds selected contact to the browser. If the contact selected in the search is already in the list, the browser focus is shifted to the selected contact.

Export

The export function will export the list of contacts in the browser window directly to Excel using fields in the browser column titles. This option is only available if the user has security to export as defined in the RM Static Control.

Go To Menu

The purpose of the Go To pull down menu is to launch programs for the contact highlighted in the browser window. The application being run will have the contact information pre-filled.

01-FACTS 7.5 Demo, Contact Display (RME210)

Go To Options Export Help

Contact F/M
New Contact

Notes
To Do

Quote Entry
SO Entry
PO Entry
Returns Entry

SO Customer Inquiry
PO Vendor Inquiry
Returns Inquiry
Item Inquiry
AR Inquiry
AP Inquiry

Commission Inquiry
Suggested PO
Exit

11:15 am Document SO 001905

NextToDo
RON 07/10/2005 10:12 am Priority Medium

Ship via UPS RED

Steve called to complain about a late delivery. Need to follow up ASAP.

Closed .00 Close Date

Requested By GUI Type CB Remind NONE

Address: 11345 IH-10 San Antonio, TX 75012

	Company	Phone	Type	Src	Slsp1	# of Emp	SIC Code	Process
h	Cowboy World	952-983-0987	...	CUS	CC	40 55	5903	NEW SALE
n	Roark Architectural, Inc.	651-636-0046	...	CUS	CRF	30 340	5904	NEW SALE
a	Cowboy World	952-983-0987	...	CUS	CC	40 55	5903	ON-GOING
asston	Deluxe Equipment Wa...	218-463-1781	...	CUS	CRF	30 500	5034	ON-GOING
ggert	Taggart Transcontine...	214-890-8498	...	CUS	CRF	30 16		ON-GOING
is	Taggart Transcontine...	214-890-8498	...	CUS	CRF	30 16		ON-GOING
son	Barnes Machinery & E...	404-223-0934	...	CUS	CC	30		NEW SALE
arber	Central Georgia Mater...	404-889-3422	...	CUS	CC	30		NEW SALE
	Equipment Handling ...	404-499-0922	...	CUS	CC	30		NEW SALE
2548	Mr. Philip Knutson		...	CUS	ERF	30		ON-GOING
2552	Ms. Nancy Harrigan		...	CUS	ERF	30		ON-GOING
2553	Mr. Darwin Goodwin		...	CUS	VRF	30		ON-GOING
2554	Mr. Clayton Jukavich		...	CUS	CC	30		NEW SALE

Filter Find Done

Vendor related programs are available for contacts associated with vendors, customer related programs are available for contacts associated with customers. Quotes are available for any type of contact. Closing those applications when done returns you to this screen.

Once you have selected an application it becomes the default application as indicated by a check mark on the menu. Double clicking on a contact in the browser window will execute the checked application.

Options Menu

The Options pull down menu will access the Email, Letter, Quick Fax, Label documents and the Start/Stop Reminder option.

The screenshot shows the '01-FACTS 7.5 Demo, Contact Display (RME210)' window. The 'Options' menu is open, listing 'Email', 'Letter', 'Quick Fax', 'Label', 'Start/Stop Reminder', and 'Preferences'. The 'Start/Stop Reminder' option is highlighted. The main window displays a contact record for 'Mr. Steve Smith' with a 'Next To Do' task: 'Steve called to complain about a late delivery. Need to follow up ASAP.' A table of other contacts is visible at the bottom.

Contact	Full Name	Company	Phone	Type	Src	Sisp1	# of Emp	SIC Code	Process
2537	Mr. Steve Smith	Cowboy World	952-983-0987	CUS	CC	40	55	5903	NEW SALE
2538	Mr Bob Gannon	Roark Architectural, Inc.	651-636-0046	CUS	CRF	30	340	5904	NEW SALE
2539	Mr. Joe Virginia	Cowboy World	952-983-0987	CUS	CC	40	55	5903	ON-GOING
2540	Mr. Steve Johnsston	Deluxe Equipment Wa...	218-463-1781	CUS	CRF	30	500	5034	ON-GOING
2544	Mr. Dagny Taggart	Taggart Transcontine...	214-890-8498	CUS	CRF	30	16		ON-GOING
2545	Mr. Eddie Wilers	Taggart Transcontine...	214-890-8498	CUS	CRF	30	16		ON-GOING
2546	Mr. James Wilson	Barnes Machinery & E...	404-223-0934	CUS	CC	30			NEW SALE
2547	Ms. Gaylene Barber	Central Georgia Mater...	404-889-3422	CUS	CC	30			NEW SALE
2548	Mr. Philip Knutson	Equipment Handling ...	404-499-0922	CUS	CC	30			NEW SALE
2552	Ms. Nancy Harrigan	Porsche Pieces, Inc.	404-237-4199	CUS	ERF	30			ON-GOING
2553	Mr. Darwin Goodwin	Texas Material Handli...	214-980-4532	CUS	VRF	30			ON-GOING
2554	Mr. Clayton Jukavich	Word Processing Syste...	404-977-9933	CUS	CC	30			NEW SALE





Start/Stop Reminders

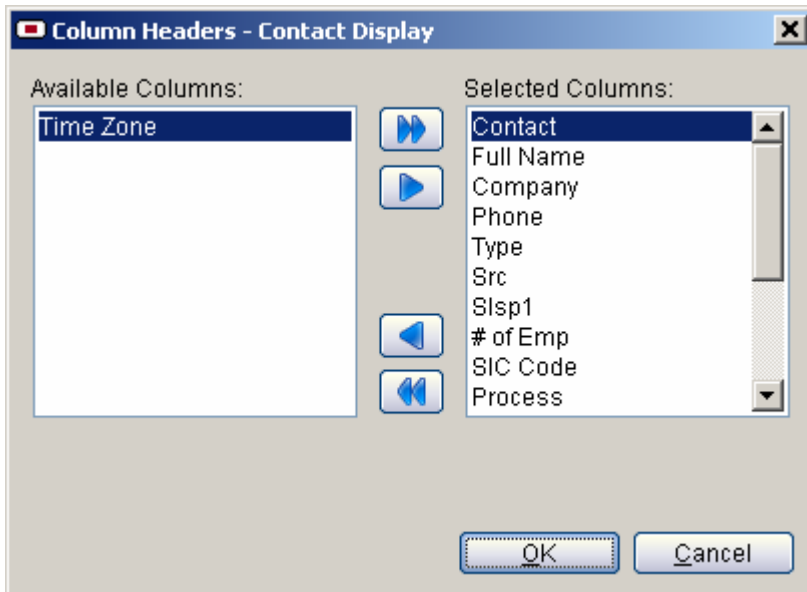
Each To Do item has a scheduled date and time the system can use to remind you of deadlines. You can start or stop the reminder program manually by selecting the Start/Stop Reminder option on the Options pull down menu. You can also stop the reminder program by clicking the Stop Reminder (All) button on the Reminder pop-up window. The reminder status is displayed on the title bar of the window.

If the system administrator has enabled the auto-start feature, you may check the auto-start reminders checkbox in the User Preferences F/M to have the reminder system start automatically when you log in.

Preferences

The preferences option allows you to control the order of the columns in the browser window. The preferences window uses the same functionality as search preferences allowing you to include/exclude columns and rearranges the order.

Preferences are available in the  Contact Display,  To Do entry,  Note Entry and  Broadcast List Entry programs.



You also can drag and drop any columns you wish. Dragged columns will be inserted before the dropped on column. Changes will take effect when you click the OK button.



Email/Labels/Letters

From the Options pull-down menu or from hyperlinks in the Contact File Maintenance program, you can send an email, generate letters & labels or send a quick fax memo to a contact.

Common Elements

Create Note

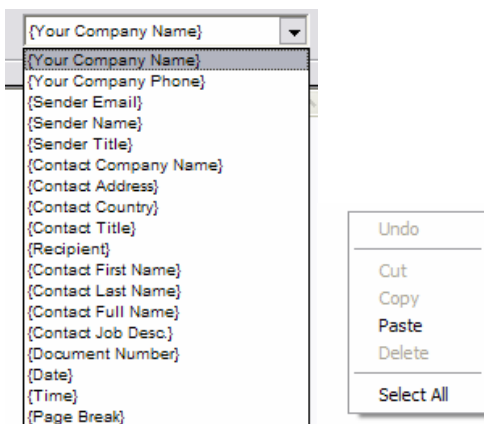
If checked, the system will create a note with the type specified in the Note Type field and the text of the subject line (email) or a message indicating what was sent.

Include Text

If the include text box is checked, the entire content is included in the note.

Active Replacements

To insert an active replacement field, select one of the fields from the pull-down. Position your cursor in the subject or message at the point where you want the field inserted and use the keyboard shortcut 'Ctrl-V' (Paste) or right click the mouse and select paste.



Refresh

The refresh button will re-display the letter/email text with data rather than the active replacement field name.

Templates

When creating a new email or letter, the default templates defined in the user preferences F/M are read and the content pre-filled based on the template. Active replacements are made on the fly so that what appears on the screen is as close to the final output as possible. A template search is available to change the template from the default. Templates will be discussed in detail later in this document.

Email

To – This is automatically filled in based on the contacts primary email address.

CC – Used for standard carbon copy of emails. Note: All addresses specified in the To or the CC fields will be visible to the recipient.

BCC – Used to indicate blind carbon copy. These addresses are not visible to the recipients.

Subject - Indicate the subject of the email.

Priority - Select High, Normal or Low priority. Normal is the default.

Message Text – Enter the text of the message.

New Mail Message

Email Options

Create Note Include Text Note Type EML **Email Note Created**

To: smith@cowboyworld.com

Cc:

Bcc:

Subject: Intro Email

Priority: N - Normal Replacement: {Your Company Name}

Message

Steve,

Thank you for your time today on the phone. It was a pleasure to introduce you to our company and our product offerings. I will be sending you a catalog under separate cover.

I will call you next week to schedule a follow-up meeting.

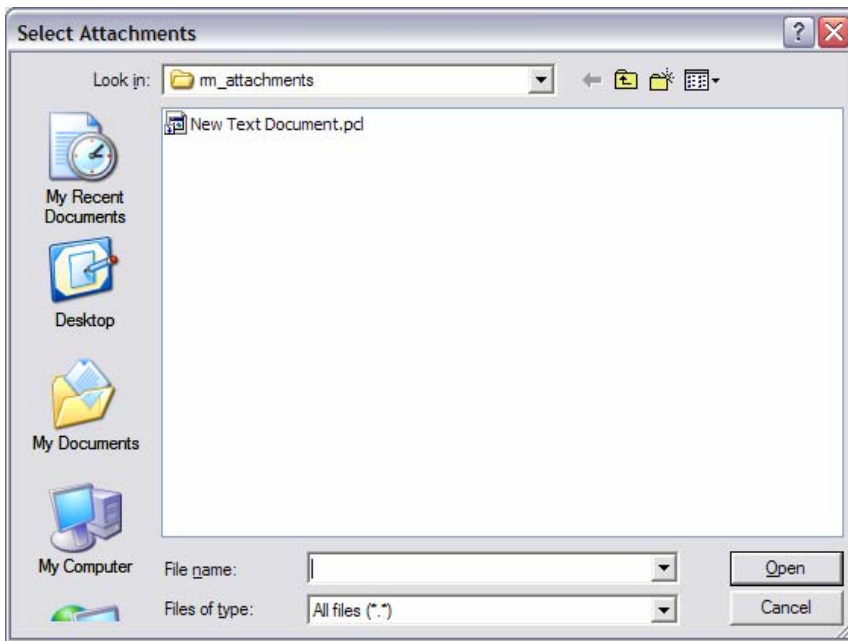
Thank you again.


George U. Invencent
ginvencent@infor.com
FACTS 7.5 Demo

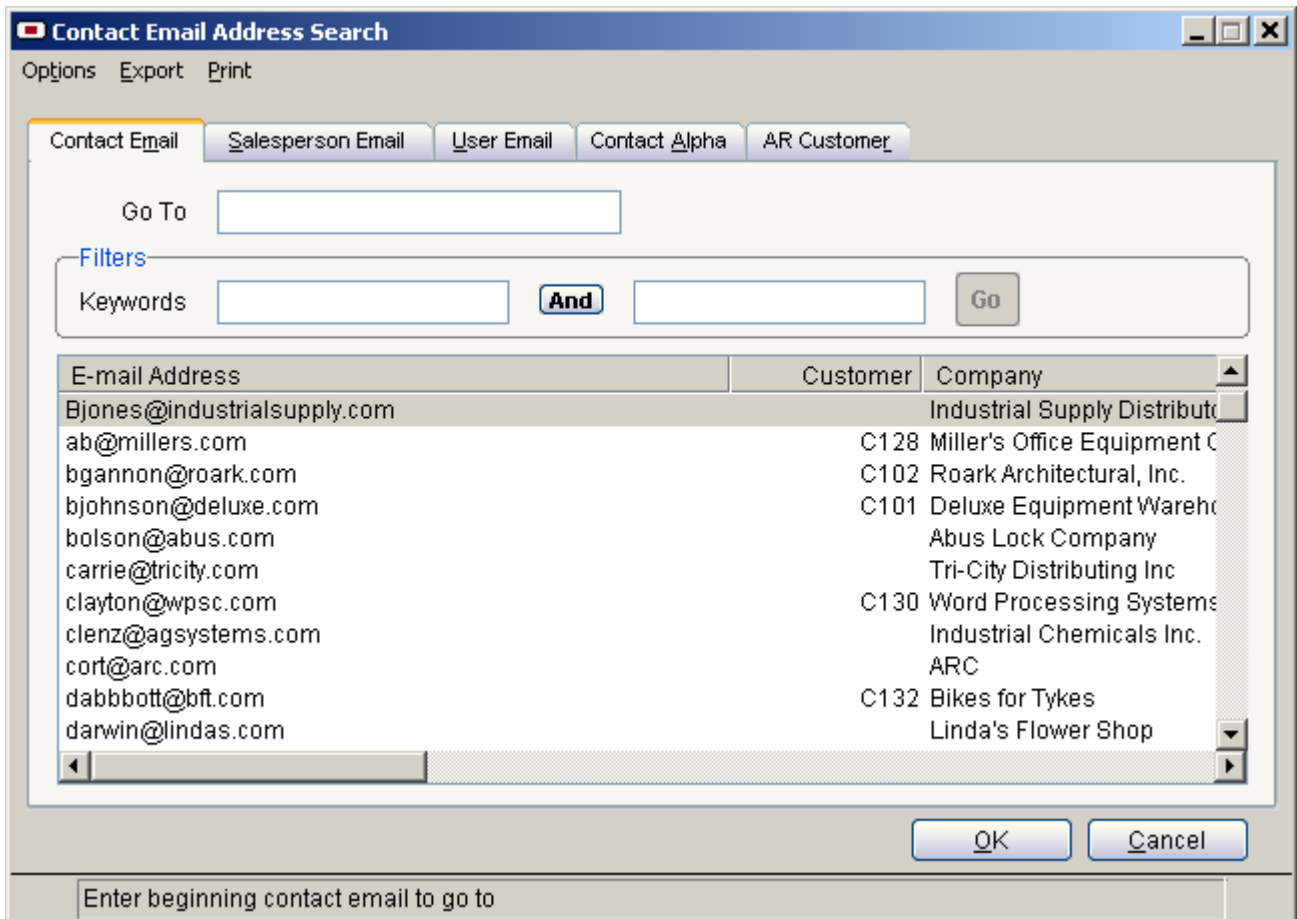
Attachment

Create a note?

Attachments – The button will open a file selection window starting in the default directory 'rm_attachments' on the server. Your ability to navigate will vary depending on the operating system environment. Select one or more attachments to send with the email.

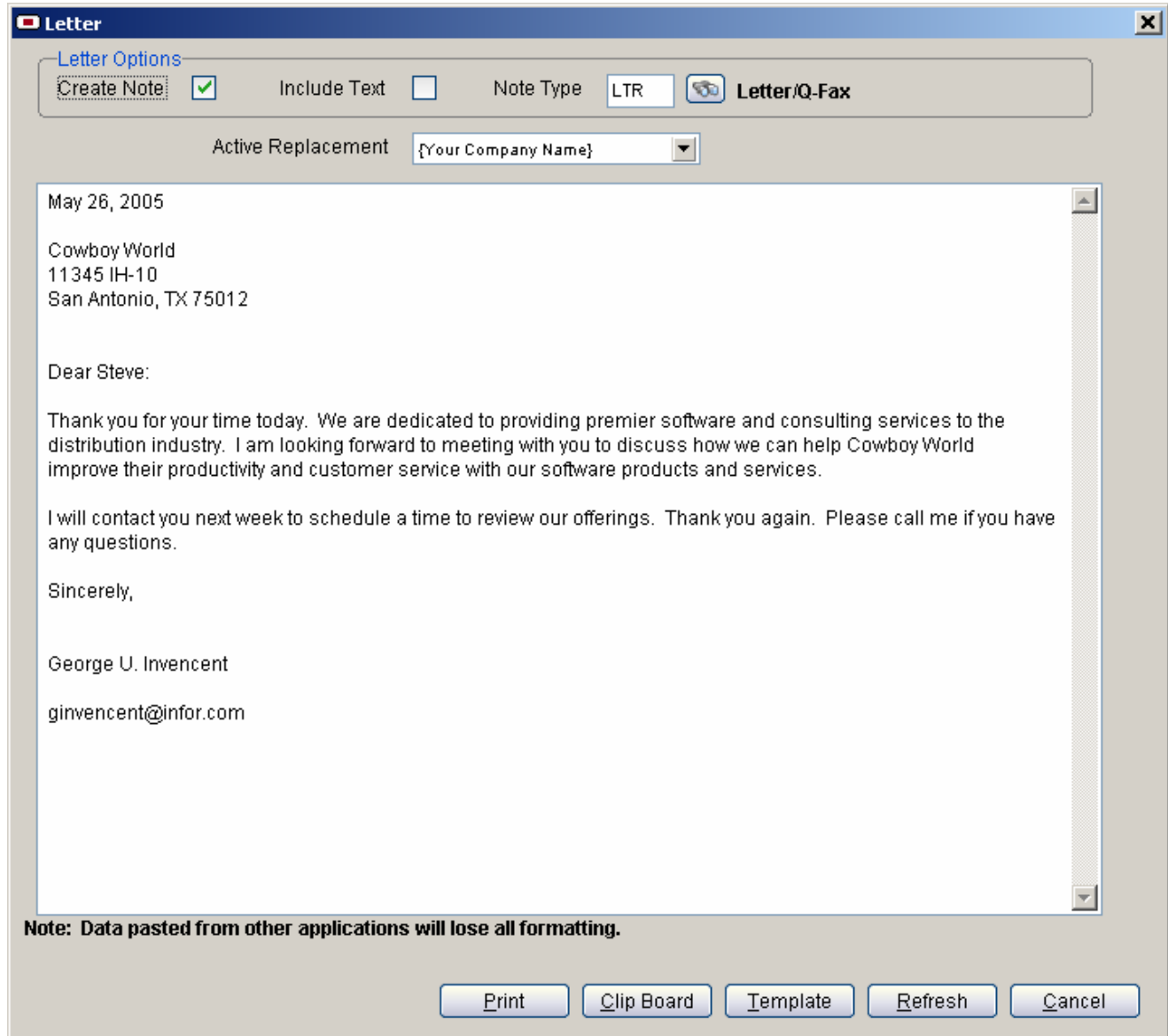


Search – The  button will allow you to search for an email address for the To, CC, or BCC fields. You can search by contact, salesperson, or user code email or by contact alpha name or by customer number. If you search for an address on a field where there is an existing address, the address from the search will append to the existing address.



Letters

The letter will initially display using the default letter that is set up in the User Preferences F/M. You can select a different letter by clicking the Template button. To print the letter click on the Print button, standard FACTS printing rules apply. To copy the letter to the clipboard, click the 'Clip Board' button and paste it into another application such as Microsoft Word. Text from other applications can also be pasted into your letter.



The screenshot shows a window titled "Letter" with a "Letter Options" section. The "Create Note" checkbox is checked, and "Include Text" is unchecked. The "Note Type" is set to "LTR" and "Letter/Q-Fax" is selected. The "Active Replacement" field contains "{Your Company Name}". The main text area contains the following content:

May 26, 2005

Cowboy World
11 345 IH-10
San Antonio, TX 75012

Dear Steve:

Thank you for your time today. We are dedicated to providing premier software and consulting services to the distribution industry. I am looking forward to meeting with you to discuss how we can help Cowboy World improve their productivity and customer service with our software products and services.

I will contact you next week to schedule a time to review our offerings. Thank you again. Please call me if you have any questions.

Sincerely,

George U. Invencent
ginvencent@infor.com

Note: Data pasted from other applications will lose all formatting.

Buttons at the bottom: Print, Clip Board, Template, Refresh, Cancel.

Quick Fax/Labels

The Quick Fax and Label options have the same functionality as Letters.

CONTACT FILTER

Filters allow you to enter multiple sets of criteria to return a targeted list of contacts.

Contact Filter

Filter Sort: 05 - Type | Select contacts meeting: All criteria

Customer: [] [All] [List Select] [Back] All

Vendor: [] [All] [List Select] [Back] All

SLSP/Terr: [] [All] [List Select] [Back] All

Mail Code: [] [All] [List Select] [Back] All

Contact Type: [] [All] [List Select] [Back] All | Class: [] [All] [List Select] [Back] All

Lead Source: [] [All] [List Select] [Back] All | Stage: [] [Back] [List Select]

Time Zone: 00 - N/A | Step: [] [Back] [List Select]

of Emp: E - Equals [] | SIC Code: E - Equals []

Date Created: Start [] [List Select] [Back] First | End [] [List Select] [Back] Last



Date Changed: Start [] [List Select] [Back] First | End [] [List Select] [Back] Last

[OK] [Clear] [Cancel]



Enter search sort sequence

Common Elements

All / Selected

Use the  icon to select all of the codes associated with a specific field or the  icon to search for a specific value.

List Select

The List Select icon  will allow you to enter up to 20 valid codes. The  will back up one entry.

Select Mail Code

Enter Mail Code: [PO] [List Select] [Back]

[CAT]

[BUY]

[]




PO Purchasing

CAT Catalog

BUY Buyer

[Done] [Cancel]

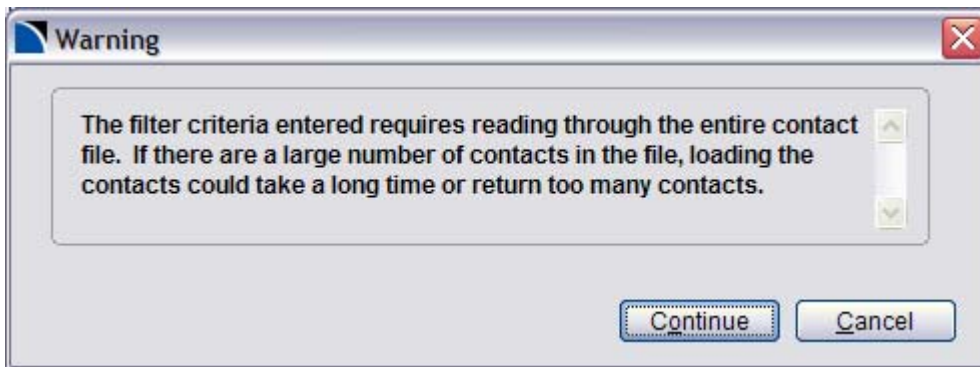
First/Last



Use these icons to select the first  or last  dates for all date fields, or the Calendar  to display a calendar to select the date.



Fields




Filter Sort - The filter sort allows you to specify the order that the filter uses to find contacts. If a sort order is selected that does not match the criteria selected, the filter automatically switches to the best sort order. For example: If you select a sort order of customer and the filter screen is set to all customers but a type of prospects, the sort order will be set to contact type.




If the selections made in the filter will require reading the entire contact file, a warning message will appear and you will have the option to continue or cancel.







Customer – Enter a customer number or use the  icon to select contacts associated with a specific customer or use  icon for all customers

Vendor – Enter a vendor number or use the  icon to select contacts associated with a specific vendor or use  icon for all vendors

SLSP/Terr – Enter a salesperson code or use the  icon to select an individual salesperson, use the  icon to make multiple selections or use the  icon for all salespeople.




Mail Code – Enter a mail code or use the  icon to select an individual mail code, use the  icon to make multiple selections or use the  icon for all mail codes.

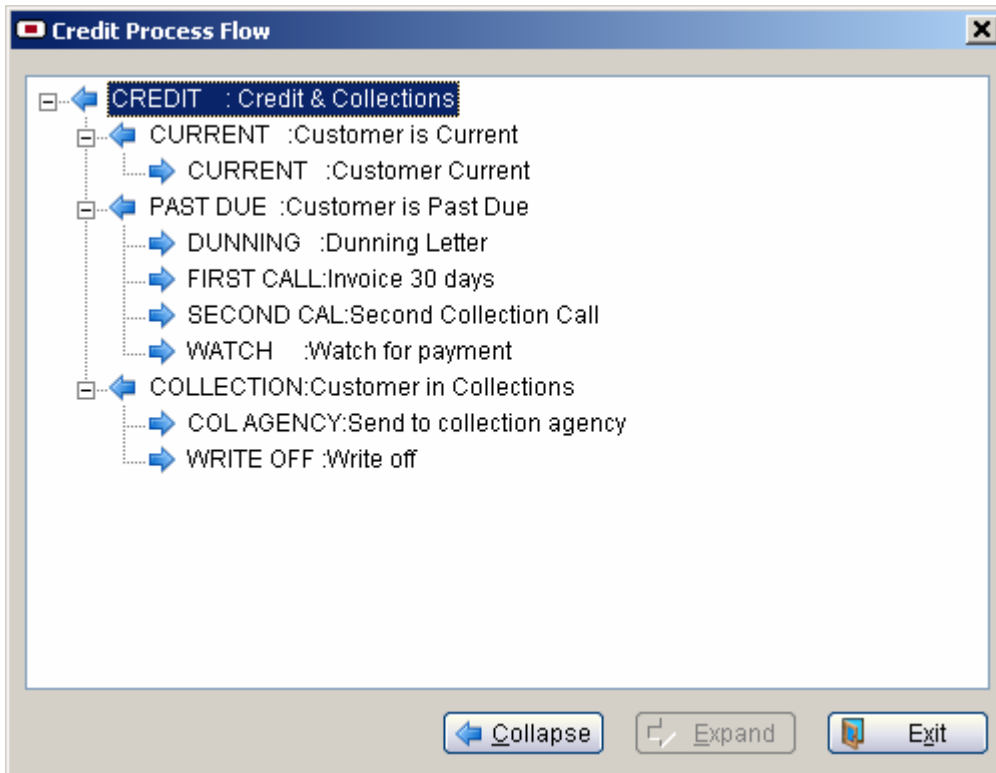
Type – Enter a type code or use the  icon to select contacts associated with a specific type code or use  icon for all types

Lead Source– Enter a lead source or use the  icon to select contacts associated with a specific lead source or use  icon for all lead sources

Time Zone– Select a time zone from the pull down menu:

- 00 – N/A – No time zone selected
- 01- -Atlantic
- 02 – Eastern
- 03 – Central
- 04 – Mountain
- 05 – Pacific
- 06 – Alaska
- 07 – Hawaii
- 08 - International




Process/Stage/Step – Enter a process/stage/step or use the  icon to select contacts associated with a specific process/stage/step or use  icon for processes/stages/steps. Use the  icon to get a tree-view listing of the selected process.



User Defined Fields - Two user defined fields can be set up in RM (See RM Static Control F/M). When defined, the field name appears as the field label on the filter screen. In the filter screen above, we have '# of Emp' and 'SIC Code' defined. The user defined fields can be filtered by a criteria pull down menu with the following selections:

- E – Equals Must match exactly – spaces on the right are ignored
- N – Not Equal Must not match – spaces on the right are ignored
- S – Starts With Must match as many characters as entered – case is ignored
- C – Contains Must contain a match for as many characters as entered – case is ignored
- G – Greater Than Numeric values only – text is ignored
- L – Less Than Numeric values only – text is ignored

For example, you could select # of Emp greater than 50 and with a SIC code starting with 590 to get a list of contacts whose companies have more that 50 employees and/or are in all SIC codes starting with 90. (See Any/All section below for an explanation of the and/or)


Date Created/Date Changed – You can enter start dates, end dates or both for a date range. Use the first  for the earliest date, last  dates for the latest date or  to select a date from a calendar.



Any/All Type Filters – The 'Select contacts meeting criteria' the pull down menu has the following options:

- Any 'Select contacts meeting all criteria' indicates all selections must be true.
- All 'Select contacts meeting any criteria' indicates any selection must be true.

Interrupt Load

While the system is sorting through your filter a message  will appear on the screen. You can click on that icon to stop the system from executing your filter.

Clear Button

Use the clear button to clear all current selections and set all selection fields to their default values.

Filter Exercises

Complete the following exercises:

1. Find all records for sales rep Ronald Patton.
2. Find all records in the New Sales Process that have never been contacted.
3. Find all contacts that are **EITHER** a prospect or came from the telemarketing list lead source.
4. Find all contacts that are **BOTH** a prospect and came from the telemarketing list lead source.
5. Find all vendor contacts.
6. Find all contacts associated with customer C100.
7. Find any contacts that have been created since 1/1/05. Once you have generated that list, sort them by process
8. Find any contacts that are set up to receive your catalog **AND** newsletter.
9. Find any contacts that are set up to receive either your catalog **OR** newsletter.
10. Find all contacts in the central time zone for sales rep Ronald Patton.

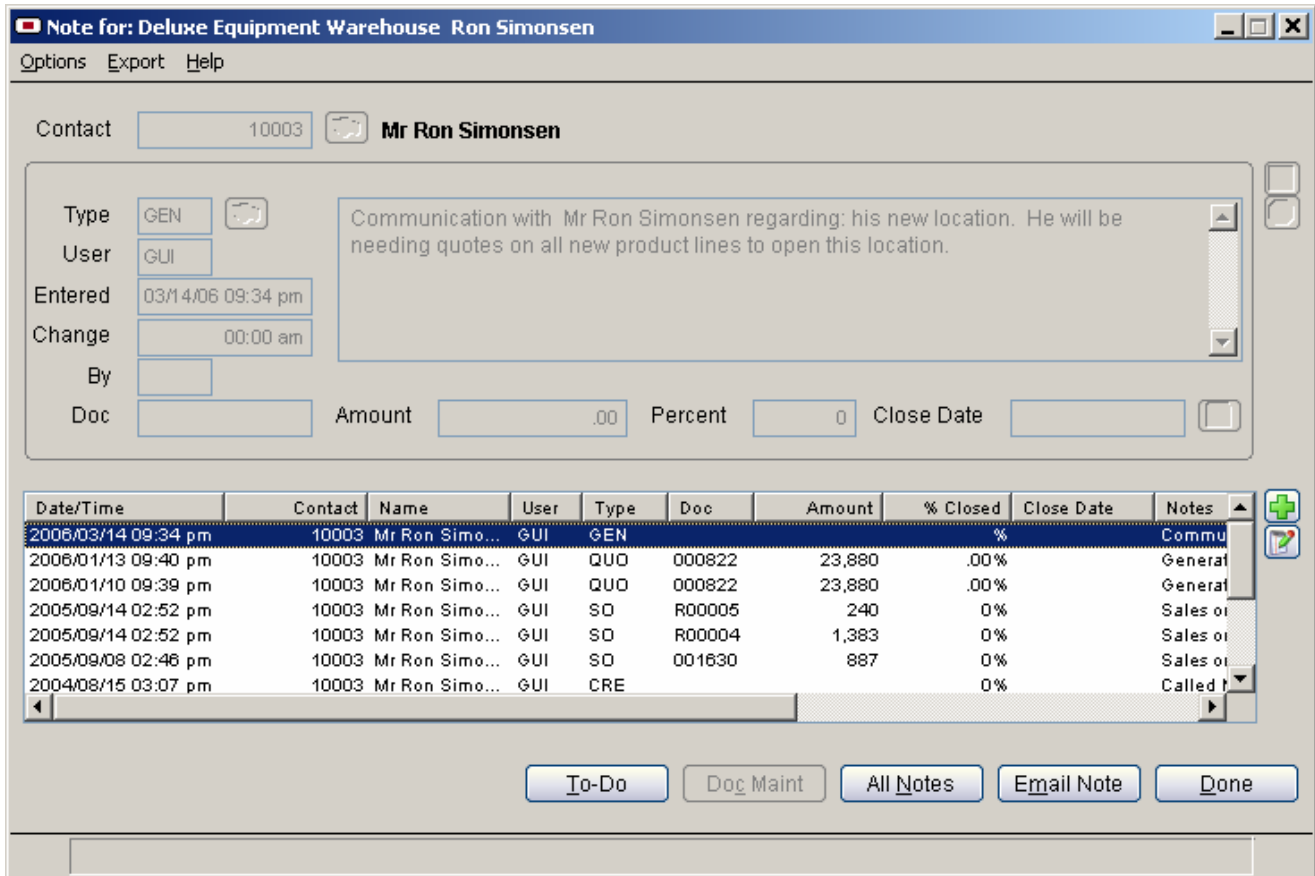
Note: Make sure you clear all filters between each exercise

Notes

Notes create a chronological history of activity for a contact. All notes are automatically stamped with user code, date and time. Notes can be accessed from the menu, Contact Display, Contact F/M, Filtered Queries, or the Contact Inquiry. There are also notes that are created automatically based on events. (See Automatic Notes section)

When you access notes from the menu, you must select a contact. If you access it from the Contact Display or file maintenance, the contact number is pre-filled.





Notes Entry

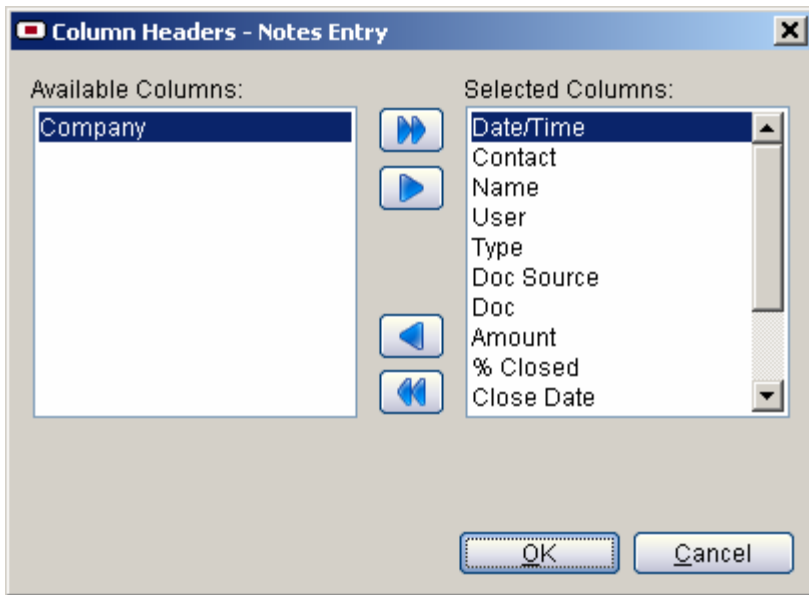


Date/Time	Contact	Name	User	Type	Doc	Amount	% Closed	Close Date	Notes
2006/03/14 09:34 pm	10003	Mr Ron Simo...	GUI	GEN			%		Commu
2006/01/13 09:40 pm	10003	Mr Ron Simo...	GUI	QUO	000822	23,880	.00%		Generat
2006/01/10 09:39 pm	10003	Mr Ron Simo...	GUI	QUO	000822	23,880	.00%		Generat
2005/09/14 02:52 pm	10003	Mr Ron Simo...	GUI	SO	R00005	240	0%		Sales or
2005/09/14 02:52 pm	10003	Mr Ron Simo...	GUI	SO	R00004	1,383	0%		Sales or
2005/09/08 02:46 pm	10003	Mr Ron Simo...	GUI	SO	001630	887	0%		Sales or
2004/08/15 03:07 pm	10003	Mr Ron Simo...	GUI	CRE			0%		Called t

Options/Preferences

The preferences option allows you to control the order of the columns in the browser window. The preferences window uses the same functionality as search preferences allowing you to include/exclude columns and

rearrange the order. Preferences are available in the  Contact Display,  To Do entry,  Note Entry and  Broadcast List Entry programs.



Changes will appear when you exit back to the program.

Export

The export function will export the list of contacts in the browser window directly to Excel using fields in the browser column titles. This option is only available if the user has security to export as defined in the RM Static Control.

Doc Maint

The functionality of this button is discussed in the Automatic Notes section.

To Do

This button takes you to the To Do browser window. This is covered in depth in the To Do section.


All Notes

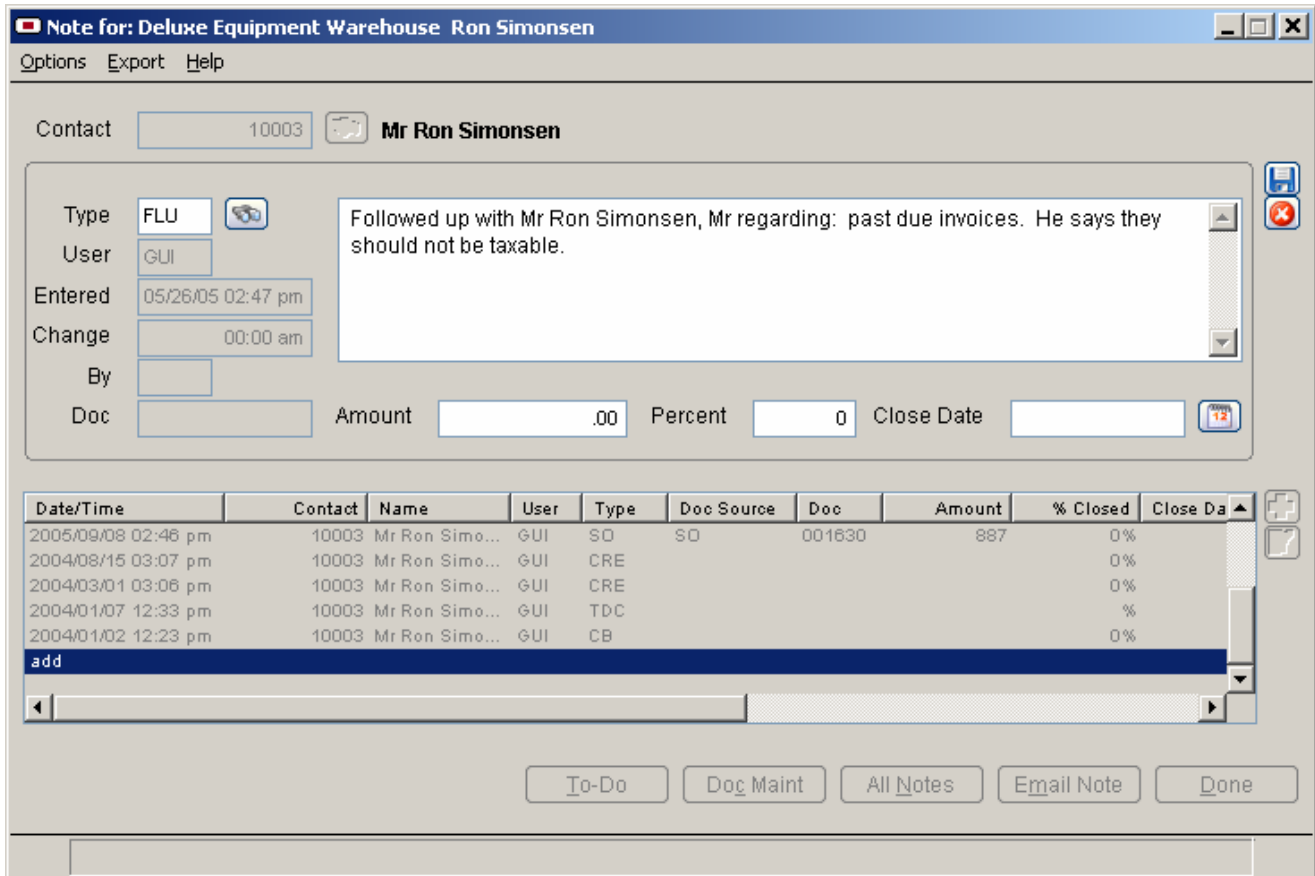
This button will display all the notes for the Customer/Vendor if one is associated to the contact record.

Email Note


This button will allow you to send the note entered as an email to someone external or internal. Highlight the note you wish to email and select that email button.


Add a Note

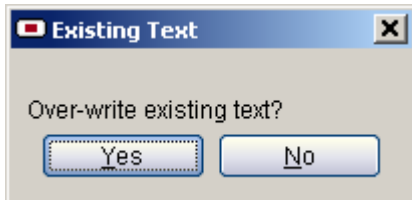
Double click the 'add' line or click the Add  icon. If you select a Note Type that has default text, the text is automatically displayed. If the default text has run time replacement fields, the replacements will be made before the text is displayed.



Date/Time	Contact	Name	User	Type	Doc Source	Doc	Amount	% Closed	Close Date
2005/09/08 02:46 pm	10003	Mr Ron Simo...	GUI	SO	SO	001630	887	0%	
2004/08/15 03:07 pm	10003	Mr Ron Simo...	GUI	CRE				0%	
2004/03/01 03:06 pm	10003	Mr Ron Simo...	GUI	CRE				0%	
2004/01/07 12:33 pm	10003	Mr Ron Simo...	GUI	TDC				%	
2004/01/02 12:23 pm	10003	Mr Ron Simo...	GUI	CB				0%	
add									

Contact – Enter a valid contact number or use the  icon to search

Type – Enter a valid note type or use the  icon to search. The default note type is defined in the User Preferences F/M and pre-filled for new notes. If you override the default note type and there is text in the note, you will receive the following warning message. Selecting 'Yes' will clear the existing text and replace it with the default text from the new note type. Selecting 'No' will leave the existing text.



User – This is your user code.

Entered – The date the record was entered or created



Changed – The date the record was changed

By – User code of the person who changed the note

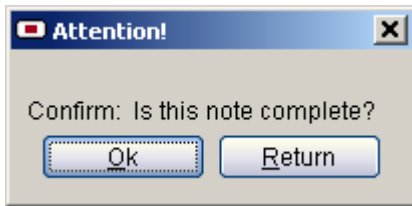
Doc – Is the document number this note is attached to (Sales Order, Purchase Order or Quote).

Note – Enter the note or paste text from another application


Amount, Percent and Close Date – These fields are used in the Contact Display and Filtered Contact Query to indicate estimated dollar amounts, likelihood of close and estimated close date.

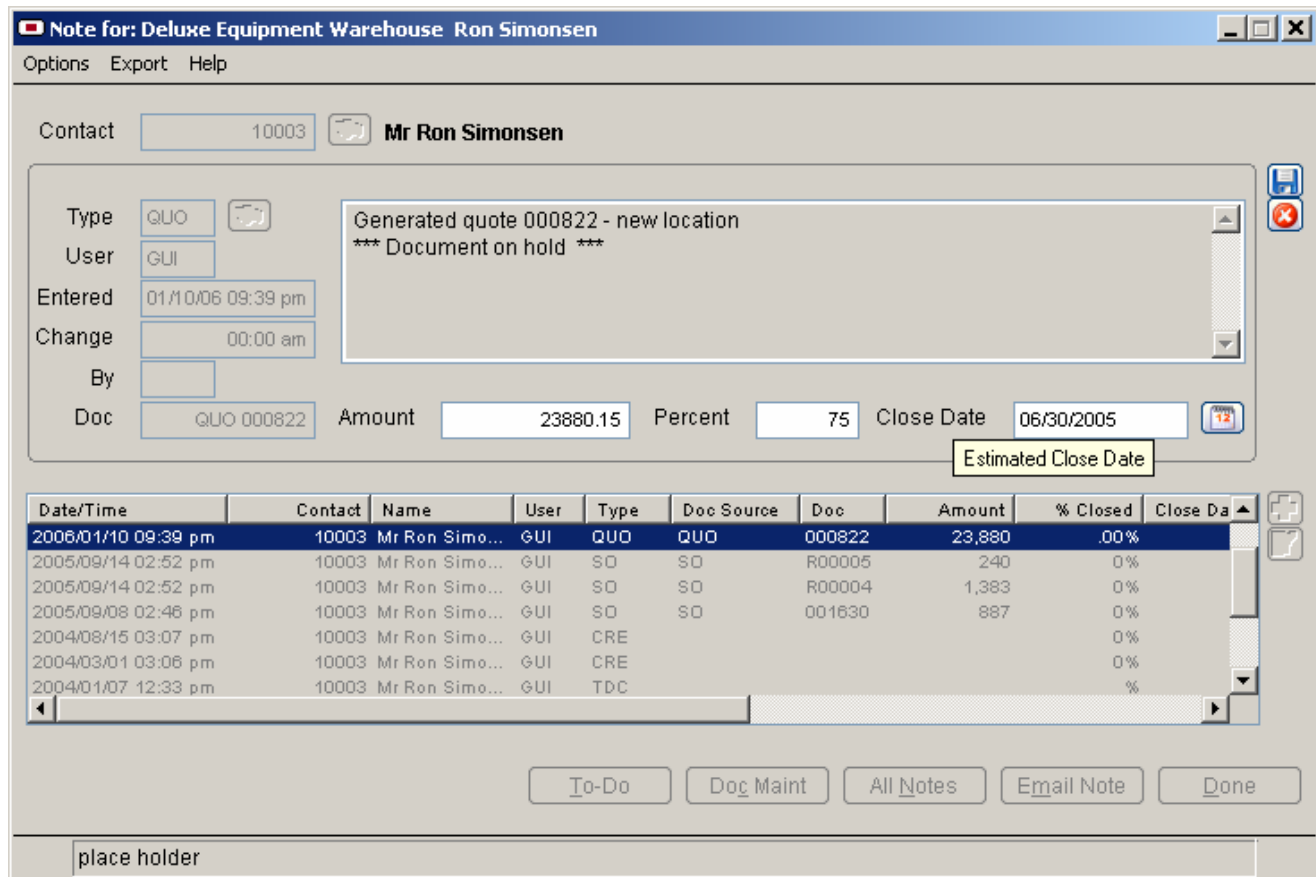
When you are done, click on the Save  icon to finish adding or the Cancel  icon to discard the entry.

Since the text of a note can't be changed after it is saved, the following prompt will be displayed. The return button will return you to the note entry and allow changed to be made. Once you click the Ok button, the note can not be changed.



Editing a Note



Highlight the note you want to edit then click the Edit  icon or double click the line. Only the Type, Amount and Percent can be edited. The Change and By fields will be updated to display the time and user who edited this note.



Estimated Close Date

Date/Time	Contact	Name	User	Type	Doc Source	Doc	Amount	% Closed	Close Da
2006/01/10 09:39 pm	10003	Mr Ron Simo...	GUI	QUO	QUO	000822	23,880	.00%	
2005/09/14 02:52 pm	10003	Mr Ron Simo...	GUI	SO	SO	R00005	240	0%	
2005/09/14 02:52 pm	10003	Mr Ron Simo...	GUI	SO	SO	R00004	1,383	0%	
2005/09/08 02:46 pm	10003	Mr Ron Simo...	GUI	SO	SO	001630	887	0%	
2004/08/15 03:07 pm	10003	Mr Ron Simo...	GUI	CRE				0%	
2004/03/01 03:06 pm	10003	Mr Ron Simo...	GUI	CRE				0%	
2004/01/07 12:33 pm	10003	Mr Ron Simo...	GUI	TDC				%	

place holder

When you are done, click on the Save  icon to finish adding or the Cancel  icon to discard the entry.

Automatic Notes

Certain applications will automatically create a note for you. These include:

- Quote Entry
- Order Entry
- Customer Returns
- Purchase Orders
- Completed or deleted To-Do
- Email/Fax/Letters
- Broadcast Fax/Email
- Quote Conversions

Notes types need to be set up for all of the following:

- QUO – Quote
- SO – Orders
- RTN – Customer Return
- PO – Purchase Order
- TDC – To Do Complete
- EML – Email
- LTR - /Fax/Letters
- BFX – Broadcast Fax
- BML – Broadcast Email
- QCV – Quote Converted

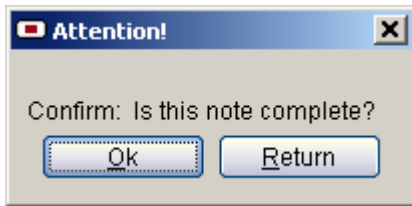
Doc Maint button

When a note is created from an entry program, a document number is associated with the note. When a note has a document number, the 'Doc Maint' button will be active and when pressed will launch the associated entry program. If the document has been updated, the appropriate inquiry program will be launched.

Date/Time	Contact	Name	User	Type	Doc Source	Doc	Amount	% Closed	Close Date
2006/01/10 09:39 pm	10003	Mr Ron Simo...	GUI	QUO	QUO	000822	23,880	00%	
2005/09/14 02:52 pm	10003	Mr Ron Simo...	GUI	SO	SO	R00005	240	0%	
2005/09/14 02:52 pm	10003	Mr Ron Simo...	GUI	SO	SO	R00004	1,383	0%	
2005/09/08 02:46 pm	10003	Mr Ron Simo...	GUI	SO	SO	001630	887	0%	
2004/08/15 03:07 pm	10003	Mr Ron Simo...	GUI	CRE				0%	
2004/03/01 03:06 pm	10003	Mr Ron Simo...	GUI	CRE				0%	
2004/01/07 12:33 pm	10003	Mr Ron Simo...	GUI	TDC				%	

When exiting a document entry program, the following note entry window will pop. The note type will pre-fill according to the entry program. If the Note Type has default text, the text is automatically displayed. If the default text has run time replacement fields, the replacements will be made before the text is displayed. The note will automatically fill the dollar amount from the document, if applicable. You are prompted to enter the estimated close percentage and date.

Since the text of a note can't be changed after it is saved, the following prompt will be displayed. The return button will return you to the note entry and allow changes to be made. Once you click the Ok button, the note cannot be changed.



Notes Exercises

Complete the following Exercises:

1. Add a new Note to contact Ralph Notch at AR North America including amount and percentage.
2. Add a To Do for that Note to remind them to schedule another training class at Pivotal.
3. Add a new Note for contact Harry McKee using the search function and a new To Do.
4. Enter a quote for any contact and create the note.
5. Go back to the note entered above and go to document maintenance and add a line to the quote – Skip the creation of the note.
6. Enter a sales order for a customer contact and create the note.
7. Enter a customer complaint for any customer contact and email it to sales rep Sally Furness.



To Do's

The To Do Entry is the foundation of the Calendar/Task workflow model. The browser window contains selected tasks ordered by date & time and becomes a single location for launching any application related to the highlighted contact or task.

Navigating the To Do List

The To Do List can be accessed from the menu, Contact Display, Contact F/M, Filtered Queries, or the Contact Inquiry.

In the browser window you will see, all To Do items based on your User ID and the details of the item currently highlighted on the top half of the screen. To view the details of another To Do item, click on the item or use the arrow keys to highlight another item. The To Do List can be sorted by clicking the browser column headings.

When you first access the To Do List you can select from a pull down menu to Show:

- My To Dos
- Assigned To Dos
- For a Contact

Next you can select from a pull down menu the Scope of To Dos you wish to view:

- Open
- Complete
- Past Due
- Today's

Note: The default value for the scope comes from the User Preference F/M.

If you select the 'For a Contact' option, you are then prompted for a contact number. Once you have entered a valid contact, all of the to Do items for the contact will be displayed in the browser.

Browser Window

To Do items listed can be sorted by any column heading by clicking on the column title.

Go To Menu


The purpose of the Go To pull down menu is to launch programs for the contact highlighted in the browser window. The application being run will have the contact information pre-filled.

Vendor related programs are available for contacts associated with vendors, customer related programs are available for contacts associated with customers. Quotes are available for any type of contact. Closing those applications when done returns you to this screen.

Once you have selected an application it becomes the default application as indicated by a check mark on the menu. Double clicking on a contact in the browser window will execute the checked application.

Time	Contact	Company	Contact Name	Phone	Time Zone	Re
12:01 PM	10017	Advanced Promotions	James Hanville	651-777-5876	Central	Po
12:59 PM	10006	A T S Steels Inc	Harry McKee	651-636-2200	Central	B
2:55 PM	10016	Advance Packaging Company ...	Dave Hasenstab	651-489-8231	Pacific	Er
12:55 PM	10015	Deluxe Equipment Warehouse	Bruce Johnson	218-463-1781	Pacific	B
3:16 PM	10000	Southeastern Industrial Supply	Julie Johnson	320-243-3736	Central	Er
12:51 PM	10011	Cowboy World	Ron Martens	952-938-5451	Central	Er
5:02 PM	2538	Roark Architectural, Inc.	Bob Gannon	651-636-0046	Central	B

Add a To Do

If you are in the View/Edit mode, double click the 'add' line or click the  icon on the right side of the screen. The top part of the screen will be available for editing.

01-FACTS 7.5 Demo, To Do List (RME220) Reminder Status: STOPPED

Go To Options Export Help

Show Scope Contact

For **George U. Invencent** Note

Req By **George U. Invencent**

Type **Call Back**

Contact **Mr. Dave Hasenstab**

Date Notify

Time Priority Remind

Record 3 of 7 Address: 1400 Mississippi Street Saint Paul, MN 55117-4693

Type	Priority	Due Date	Time	Contact	Company	Contact Name	Phone	Time Zone	Re
CB	3-Medium	2004/03/04	12:01 PM	10017	Advanced Promotions	James Hanville	651-777-5876	Central	Po
CB	3-Medium	2004/03/04	12:59 PM	10006	A T S Steels Inc	Harry McKee	651-636-2200	Central	B
CB	3-Medium	2004/03/04	2:55 PM	10016	Advance Packaging Company ...	Dave Hasenstab	651-489-8231	Pacific	Er
CB	1-Urgent	2004/03/05	12:55 PM	10015	Deluxe Equipment Warehouse	Bruce Johnson	218-463-1781	Pacific	B
CB	2-High	2004/03/15	3:16 PM	10000	Southeastern Industrial Supply	Julie Johnson	320-243-3736	Central	Er
CB	3-Medium	2004/03/19	12:51 PM	10011	Cowboy World	Ron Martens	952-938-5451	Central	Er
QUO	3-Medium	2004/10/12	5:02 PM	2538	Roak Architectural, Inc.	Bob Gannon	651-636-0046	Central	B

add

Enter user code, F2-Search

For – This will be your user code by default, you may add To Do items for other users.

Req By – This is the user code of the person who assigned this To Do item to you. It will default to your user code when creating To Do items for yourself.

Type – This has a search that allows you to select a To Do type. If automatic text has been defined for the type selected, the note will be pre-filled with the text. Types are defined in the To Do Type FM program.

Contact – This is optional, meaning you can have personal To Do's not assigned to any contact and related just to your schedule. However, you can assign a To Do to a contact by entering their contact number here. A search is available for your convenience. If you are in a contact record, it will default to the one you are on.

Date – This is the date the Reminder will pop up. The default is the system date. A calendar can be viewed by clicking the icon next to the field. The calendar will not allow you to select dates prior to today.

Time – Defaults to current time plus 15 minutes unless a specific time is designated. Time can be entered as HH:MM AM or as a decimal (2.5 is the same as 2:30 PM). When entering time as a decimal, the system assumes times that numbers from 6 to 11 are AM and times from 1-5 are PM.

Priority – This has a drop down box revealing four levels of priority: Urgent, High, Medium and Low.

Remind – Select Pop-up, Email, Both or None. If you select Email or Both, the icon to the right of the remind field will be enabled so that you can enter delivery information. The 'to' address is the email address associated with the 'for' user code. You may add additional addresses as needed. The priority of the email reminder is translated from the To Do priority.

Notify – This option is available only for assigned To Do items and will send an email notification when the To Do is completed.

Set Email Reminder Addresses


To: ginvencent@sofsol.com

Cc:

Bcc:


Priority: N - Normal

Done Cancel

Notes – This is where the nature of the To Do is identified. Up to 3072 characters can be entered. You can view the complete text by clicking the edit  icon and scrolling. The text of a To Do can be edited after it is saved.

To save your To Do, click on the Save  icon or the Cancel  icon to discard the entry.

Editing a To Do Item

First, select a To Do item to edit by double clicking on an item in the browser or by highlighting the line and selecting the edit  icon. If this To Do item was assigned by another user, you must have the necessary security to make changes. Security is set up in the RM Static Control F/M.

Delete a To Do Item

Deleting a To Do Item because it is finished is not recommended. Instead mark it Complete and the item will be removed from the screen but not deleted. That way you have a history of transactions with a contact. However, if you do want to remove an item, click once on the item then press the Delete. This delete cannot be undone. If this To Do item was assigned by another user, you must have the necessary security to delete it.

Mark a To Do Completed

Mark a To Do as complete by highlighting the To Do and selecting the Complete button. You can also mark a To Do item complete from the Reminder program. A confirmation screen will appear. If you choose the copy option, your current To Do item will be completed and a new To Do will be created.

Complete To Do

Select: C - Complete

Completion Note: C - Complete
N - Copy and create new To Do

OK Cancel

Completion memo on note completion

- Adds the completion note to the original text of the To Do so that it can be viewed on the completed To Do. The option is available in the standard notes entry program as well as the pop-up reminder.

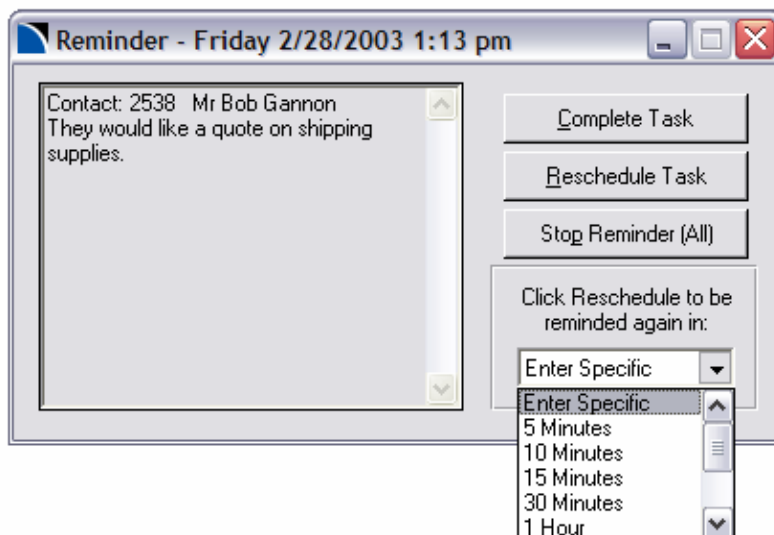


Start/Stop Reminders

Each To Do item has a scheduled date and time the system can use to remind you of deadlines. You can start or stop the reminder program manually by selecting the Start/Stop Reminder option on the Options pull down menu. You can also stop the reminder program by clicking the Stop Reminder (All) button on the Reminder pop-up window. The reminder status is displayed on the title bar of the window.

Reminders

When the Reminder program is running and a To Do was created with a reminder type of 'Pop-up' or 'Both', a reminder screen pops up at the scheduled date and time. Reminders will come up one at a time and must be rescheduled or completed before the next reminder is displayed.

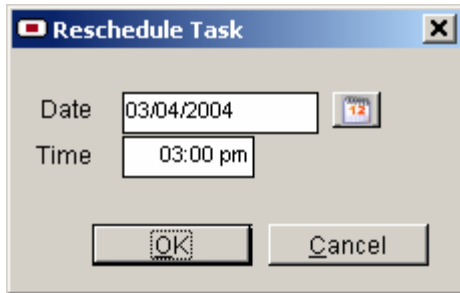


Your options when the system prompts you for a reminder are:

Complete Task – This will remove the item from your open To Do list and mark it as complete.

Reschedule Task - You can select from one of the standard time periods to reschedule a task.

When you select the Enter Specific the system will prompt you for the following:



Enter a specific date and time then click the reschedule button.

Stop Reminders (All) - You can stop the reminder program by clicking the Stop Reminder button.
To restart the reminder program, click the Start Reminder button.

Note: If you set up a To Do with an email only reminder, the only way to reschedule or complete the To Do is through the To Do Entry program.

To Do List Exercises

1. Add a new To Do for next week with a priority of High using the Plus button on the right side of the screen. Include a note.
2. Add a Contact to the To Do above using the search function and a person with a name starting with "R".
3. Add another To Do for today with a Reminder checked using the Add line, a Contact and a Type of APT. Include a Note.
4. Reassign a To Do to a new person.
5. Create a new To Do with a pop up Reminder in two minutes and start the Reminder System.
6. When the Reminder pops up, reschedule for tomorrow at 8am.
7. Mark a To Do completed add a text note about the completion.
8. Complete a To Do and reschedule it for two weeks out.



Filtered Notes Query

The Filtered Note Query is an on-screen reporting tool designed to present selected data in a condensed format. Data is presented in a tree-view format much like Windows Explorer with expandable and collapsible sections. Navigation can be done using either the keyboard or mouse.

Common Elements

Mouse Navigation

Click on the + to expand or the - to collapse. Double click on the text to expand or collapse.

Keyboard Navigation

Press

END

HOME

NUM LOCK+ASTERISK on numeric keypad (*)

NUM LOCK+PLUS SIGN on numeric keypad (+)

NUM LOCK+MINUS SIGN on numeric keypad (-)

LEFT ARROW

RIGHT ARROW

UP ARROW

DOWN ARROW

Any letter or number

To

Display the bottom of the active window.

Display the top of the active window.

Display all subfolders under the selected folder.

Display the contents of the selected folder.

Collapse the selected folder.

Collapse current selection if it's expanded, or select parent folder.

Display current selection if it's collapsed, or select first subfolder.

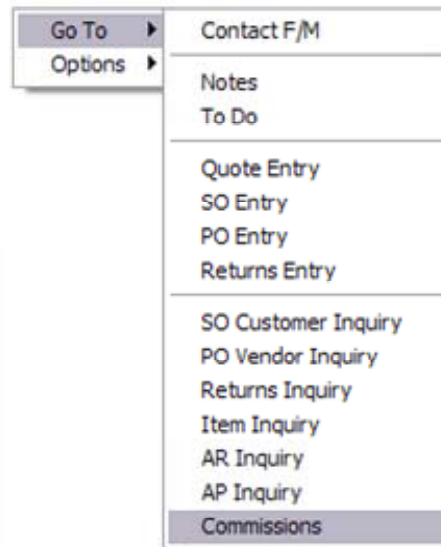
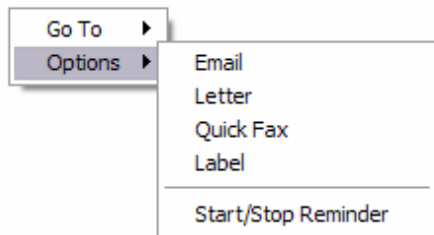
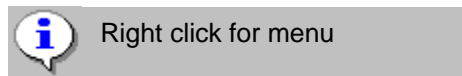
Highlight previous entry

Highlight next entry

Goes to the entry in the highlighted level of the tree that corresponds to the key pressed

Right Click

When a query is expanded to the contact level, the right click option is enabled and gives you complete navigational control of the RM environment.



Notes Filter

The notes query uses all of the standard filter elements with the addition of note and To Do criteria. For notes, you can filter by note date range, type, entered by and keywords. You can optionally include To Do items by scope with keywords. The date sort applies to both To Do and notes.

The standard filter logic is first used to select contacts and then notes and To Dos are checked. Notes or To Dos meeting any criteria are included in the results.

Contact Filter

Filter Sort: 05 - Type | Select contacts meeting: All criteria

Customer: [] All | Vendor: [] All | SLSP/Terr: [] All | Mail Code: [] All

Contact Type: [] All | Address: [] All | Lead Source: [] All | Stage: [] | Time Zone: 00 - N/A | Step: []

of Emp: E - Equals [] | SIC Code: E - Equals []

Date Created | **Date Changed**

Start: [] First | Start: [] First
 End: [] Last | End: [] Last

Notes

Start Date: [] First | Note Type: [] All
 End Date: [] Last | Note Owner: [] All
 Keywords: [] And [] | Date Sort: A - Ascending

To Do

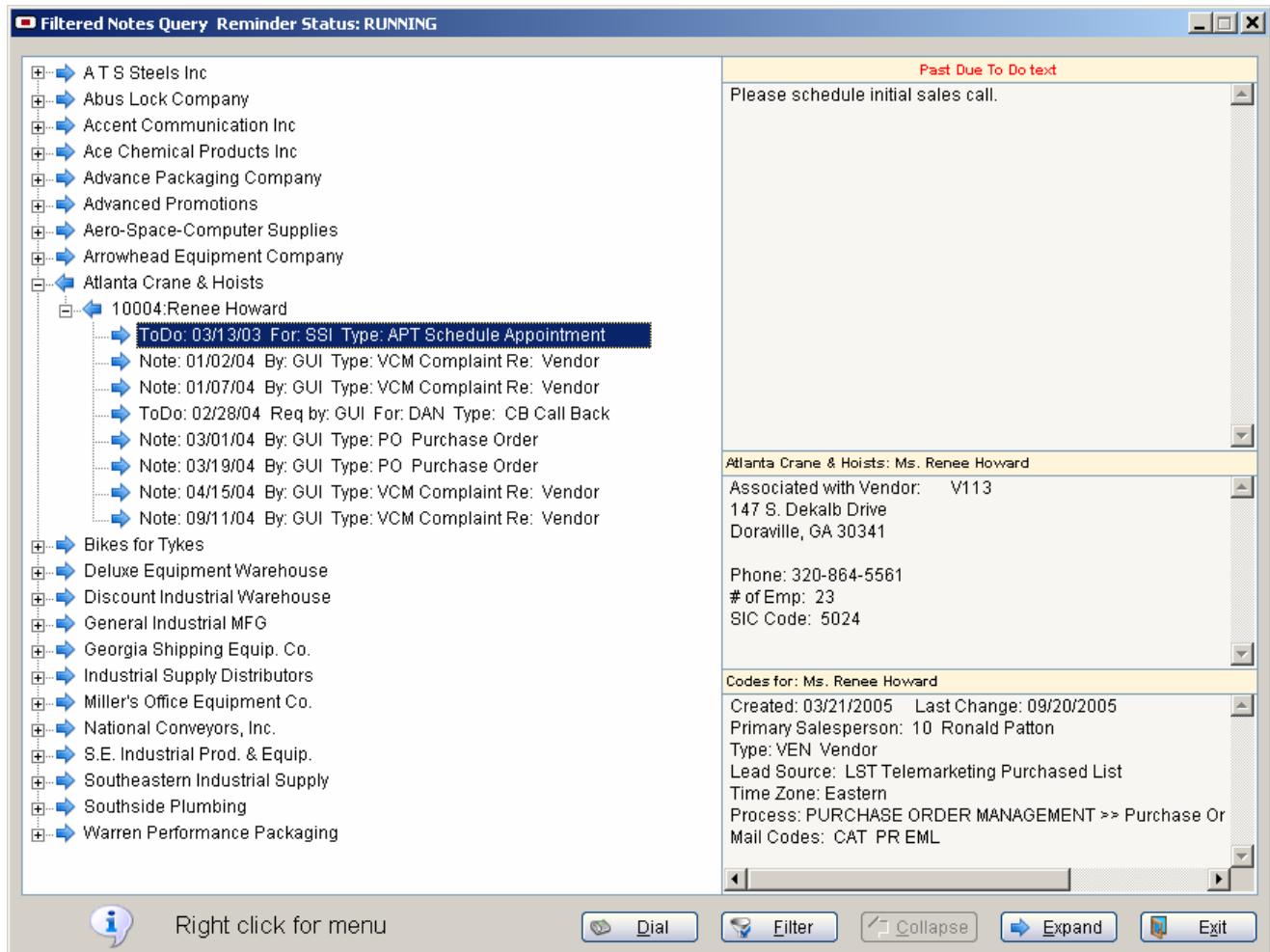
Include: | Scope: O - Open | **Notes and ToDos match any criteria. ToDo dates match Note dates**
 Keywords: [] And []

OK Clear Cancel

Enter search sort sequence

Notes Query

The Notes Query is a reporting tool designed to summarize recent activity by customer & contact in a condensed format based on the notes filter selections. Contacts selected with the standard filter are displayed along with all notes and To Dos meeting the notes and To Do filter selections.



Example

Verbal Quotes

Select a contact type representing existing customers. Then select the note type associated with verbal quotes and a starting date looking back a week. Check the include To Do box and run the query. You will see a listing of all contacts who have been given verbal quotes and have had notes or To Dos entered within the last week. By expanding the tree, you can see all of the information. With the right click menu, you can then add notes, create To Dos, send an email, etc. right from the query.

To further enhance the power of the query, synchronize your favorite views from the customer inquiries or the RM Contact inquiry. (See Synchronization)

Filtered Notes Query Exercises

1. Generate a list of all customer complaints (note type) received since 1/1/05
2. Expand into the detail of the note.
3. Create a To-Do for user MEJ to follow up on the complaint.
4. Email the note to sales rep Ron Patton

Commission Inquiry

The commission inquiry is available as a standard menu item from the contact F/M, pull-down Go To menus and right click menus.

Highlights include:

- Displays only for the salesperson code assigned to the logged in user
- Shows both pay and hold commission totals
- Drill down to line item detail
- Drill to past invoice inquiry
- Individual columns can be sorted in both views
- Column order preferences & export options are available in both summary & detail views

01-FACTS 7.5 Demo, Commission Display for: 30 Sally Furness (RMI620)

Options Export Help

Invoice	Customer	Date	Sales	Commission	Status	S...	Gross Profit	Comm %
000247	C100	2005/09/30	190.00	0.00	Pay	30	90.00	.00%
001724	C100	2005/09/21	2277.15	113.86	Pay	30	555.95	5.00%
001777	C100	2005/09/27	1809.99	0.00	Pay	30	448.39	.00%
001791	C100	2005/09/01	1164.15	58.21	Pay	30	328.62	5.00%
001835	C100	2005/09/01	635.74	31.79	Pay	30	105.83	5.00%
001841	C100	2005/09/01	-468.75	0.00	Pay	30	-134.58	.00%
001842	C100	2005/09/01	161.07	0.00	Pay	30	50.57	.00%
001847	C100	2005/09/15	-285000.00	0.00	Pay	30	-173610.00	.00%
001852	C100	2005/09/15	921.60	0.00	Pay	30	372.96	.00%
001861	C100	2005/09/15	541.20	0.00	Pay	30	202.96	.00%
001863	C100	2005/09/15	892.80	0.00	Pay	30	334.80	.00%
001865	C100	2005/09/15	5810.77	0.00	Pay	30	2081.77	.00%
001877	C100	2005/09/15	0.00	0.00	Pay	30	.00	.00%
001879	C100	2005/09/15	0.00	0.00	Pay	30	.00	.00%
001881	C100	2005/09/15	-183.54	-9.18	Pay	30	-48.27	5.00%
001882	C100	2005/09/15	203.52	0.00	Pay	30	87.58	.00%

Hold Total:

Pay Total:

Detail View Invoice Close

01-FACTS 7.5 Demo, Commission Detail for: Southeastern Industrial Supply Invoice: 000247 (RMI620)

Options Export Help

Item Number	Description	Quantity	Ext Price	Ext Cost	Commission	Comm %
ALL	ALL ITEMS	1	200.00	100.00	0.00	.00%

Close



Synchronization

The RM Module can utilize the powerful synchronization feature of FACTS. This means that all of your RM programs can be synchronized with the following inquiries:

- AR Customer Inquiry
- SO Customer Inquiry
- AP Vendor Inquiry
- RM Inquiry

To use synchronization:

- Start a Facts session
- Open the desired inquiry program
- Select view(s)
 - Select 'open view as window' from the options pull down menu for each view you want to see
- Click on the synchronize button
 - Minimize the inquiry window so that only the selected views are visible on the screen
 - Arrange on the screen so that all are visible. The inquiry programs remember the locations.
- Start another Facts session
- Go into RM Contact Display, To Do, Broadcast List entry or any of the Filtered Queries
- Execute a filter to bring up customers or vendors
- Note as you move from record to record that the inquiry is synchronized

You may also open any specific views as windows out of the inquiry programs and have those available on your screen. (Standard Facts feature)

Synchronization Exercises

1. Start one Facts session and access the Contact Display from the menu
2. Start a second Facts session and go to the AR customer inquiry.
3. Select the synchronize option.
4. Go back to your first session, execute the filter calling up a contact from Deluxe Equipment
5. Go to your second session and notice the inquiry is synchronized.



BROADCAST LISTS

Broadcast List Maintenance

This program is used to associate contacts with specific Broadcast Lists. The header identifies the List Name as defined in the List Name F/M which will be covered later in this document. Statistics for the last broadcast are also displayed in the header.

01-FACTS 7.5 Demo, List Maintenance (RME230)

Options Export Help

List Name: CATALOG
 Catalog List

Statistics
 Last Fax
 Last Email
 User: **GUI** George U. Invencent
 Results

Contact: 2537 Mr. Steve Smith
 Company: Cowboy World
 Fax #
 Email: smith@cowboyworld.com
 Dates: Added 01/07/2004
 Changed
 Sent
 Update Contact





Record 1 of 9

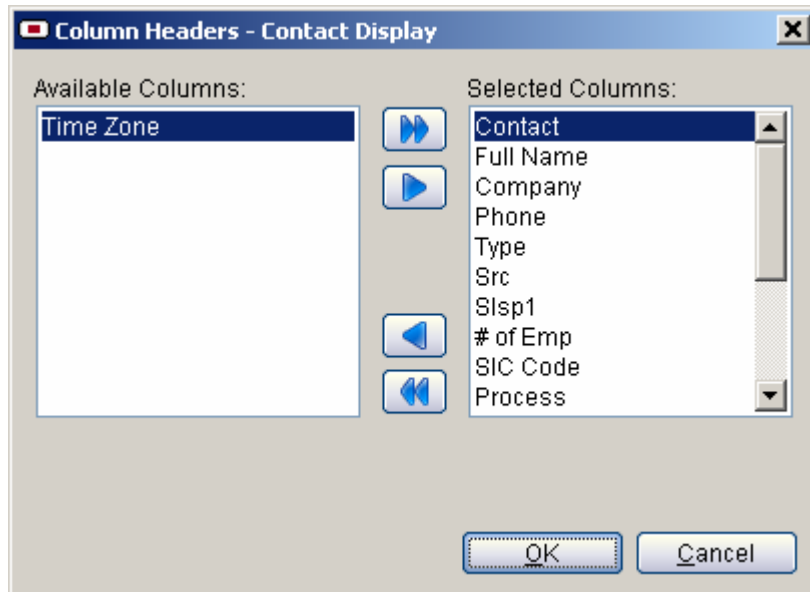
LN#	Company Name	Fax Number	Email Address	Results
0002	Cowboy World		smith@cowboyworld.com	
0003	Roak Architectural, Inc.		bgannon@roak.com	
0004	Miller's Office Equipment Co.		ab@millers.com	
0005	Atlanta Crane & Hoists		rhoward@atlantacrane.com	...
0006	A R North America Inc		rnotch@arnorth.com	
0007	Abus Lock Company		bolson@abus.com	
0008	Accent Communication Inc		steve@accent.com	
0009	Ace Chemical Products Inc		vertin@ace.com	

Filtered Add Filtered Del Clear List Note Only Fax E-Mail Done

Options/Preferences

The preferences option allows you to control the order of the columns in the browser window. The preferences window uses the same functionality as search preferences allowing you to include/exclude columns and rearranges the order.

Preferences are available in the  Contact Display,  To Do entry,  Note Entry and  Broadcast List Entry programs.



Export

The export function will export the list of contacts in the browser window directly to Excel using fields in the browser column titles. This option is only available if the user has security to export as defined in the RM Static Control.

Filtered Add or Delete

Contacts may be added to or deleted from the Broadcast List by using the 'Filtered Add' or 'Filtered Del' buttons. Using the Contact Filter, you can perform multiple combinations of additions or deletions to fine tune your list.

Filtered Add

Use the filter to select the criteria for contacts you want to add to the list. Duplicates will not be added.

Filtered Delete

Use the filter to select the criteria for contacts you want to delete from the list.

Clear List

This button provides a simple method to all contact from a list.

Contact Filter

Filter Sort: 05 - Type Select contacts meeting: All criteria

Customer: [] All

Vendor: [] All

SLSP/Terr: [] All

Mail Code: [] All

Contact Type: CUS Customer Class: [] All

Lead Source: [] All Stage: []

Time Zone: 00 - N/A Step: []

of Emp: E - Equals [] SIC Code: E - Equals []

Date Created

Start: [] First End: [] Last

Date Changed

Start: [] First End: [] Last

Notes

Start Date: [] First Note Type: QUO Quote

End Date: [] Last Note Owner: [] All

Keywords: [] And []

OK Clear Cancel

Enter user code, F1-All, F2-Search, F3-Selected User codes

Example:

Use a combination of contact type, note type and a note date range to select a list of call contacts who received a quote in the last week.

Note Only

This button will create a note for the contacts in the list without having to send a broadcast. Users can select the note type and use the active replacement options when creating the note text.

Broadcast Note

Note Type: NPA Replacement: {Your Company Name}

Note Text: New product announcement flyer sent to {Contact Full Name}

Send Cancel

Enter message


Export

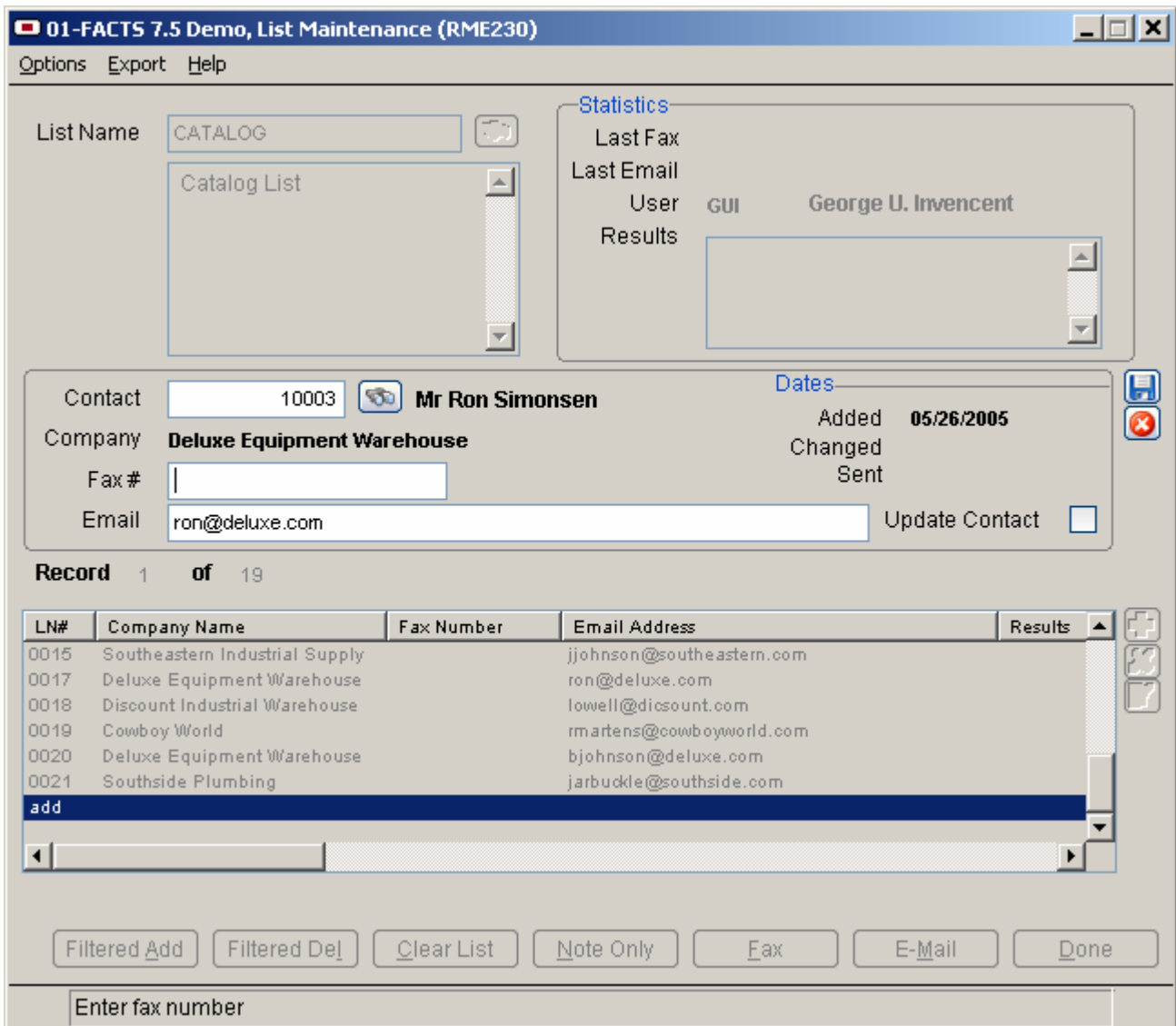
The export function will export the list of contacts in the browser window directly to Excel using fields in the browser column titles. This option is only available if the user has security to export as defined in the RM Static Control.

Adding, Editing and Deleting Individual Contacts

In addition to the filtered methods, the list can be fine-tuned to add individual contacts, delete individual contacts and even change the fax or email address of contacts just for the purpose of this mailing.

Adding a Contact

Contacts can be added to the Broadcast List one at a time by using the  icon on the right side of the screen or clicking 'add' in the browser window.



01-FACTS 7.5 Demo, List Maintenance (RME230)

Options Export Help

List Name: CATALOG

Catalog List

Statistics

Last Fax
Last Email
User: GUI George U. Invencent
Results

Contact: 10003 Mr Ron Simonsen
Company: Deluxe Equipment Warehouse
Fax #:
Email: ron@deluxe.com

Dates


Added: 05/26/2005
Changed:
Sent:
Update Contact:

Record 1 of 19

LN#	Company Name	Fax Number	Email Address	Results
0015	Southeastern Industrial Supply		jjohnson@southeastern.com	
0017	Deluxe Equipment Warehouse		ron@deluxe.com	
0018	Discount Industrial Warehouse		lowell@discount.com	
0019	Cowboy World		rmartens@cowboyworld.com	
0020	Deluxe Equipment Warehouse		bjohnson@deluxe.com	
0021	Southside Plumbing		jarbuckle@southside.com	
add				


Filtered Add Filtered Del Clear List Note Only Fax E-Mail Done

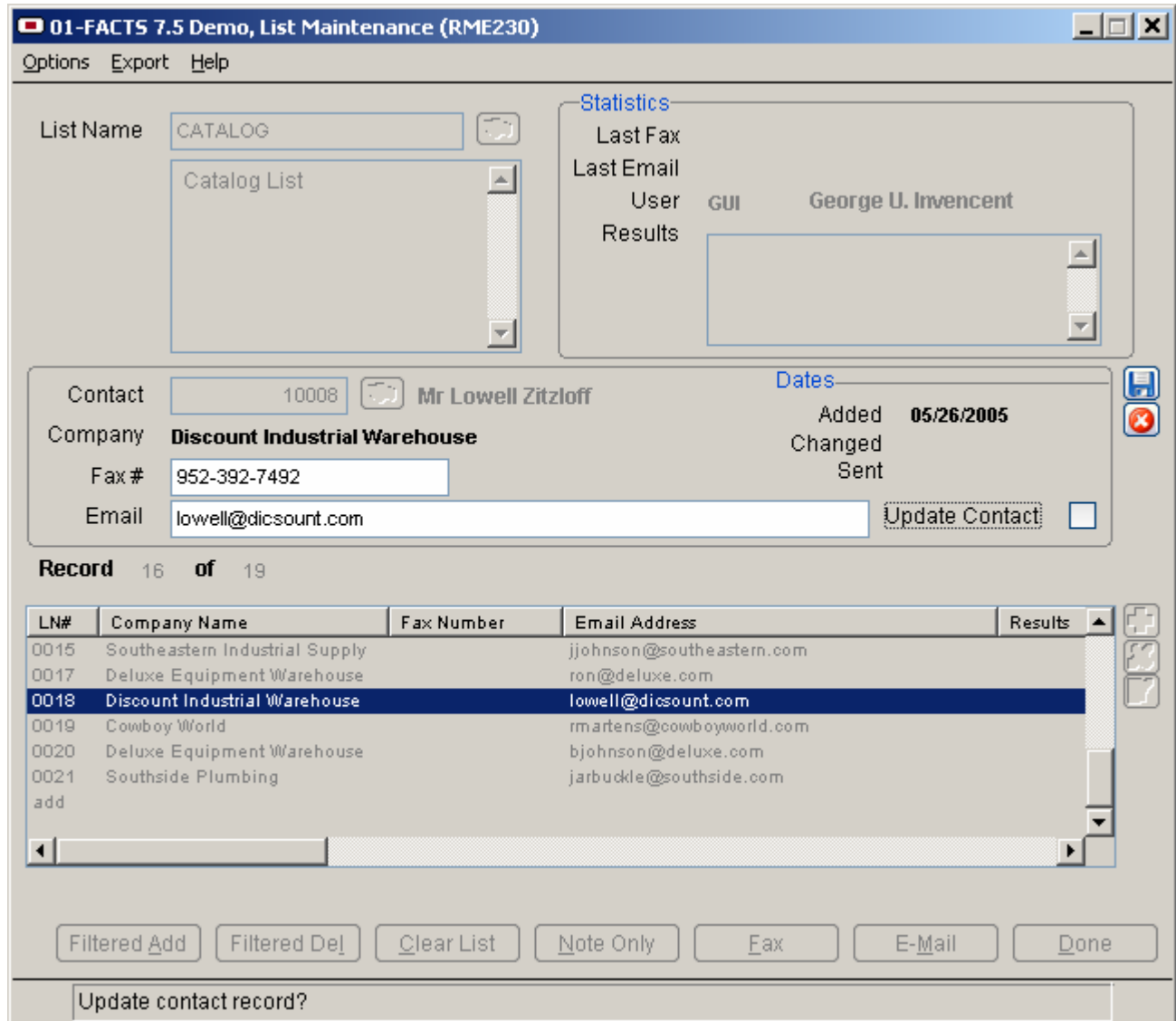
Enter fax number

To find a contact, click the  icon for the standard contact search. The fax number and email address are pre-filled from the contact file.

Update Contact - If you change a fax number of email address and check the update contact checkbox, the changes will be written back to the contact file.

Editing a Contact

Double click a contact in the Broadcast List or click highlight the contact and click the  icon. You will be presented with the Edit screen as shown below allowing the fax and email address to be changed. If the update contact button is checked, the contact record will be changed.



01-FACTS 7.5 Demo, List Maintenance (RME230)

Options Export Help

List Name: CATALOG

Catalog List

Statistics

Last Fax
Last Email
User: GUI
Results: George U. Invencent

Contact: 10008 Mr Lowell Zitzloff

Company: Discount Industrial Warehouse

Fax #: 952-392-7492

Email: lowell@dicsount.com

Dates

Added: 05/26/2005
Changed
Sent



Update Contact:

Record 16 of 19


LN#	Company Name	Fax Number	Email Address	Results
0015	Southeastern Industrial Supply		jjohnson@southeastern.com	
0017	Deluxe Equipment Warehouse		ron@deluxe.com	
0018	Discount Industrial Warehouse		lowell@dicsount.com	
0019	Cowboy World		rmartens@cowboyworld.com	
0020	Deluxe Equipment Warehouse		bjohnson@deluxe.com	
0021	Southside Plumbing		jarbuckle@southside.com	
	add			

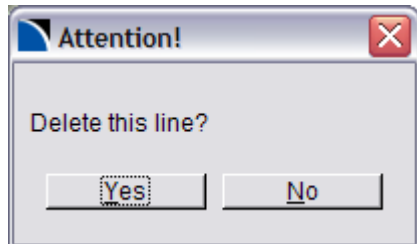
Filtered Add Filtered Del Clear List Note Only Fax E-Mail Done

Update contact record?

When you are done, click on the Save  icon to finish adding or the Cancel  icon to discard the entry.

Deleting a Contact

Highlight the contact to be deleted and press the  icon to delete that record from the list.



Broadcasting - Common Elements

Create Note

If checked, the system will create a note with the type of 'BFX' or 'EML' and the text of the subject line (email) or a message indicating what was sent.

Include Text

If the include text box is checked, the entire content is included in the note.

Active Replacements

To insert an active replacement field, select one of the fields from the pull-down. Position your cursor in the subject or message at the point where you want the field inserted and use the keyboard shortcut 'Ctrl-V' (Paste) or right click the mouse and select paste.



Templates

A template search is available to add or change the template. Set-up of Templates will be discussed in detail later in this document.

Fax

The Fax button will display the following screen, allowing the user to configure how they want to send the fax. The broadcast fax can be used to send a file, cover page or both. All broadcast faxes are set to a low priority for transmission so that your regular FaxLink activity will not be affected.

Broadcast Fax Setup

File Name: C:\FACTS75_Demo\NPT1.txt

Delivery Options

Send at: ASAP | Mode: S - Standard (98x204) | Notification: F - Failure only

Cover Page Options

Cover Page: 1003 | Subject: New Catalog from {Your Company Name}

Message:
Dear {Contact First Name},

Attached is an electronic version of our new catalog. We have many new products listed. If you would like to discuss your pricing or any of our new products, please contact me at {Your Company Phone}.

If you cannot open the document and would like a printed copy please contact me and I would be happy to forward it to you.

{Your Company Name}
{Sender Name}
{Sender Title}
{Sender Email}
{Your Company Phone}


Contact Options

Create Note: | Include Text: | Note Type: EML | Email Note Created

Buttons: Send, Test, Template, Sender Info, Cancel

Status: Create a note?


File Name

To fax a file, click on the  icon located next to the field. There are four types of files that can be faxed:

- PCL Files (*.pcl)
- TIFF Images (*.tif)
- Postscript Files (*.ps)
- Text Files (*.txt)

The default directory for attachments is 'rm_attachments' located in your working directory.

Delivery Options

Send at - The user can give a send time for FACTS to start sending the fax or click the  icon and FACTS will send this fax out ASAP.

Mode – Select how to send the fax, in standard mode or fine mode. Most graphical files should be sent in fine mode.

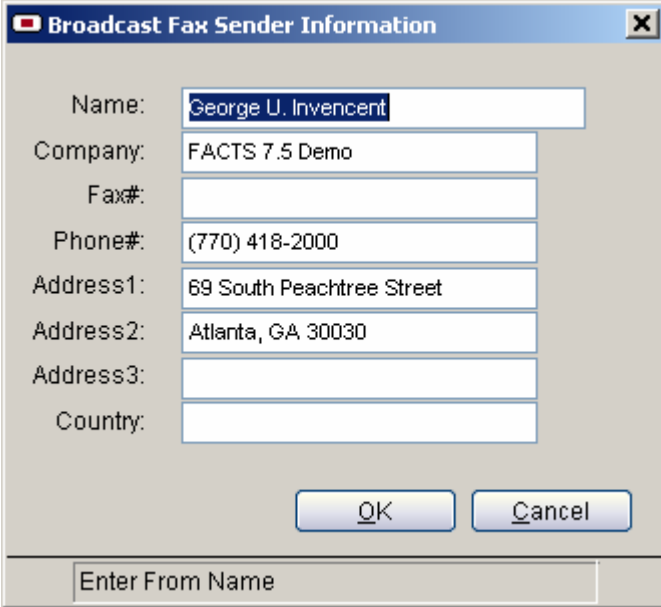
Notify – Enter in an email address to activate the notification field. This will allow the user to select if they want to receive email notification of the following:

- Always – Always notify the user on each attempt, if the fax succeeds, and/or if the fax fails.
- Failure only – Only notify the user if the fax fails.
- Success only – Only notify the user if the fax completes sending with no problems.
- Each attempt – Notify the user each time the fax attempts to send.

Cover Page Options

Select a cover page format to use to send the fax. If the user selects a cover page the replacement, subject, and message fields will become active. This will allow the user to customize the cover page of the fax by selecting a template to send with the fax, or creating their own cover page. Click on the Template button to search for an existing template. To create a new template see the section on Email/Letter Template F/M later in this document

Click the **Send** button to send the fax. To view the senders information click the Sender Information button, the user can change any of these fields as appropriate for the fax being sent. The Name comes from the user code of the person logged in and the rest of the information comes from the Company F/M. Changing any of these fields will not overwrite the information in the file maintenances.



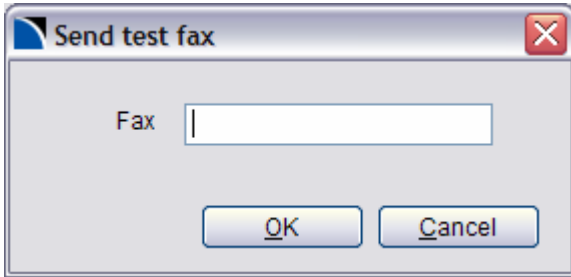
The image shows a dialog box titled "Broadcast Fax Sender Information" with a close button (X) in the top right corner. The dialog contains several text input fields for sender information:

- Name: George U. Inwencent
- Company: FACTS 7.5 Demo
- Fax#: (empty)
- Phone#: (770) 418-2000
- Address1: 69 South Peachtree Street
- Address2: Atlanta, GA 30030
- Address3: (empty)
- Country: (empty)

At the bottom of the dialog are two buttons: "OK" and "Cancel". Below the dialog box is a text input field with the placeholder text "Enter From Name".

Test button. Opens a window for the user to enter a fax number for the test fax or an email address for a test email. Pressing the test button will send a single copy of the broadcast fax/email for review prior to the entire list being sent.


In addition, the broadcast history contact will be automatically included in all broadcasts and a note with full text will be written.

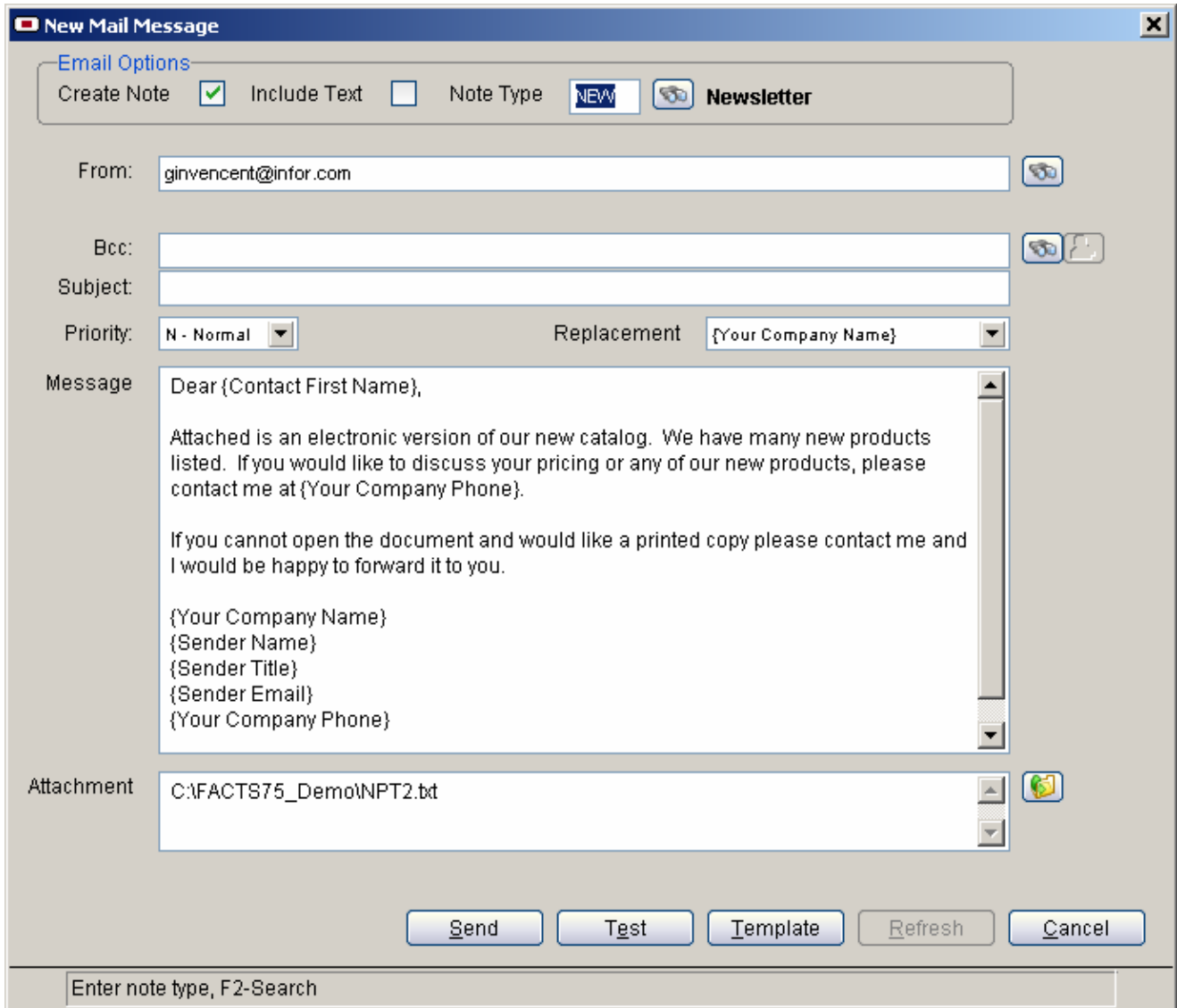


Email

The broadcast email has all of the capabilities described in the email section earlier in this document with the following exceptions.

The To and CC addresses are omitted from the screen. The To address will be supplied by the Broadcast List and the CC is unnecessary. The From address defaults to the email address set up in the User Code

Additional Info F/M. The  icon will display a from address search allowing the selection of either a user code or salesperson address.




Test button. Opens a window for the user to enter an email address for the test. Pressing the test button will send a single copy of the broadcast email for review prior to the entire list being sent.

From Email Address Search [Minimize] [Maximize] [Close]

Options Export Print

User Email Salesperson Email

Go To 

Filters

Keywords **And** **Go**

User email	Code	User Name
dsimmons@infor.com	DAN	Daniel Simmons
ginvencent@infor.com	GUI	George U. Invencent
in4@infor.com	IN4	Infor Global Solutions
mjones@infor.com	MEJ	Mary Elizabeth Jones
rpatten@infor.com	RON	Ronald Patten
sinvencent@infor.com	SSI	Not on file
tware@infor.com	TBW	Tony B. Ware

OK Cancel

Enter beginning user email to go to, F2-Search

List Name File Maintenance

A Broadcast List is a contact list you define. First, use the Broadcast List File Name F/M to create a name or identifier of your list. Codes are a 20-character alphanumeric field with a description; a search is available to look up any existing List Name codes. There is no limit to the number of Contact Lists you may have and contacts may belong in more than one list. The List F/M will also track statistics on the last time this list was sent by fax and email, the last user who sent it and the results.

01-FACTS 7.5 Demo, List Name F/M (RMF940)

Help

Broadcast List NEWSLETTER

Main

Description Quarterly electronic newsletter list.

Statistics

Last Fax

Last Email

User GUI0123 George U. Invencent

Results

Save Delete New Exit

Enter the list description

Broadcast List Exercises

1. Create two new Mail Codes:
 - Christmas Card List
 - Personal Contact List
2. Create a broadcast list for a sales promotion.
3. Add customer contacts for Salesrep 30.
4. Remove any duplicates.
5. Save the list.
6. Recall your promotion list
7. Prepare an email for your promotion including subject and message and attach a file. Make sure a note is included in their files.
8. Decide you would rather use a template. Copy your text message and create a new template.
9. Paste the text into the new template.
10. Save the template and use it for sending to your list.
11. Attach a file again.
12. Edit one of the contacts to change the email address to: info@pivotalystems.com



Contact Inquiry

The contact inquiry has all of the features of standard FACTS inquiries. All of the contact inquiry views synchronize with the Contact Display, To Do entry, Note entry, Broadcast List entry and Filtered Queries.

01-FACTS 7.5 Demo, Contact - Customer Order (RMI610)

Options View Sort By Export Print Help

Go To Starts with

Customer	Company	Alpha	Contact	First Name
	Warehouse Interiors, Inc.	WAREHOUSE	2549	Mark
	Rearden Metals, Inc.	REARDEN ME	2550	Christi
	Warehouse Equipment Unlimited	WAREHOUSE	2551	Elizabeth

Notes Broadcast To Do

Date	Time	User	Type	Customer	Source	Doc #	Vendor
03/11/2006	2:47 PM	GUI	PO		PO	001356	
03/11/2006	2:44 PM	GUI	PO		PO	001080	
03/08/2006	2:23 PM	GUI	PO		PO	001168	

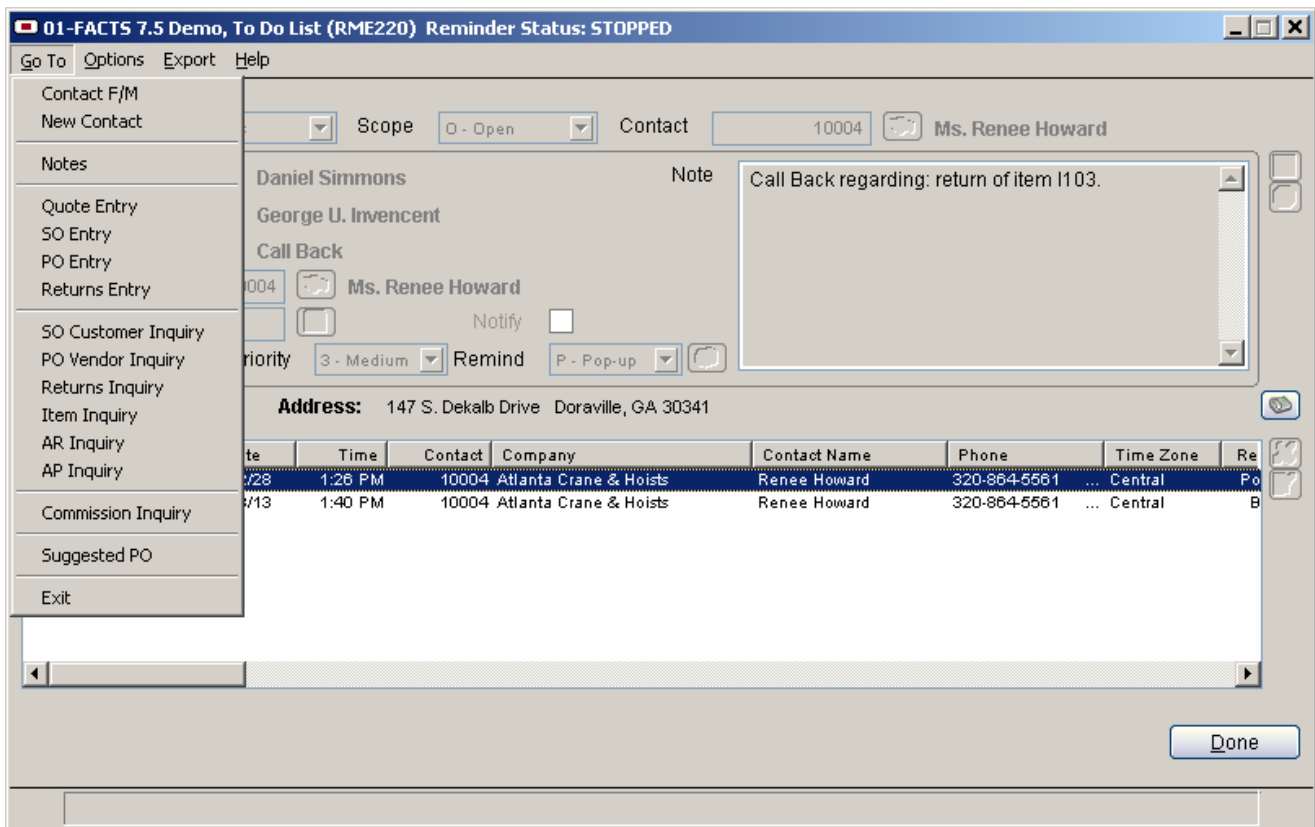
Start From Contact

Detail Exit

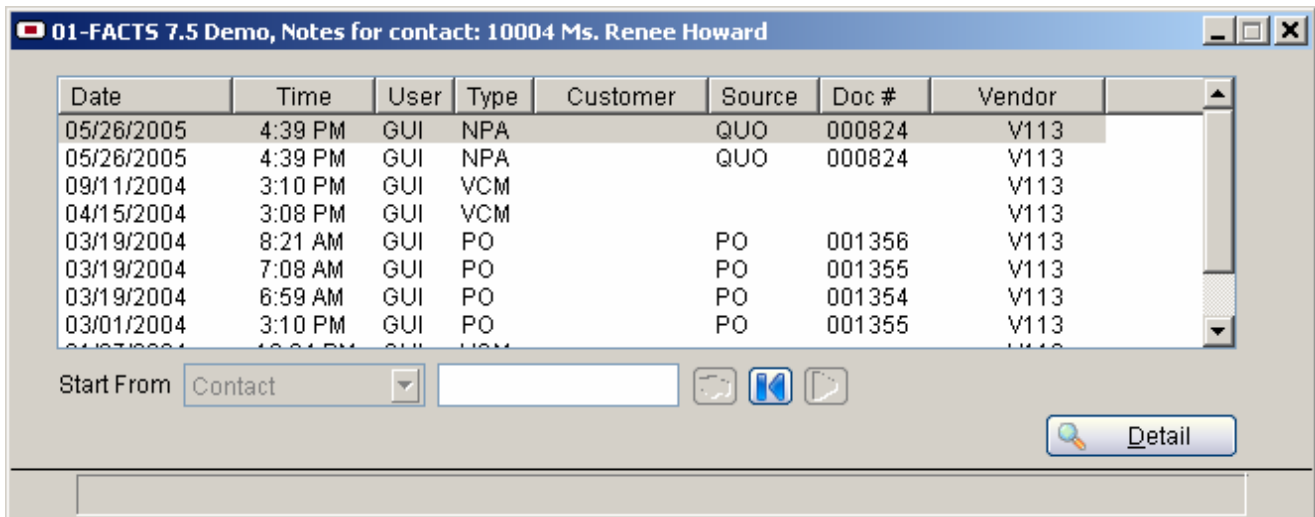
Enter characters customer must start with

To Do View

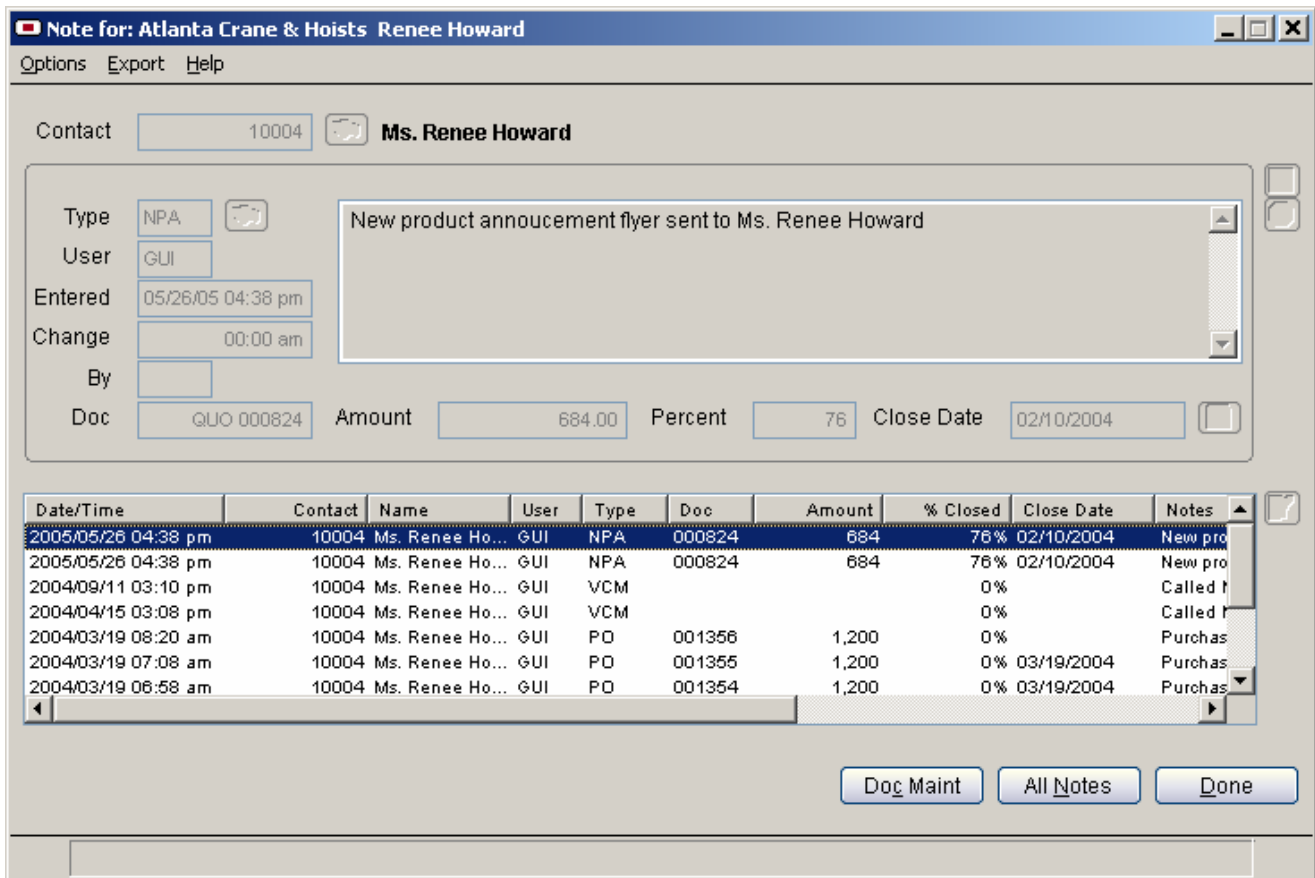
As shown in the screen above, you can start from either open or completed To Dos. The detail button will display a read only version of the To Do entry program. Once in the To Do entry program, all of the functionality of the pull down menus is available. While you can't make changes to the note, the text window is active for scrolling.



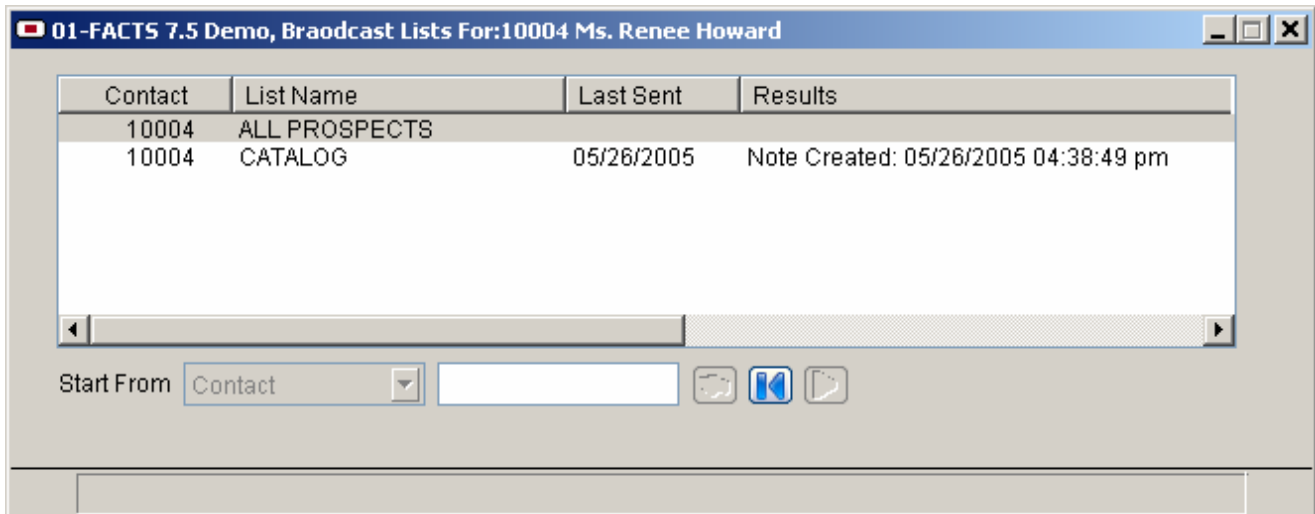
Notes View



The detail button will display a read only version of the note entry program. Once in the notes entry program, the 'All Notes' and 'Doc Maint' buttons are available. While you can't make changes to the note, the text window is active for scrolling through long notes.



Broadcast List View



The Broadcast List View allows you to see all of the lists containing this contact.



User Code Inquiry

The user code inquiry shows To Dos by user with a detail button, which runs the To Do entry program.

01-FACTS 7.5 Demo, User Code - User Code Order (RMI630)

Options View Export Print Help

Go To

User Code	User Name	Slsp Code
DAN	Daniel Simmons	40
GUI	George U. Invencent	30
IN4	Infor Global Solutions	

To Do

Date	Time	Customer	Contact	Type	Priority
04/03/04	12:59 PM		Mr Harry Mc Kee	CB	Medium
04/03/04	2:55 PM		Mr. Dave Hasenstab	CB	Medium
04/03/05	12:55 PM	Deluxe Equipment War	Bruce Johnson	CB	Urgent
04/03/15	3:16 PM	Southeastern Industr	Ms. Julie Johnson	CB	High
04/03/19	12:51 PM	Cowboy World	Mr Ron Martens	CB	Medium
04/10/12	5:02 PM	Roark Architectural,	Mr Bob Gannon	QUO	Medium
05/07/10	10:02 AM	Cowboy World	Mr. Joe Virginia	CB	Medium

Start From

Detail Exit

Enter beginning user code to go to



Customer & Vendor Inquiry Views for RM Contacts

RM Contact views are available from both the AR customer and the AP vendor inquiry programs. Both of these views call the Contact Display program with the list of contacts displayed in the view window. Once in the Contact Display, all of the functionality of the pull down menus is available. The 'Filter' and 'Find' buttons are excluded when called from an inquiry.

These views provide convenient access to RM for those users who are focused on customers and vendors rather than on contacts.

Customer Inquiry

01-FACTS 7.5 Demo, AR Customer Inquiry - Customer Order (ARI610)

Options View Sort By Export Print Help

Go To Starts with

Customer	Name	Notes	City, State	ip (▲)
C100	Southeastern Industrial Supply	Y	Atlanta, GA	30
C101	Deluxe Equipment Warehouse	U	Douglasville, GA	30
C102	Roark Architectural, Inc.	Y	Acworth, GA	30

Payment 1 Sales 2 Ship-To Notes **3 RM Contacts** Z-User Def

Contact	First Name	Last Name	Phone	Type	E-mail Address
2540	Steve	Johnsston	218-463-1781	CUS	sjohnssto
10003	Ron	Simonsen	507-451-4054	CUS	ron@delu
10015	Bruce	Johnson	218-463-1781	CUS	bjohnson

Start From Customer

Dial Display Exit

Enter characters customer must start with

Vendor Inquiry

01-FACTS 7.5 Demo, AP Vendor Inquiry - Alpha Order (API610)

Options View Sort By Export Print Help

Go To

Alpha	Vendor	Vendor Name	City, State
GENERAL IN	U100	General Industrial MFG	Atlanta, GA
GEORGIA IN	U118	Georgia Insurance Services	Atlanta, GA
GEORGIA NE	U108	Georgia Newspaper	Atlanta, GA

Ledgercards Open Docs Paid Docs Payment Hist Notes **RM Contacts**

Contact	First Name	Last Name	Phone	Type	E-mail Addr
10025	Kevin	Larson	763-559-5911	VEN	klarson@not
10888	Heather	Jonesborough	763-513-3230	VEN	heather@ge

Start From Vendor

Dial Display Exit

Enter beginning alpha to go to



Contact Import

The Contact Import feature makes it easy to import Contacts, Notes or To Dos directly from an Excel spreadsheet. You can also import contacts from other contact management packages such as ACT or GoldMine, purchased lists or TeleFacts. We recommend that you format your spreadsheets, as shown below, with column headers and column numbers to facilitate data mapping.

1	Sample Contact Import Template													
2	1	2	3	4	5	6	7	8	9	10	11	12	13	14
3	Contact	First	Last	Company									Mail Code	Mail Code
4	Number	Name	Name	Name	Address 1	Address 2	City	State	Zip	Phone #	Fax #	Email	1	2
5														
6														
7														

Data Set File Maintenance

The Data Set represents a collection of fields in a spreadsheet generally relating to the source of the data.

01-FACTS 7.5 Demo, Data Set F/M (RMF410)

Help

Data Set:

Main

Description:

Start Row:

Sheet Name:

Set Type:

Save Delete New Exit

Enter Set Description

You can create a name by entering a Data Set name not already on file and adding the following fields:

Description – Enter a meaningful description for this definition.

Start Row – Indicates the starting column number of data to be imported. This is typically the first row after column headers.

Sheet Name – This field is used for reference purposes only. The active sheet in the opened workbook will be used.

Set Type – The Update set type will import records only for existing Contacts, Notes and To Dos. Data read from the spreadsheet that can not be matched to an existing record in FACTS will be ignored. The Create set type will update existing records, if found, or create new records.

Data Map File Maintenance

The Data Map is where individual columns in a spreadsheet are associated with a field in FACTS.

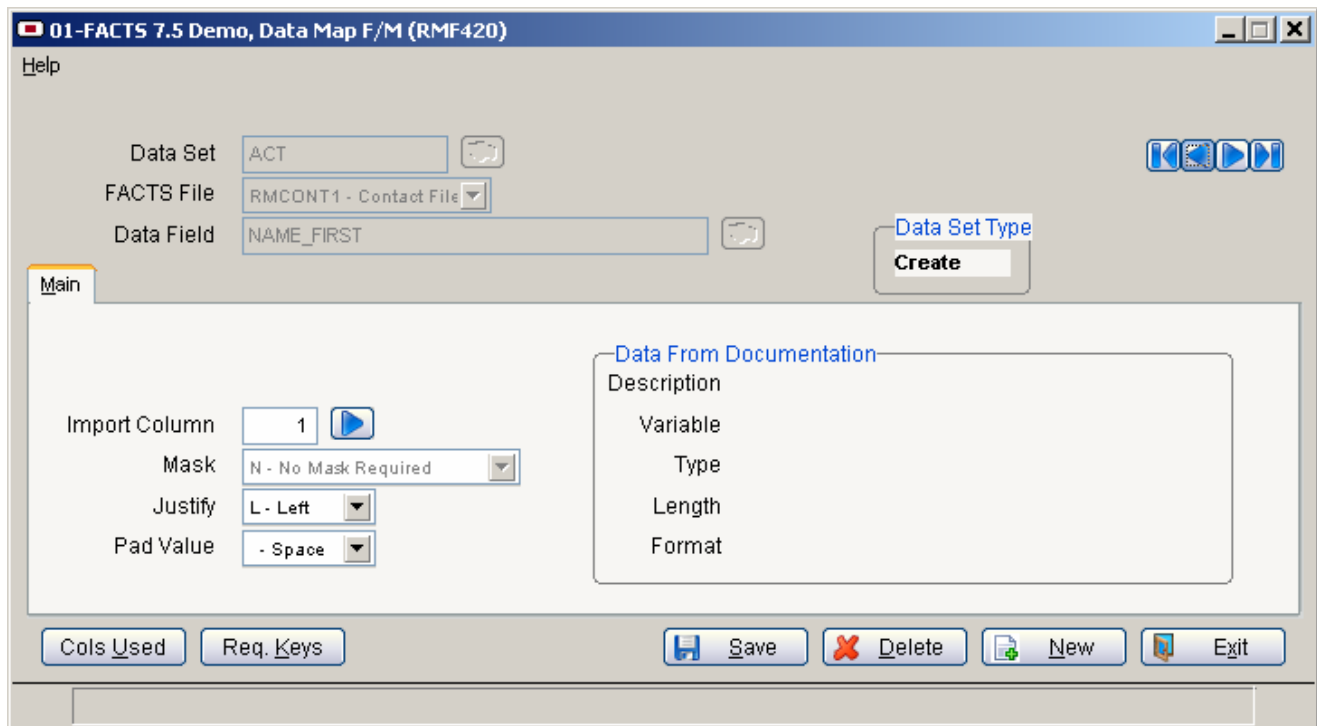
Header Information

In the Header you identify:

Data Set – As defined in the Data Set F/M

FACTS File – The FACTS file to receive the data from the import (Contacts, Notes or To Do)

Data Field - The destination field in the FACTS file where the data will be placed.



Detail Information

The following information defines the data in a particular column:

Import Column – The specific column number in the spreadsheet where data will be imported and assigned to a field in FACTS

Mask – Used for formatting numeric fields. You can select from any of the standard FACTS masks

Justify – Left & Right justification will fill the field with the pad value character, None will leave the data exactly as imported.

Pad Value – Represents the character to be used to fill the field to its maximum length

Cols Used button – Allows you to browse all the fields defined. You can sort columns enabling you so see all spreadsheet columns used, etc.

01-FACTS 7.5 Demo, Rows/Cols Used for Set: ACT (RMC480)

Help

Imp Col	File Name	Alias	Mask	Justify	Pad
3	RMCONT	COMPANY_NAME	None	Left	Space
4	RMCONT	PHONE	None	Left	Space
5	RMCONT	EMAIL	None	None	Space
6	RMCONT	FAX	None	None	Space
1	RMCONT	NAME_FIRST	None	Left	Space
2	RMCONT	NAME_LAST	None	Left	Space
7	RMCONT	MAIL_CODE_1	None	Right	Space
9	RMCONT	CONTACT	None	Right	Space
8	RMCONT	MAIL_CODE_2	None	Right	Space
26	RMCONT	MOBILE_PHONE	None	Left	Space
105	RMCONT	NOTE	None	None	Space

Close

Req Keys button – Displays required key fields and whether they have been defined.

01-FACTS 7.5 Demo, Required Keys For Selected Files (RMC470)

Help

File Name	File Desc	Key Field	Description	Defined
RMCONT1	CONTACT MANAGEMENT M...	contact	CONTACT NUMBER	No

Close

Import Contact Information

This program performs the actual import from Excel. There may be instances where you have a mapped field in the spreadsheet that is the same as one of the default code fields on the set-up screen. When contact data is read from the spreadsheet, all mapped fields are evaluated and validated. If the field from the spreadsheet has a value, the default is ignored. If not, the default value is used. For instance, the contact type in the spreadsheet has a value of 'XXX' and the default is set to 'PRO' the contact type will be 'XXX'. If the value from the spreadsheet is blank, the contact type will be set to 'PRO'.

The spreadsheet to be imported should be opened and the selected sheet should be highlighted before starting the program.

Data Set – Select the previously defined Data Set, a search is available

Options:

Create contacts – If the Data Set allows contact creation, checking this box will allow the creation of a new contact. If the Data Set is set to update only or the create contact box is un-checked, no new contact will be created.

Apply Full Name Rules – This option formats the full name field in the contact file based on the rules setup in the RM Static Control or the User Preferences F/M

Apply Alpha Sort Rules – This option formats the alpha field in the contact file based on the rules setup in the RM Static Control

Auto Assign contact numbers – As new contact records are created, the contact number is assigned from the RM Non-Static Control. See suggestion below.

Display Validation Rules – Displays validation errors during the import so that you know which contact might have to be adjusted manually

Create Contact Note – If checked, a note will be created in the notes file using the text from the text box and the user code and type from the Notes Defaults

Default Codes – These are the default values to be used when creating contacts.

To Do Defaults – These are the default values to be used when creating To Dos. If no To Do fields are mapped, this section does not need to be populated

Notes Defaults – These are the default values to be used when creating Notes. If no note fields are mapped or the Create Contact Note box is un-checked, this section does not need to be populated

Suggestion: Pre-number contacts in the spreadsheet. Doing so can reduce or eliminate duplicate contacts.

01-FACTS 7.5 Demo, Import Contact Information (RMU410)

Template Print Options Help

Data Set **Import from ACT**

Options

- Create Contacts, To Dos and Notes
- Apply Full Name Rules
- Apply Alpha Sort Rules
- Auto Assign contact Numbers
- Display Validation Errors
- Create Contact Note

To-Do Defaults

User **George U. Invencent**

Priority

Type **Call Back**

Notes Defaults

User **George U. Invencent**

Type **General Note**

Default Contact Codes

Process **New Sale to Cust**

Stage **Prospect Never C**

Step **Never Contacted**

Type **Prospect**

Lead Source **Harris**

Time Zone

Default Mail Codes

Primary Contact

Default Sales/User Codes

Ronald Patton

Template _____ Printer _____

Harris import RM Excel Import

Convert TeleFacts to RM

This Program will convert your existing data that you have stored in TeleFacts into the RM module. This area will require some technical assistance from your Facts Solution Provider.

The screenshot shows a Windows-style dialog box titled "01-FACTS 7.5 Demo, Create TF / RM Cross Reference File (RMU510)". The dialog has a menu bar with "Template" and "Help". A large text box contains the following warning: "This program will convert TeleFacts data to the RM system. Running this program multiple times can cause severe data corruption. If you have any doubts about running this program, please click the Cancel button." Below the warning, there are several options: "Include:" with a dropdown menu set to "0 - Telefacts Contacts"; "Purge File" with a checked checkbox; "All Companies" with a checked checkbox; "Convert Follow-ups" with a checked checkbox; "Convert Notes" with a checked checkbox; and "Cutoff Date" with a text box containing "05/26/2005". At the bottom left, there is a "Template" field with "None" selected. At the bottom right, there are "OK" and "Cancel" buttons. A status bar at the very bottom of the dialog contains the text "Purge cross reference file on open".

Include – TeleFacts Contacts, Customer and Prospect, or Both types of data can be created.