FACTS 7.5.0 Training

# Relationship Management


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# INTRODUCTION

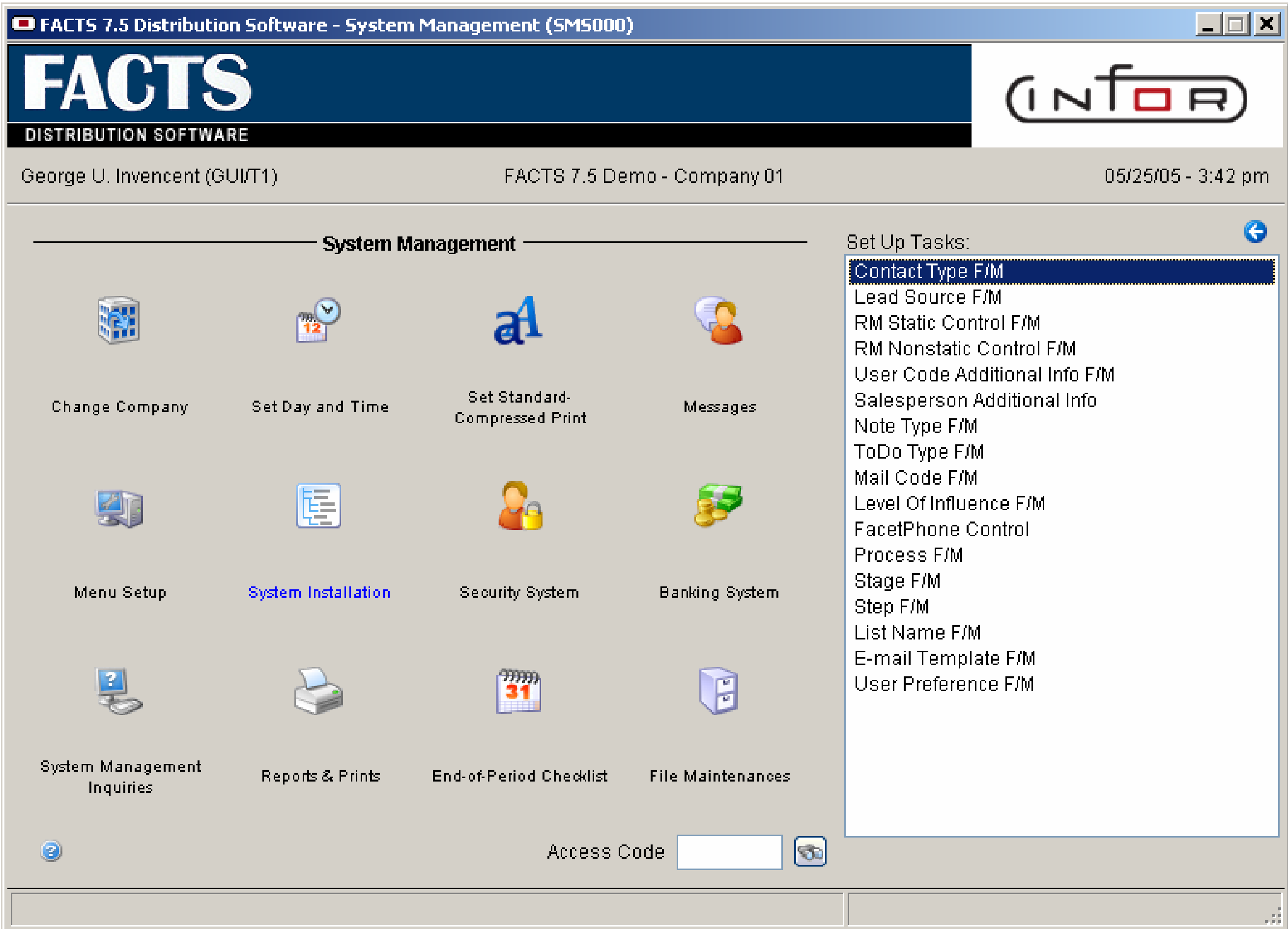
With Relationship Management you can manage all of your key business relationships including customers, vendors, prospects and others. Being fully integrated with the FACTS application, RM provides complete access to all information relating to your contact. Through any of the work flow models you can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

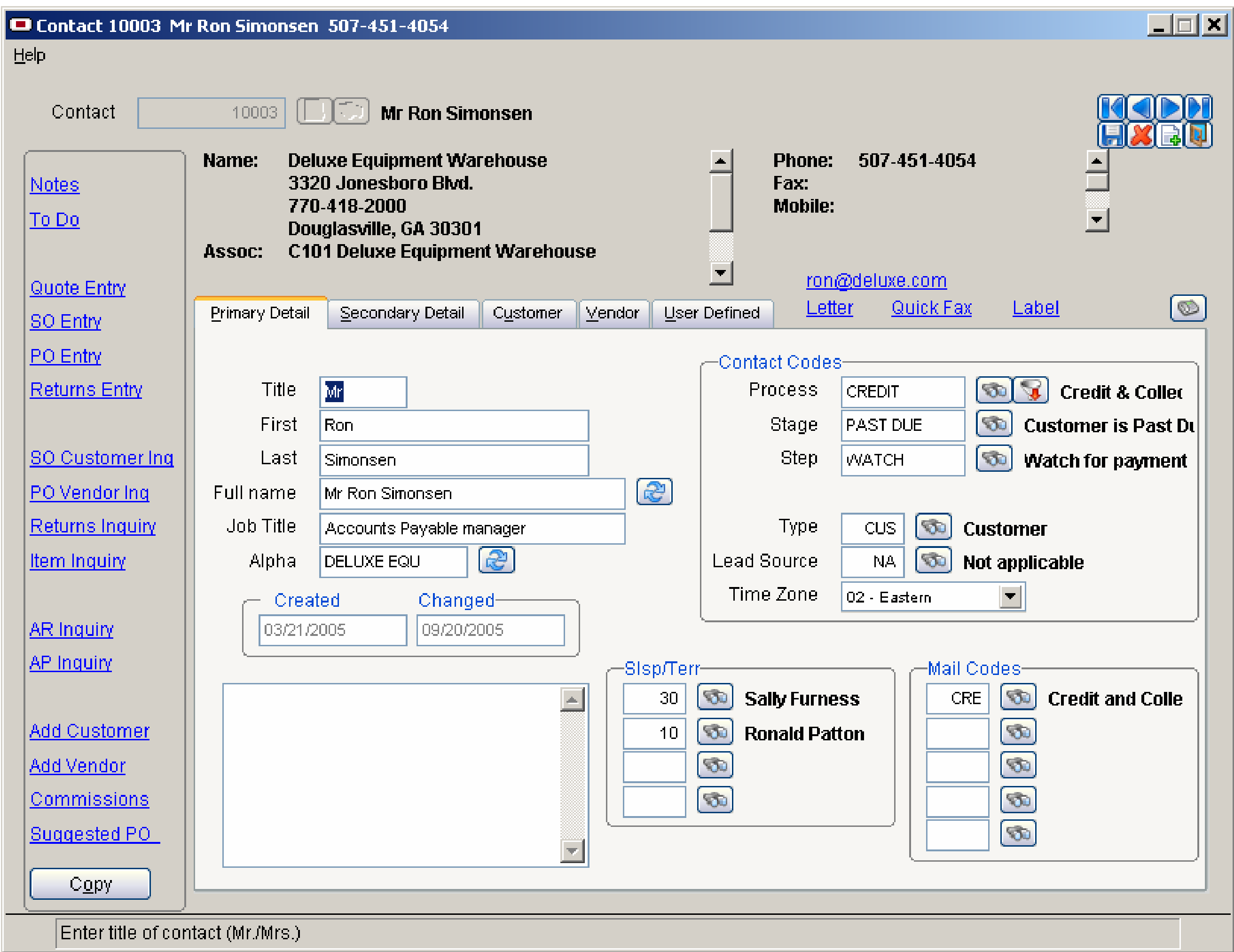
- User code Additional Info F/M
- Salesperson Additional Info
- User Preference F/M

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

# 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



## 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

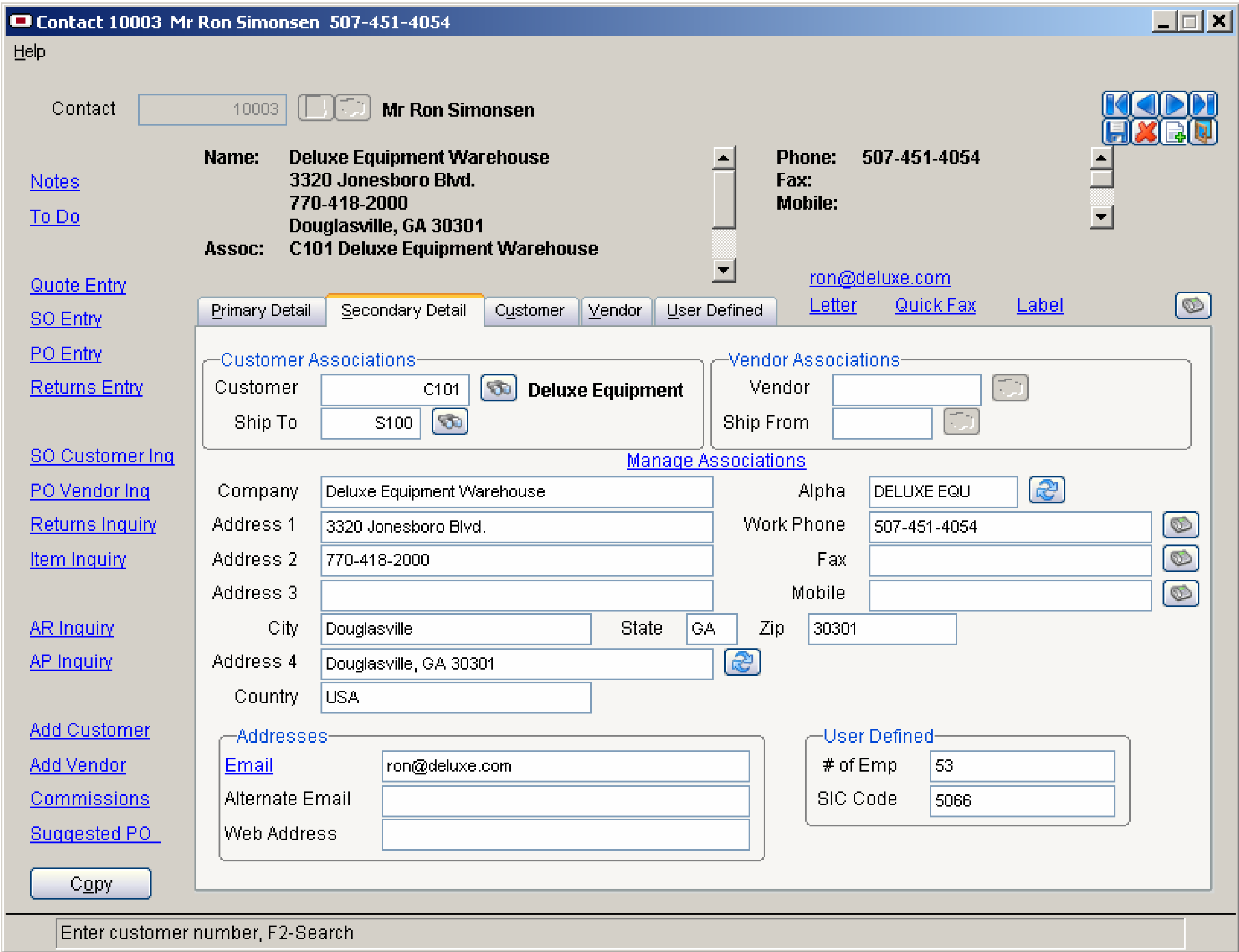
A file maintained field to allow you to group contacts for filtering, broadcast faxing or email purposes. You set up the codes you would like, for example, newsletter, catalog, Christmas card and more. You can assign an individual contact up to 5 different mail codes. See Mail Code F/M.

## 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.

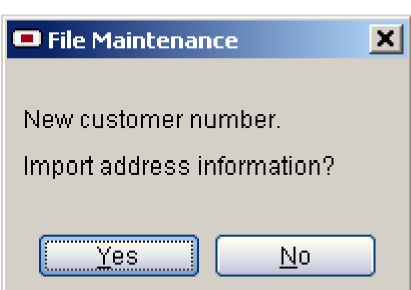
# Secondary Detail

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.




## 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:



## 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® intergration and auto dial will be discussed later.

## Email, Alternate Email, Web Address

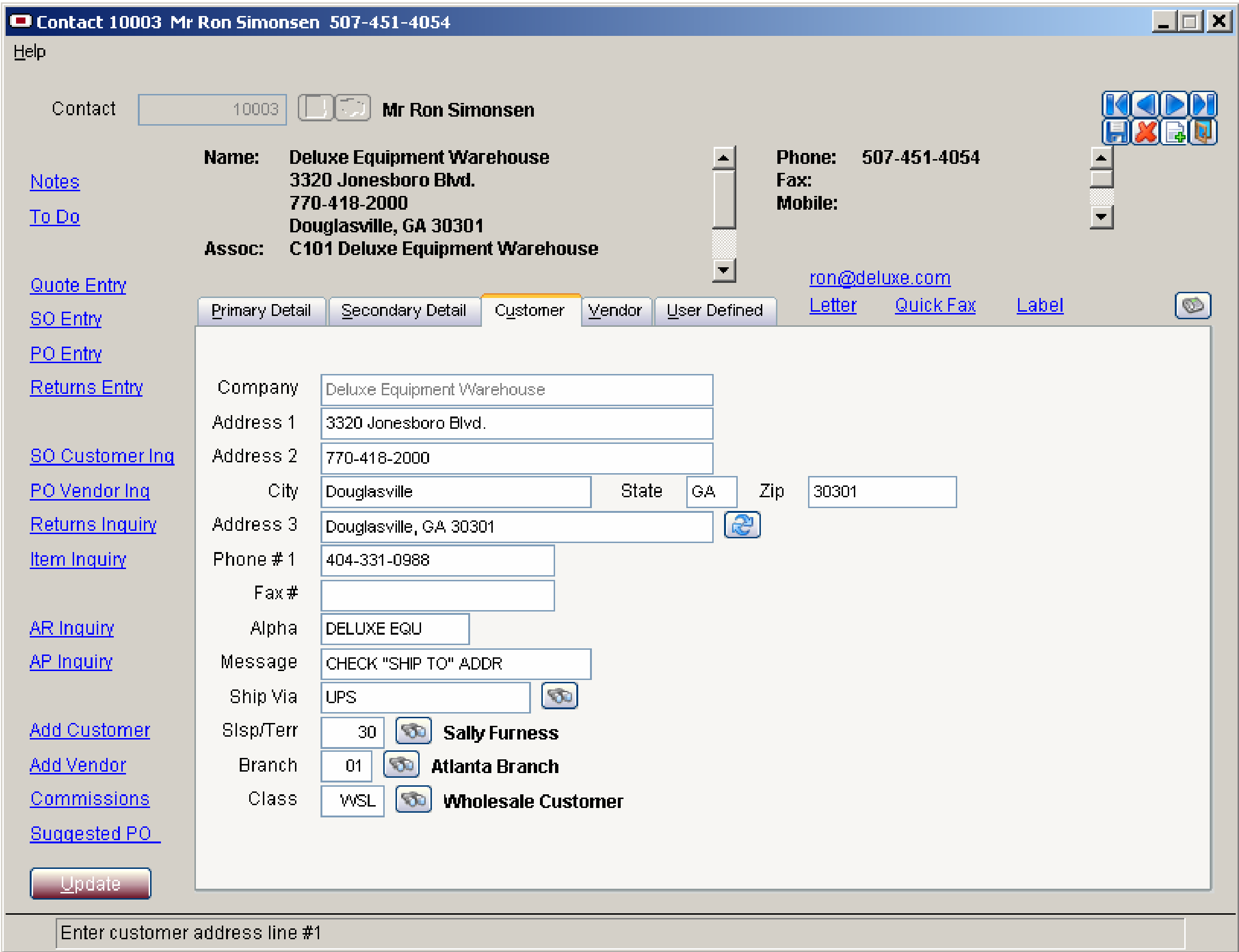
Enter up to two email addresses and a web address for the contact. When a field is populated, the label for the field is changed to a hyperlink. Click on the field label to launch the email system to send an email to that address. The first email address is displayed as a hyperlink in the header. If 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.

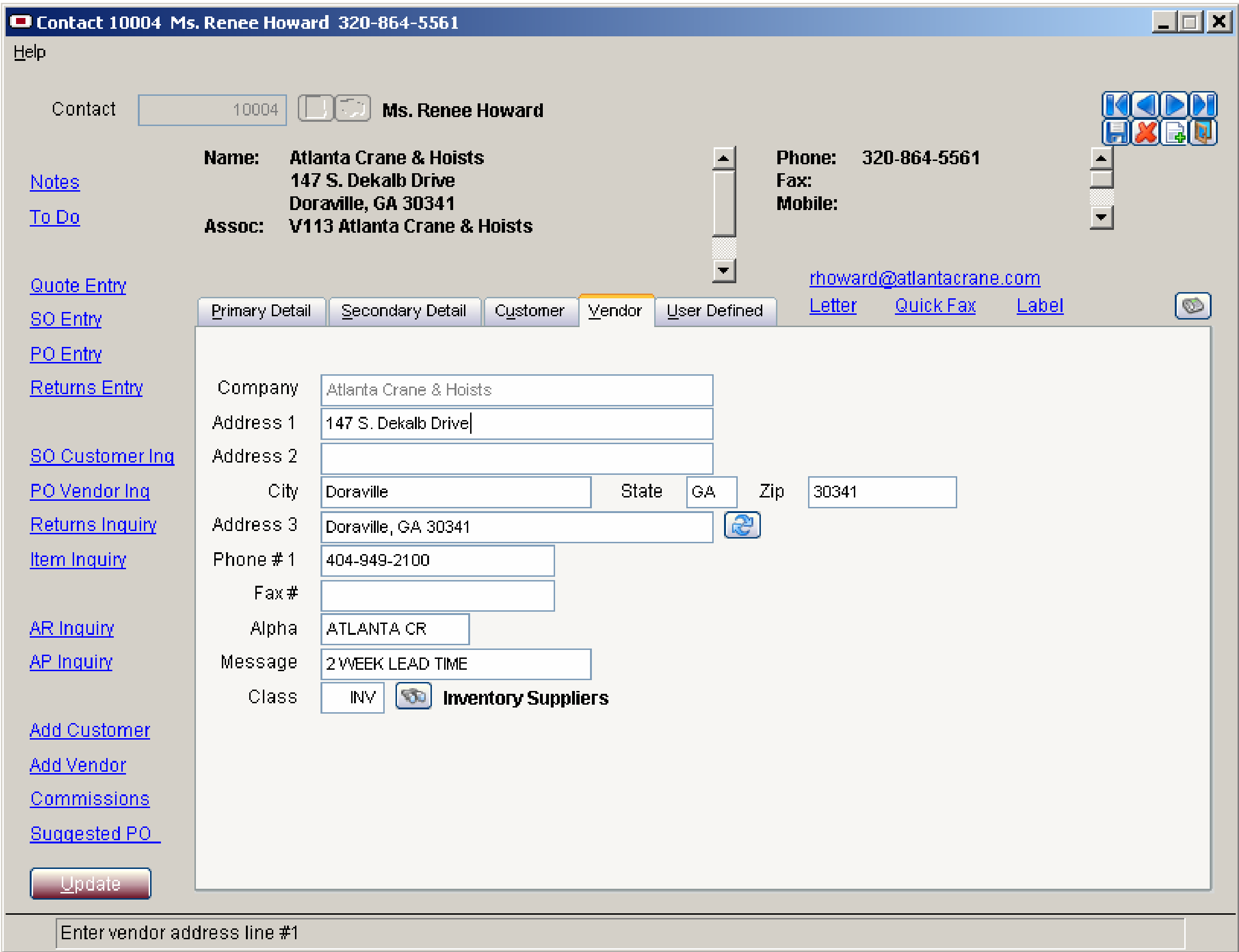
# Customer Information

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.



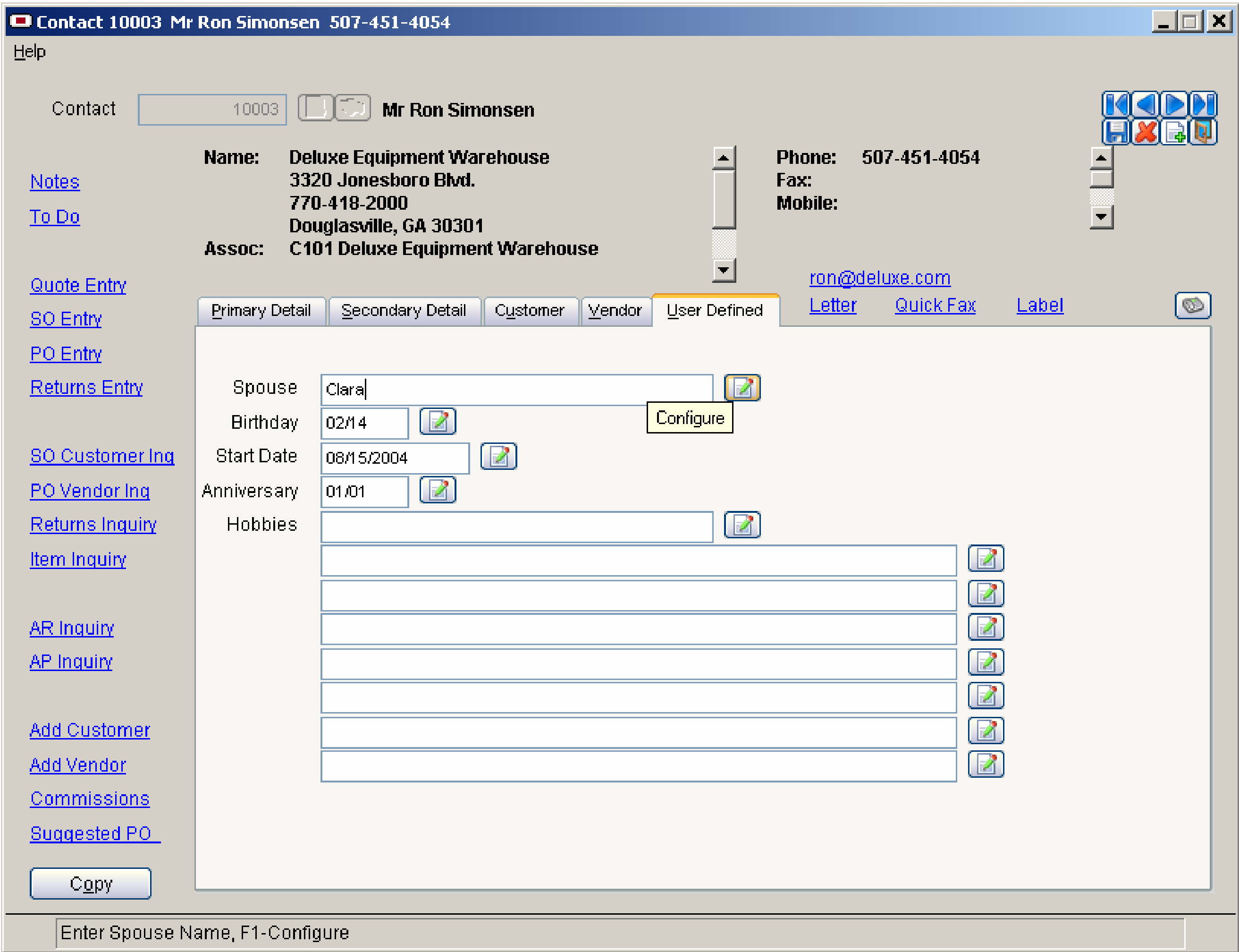
# Vendor Information

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.



## 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

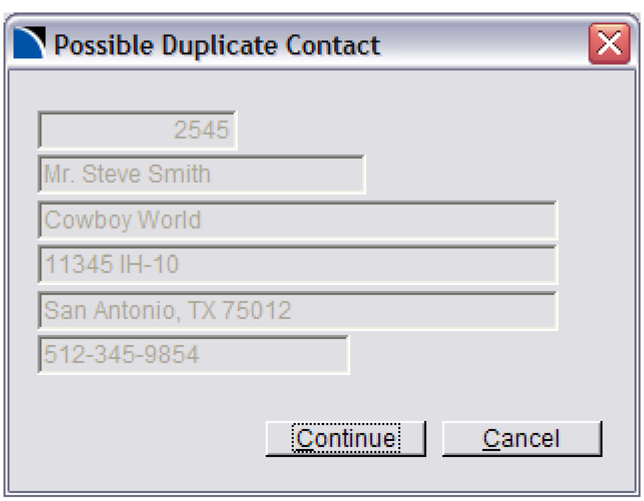
This button will create a new contact using the information from an existing contact. Go to the contact you want to use as the basis for the new contact and click the Copy button. Enter a new ID or click the icon and click Continue. The new record will be identical to the previous record except it will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


The following fields are cleared in the new contact:

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

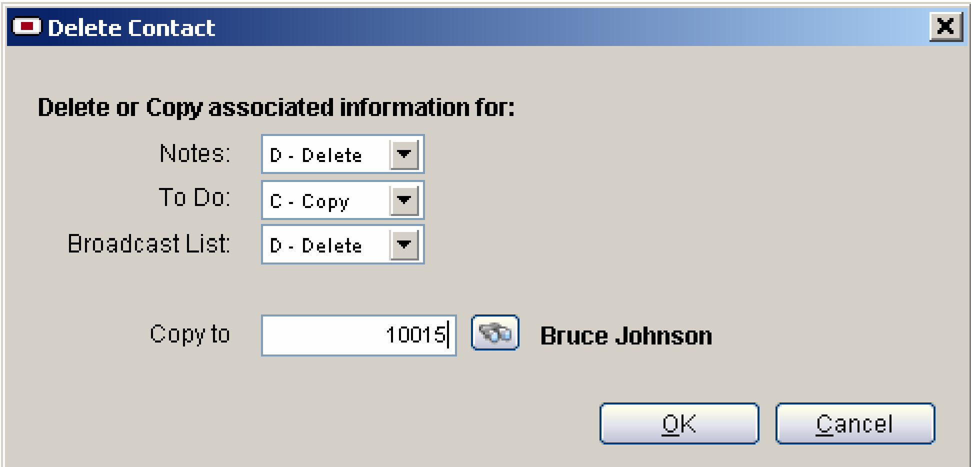
## Duplicate Contact Check

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.



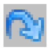
## Delete a Contact

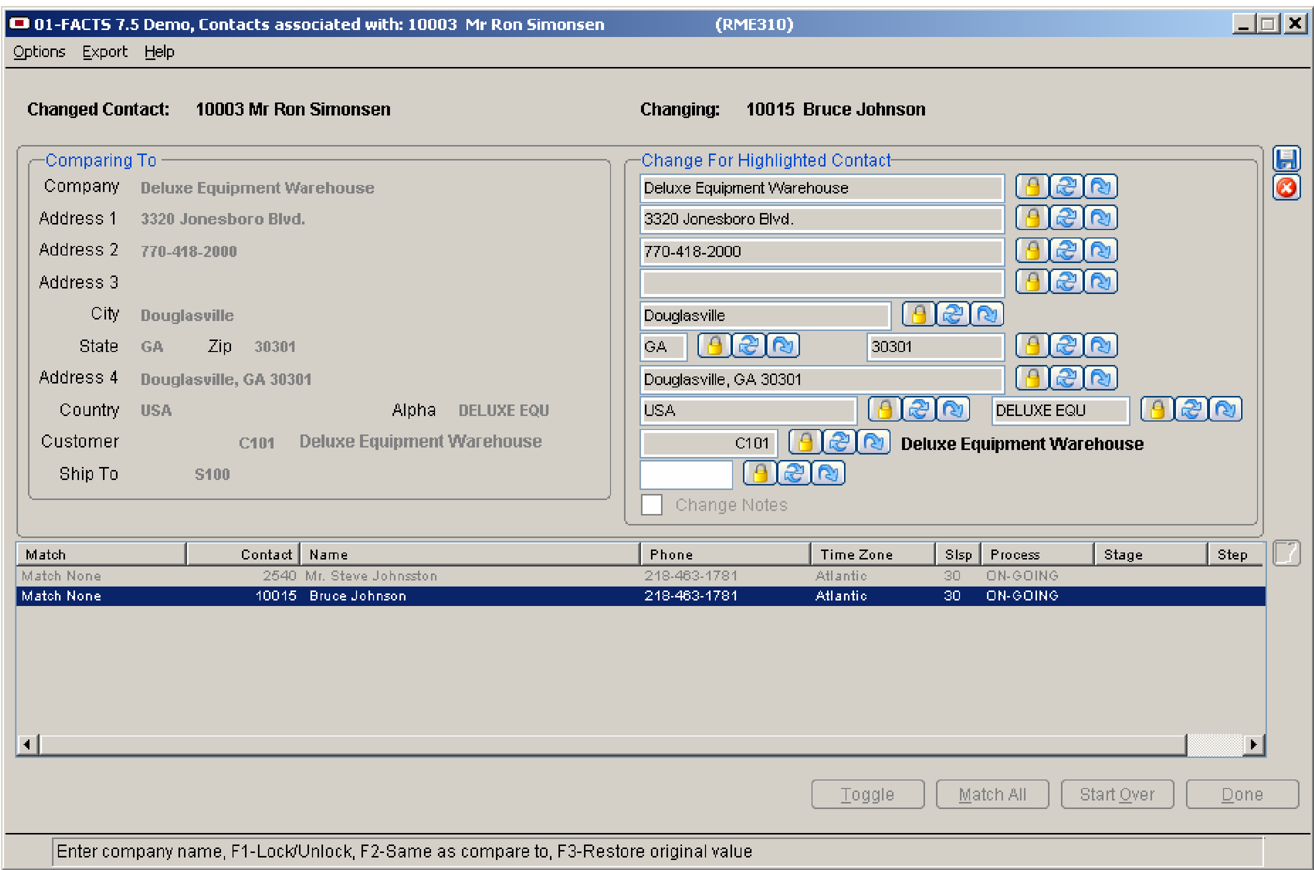
In the contact file maintenance, select the delete icon.  If there is history for the contact the following screen will appear.



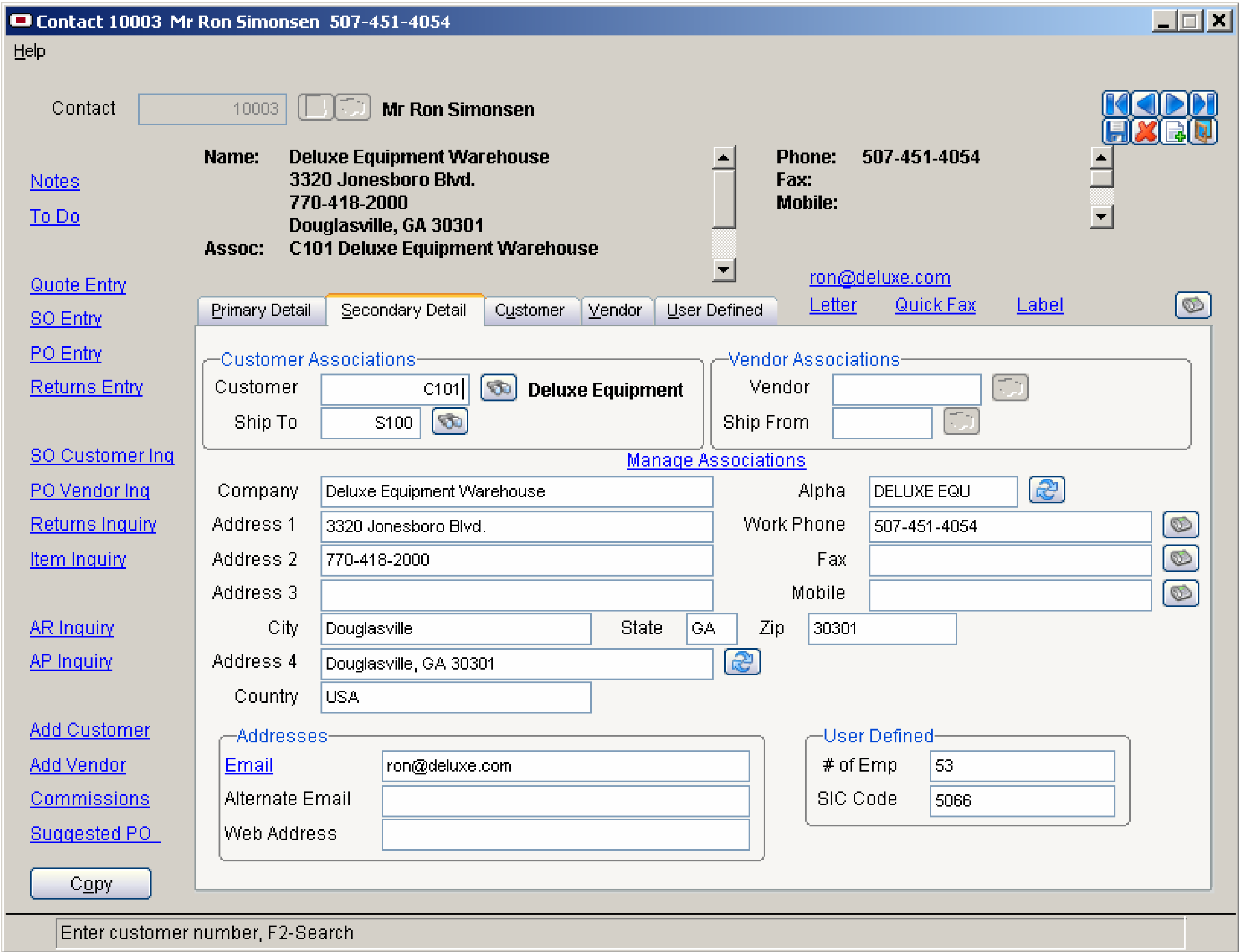

You can choose to copy notes, to-dos, broadcast list records to another contact or simply delete them.

# 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




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
10003
Mr Ron Simonsen
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
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
Copy
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

# Contact Search

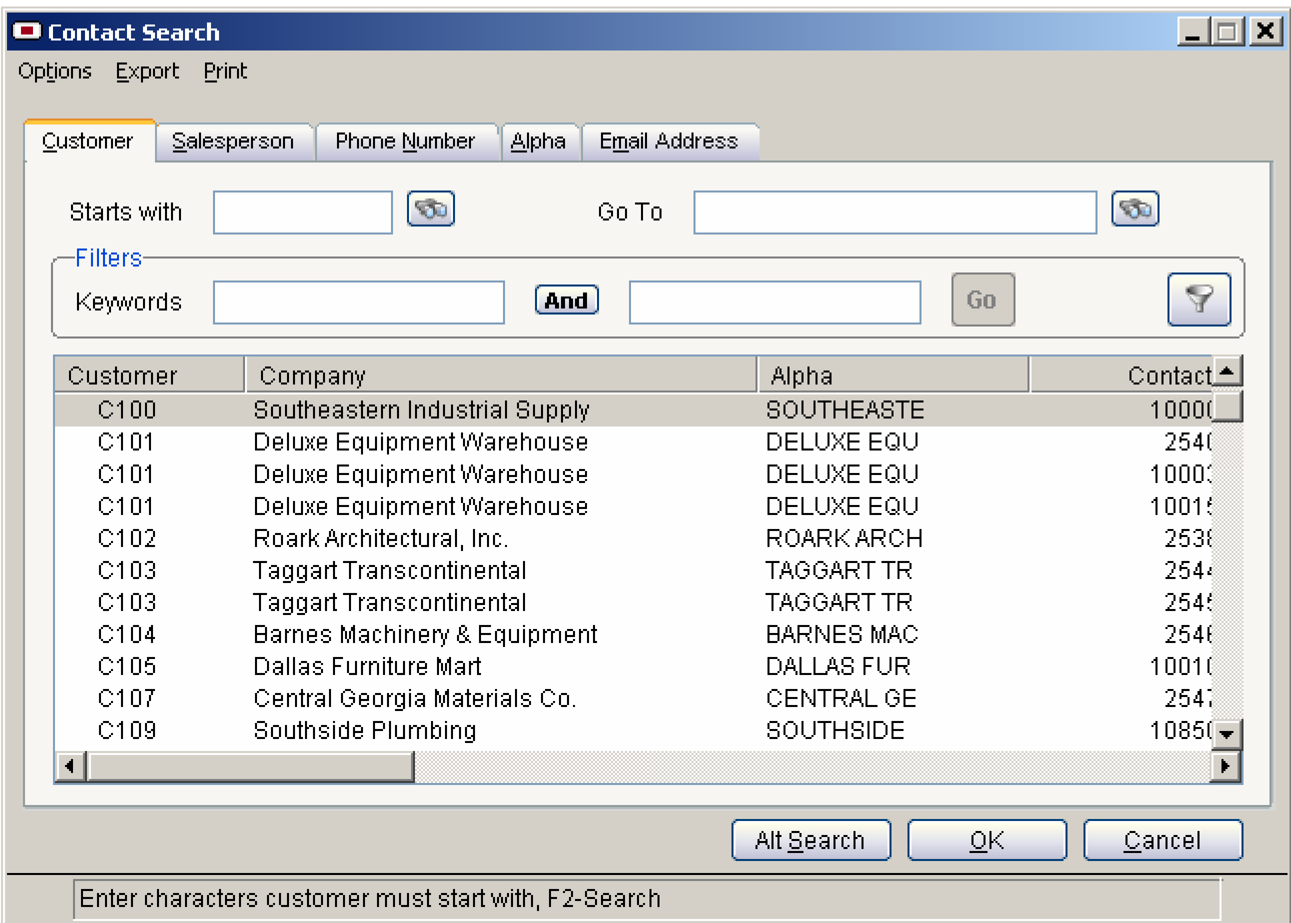
A Contact Search can be executed.  The following sort orders are available in the primary search:

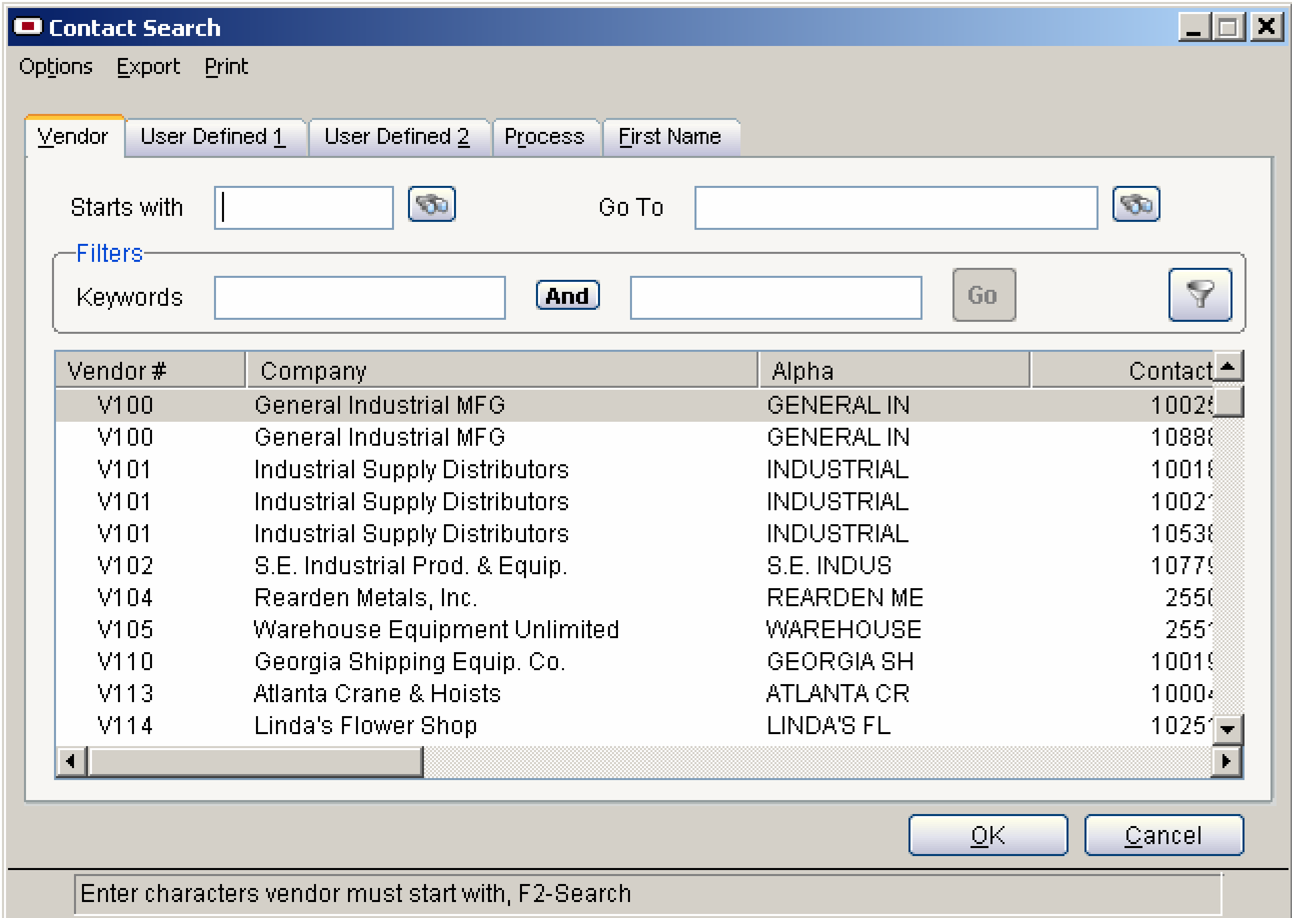
- Customer Number
- Salesperson
- Phone Number
- Alpha
- Email Address

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.




Contact Search
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
V100 General Industrial MFG GENERAL IN
V101 Industrial Supply Distributors INDUSTRIAL
V101 Industrial Supply Distributors INDUSTRIAL
V101 Industrial Supply Distributors INDUSTRIAL
V102 S.E. Industrial Prod. & Equip. S.E. INDUS
V104 Rearden Metals, Inc. REARDEN ME
V105 Warehouse Equipment Unlimited WAREHOUSE
V110 Georgia Shipping Equip. Co. GEORGIA SH
V113 Atlanta Crane & Hoists ATLANTA CR
V114 Linda's Flower Shop LINDA'S FL
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.

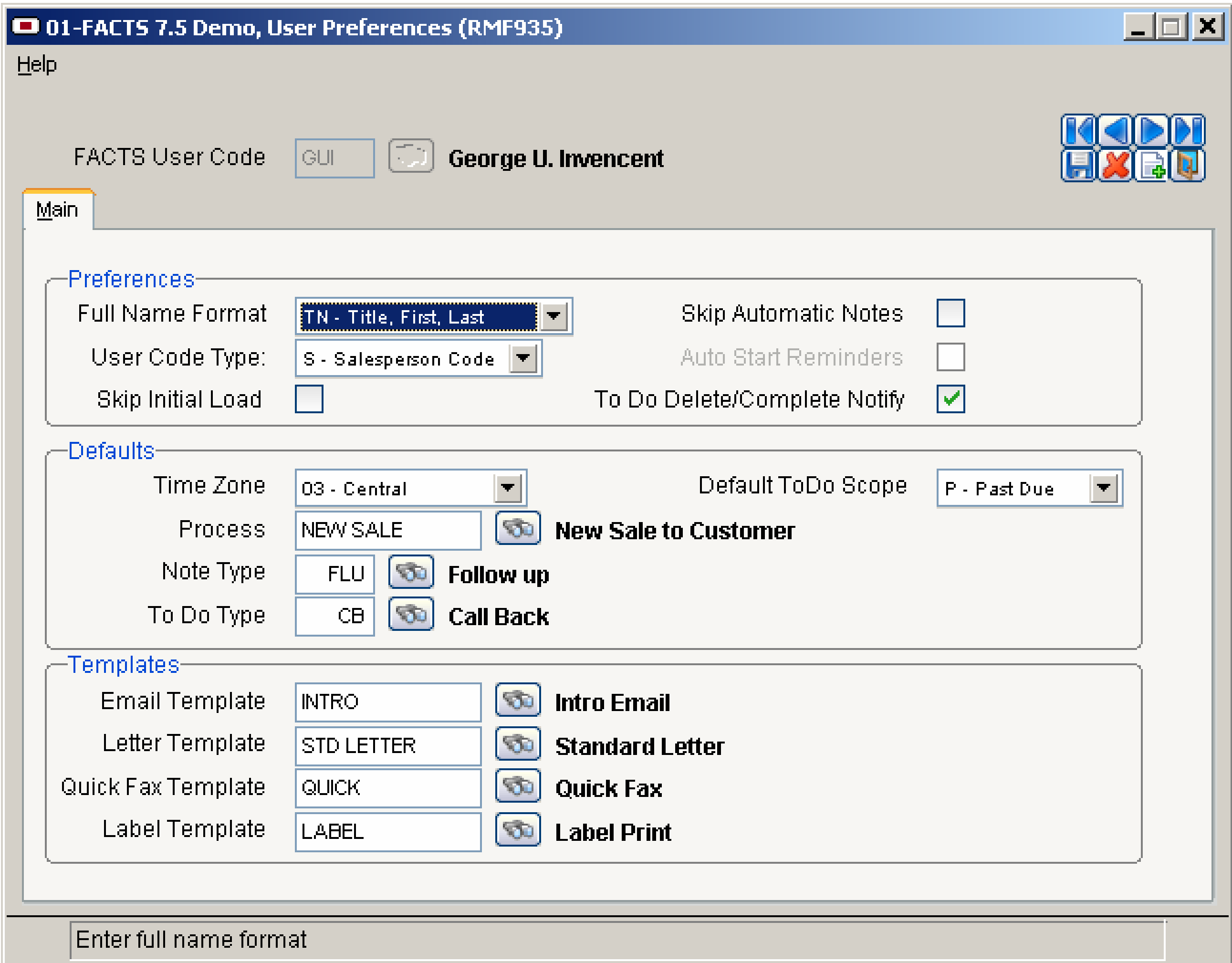
9. Go back to the first Contact you entered:
   – Copy that Contact to create another Contact working at the same company
   – Change the Mail Codes and add the first step and stage in the collection process
   – Add an email address

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

## User Preferences File Maintenance




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.

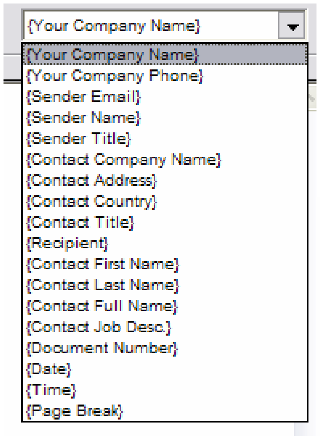
# Email/Letter Template File Maintenance

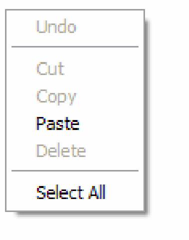
## Common Elements

### 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.

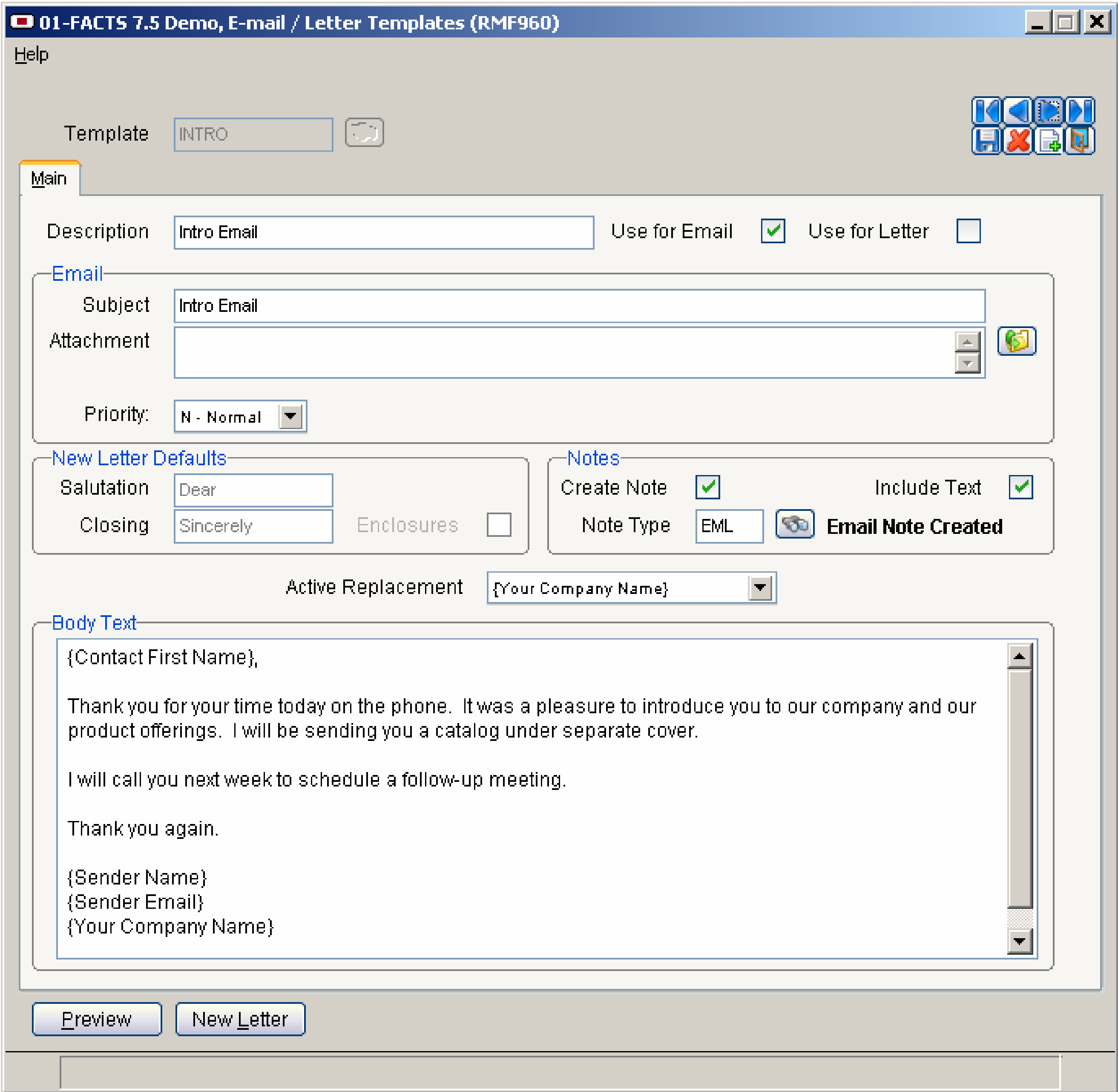



Email/Letter Template F/M is used for creating pre-defined formats for email, fax cover pages and broadcasts.

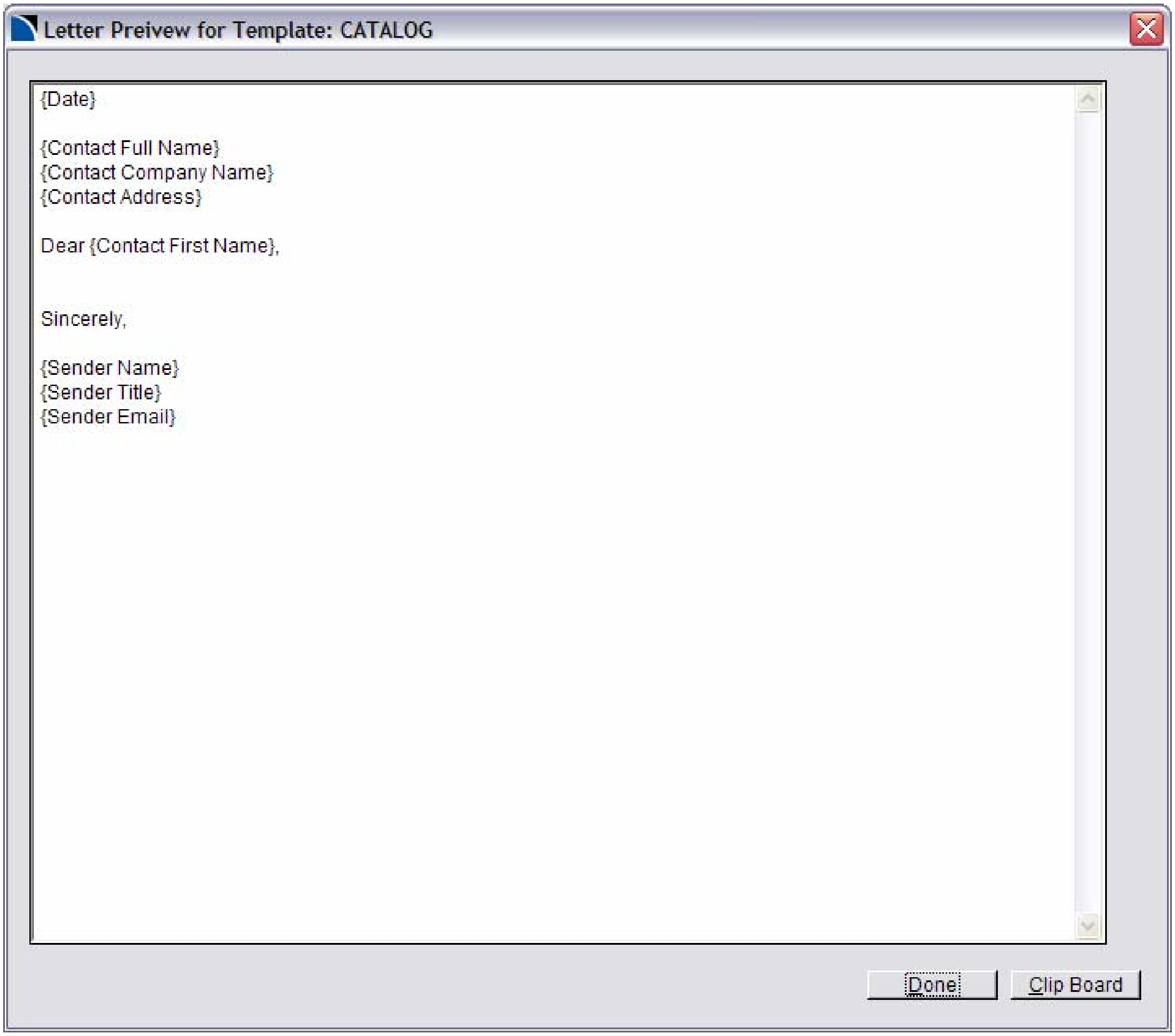
**Email**
If the Use for Email box is checked, you can enter a default subject line, select one or more attachments, and determine the default priority for the new email messages. You can use the Active Replacement values in both the subject and body text areas.

**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.

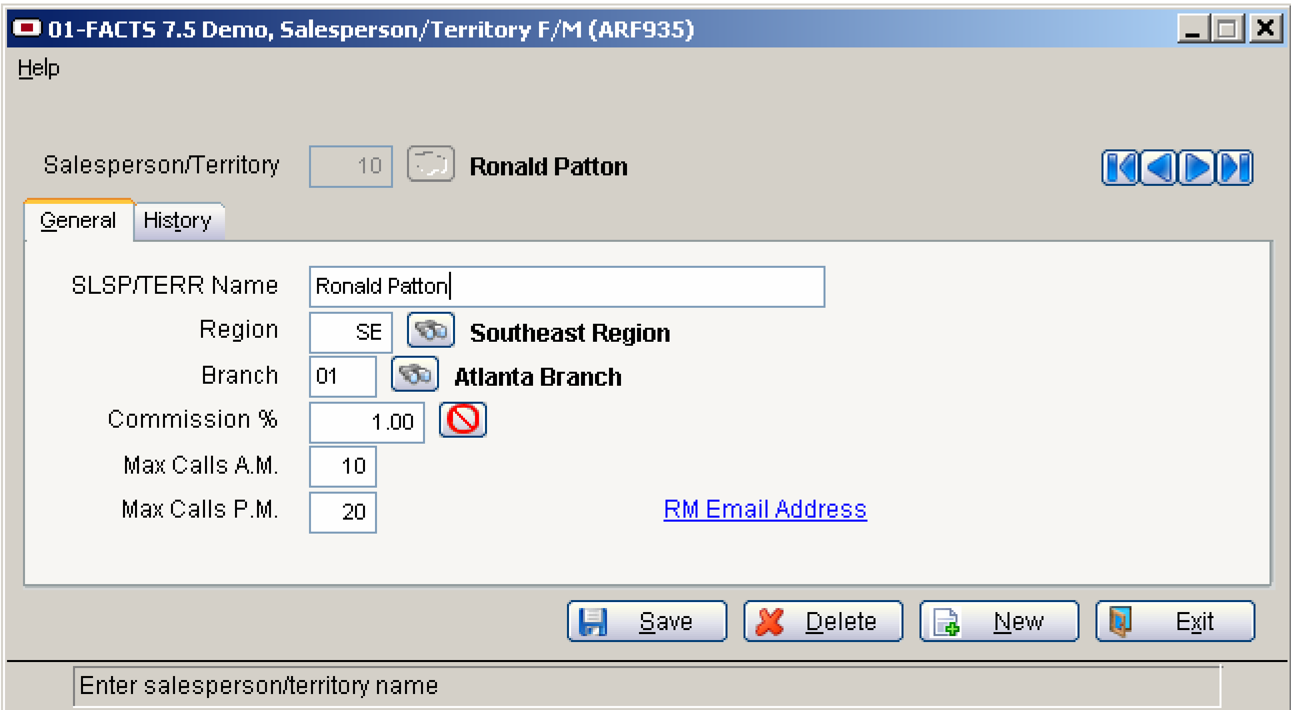
**Preview** Button – Display the current template in a larger window for viewing. To copy the text to the clipboard, click the 'Clip Board' button and paste it into another application such as Microsoft Word. Text from other applications can also be pasted into your letter.

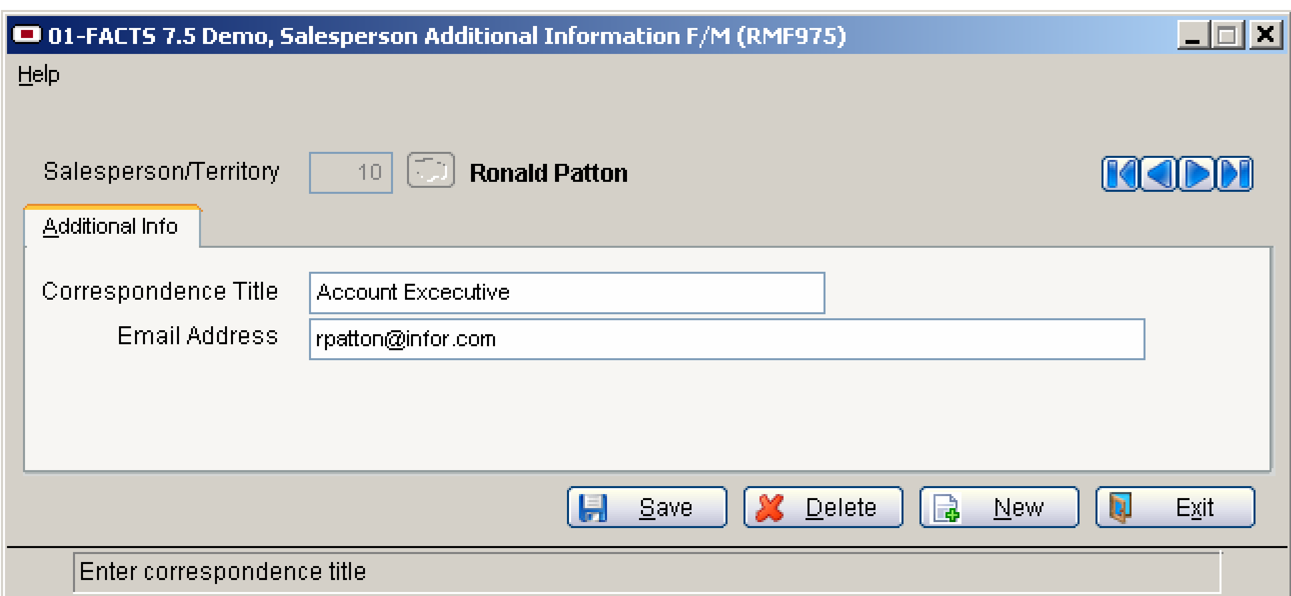

Letter Preivew for Template: CATALOG
{Date}
{Contact Full Name}
{Contact Company Name}
{Contact Address}
Dear {Contact First Name},
Sincerely,
{Sender Name}
{Sender Title}
{Sender Email}
Done
Clip Board

# Infrequent File Maintenances

## Salesperson Additional Info File Maintenance

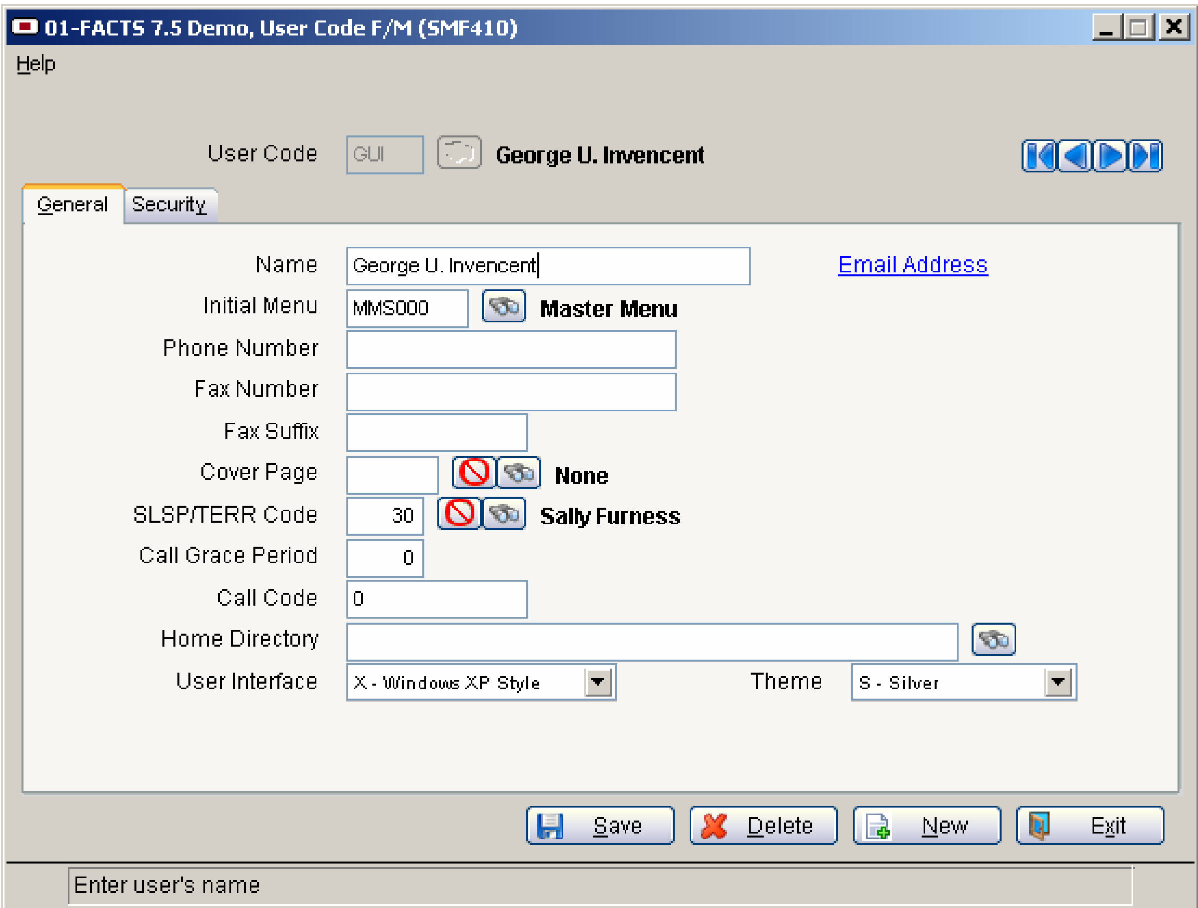
Enter a valid salesperson code and that person's correspondence title if applicable and email address. There is also a link in the Salesperson/Territory Code F/M that will allow you to add or change the email address directly from that program.

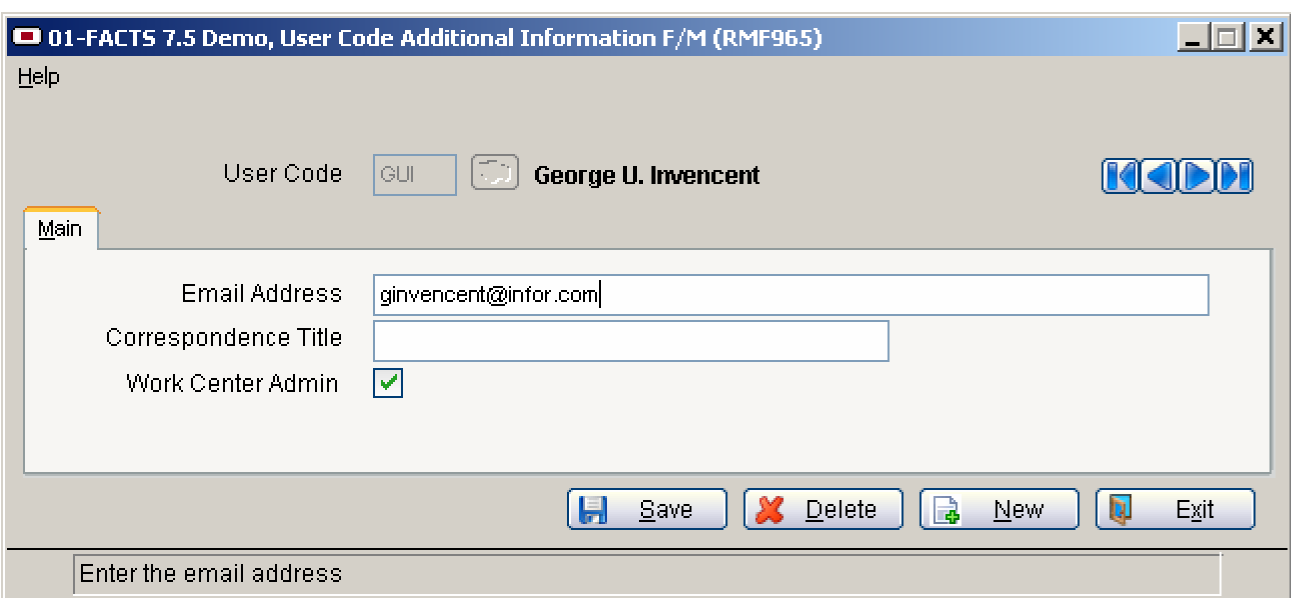


## User Code Additional Info File Maintenance

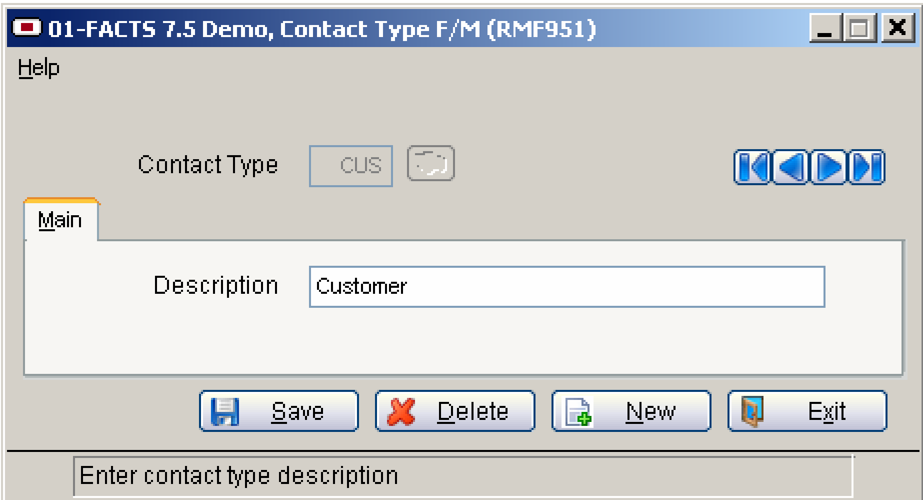
Enter the FACTS user code, that person's correspondence title, and email address.  There is also a link in the User Code F/M that will allow you to add or change this information directly from that program.



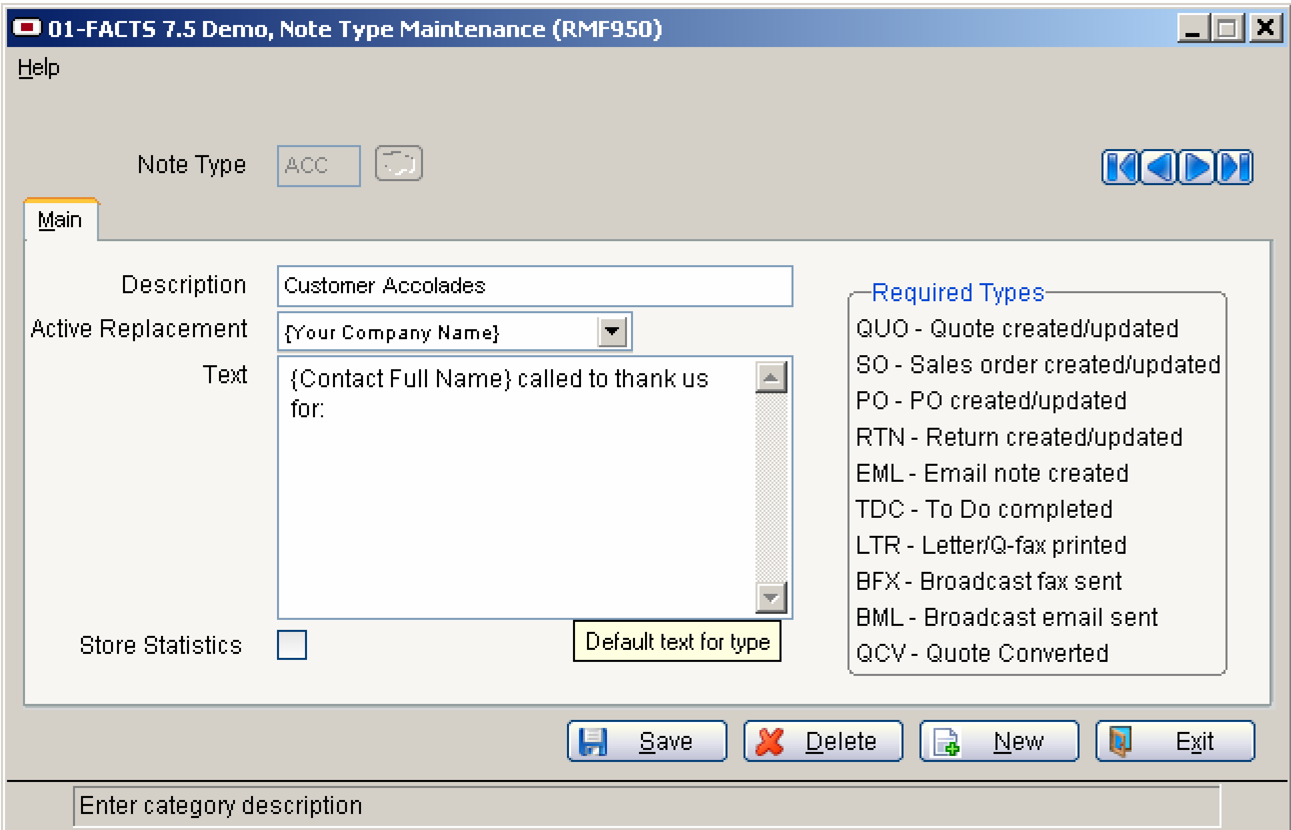
## Contact Type File Maintenance

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.



# 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

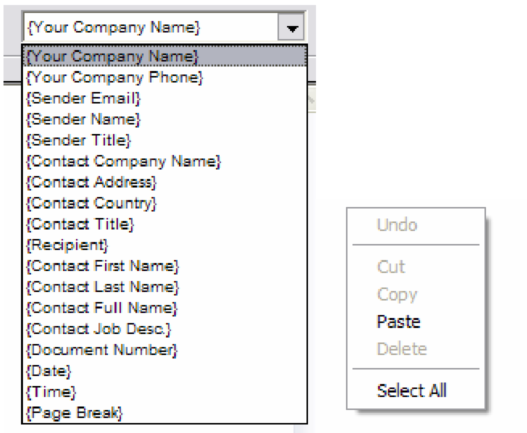
This feature is for future release

## Required Types

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

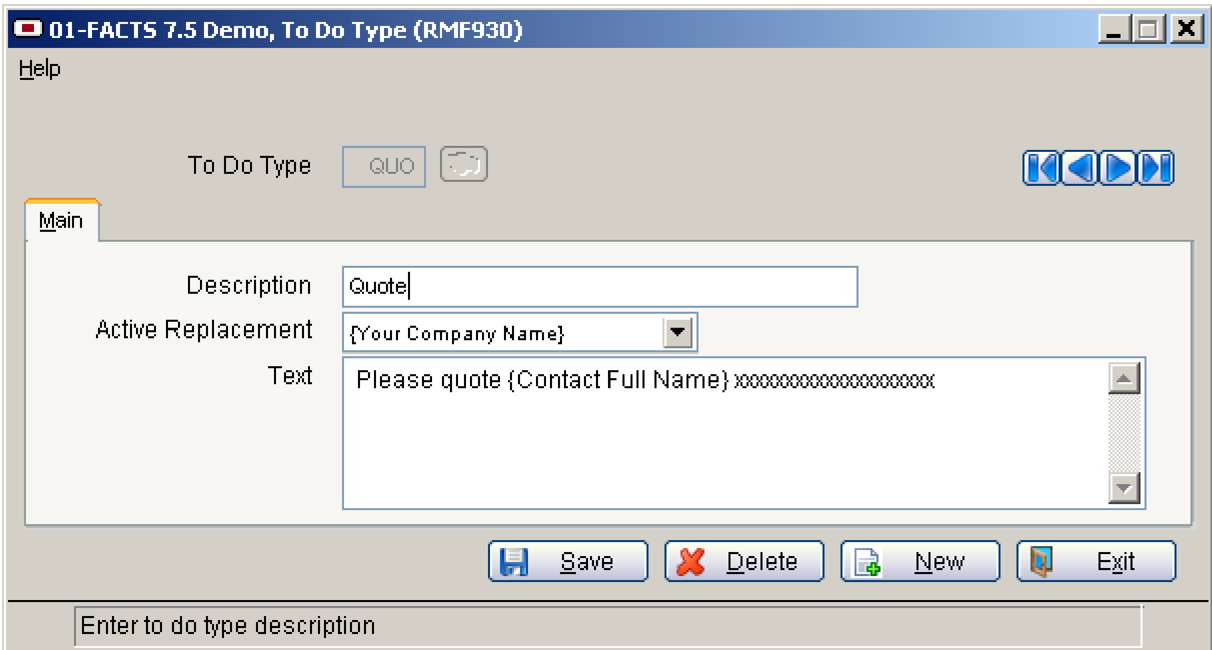
## Active Replacements

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.



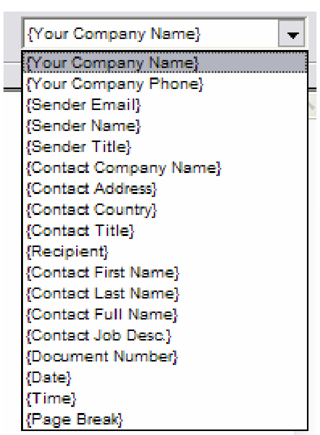
# To Do Type File Maintenance

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.



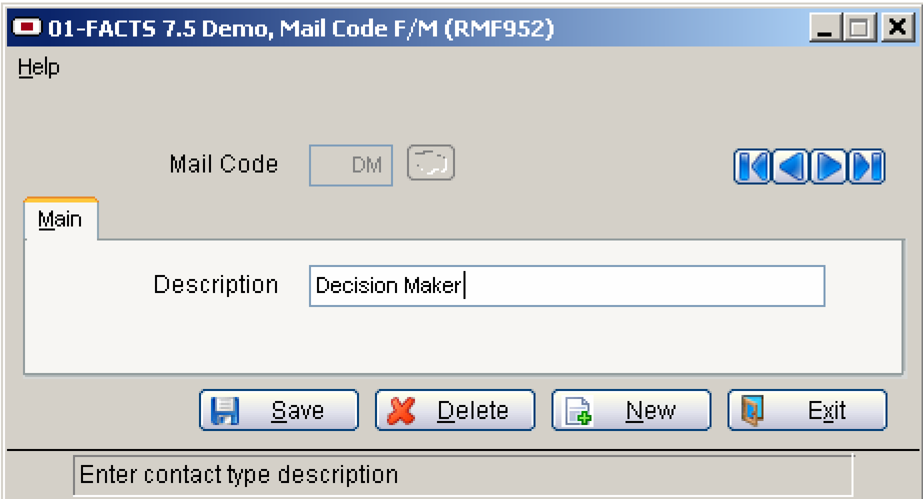

## Active Replacements

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.



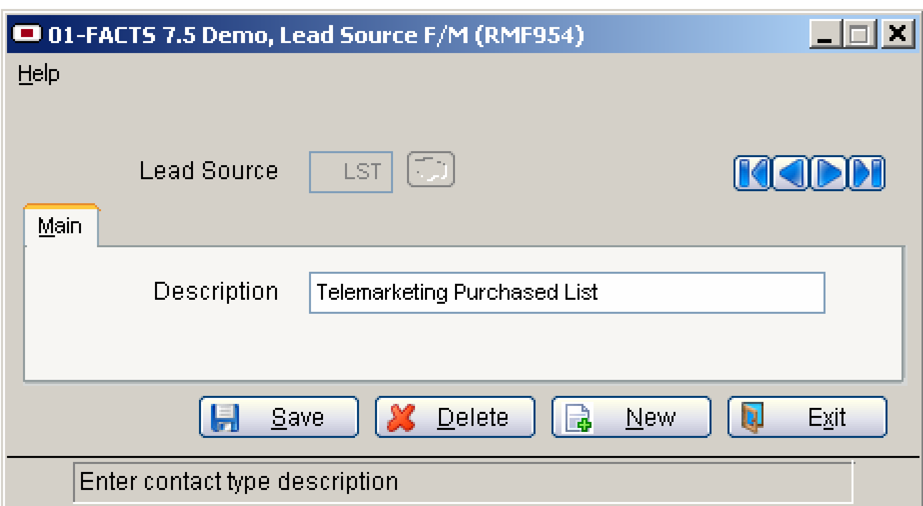

## Mail Code File Maintenance

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.



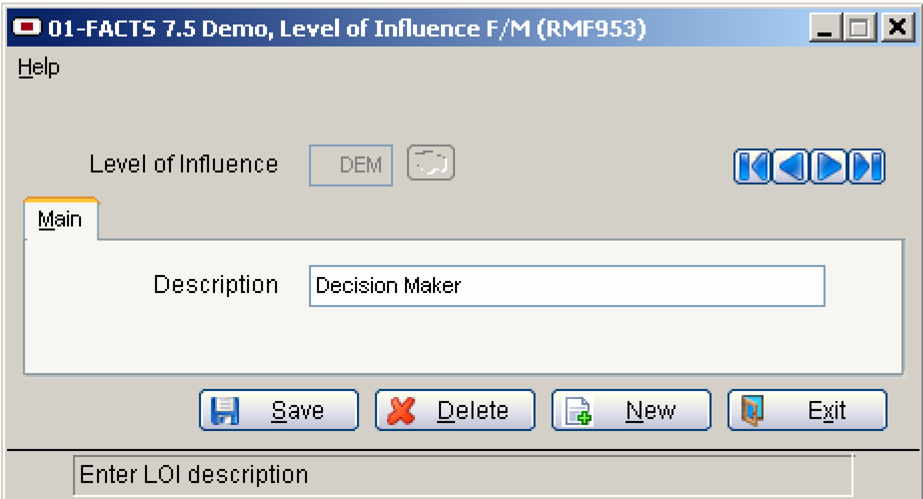

## Lead Source File Maintenance

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.



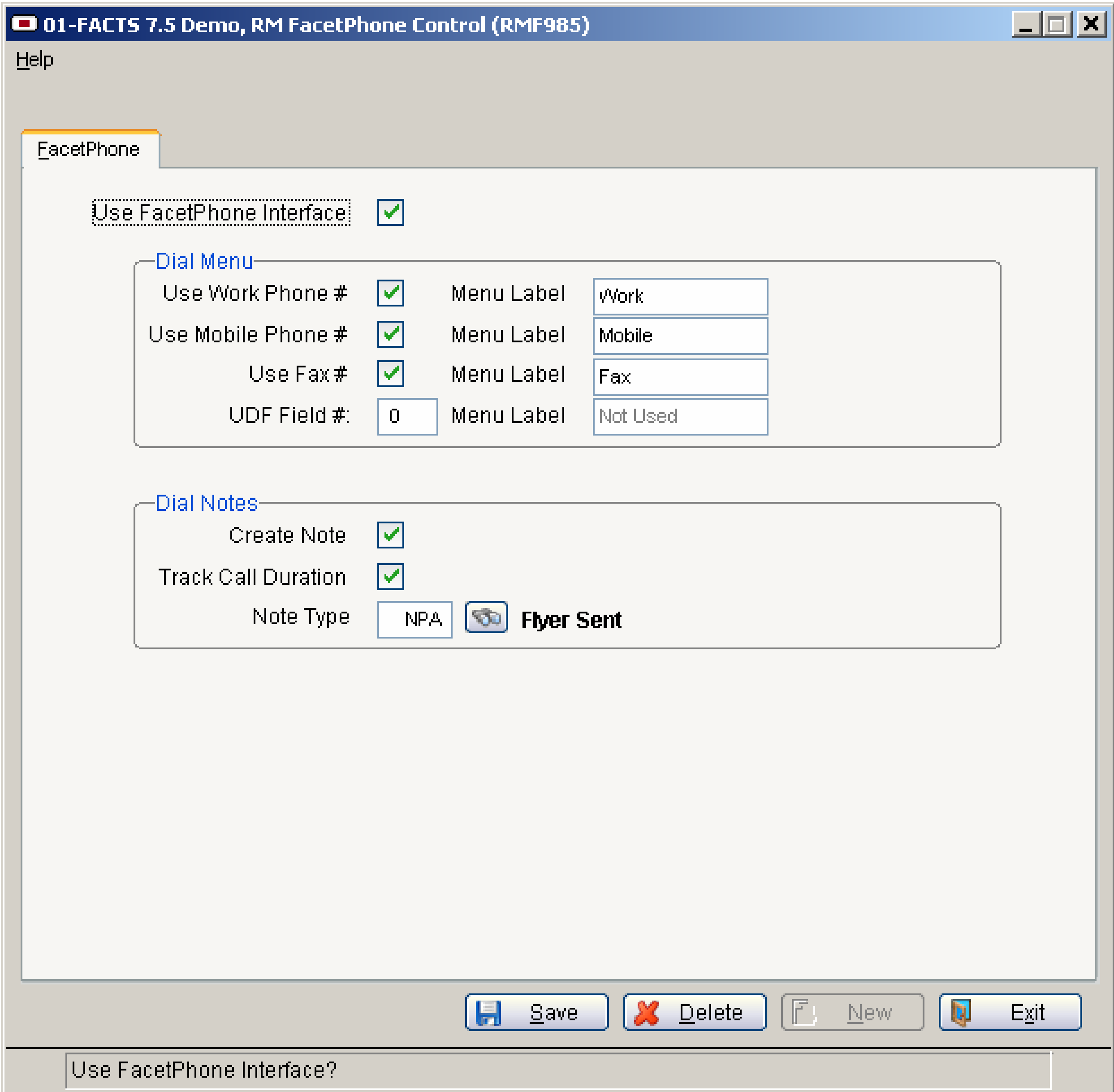
## Level of Influence File Maintenance

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

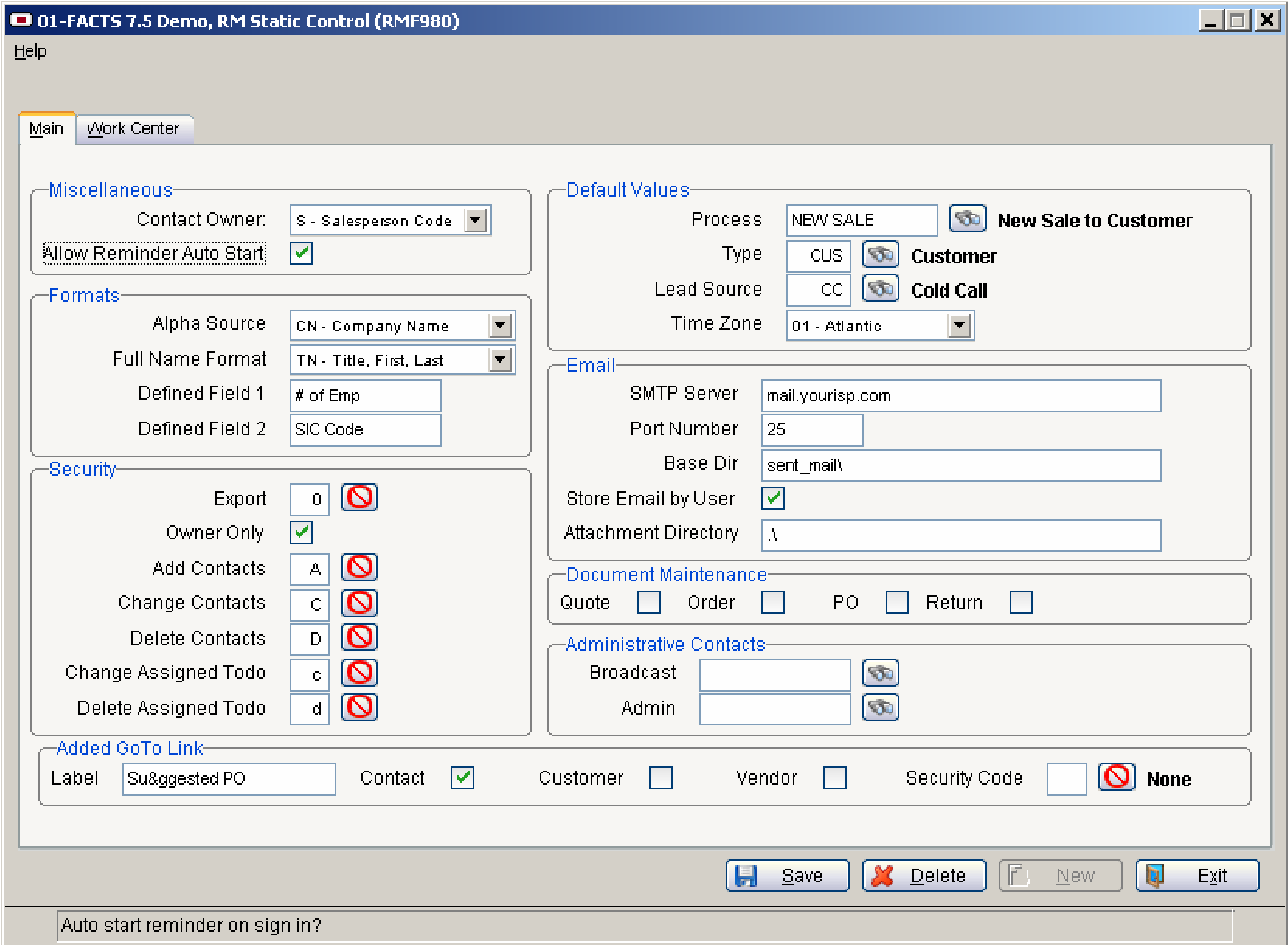
Use the FacetPhone Control to turn on and configure the FacetPhone integration with relationship management. This file maintenance allows the system administrator to define the labels that display for the phone numbers when using the auto dial button. As well as specify if they want to create a note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

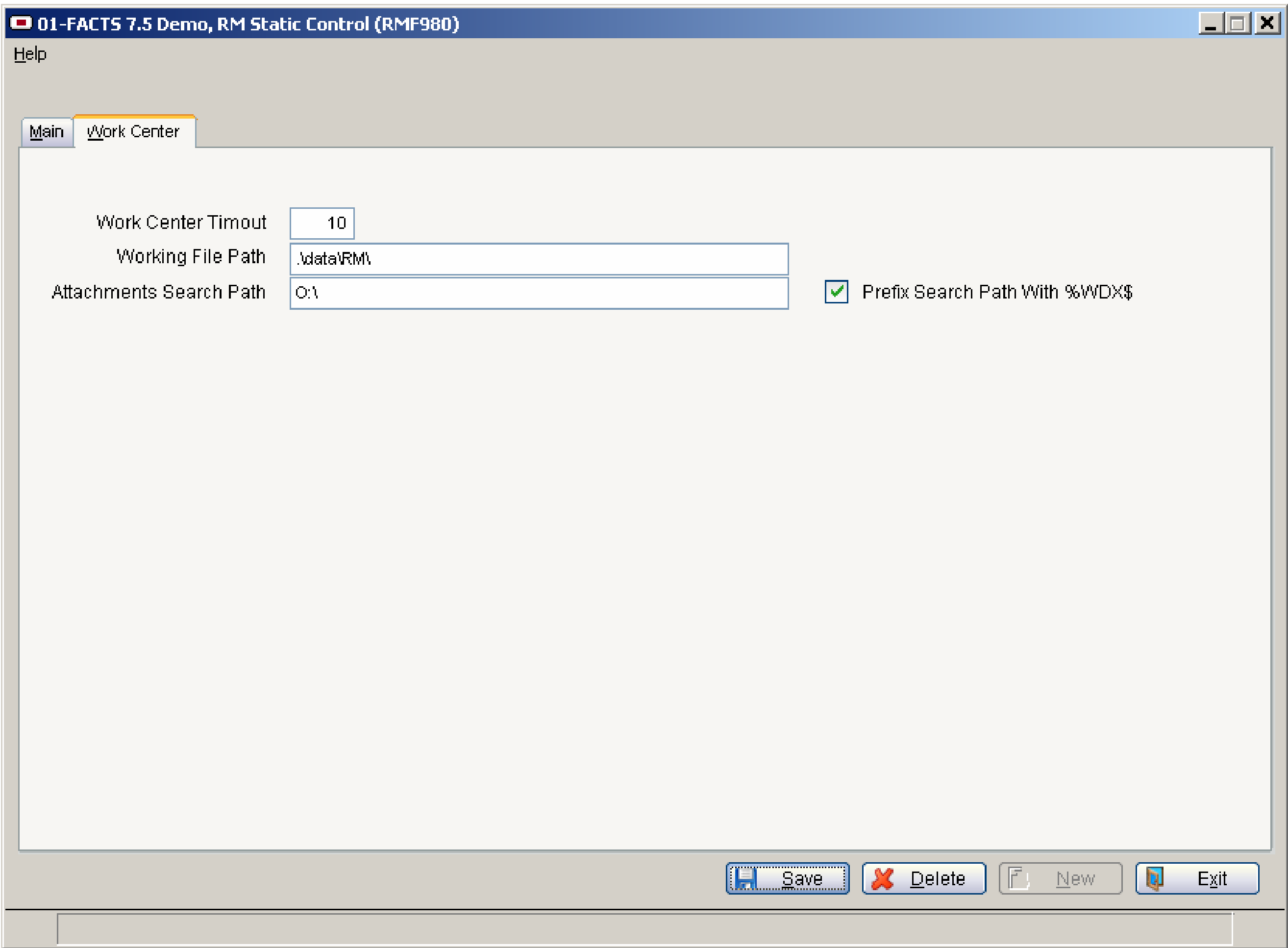
## Admin

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.




## 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.

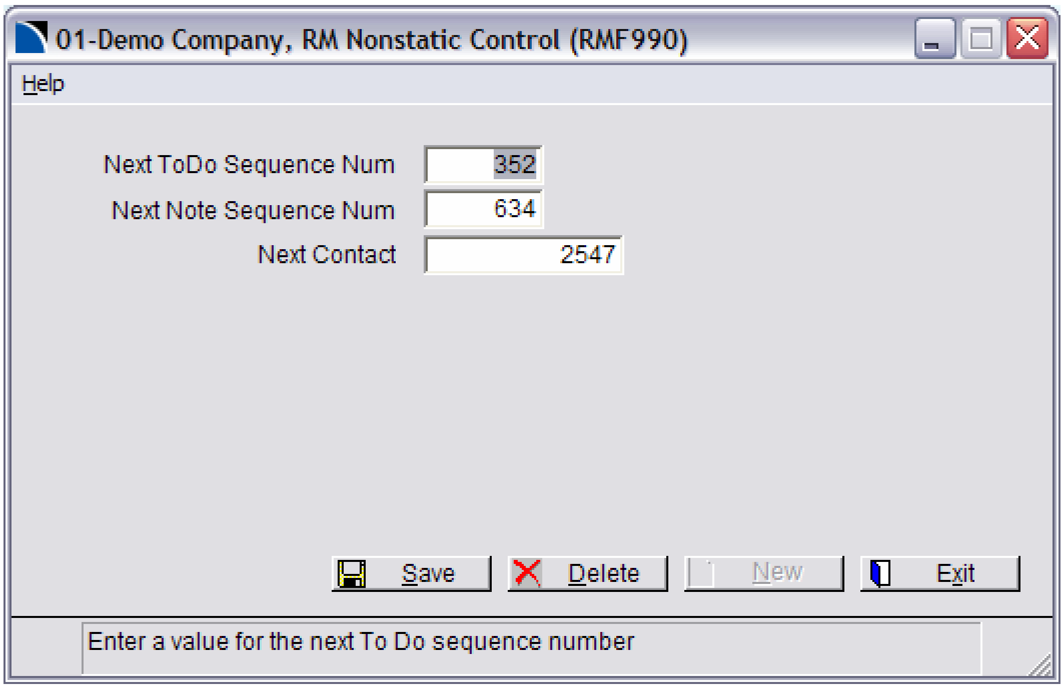
### Attachments Search Path

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.



## 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

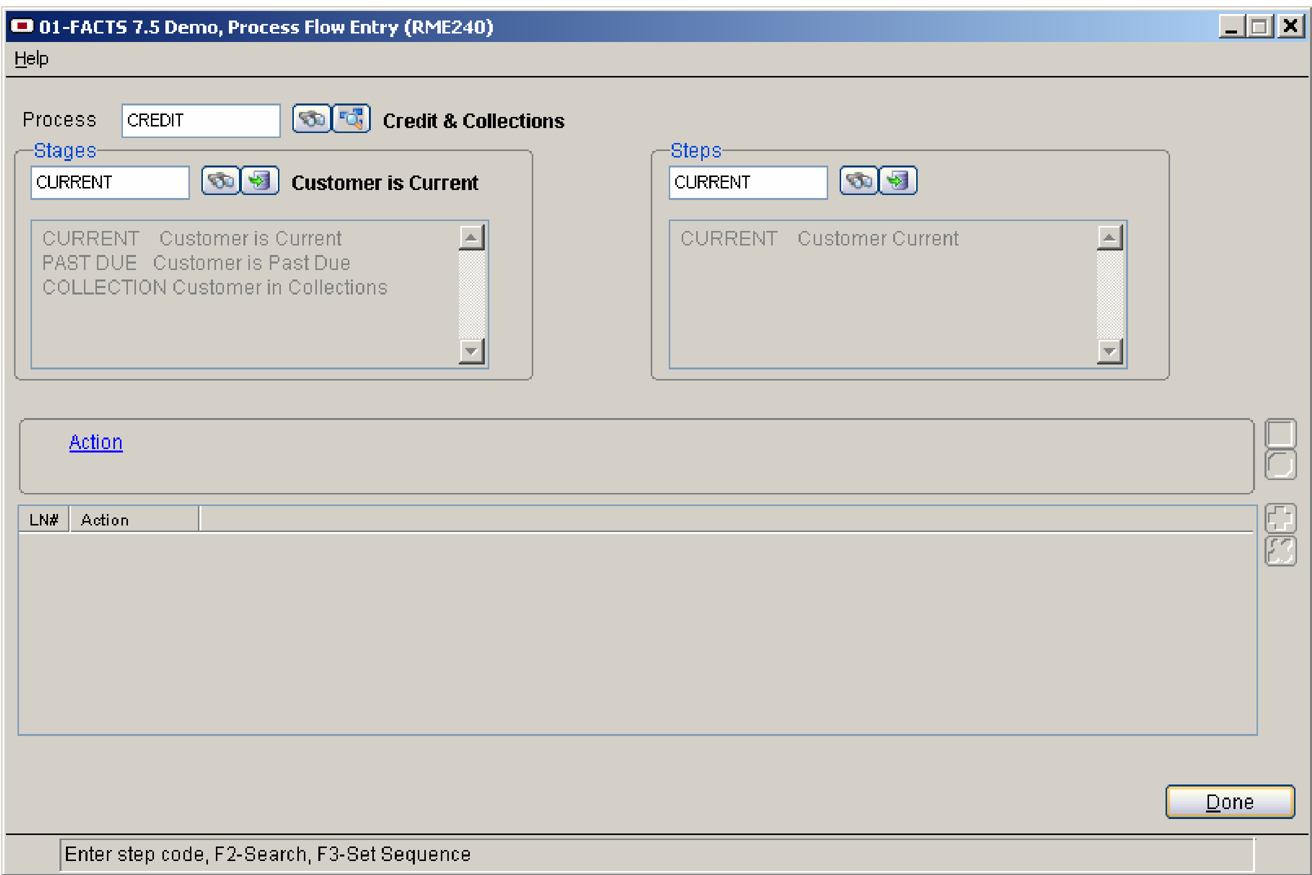
RM includes a Process Flow Management system. A process flow contains stages and steps. A process can contain multiple stages. A stage can contain multiple steps. These can be used for tracking and filtering on any function or process within your company.

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.

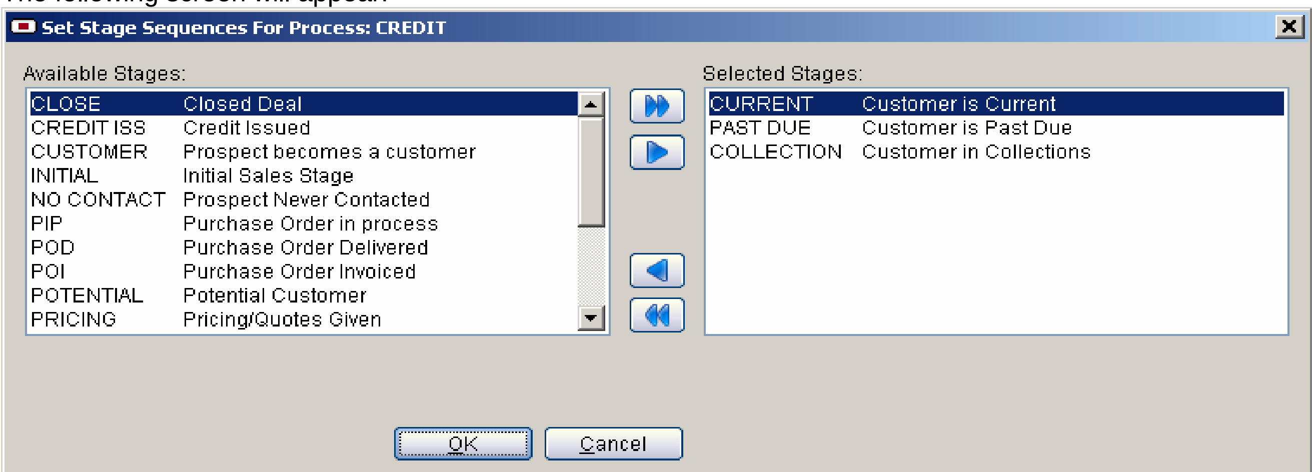


## Assign Stages

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.

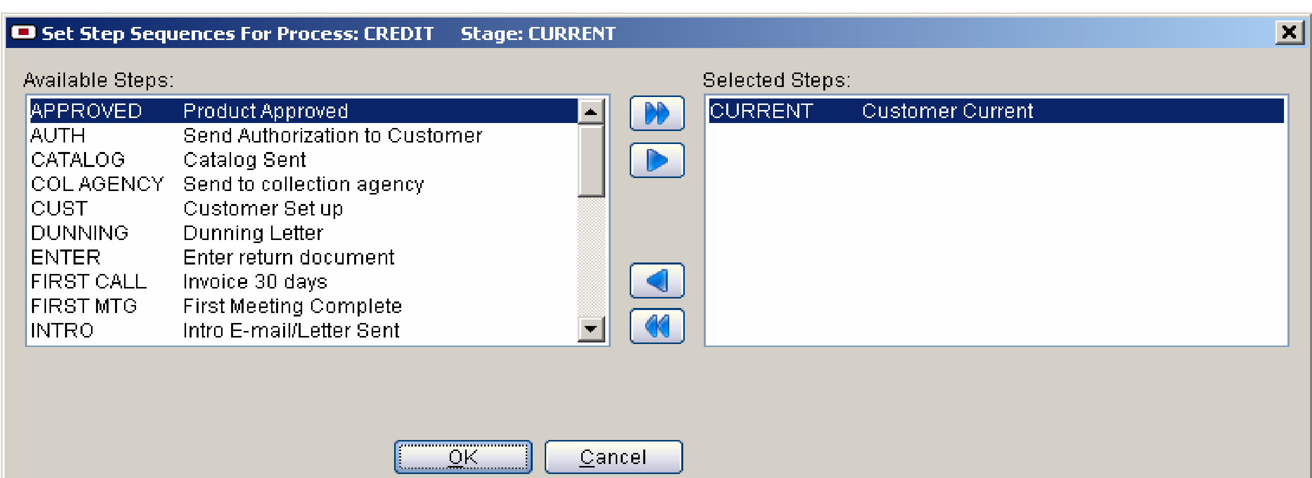
Arrow key usage

- 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

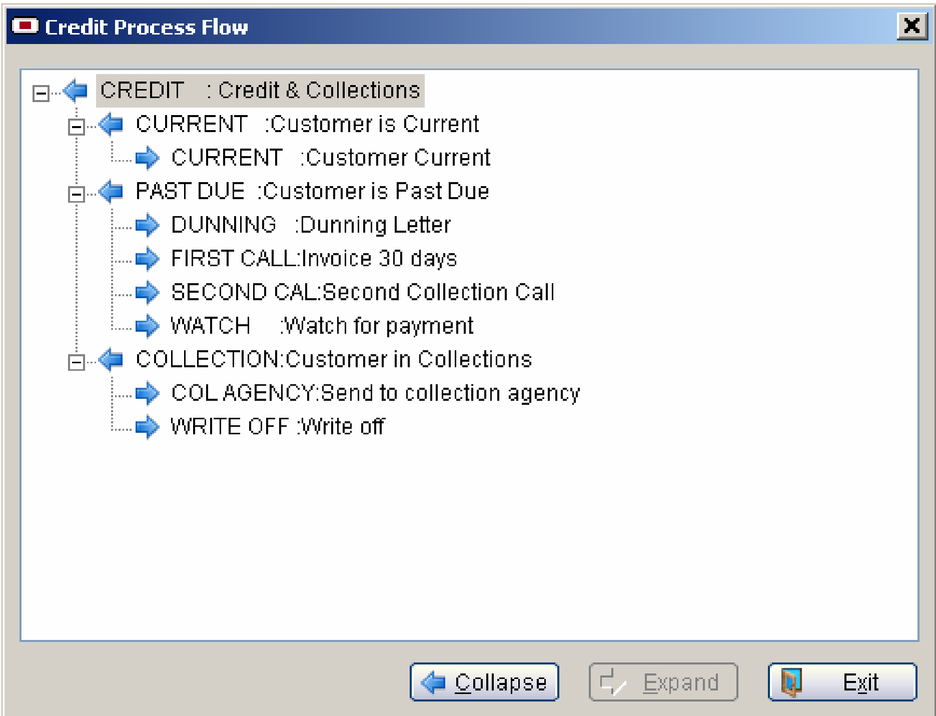
1. Call up the stage to which you want to assign steps.
2. Select the set sequence icon for the steps.

The following screen will appear:



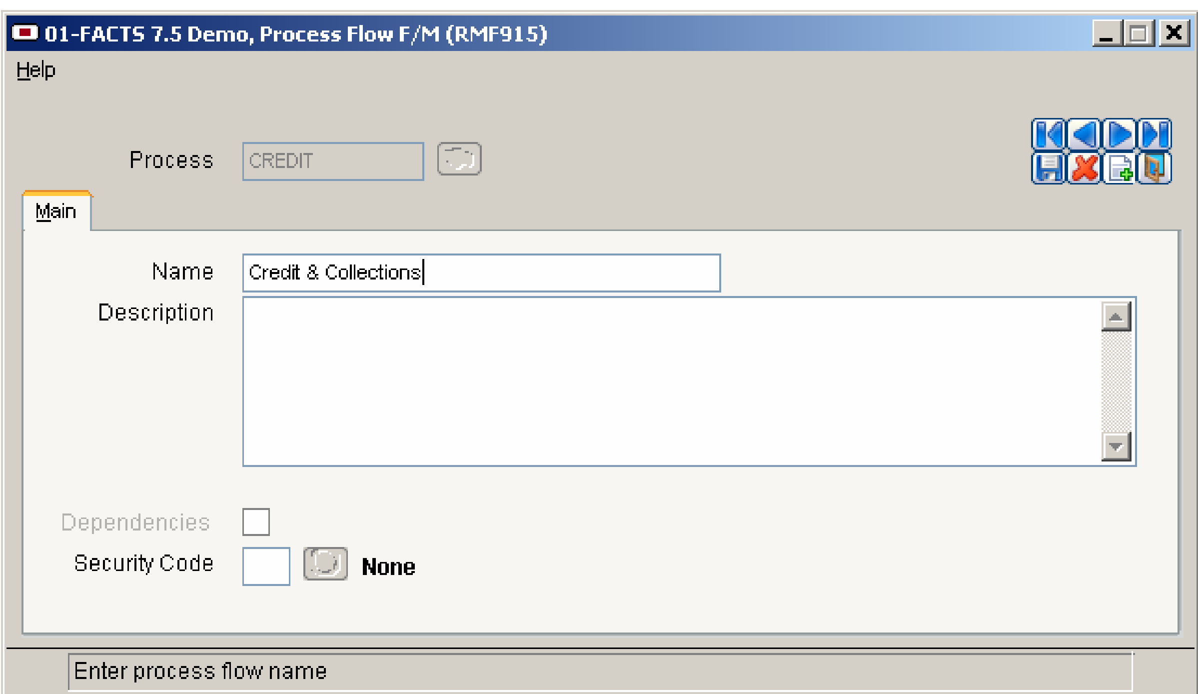
## Process Flow Tree-view

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.



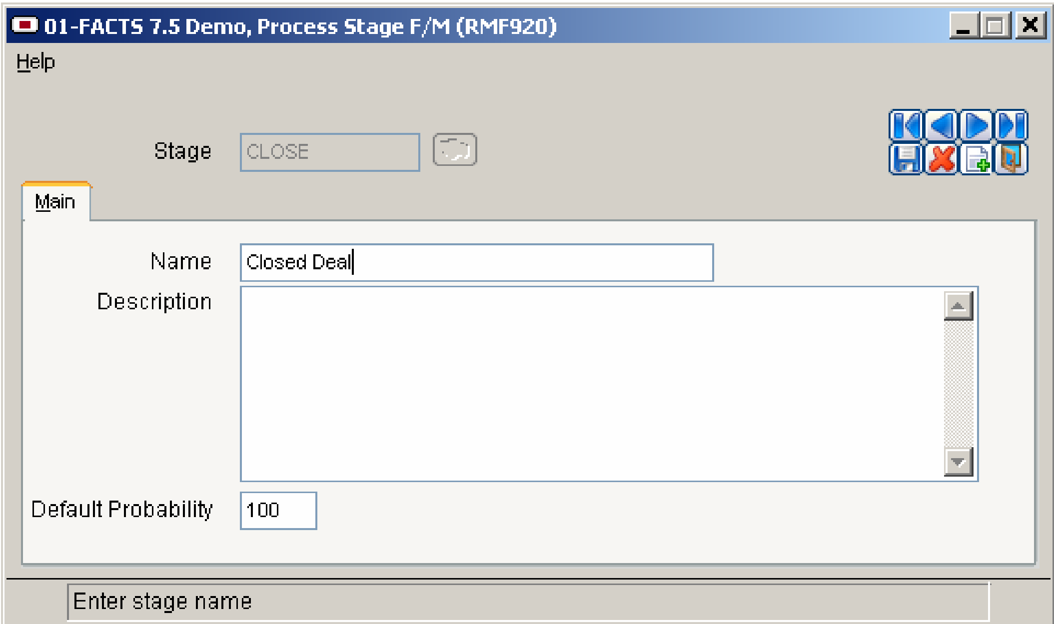

## Process File Maintenance

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.



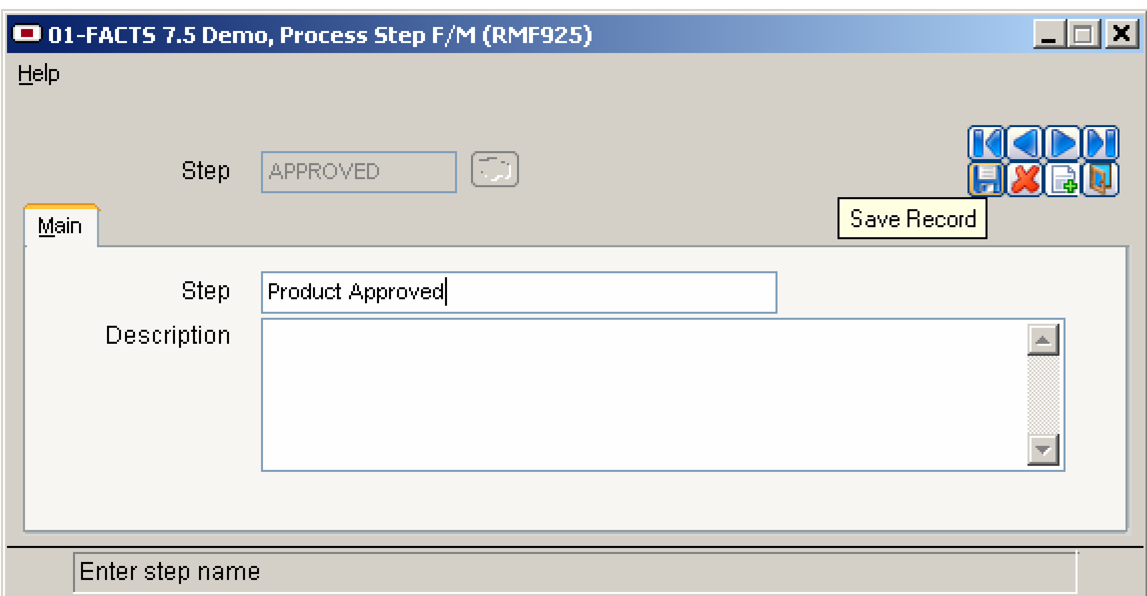
## Stage File Maintenance

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.




## 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.

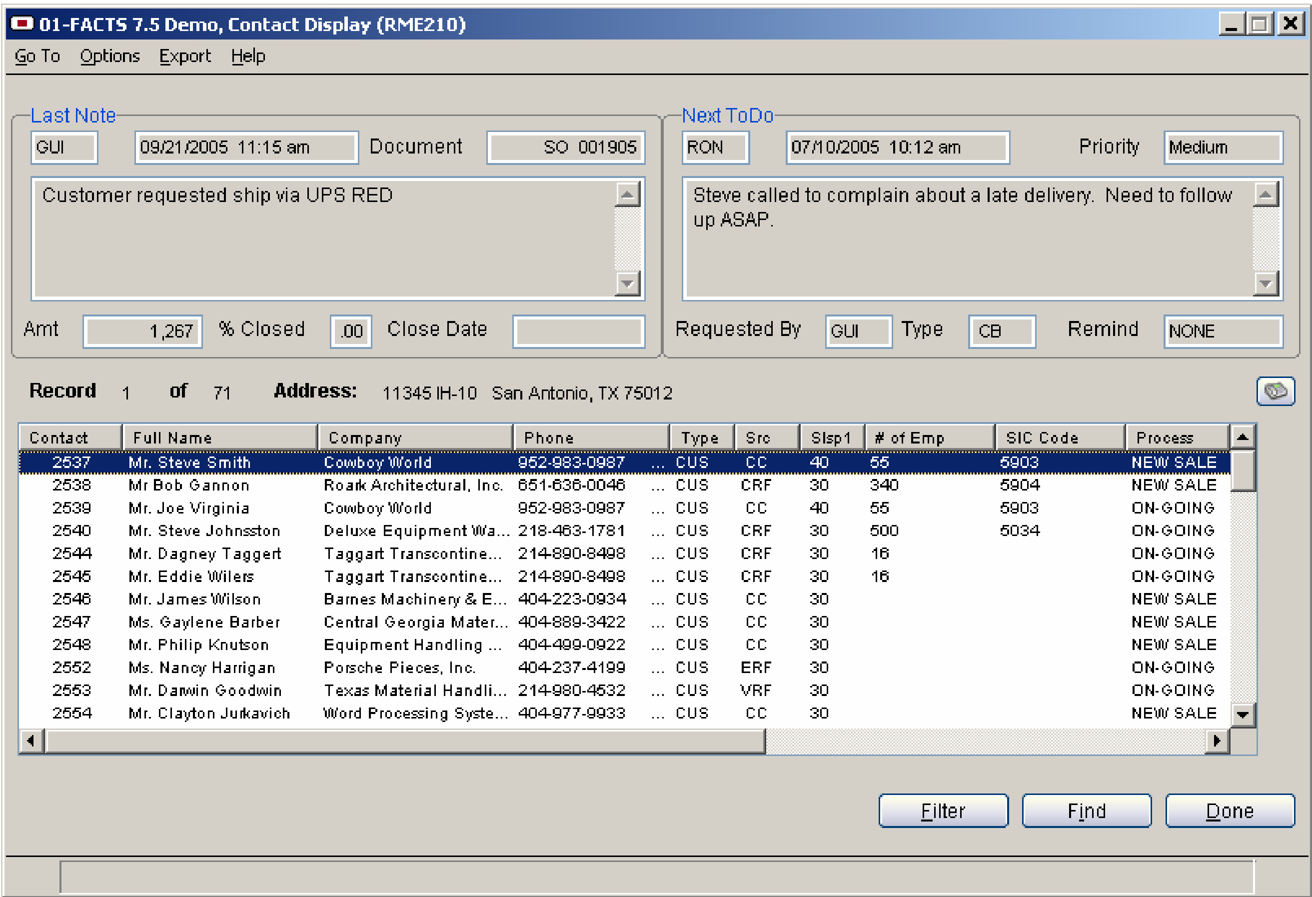


## Process Flow Exercises

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.




## 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

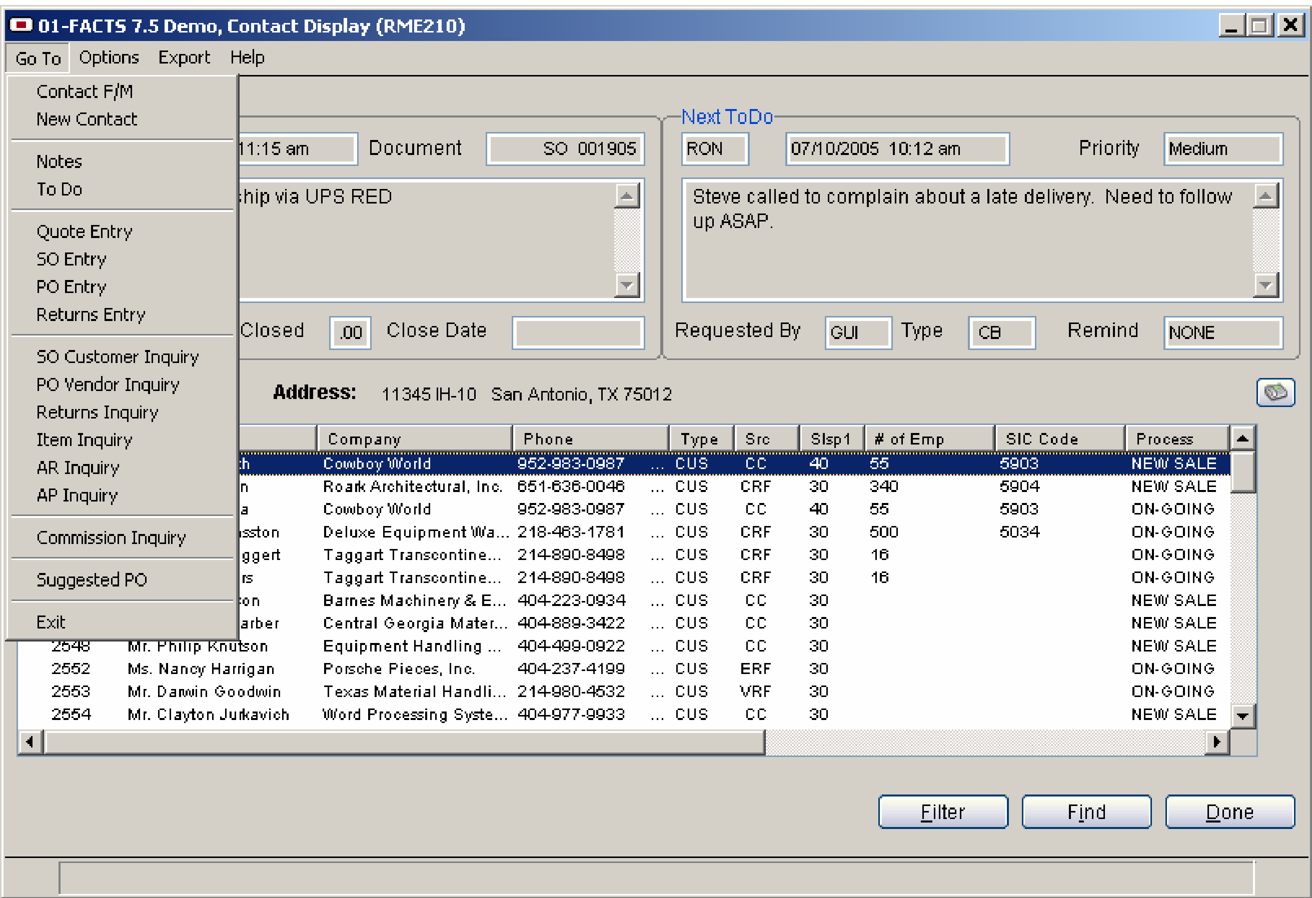
Executes the Contact Search and adds selected contact to the browser. If the contact selected in the search is already in the list, the browser focus is shifted to the selected contact.

## 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.

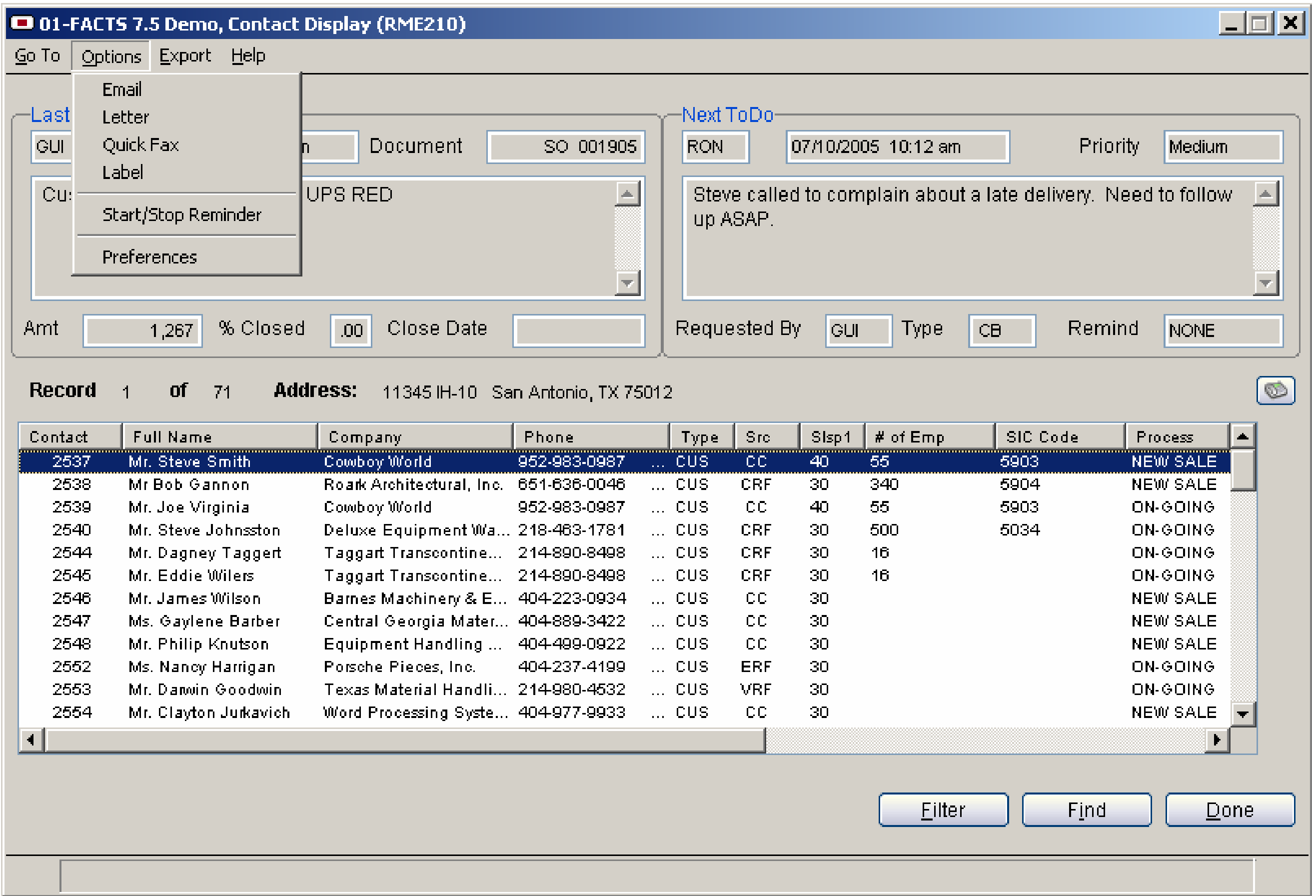



Vendor related programs are available for contacts associated with vendors, customer related programs are available for contacts associated with customers. Quotes are available for any type of contact. Closing those applications when done returns you to this screen.

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.



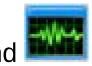

# Start/Stop Reminders

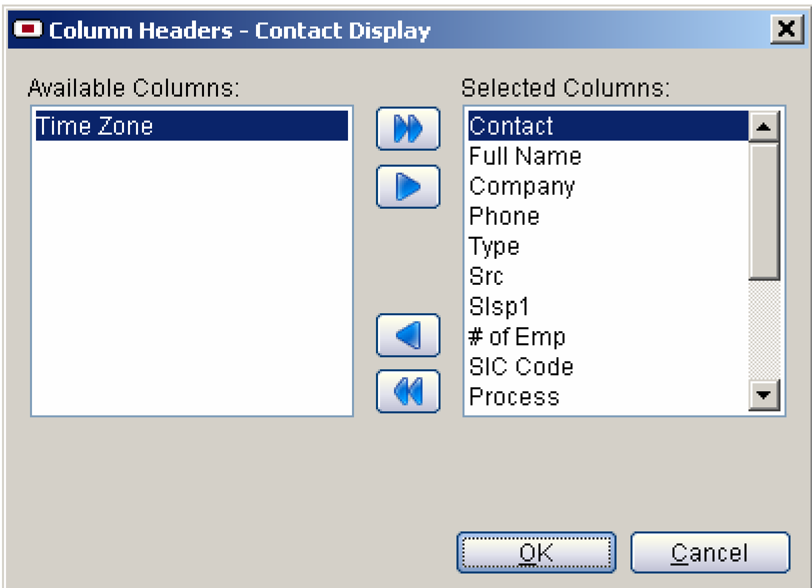
Each To Do item has a scheduled date and time the system can use to remind you of deadlines. You can start or stop the reminder program manually by selecting the Start/Stop Reminder option on the Options pull down menu. You can also stop the reminder program by clicking the Stop Reminder (All) button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

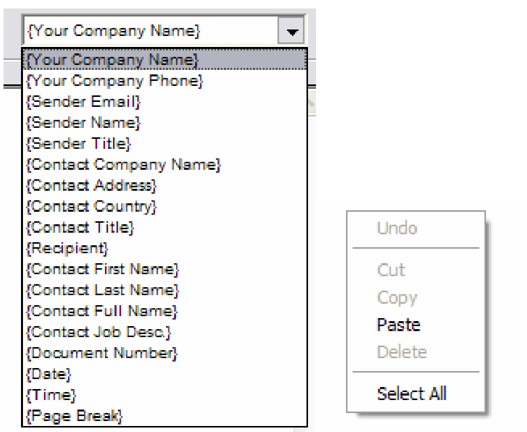
If checked, the system will create a note with the type specified in the Note Type filed and the text of the subject line (email) or a message indicating what was sent.

### 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

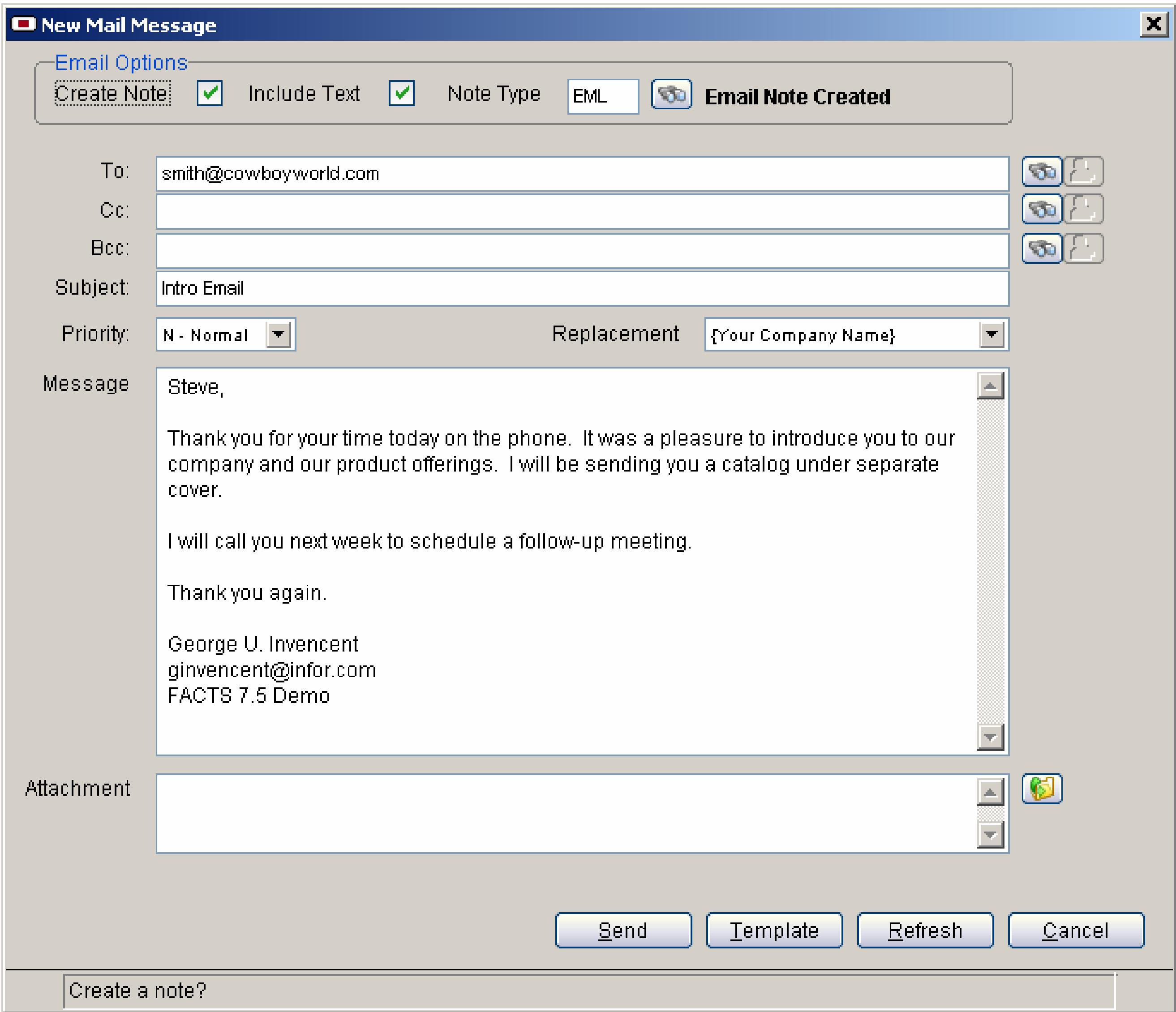
The refresh button will re-display the letter/email text with data rather than the active replacement field name.

### Templates

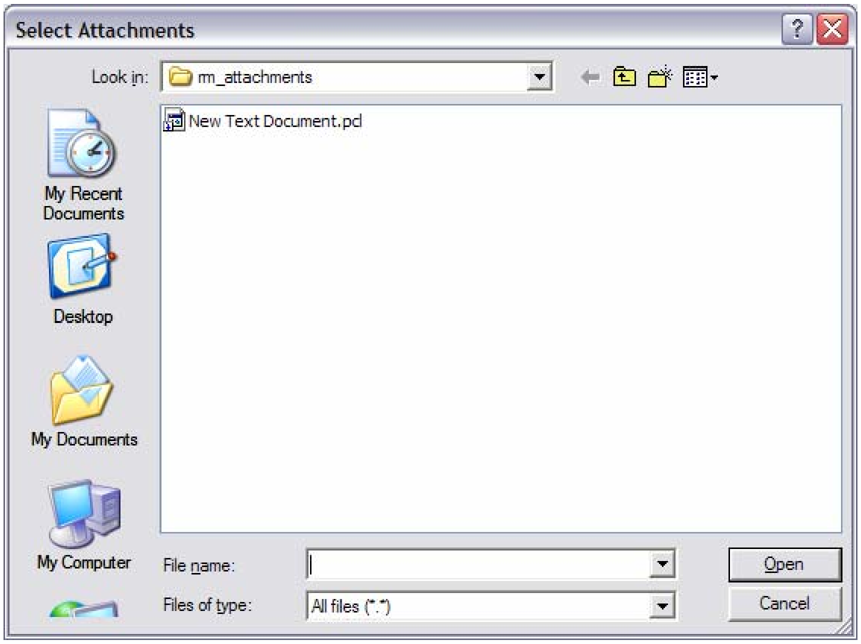
When creating a new email or letter, the default templates defined in the user preferences F/M are read and the content pre-filled based on the template. Active replacements are made on the fly so that what appears on the screen is as close to the final output as possible. A template search is available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

# Email

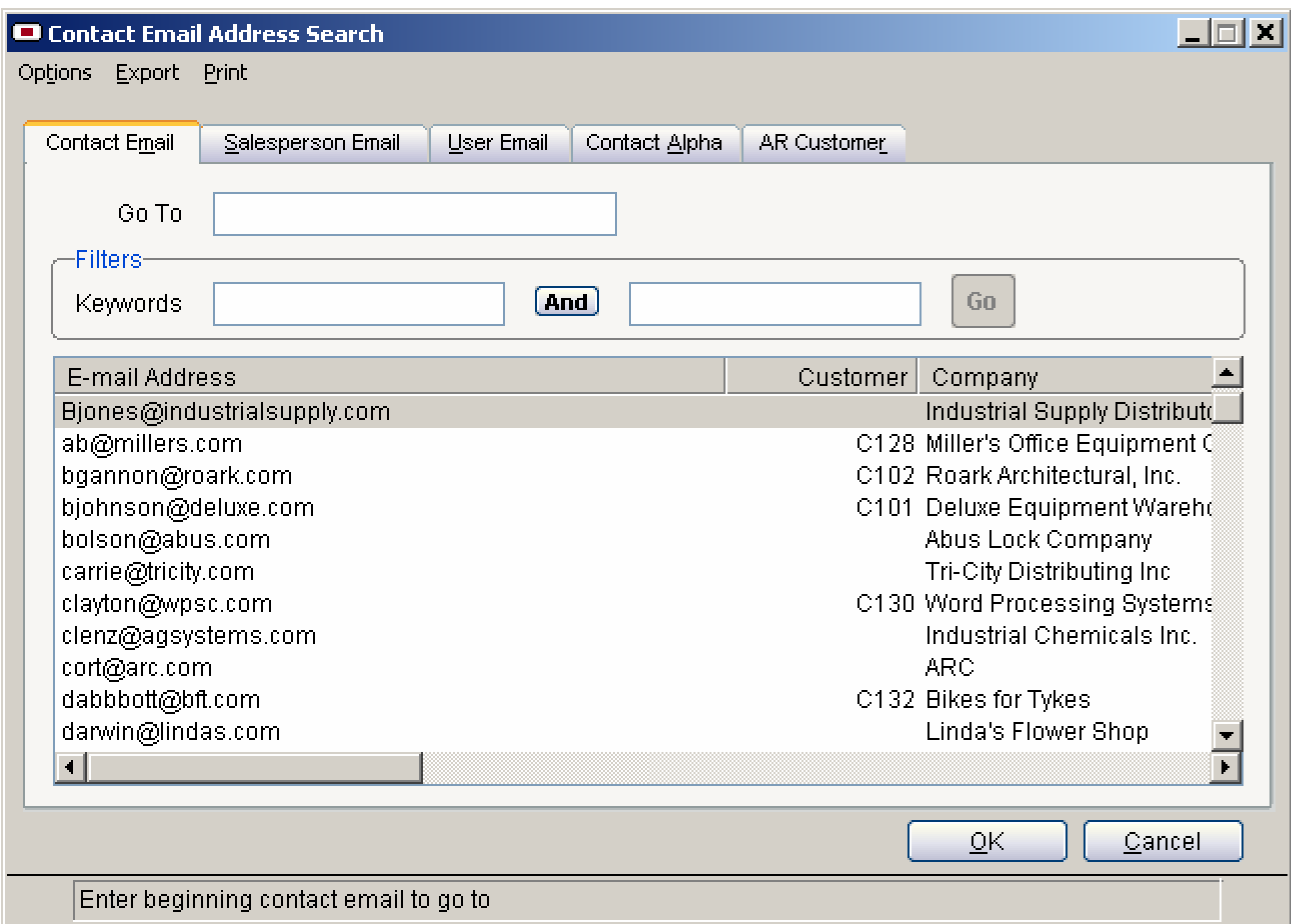
**To** – This is automatically filled in based on the contacts primary email address.
**CC** – Used for standard carbon copy of emails. Note: All addresses specified in the To or the CC fields will be visible to the recipient.
**BCC** – Used to indicate blind carbon copy. These addresses are not visible 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.




**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.

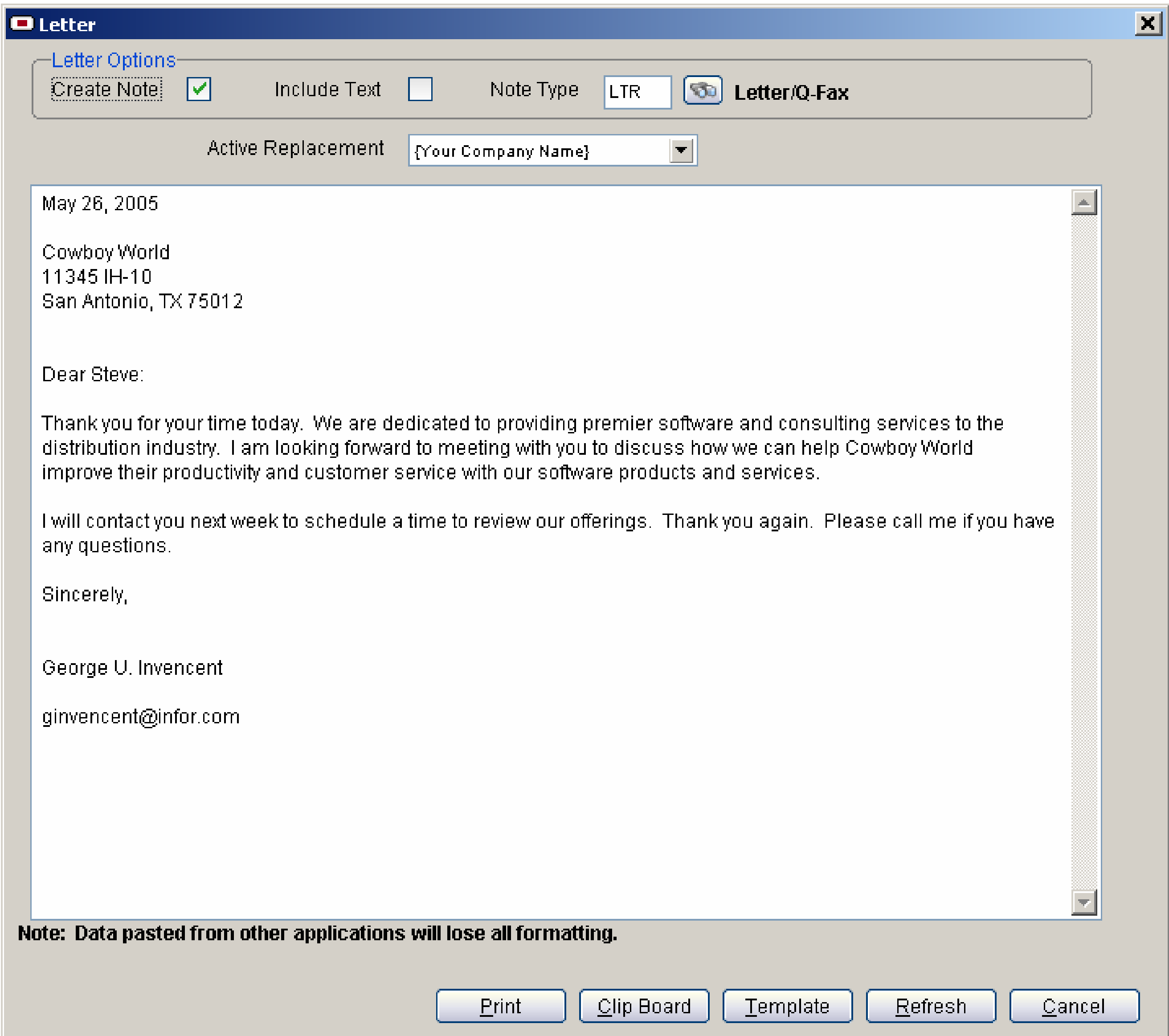



Search – The  button will allow you to search for an email address for the To, CC, or BCC fields.  You can search by contact, salesperson, or user code email or by contact alpha name or by customer number.  If you search for an address on a field where there is an existing address, the address from the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

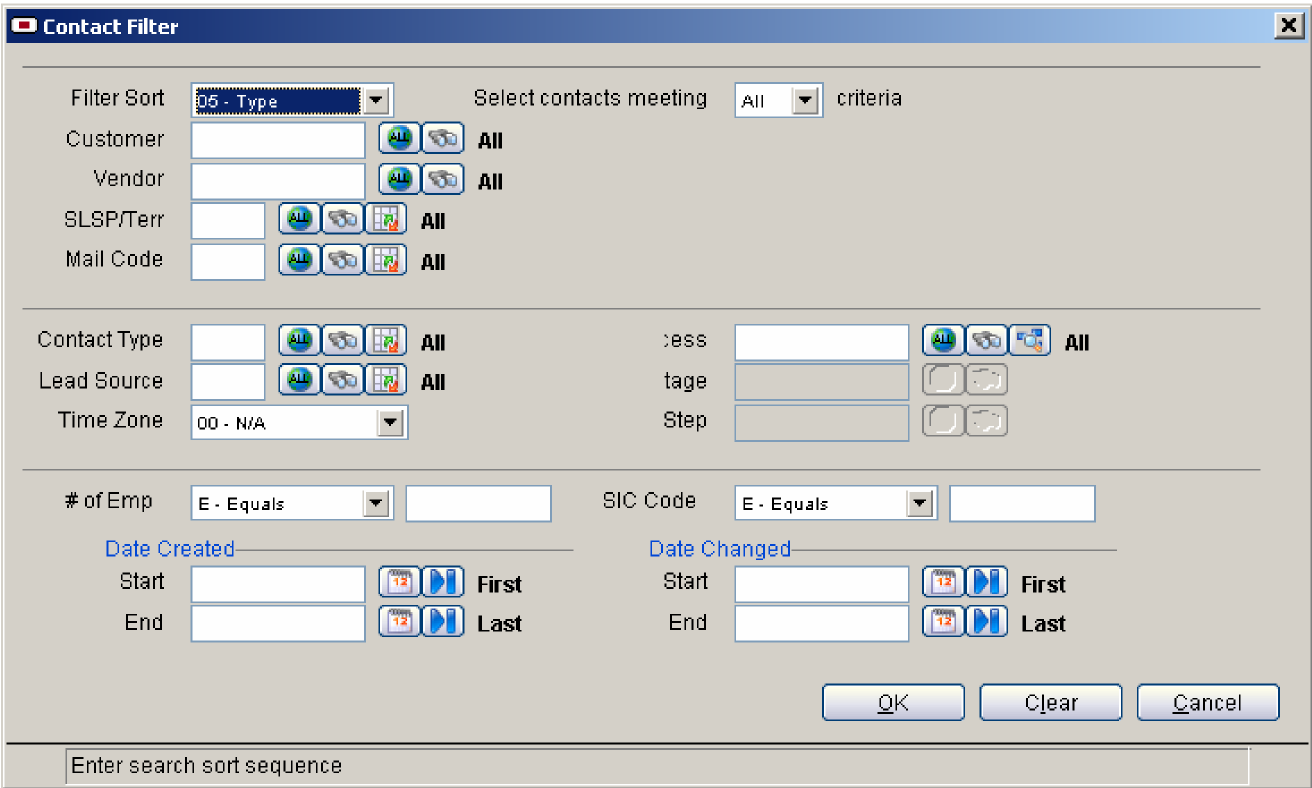



## Quick Fax/Labels

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.



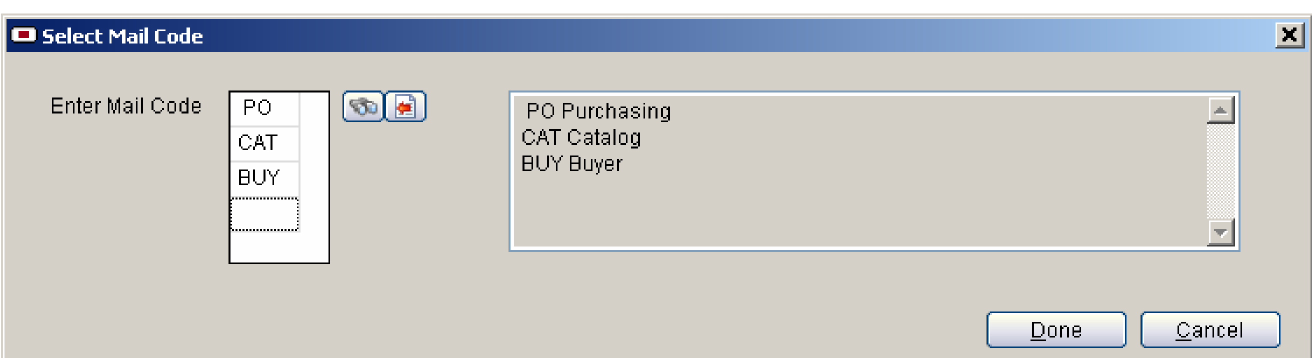

## Common Elements

### 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.



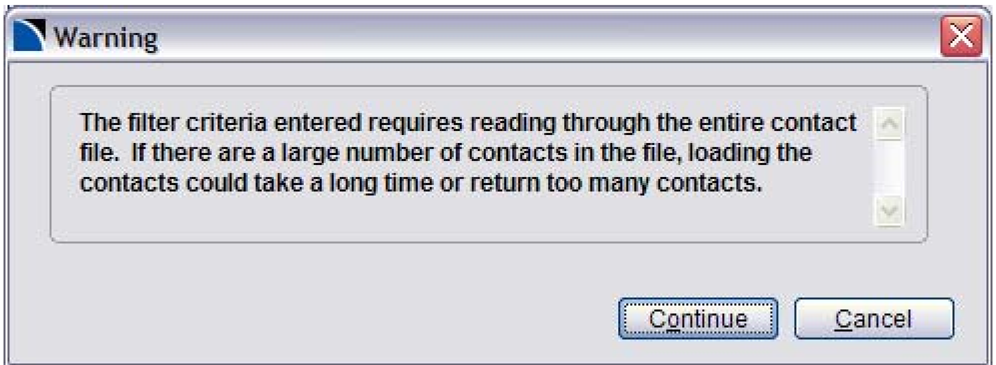
### First/Last

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 of 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.

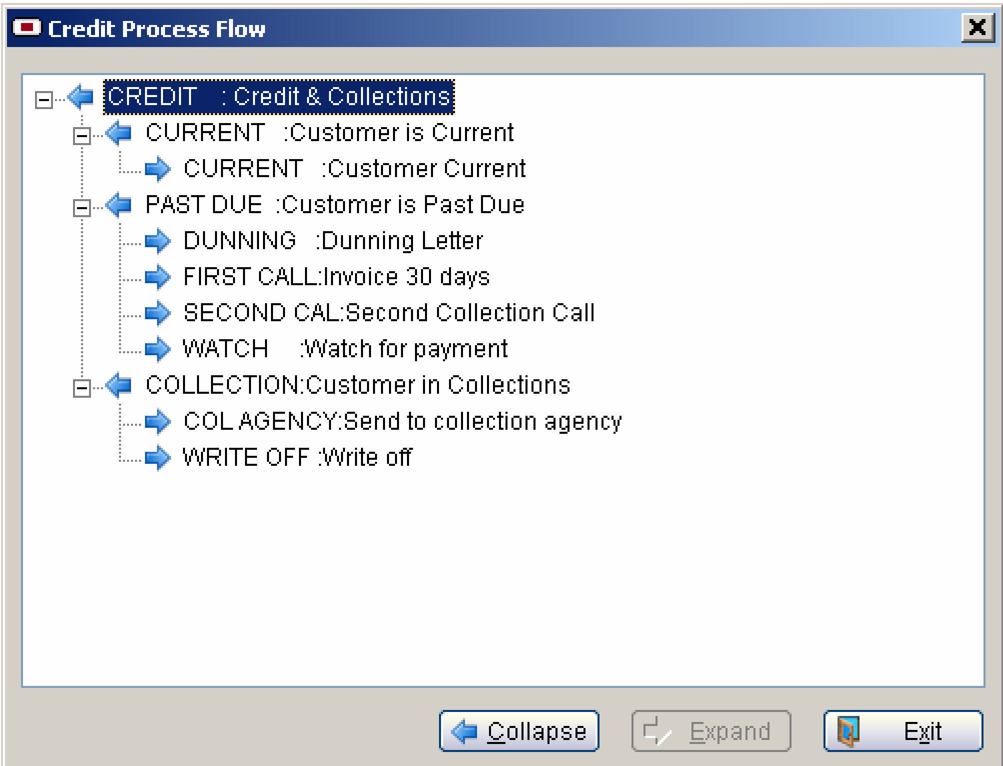
**Type** – Enter a type code or use the icon to select contacts associated with a specific type code or use icon for all types

**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

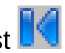
**Process/Stage/Step** – Enter a process/stage/step or use the icon to select contacts associated with a specific process/stage/step or use icon for processes/stages/steps. Use the icon to get a tree-view listing of the selected process.



**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.

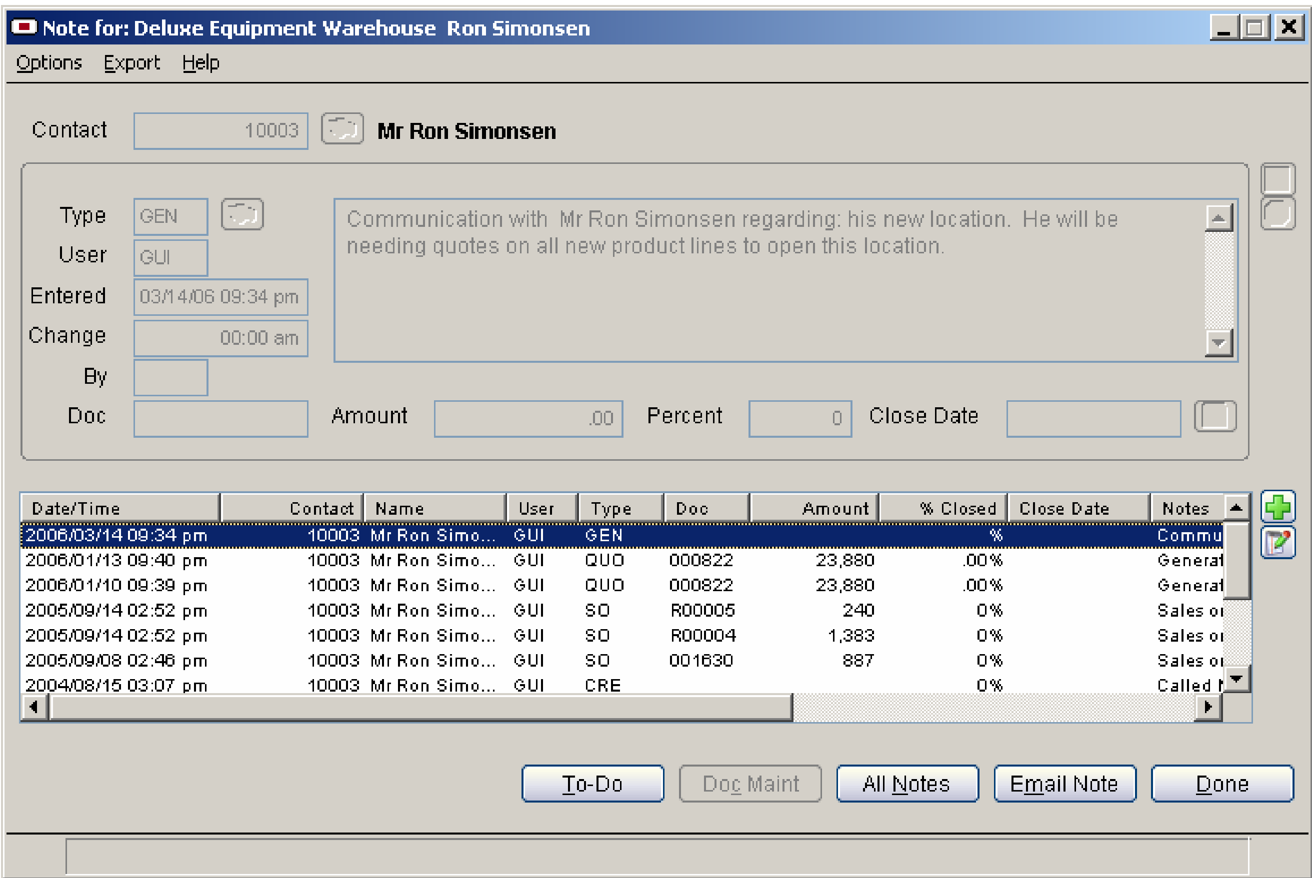
Note: Make sure you clear all filters between each exercise

#  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)

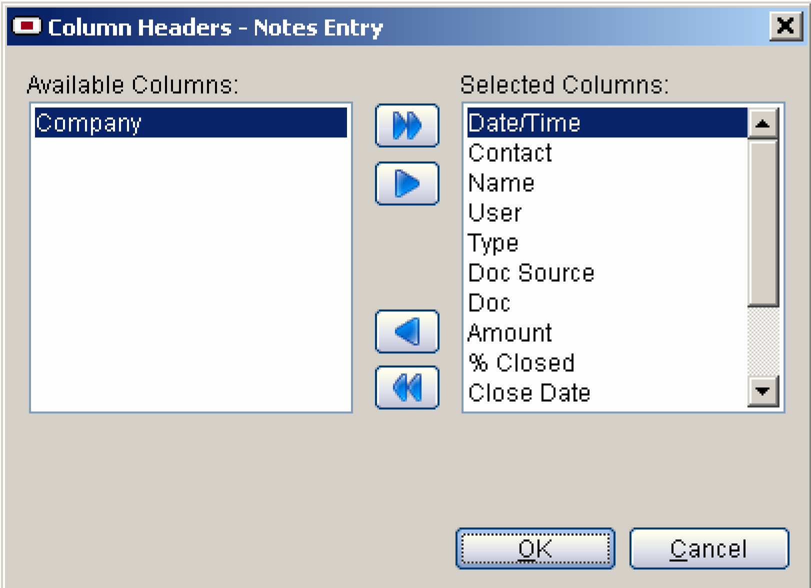
When you access notes from the menu, you must select a contact. If you access it from the Contact Display or file maintenance, the contact number is pre-filled.

## Notes Entry




## 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

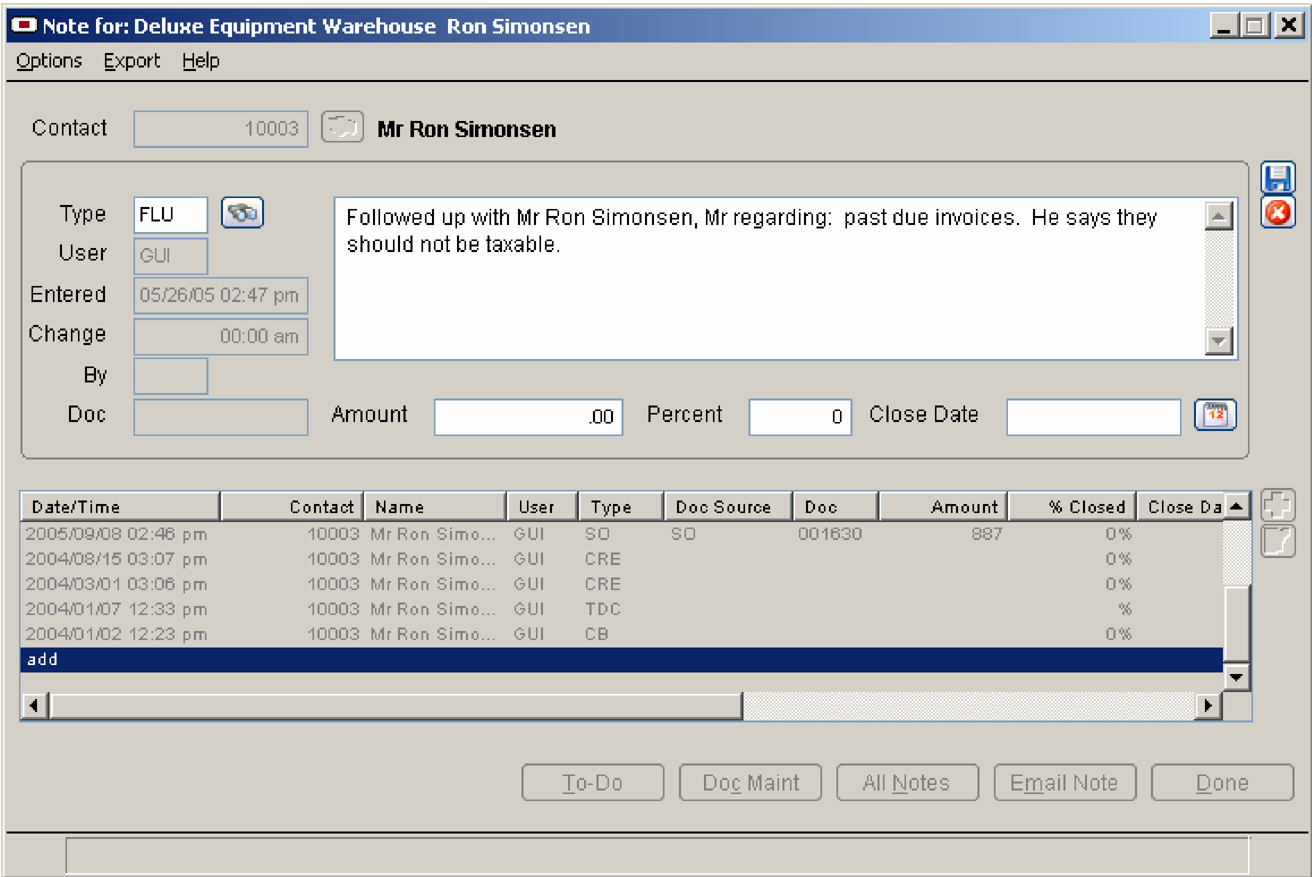
This button will display all the notes for the Customer/Vendor if one is associated to the contact record.

## 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.

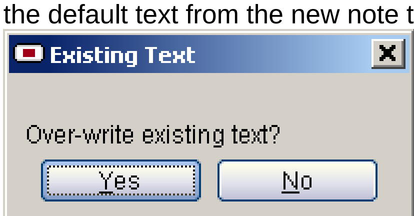
## Add a Note

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.




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

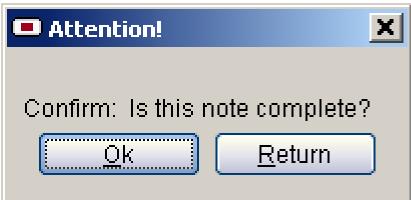
**Type** – Enter a valid note type or use the icon to search. The default note type is defined in the User Preferences F/M and pre-filled for new notes. If you override the default note type and there is text in the note, you will receive the following warning message. Selecting ‘Yes’ will clear the 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.

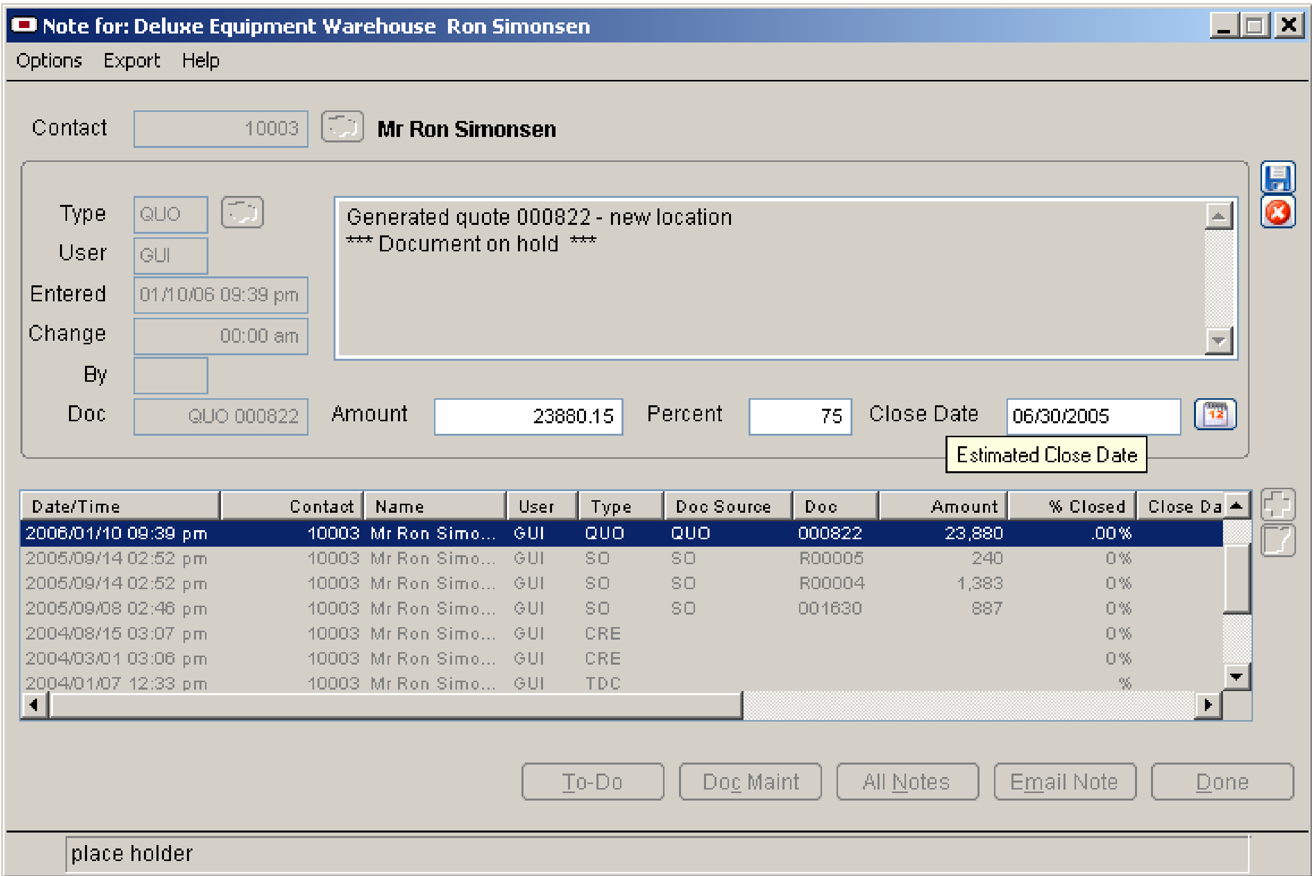
When you are done, click on the Save icon to finish adding or the Cancel icon to discard the entry.

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 of 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.




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:

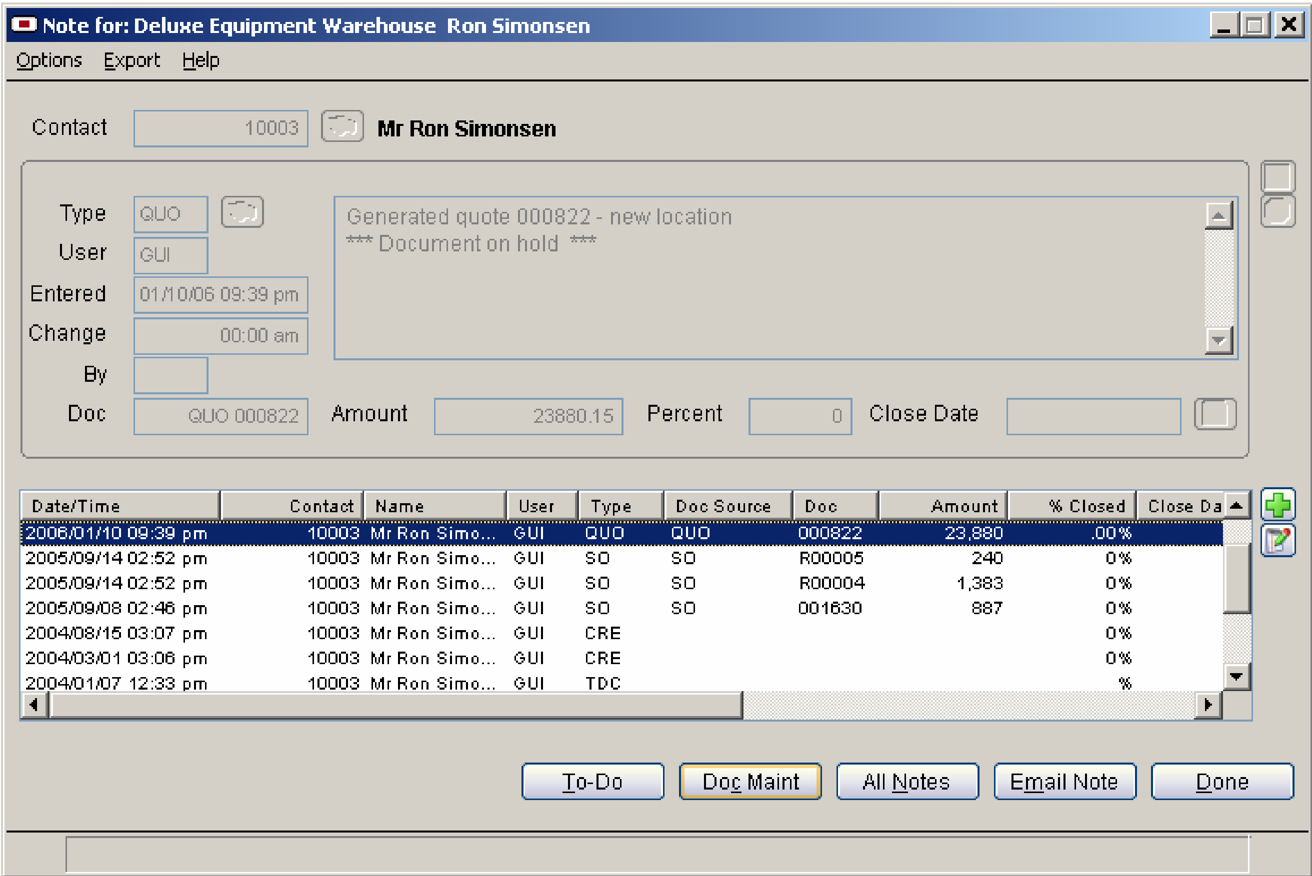
- Quote Entry
- Order Entry
- Customer Returns
- Purchase Orders
- Completed or deleted To-Do
- Email/Fax/Letters
- Broadcast Fax/Email
- Quote Conversions

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

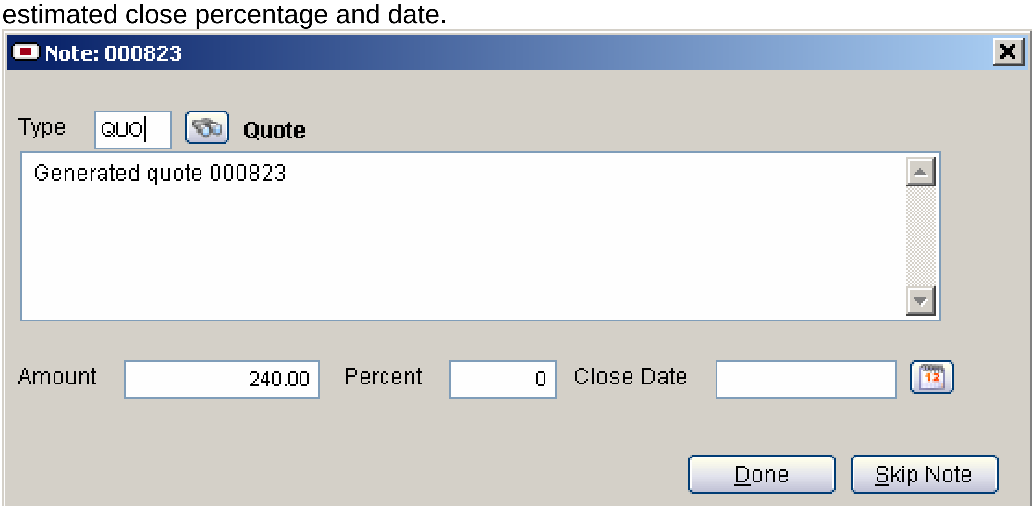
- QUO – Quote
- SO – Orders
- RTN – Customer Return
- PO – Purchase Order
- TDC – To Do Complete
- EML – Email
- LTR - /Fax/Letters
- BFX – Broadcast Fax
- BML – Broadcast Email
- QCV – Quote Converted

## Doc Maint button

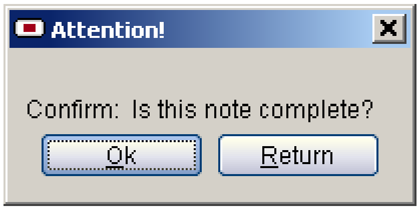
When a note is created from an entry program, a document number is associated with the note. When a note has a document number, the 'Doc Maint' button will be active and when pressed will launch the associated entry program. If the document has been updated, the appropriate inquiry program will be launched.



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.

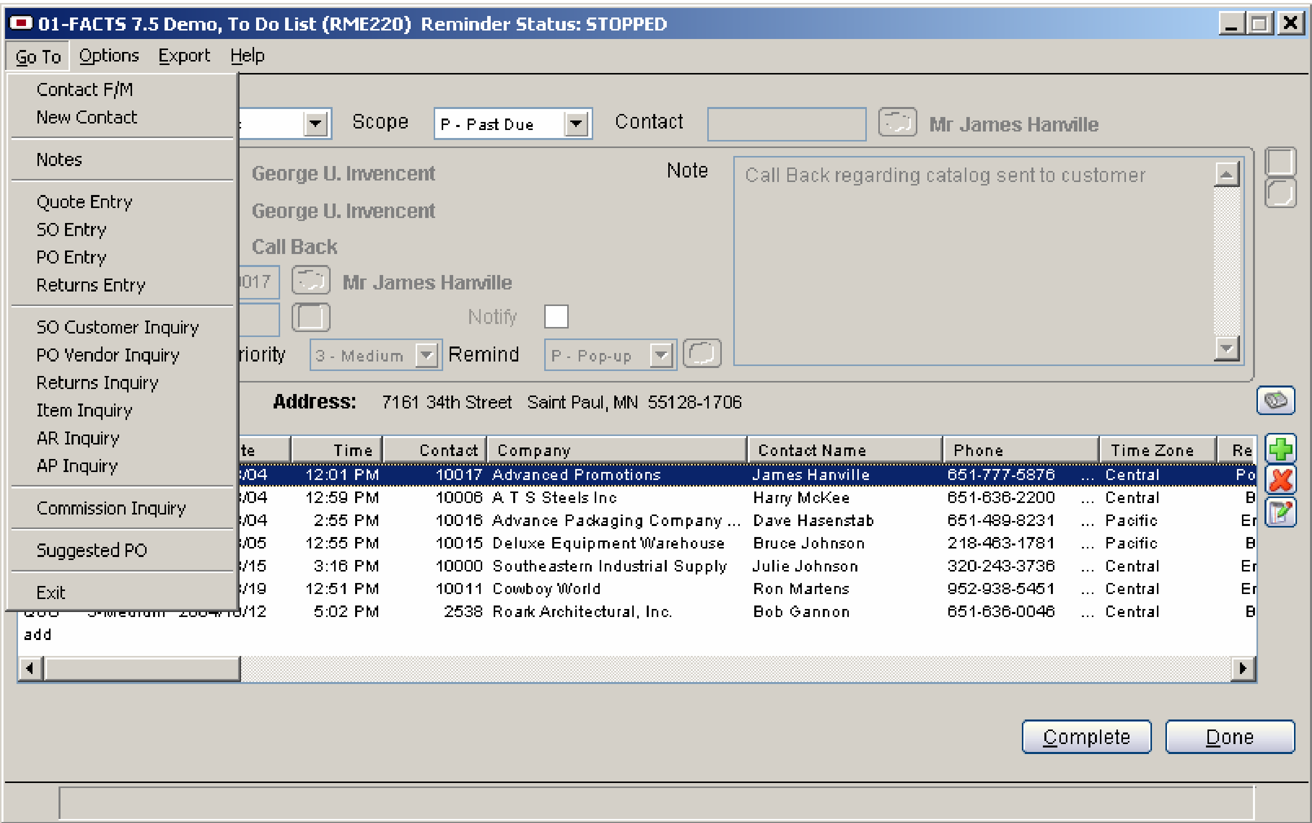
## Browser Window

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

# Go To Menu

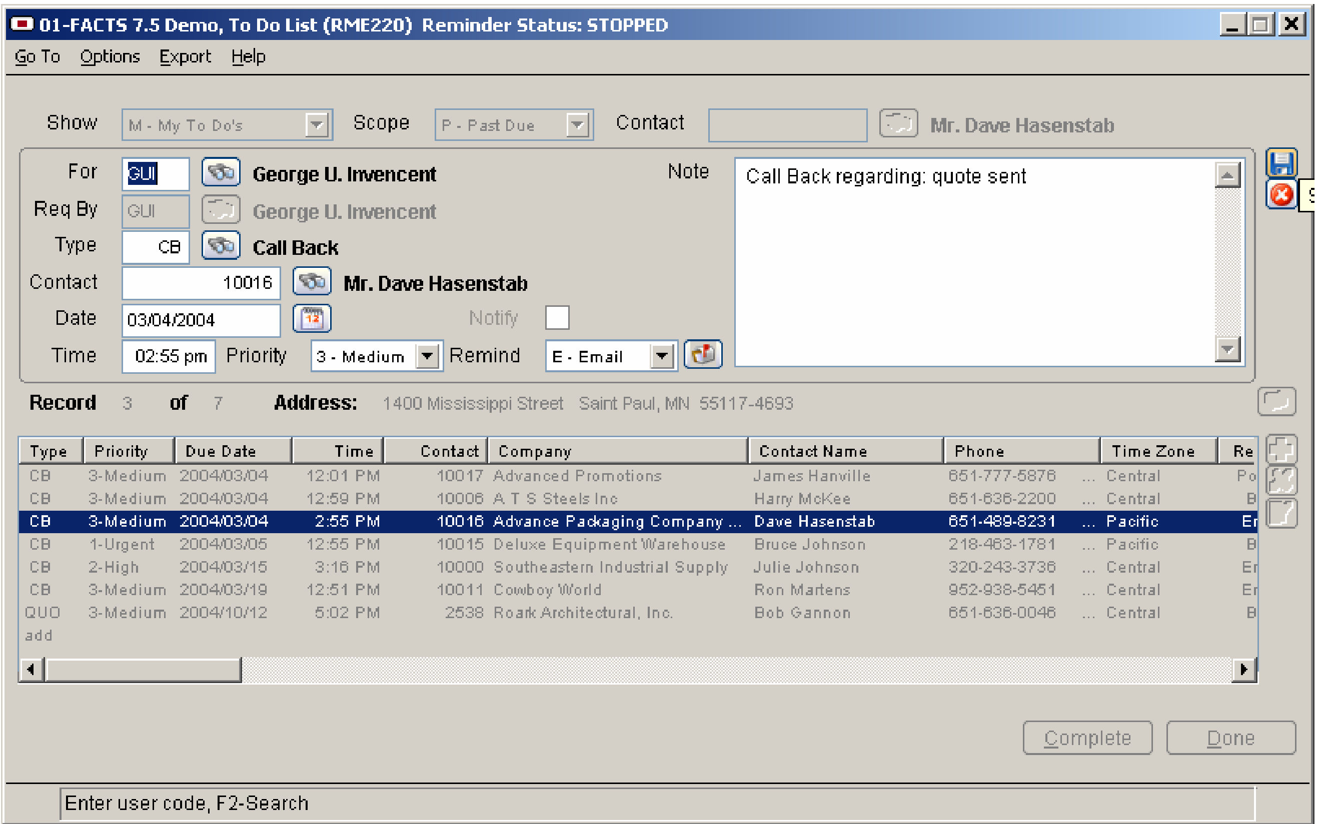
The purpose of the Go To pull down menu is to launch programs for the contact highlighted in the browser window. The application being run will have the contact information pre-filled.
Vendor related programs are available for contacts associated with vendors, customer related programs are available 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.

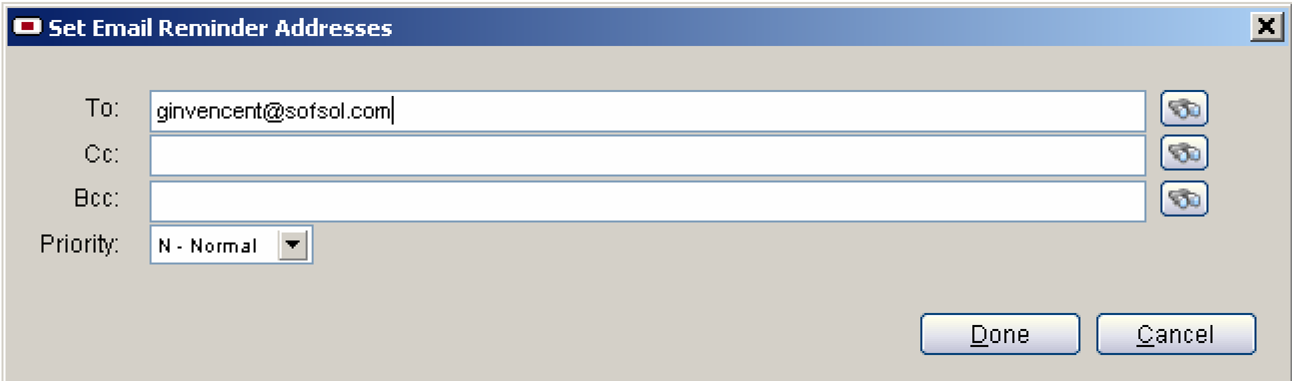



# Add a To Do

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.




**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 of 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.




**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

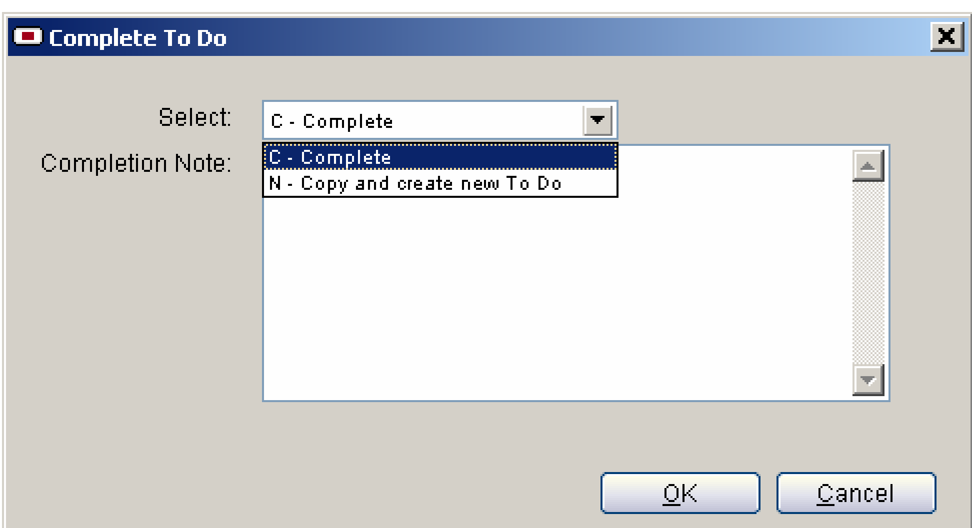
First, select a To Do item to edit by double clicking on an item in the browser or by highlighting the line and selecting the edit icon. If this To Do item was assigned by another user, you must have the necessary security to make changes. Security is set up in the RM Static Control F/M.

## 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.



## Completion memo on note completion

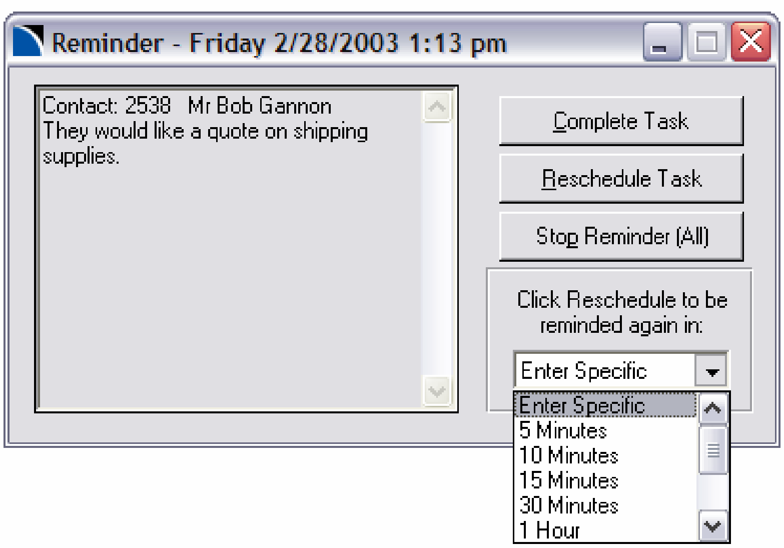
- Adds the completion note to the original text of the To Do so that it can be viewed on the completed To Do. The option is available in the standard notes entry program as well as the pop-up reminder.


## 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.

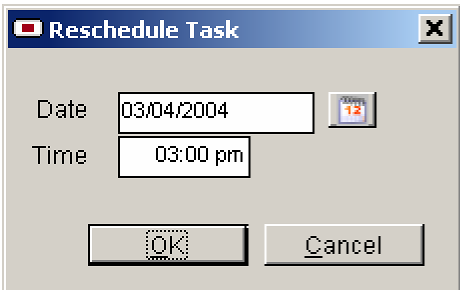
## Reminders

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.

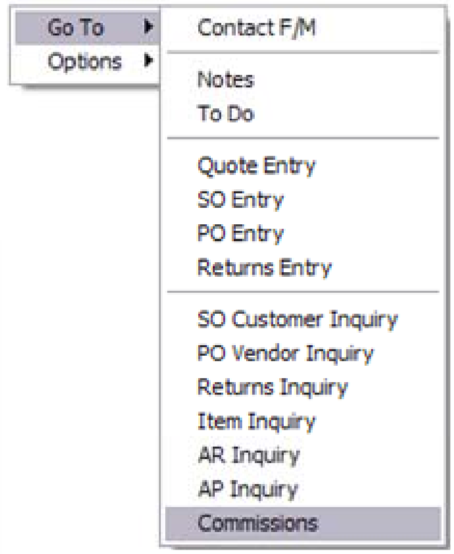
### Keyboard Navigation

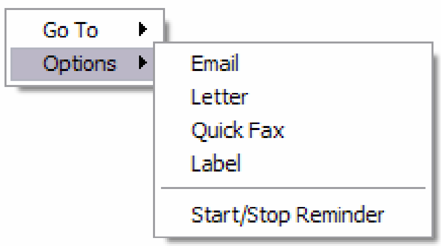
| **Press** | **To** |
|---|---|
| END | Display the bottom of the active window. |
| HOME | Display the top of the active window. |
| NUM LOCK+ASTERISK on numeric keypad (*) | Display all subfolders under the selected folder. |
| NUM LOCK+PLUS SIGN on numeric keypad (+) | Display the contents of the selected folder. |
| NUM LOCK+MINUS SIGN on numeric keypad (-) | Collapse the selected folder. |
| LEFT ARROW | Collapse current selection if it's expanded, or select parent folder. |
| RIGHT ARROW | Display current selection if it's collapsed, or select first subfolder. |
| UP ARROW | Highlight previous entry |
| DOWN ARROW | Highlight next entry |
| Any letter or number | 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.

Right click for menu

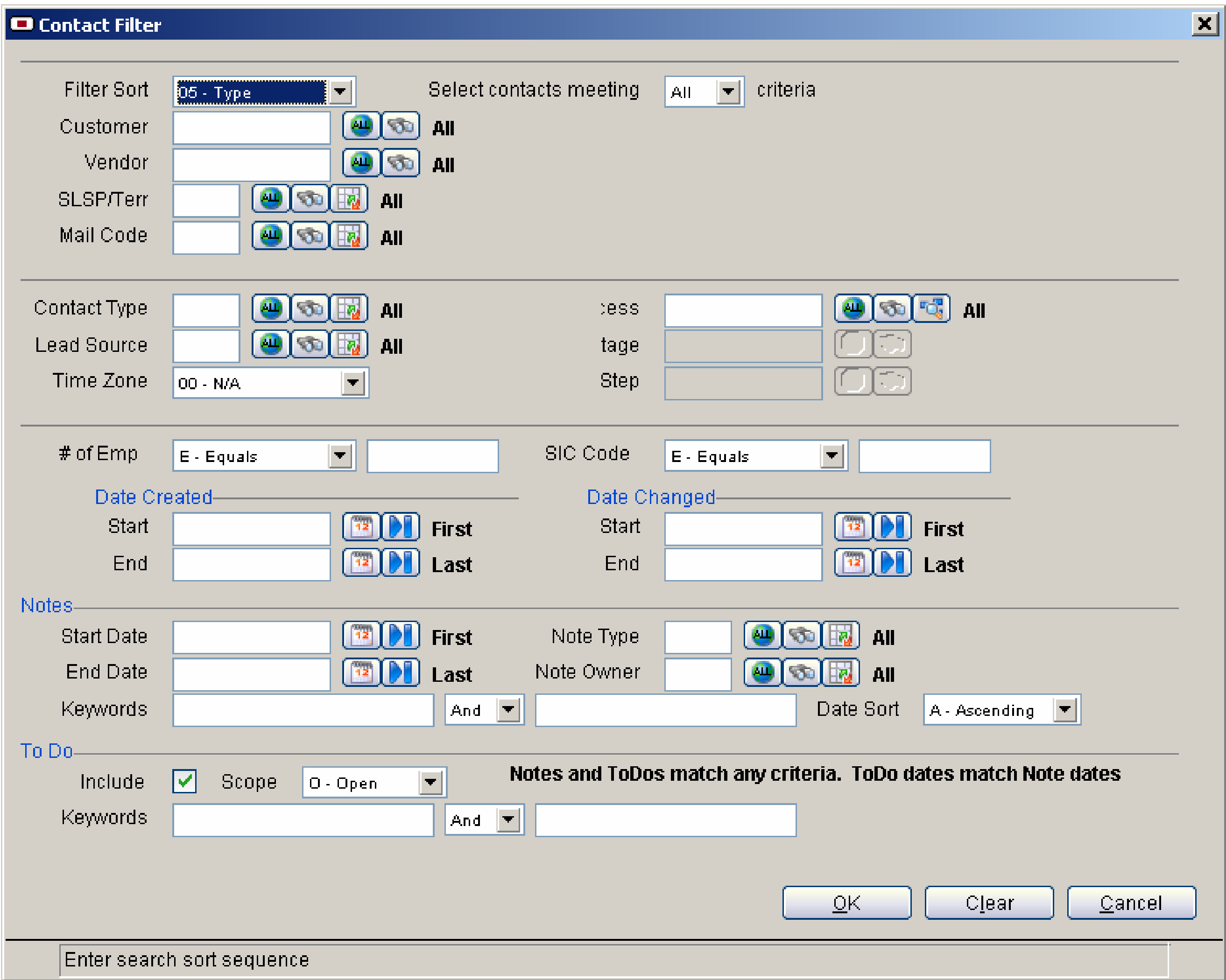


## Notes Filter

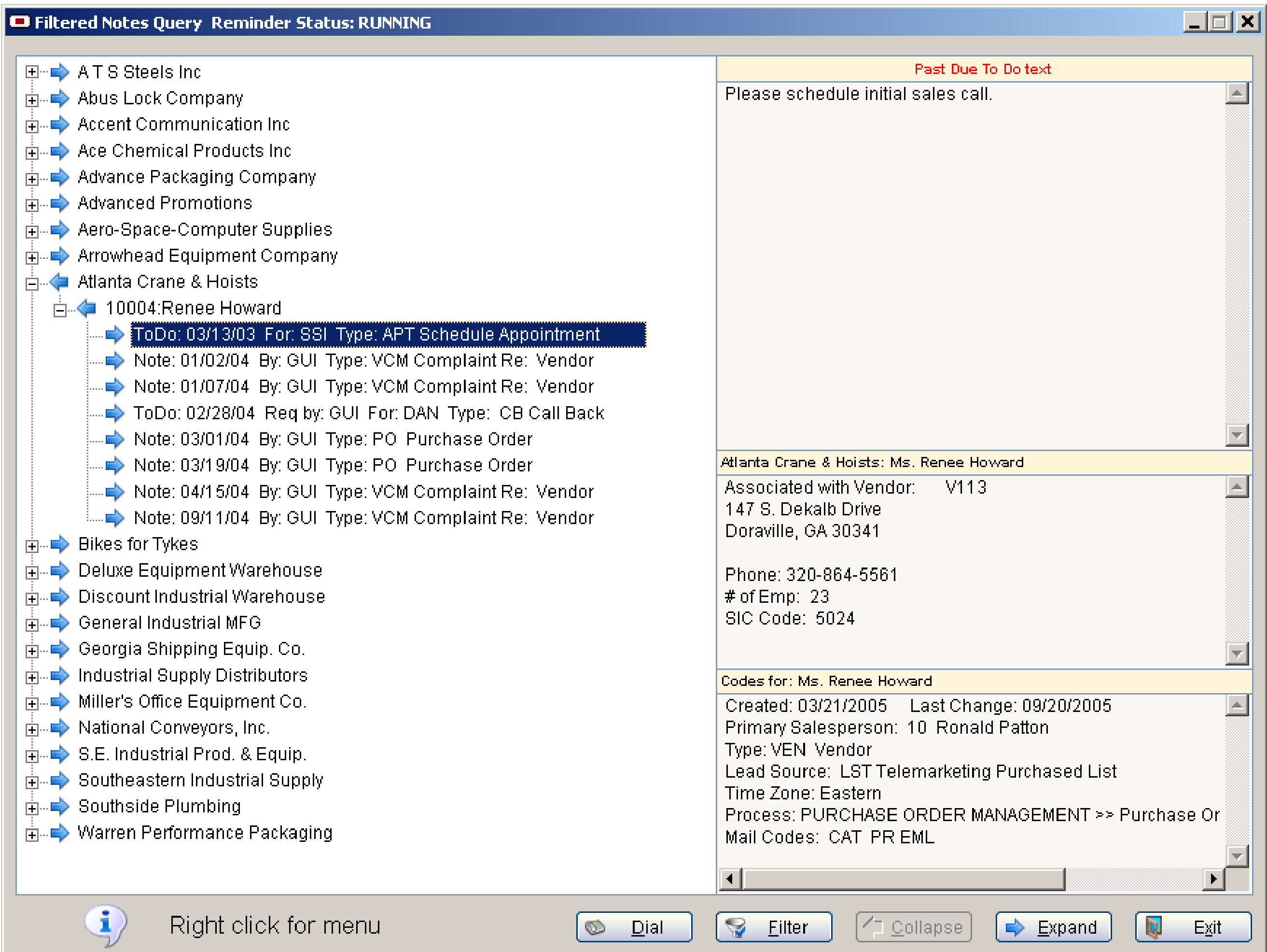
The notes query uses all of the standard filter elements with the addition of note and To Do criteria. For notes, you can filter by note date range, type, entered by and keywords. You can optionally include To Do items by scope with keywords. The date sort applies to both To Do and notes.

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.



## 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

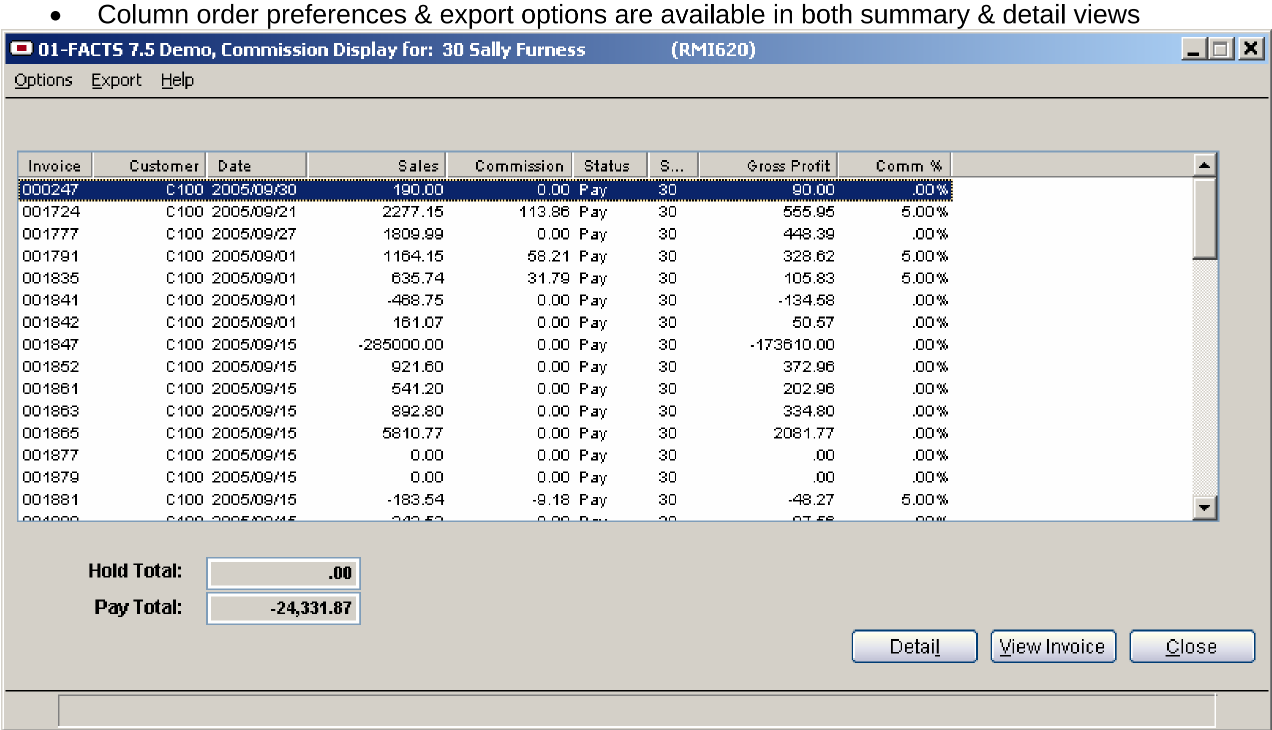
1. Generate a list of all customer complaints (note type) received since 1/1/05
2. Expand into the detail of the note.
3. Create a To-Do for user MEJ to follow up on the complaint.
4. Email the note to sales rep Ron Patton

# Commission Inquiry

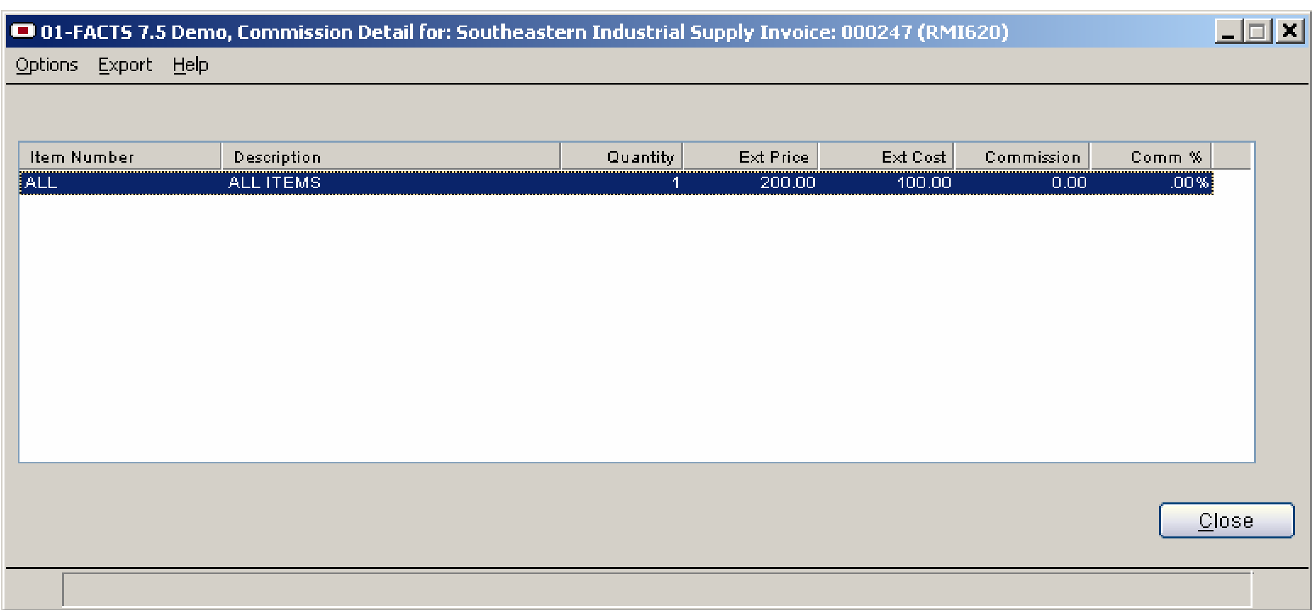
The commission inquiry is available as a standard menu item from the contact F/M, pull-down Go To menus and right click menus.

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




| 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% |




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

# 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)

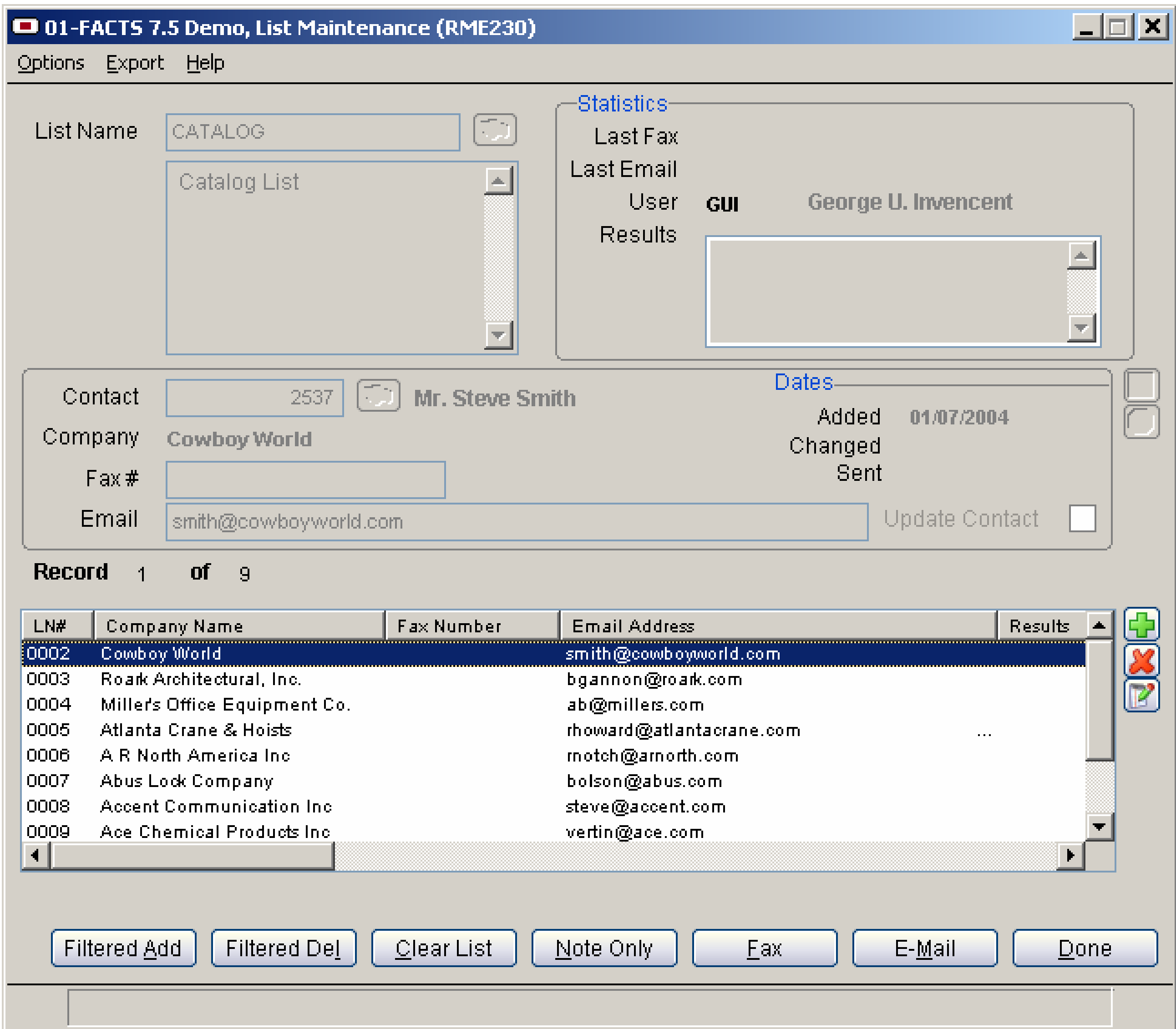
## Synchronization Exercises

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

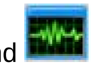
## Broadcast List Maintenance

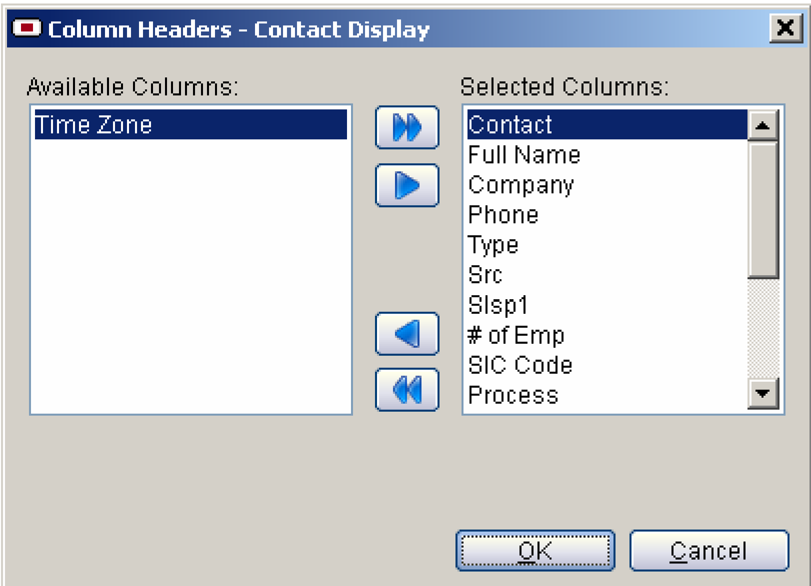
This program is used to associate contacts with specific Broadcast Lists. The header identifies the List Name as defined in the List Name F/M which will be covered later in this document. Statistics for the last broadcast are also displayed in the header.



## 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

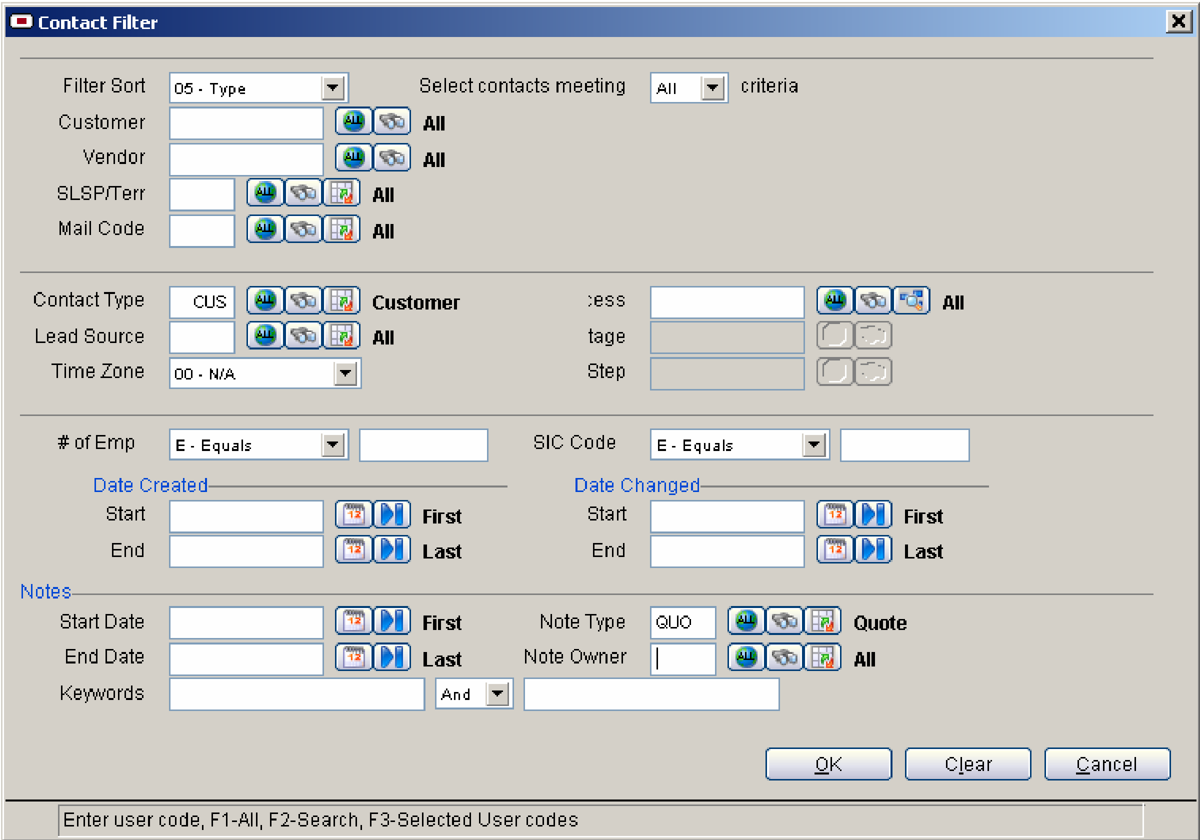
Contacts may be added to or deleted from the Broadcast List by using the ‘Filtered Add’ or ‘Filtered Del’ buttons.  Using the Contact Filter, you can perform multiple combinations of additions or deletions to fine tune your list.

**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

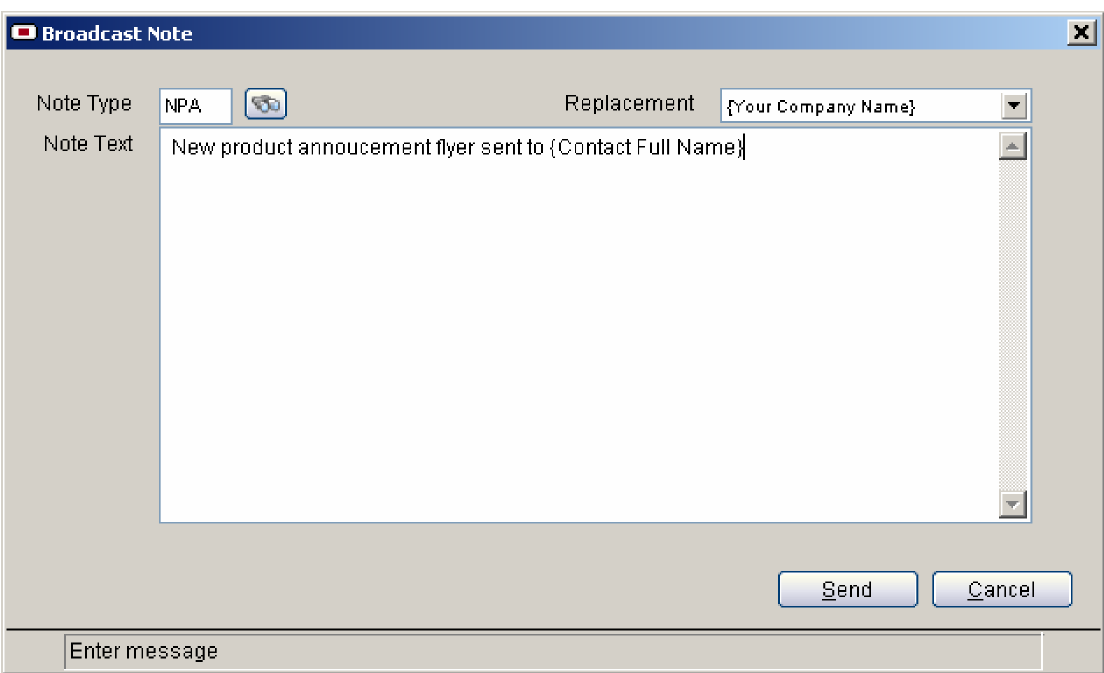
This button provides a simple method to all contact from a list.




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.



## Export

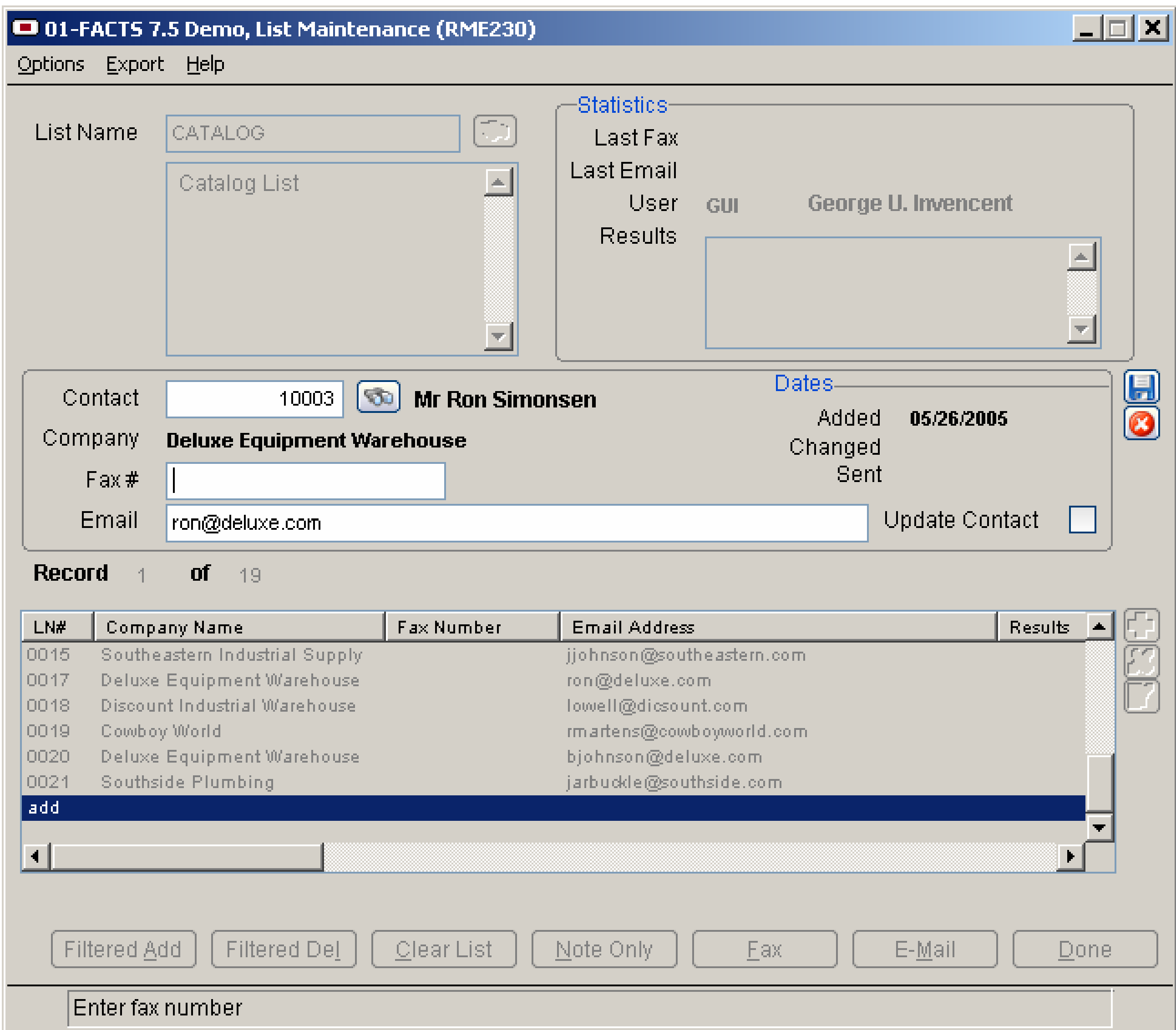
The export function will export the list of contacts in the browser window directly to Excel using fields in the browser column titles. This option is only available if the user has security to export as defined in the RM Static Control.

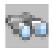
## Adding, Editing and Deleting Individual Contacts

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.

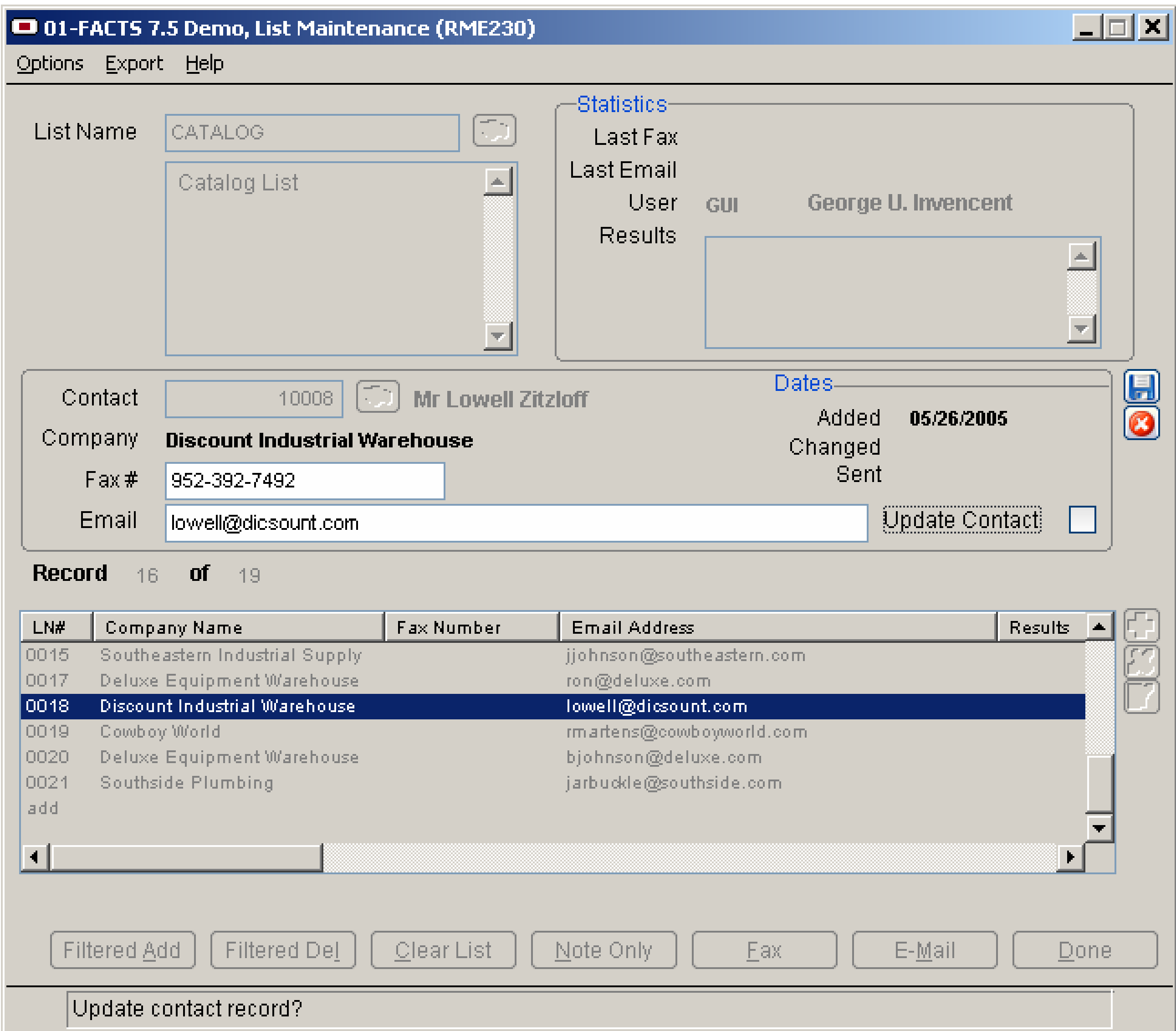


To find a contact, click the  icon for the standard contact search.  The fax number and email address are pre-filled from the contact file.

**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

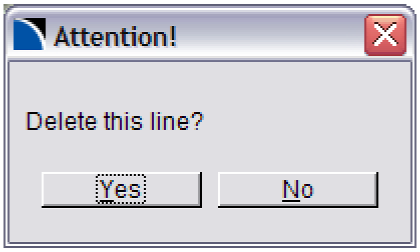
Double click a contact in the Broadcast List or click highlight the contact and click the  icon.  You will be presented with the Edit screen as shown below allowing the fax and email address to be changed.  If the update contact button is checked, the contact record will be changed.




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

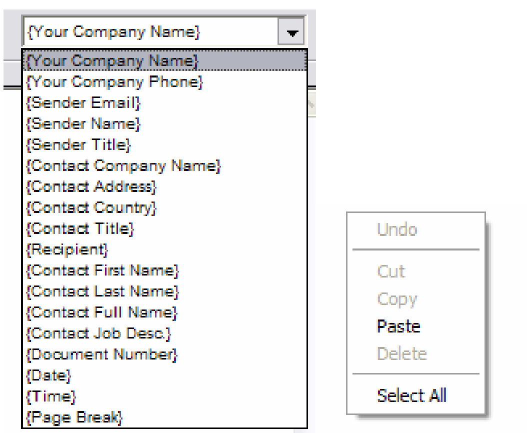
If checked, the system will create a note with the type of ‘BFX’ or ‘EML’ and the text of the subject line (email) or a message indicating what was sent.

### 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.

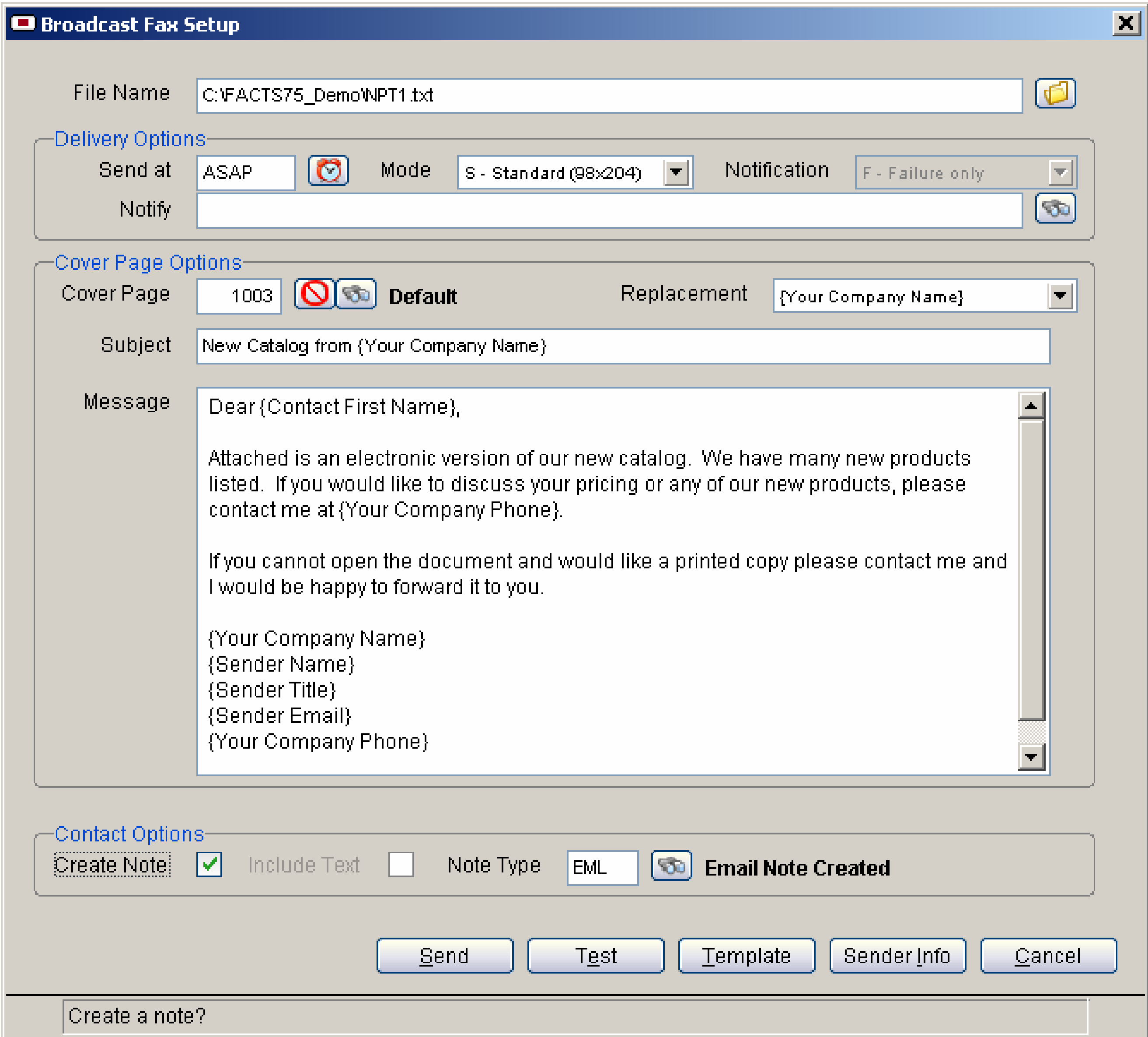



### Templates

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.




### 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 of 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.

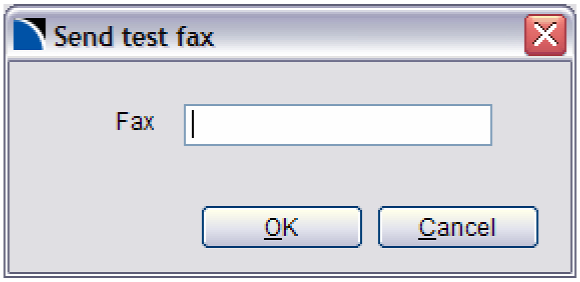
## Cover Page Options

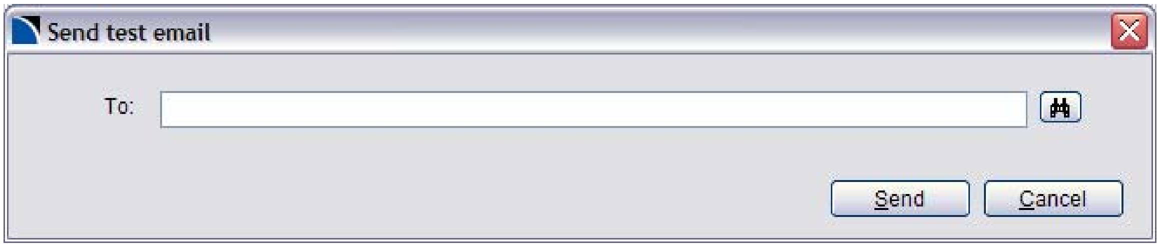
Select a cover page format to use to send the fax. If the user selects a cover page the replacement, subject, and message fields will become active. This will allow the user to customize the cover page of the fax by selecting a template to send with the fax, or creating their own cover page. Click on 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 form the user code of the person logged in and the rest of the information comes form the Company F/M. Changing any of these fields will not overwrite the information in the file maintenances.


**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.

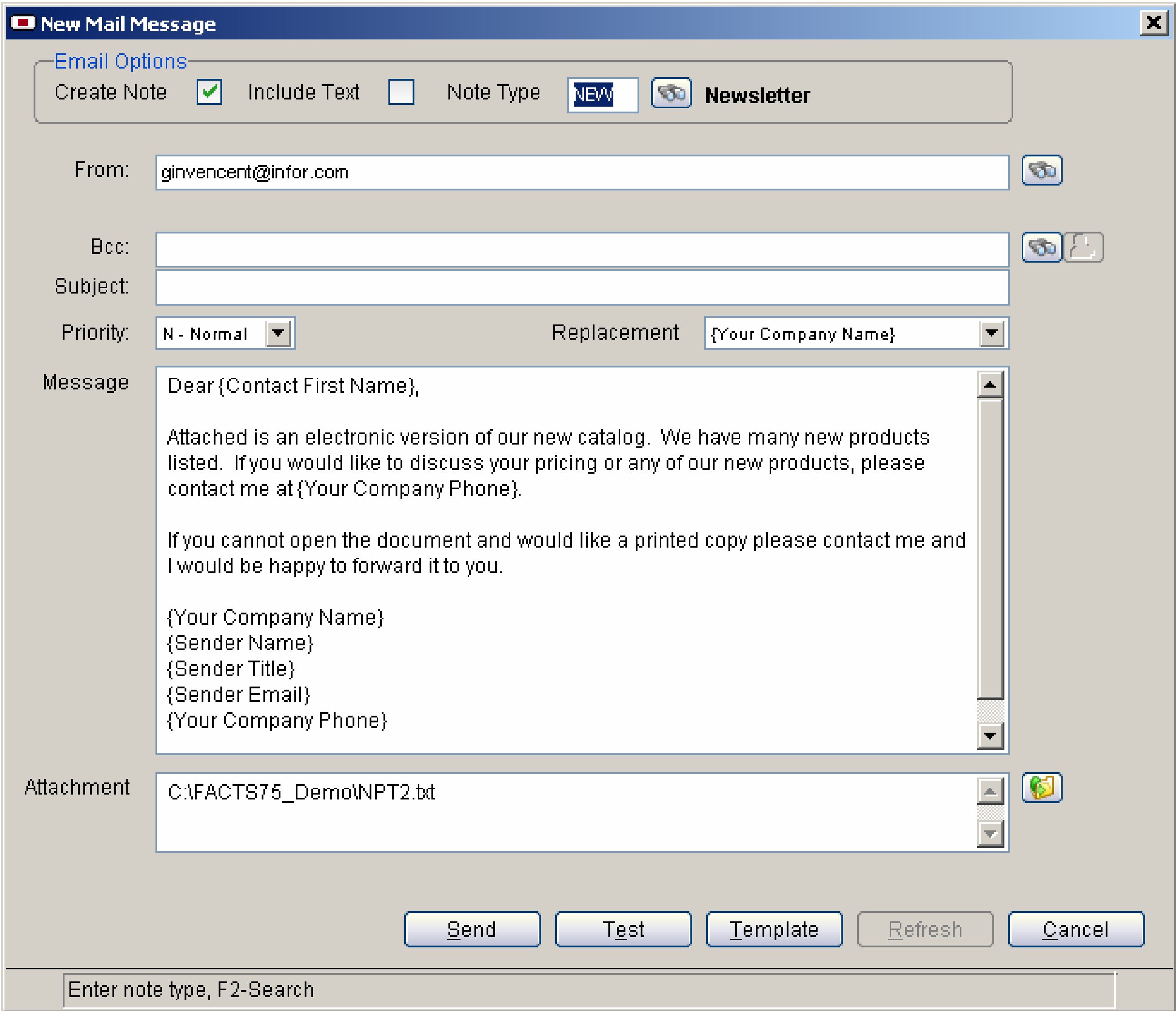


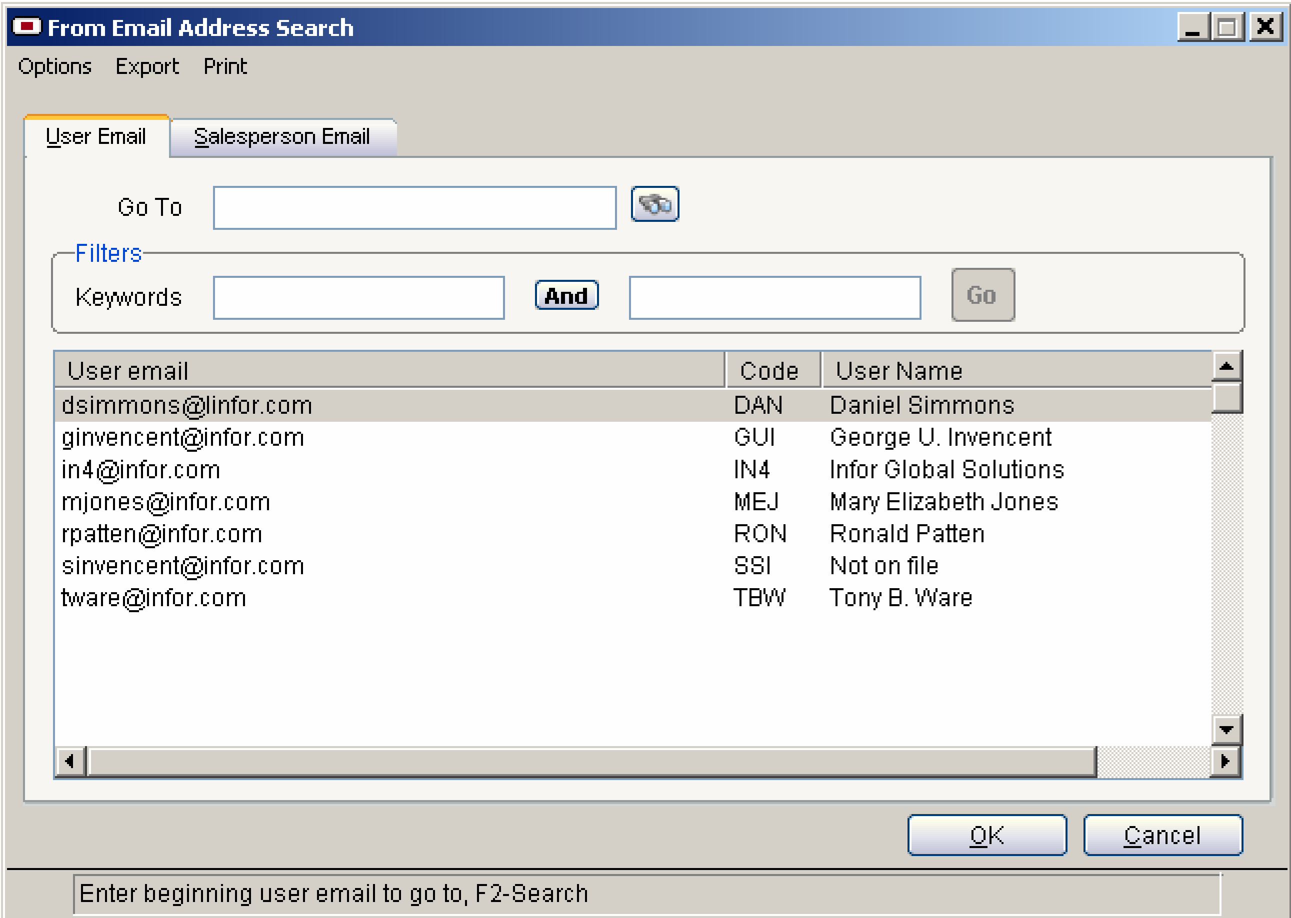

## Email

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.

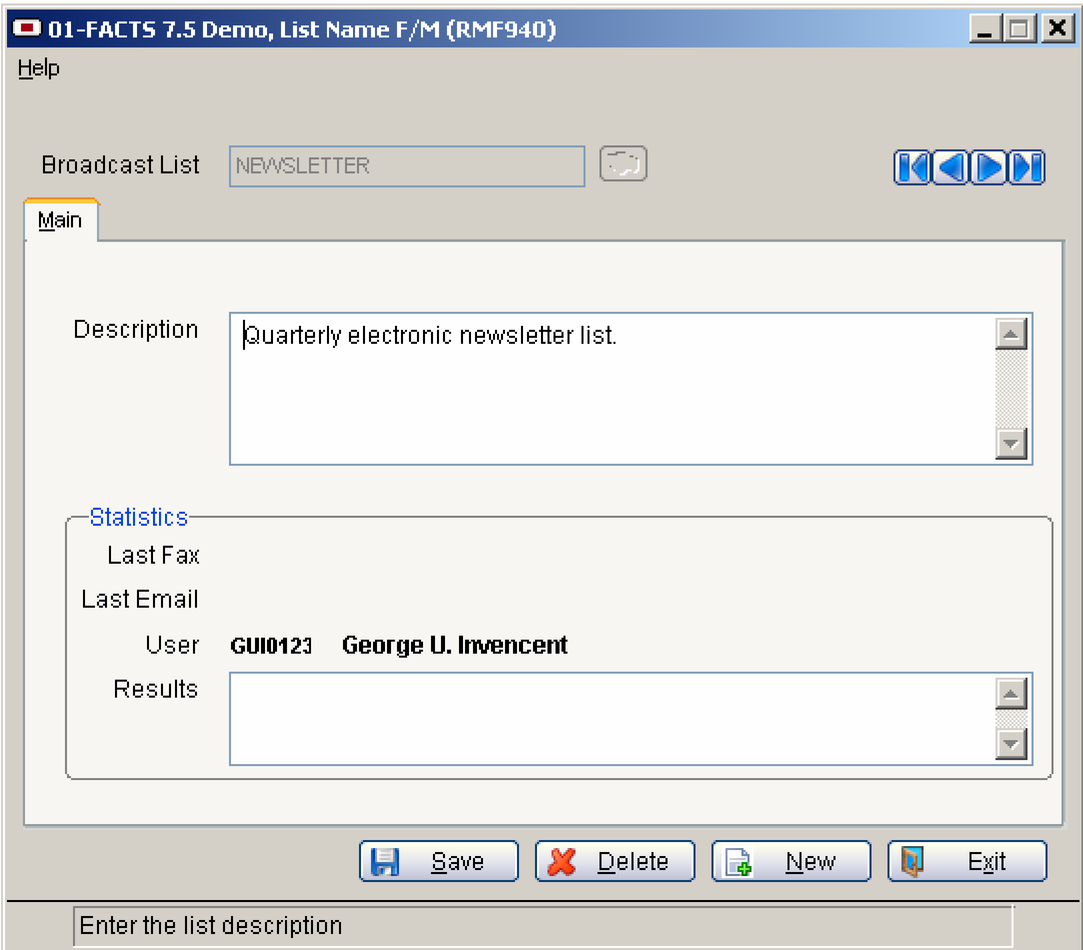



**Test** button. Opens a window for the user to enter an email address for the test. Pressing the test button will send a single copy of the broadcast email for review prior to the entire list being sent.


From Email Address Search
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.



# 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.

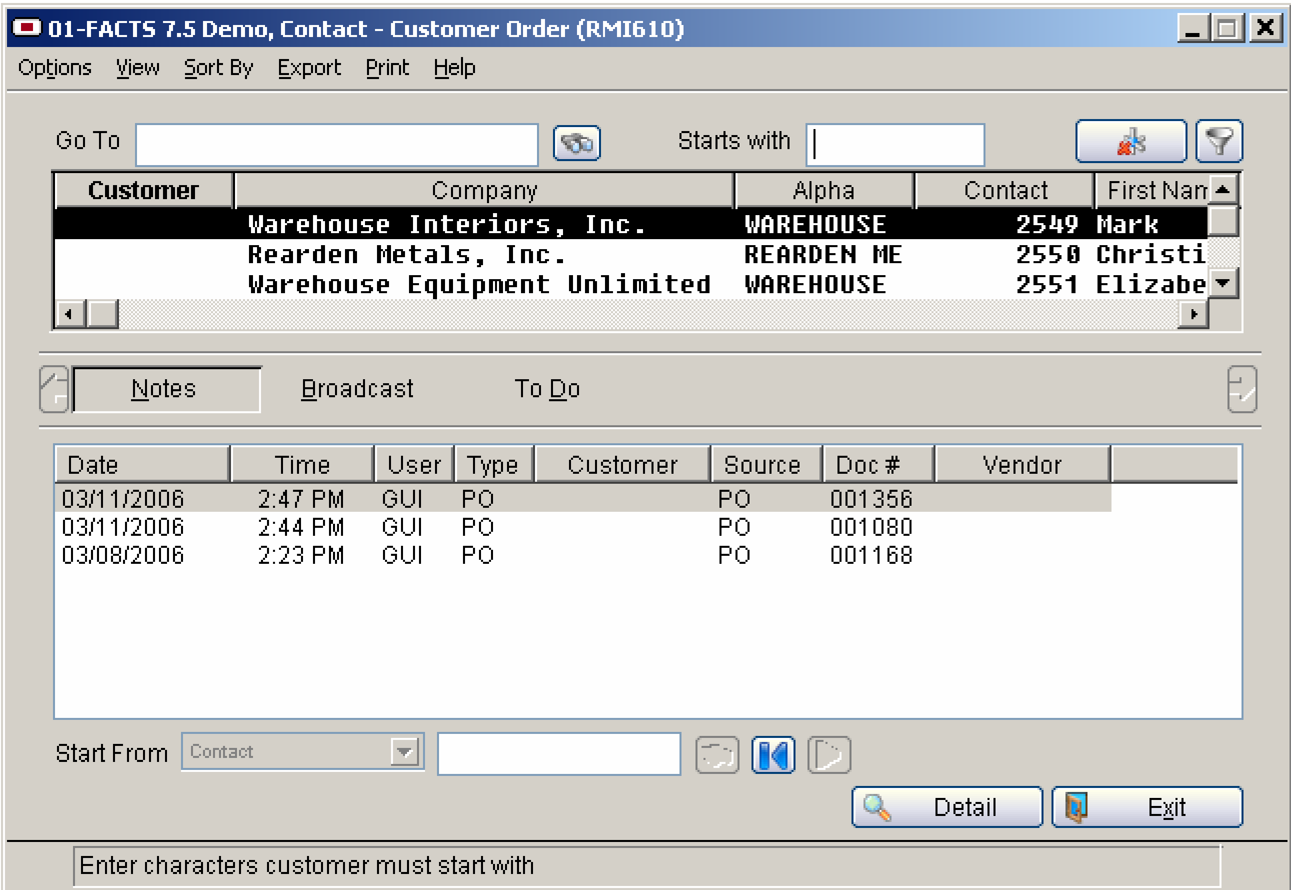
10. Save the template and use it for sending to your list.

11. Attach a file again.

12. Edit one of the contacts to change the email address to: info@pivotalsystems.com

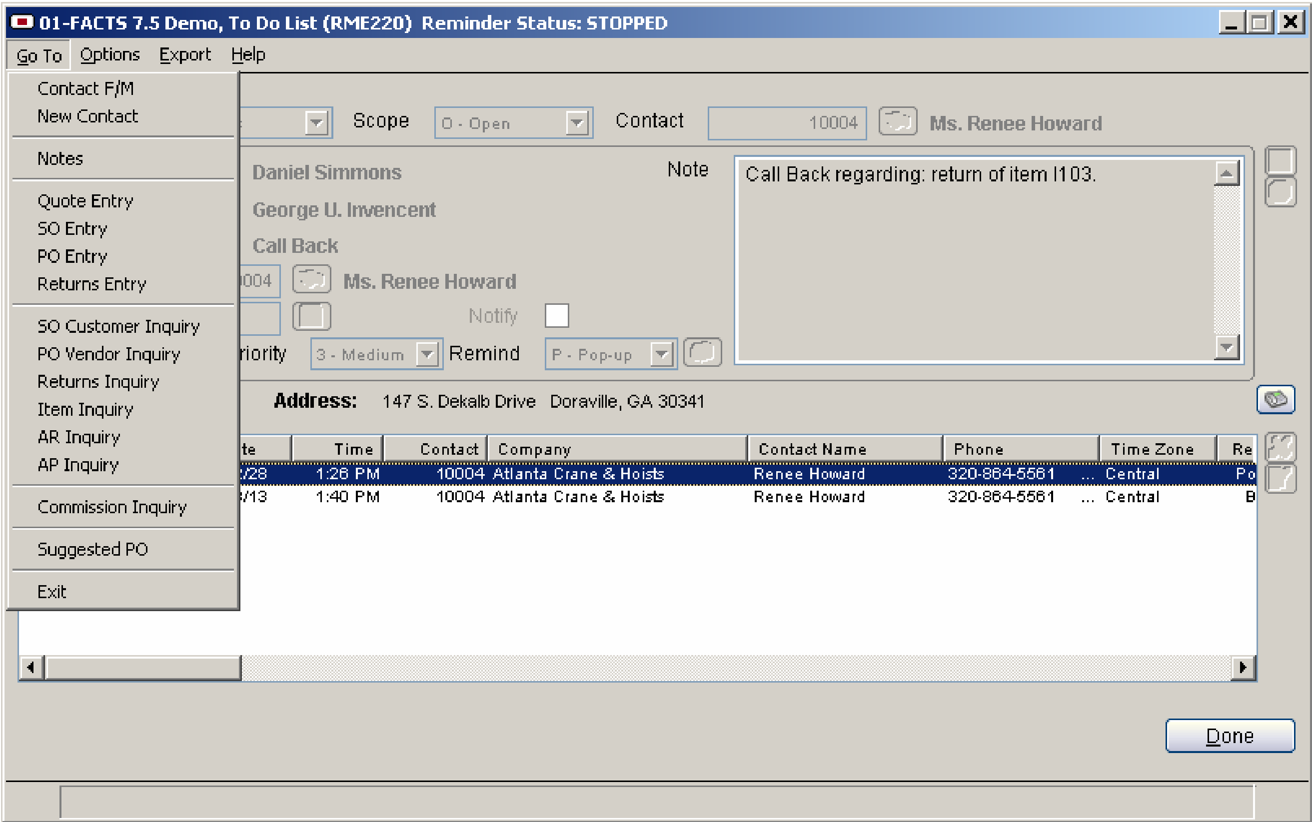
## Contact Inquiry

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.

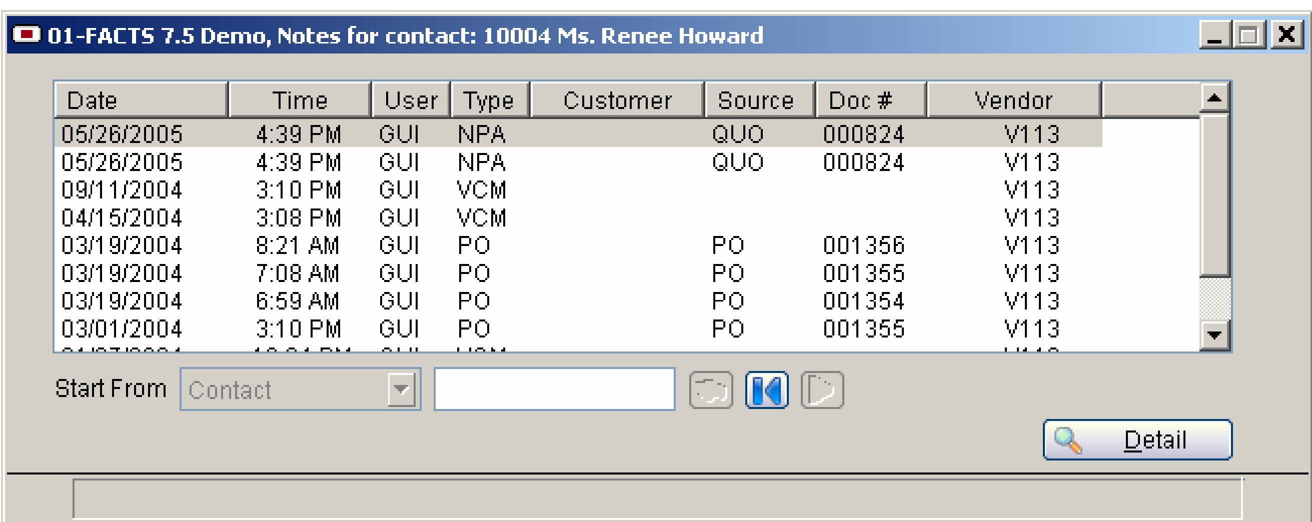



## To Do View

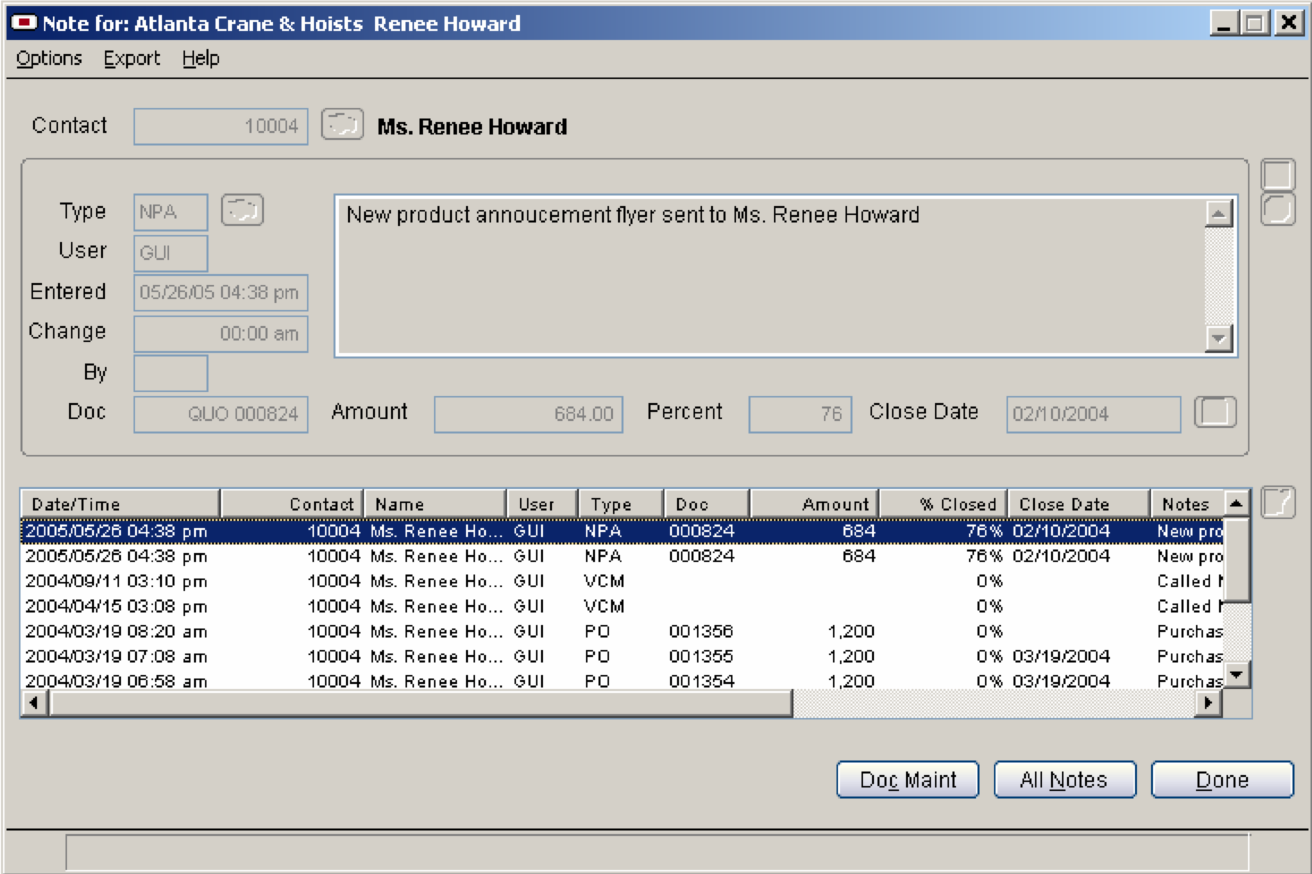
As shown in the screen above, you can start from either open or completed To Dos. The detail button will display a read only version of the To Do entry program. Once in the To Do entry program, all of the functionality of the pull down menus is available. While you can't make changes to the note, the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



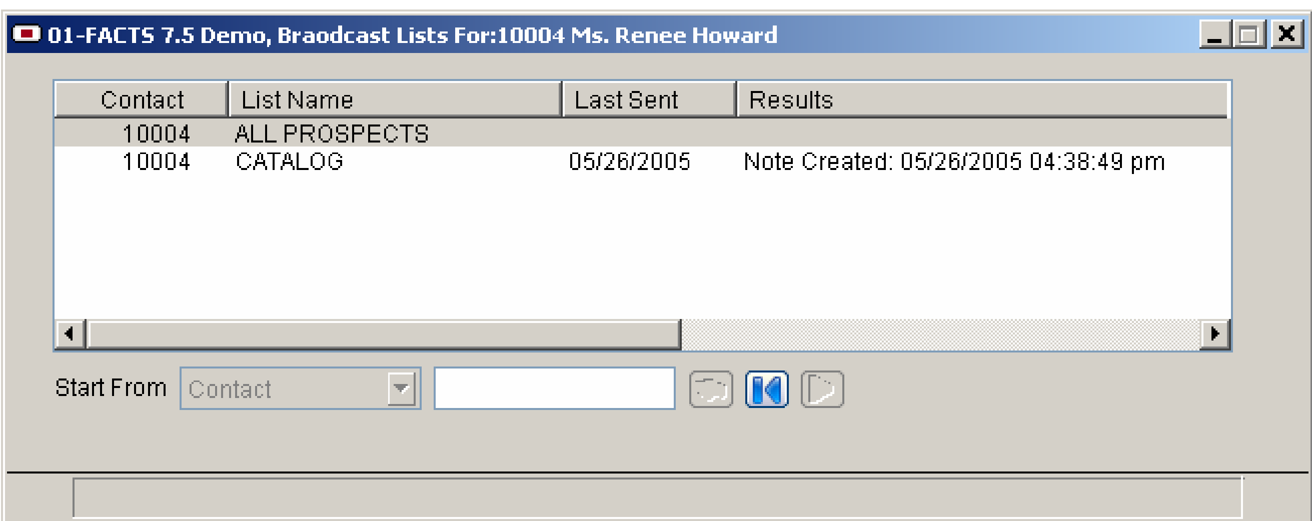

## Notes View




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.



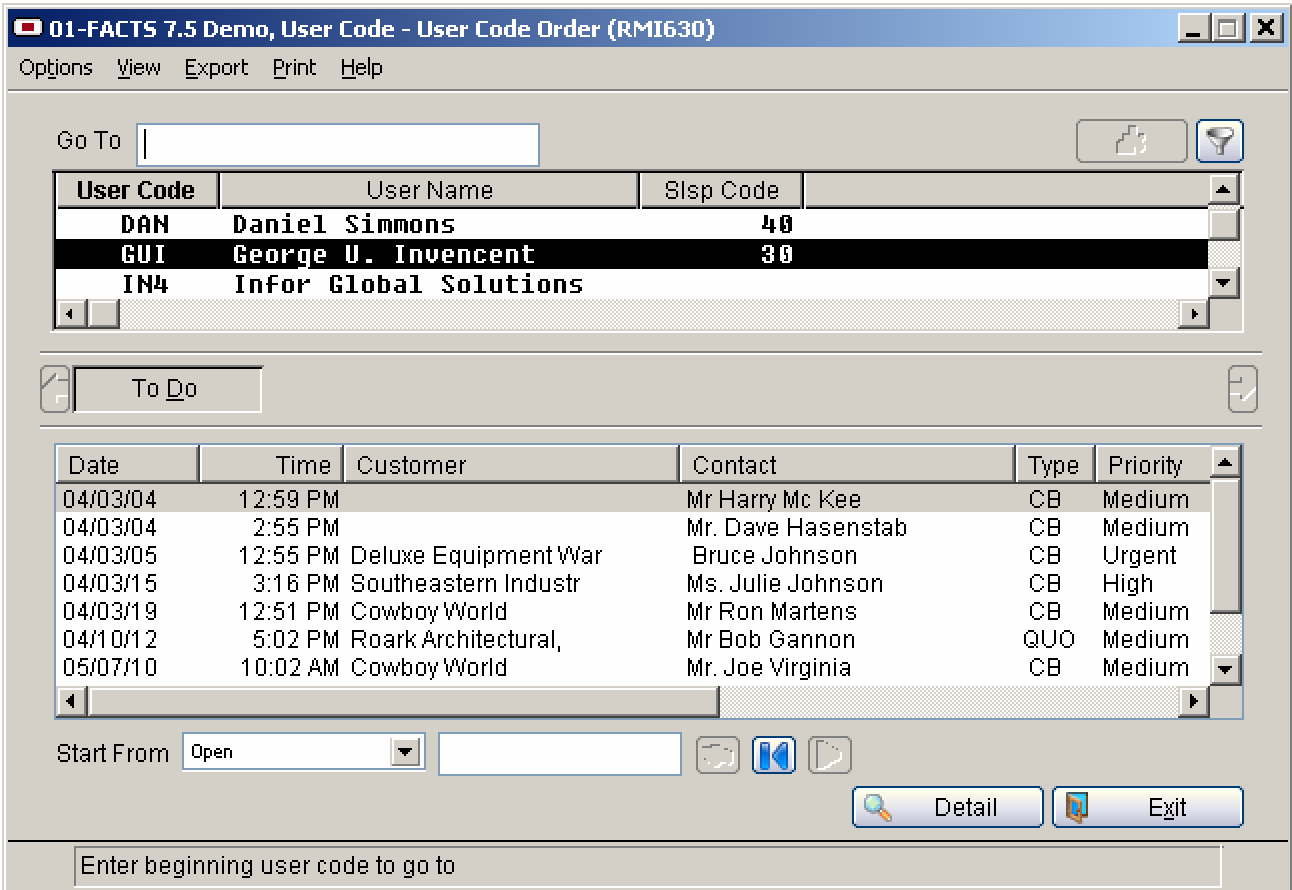

# Broadcast List View




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.

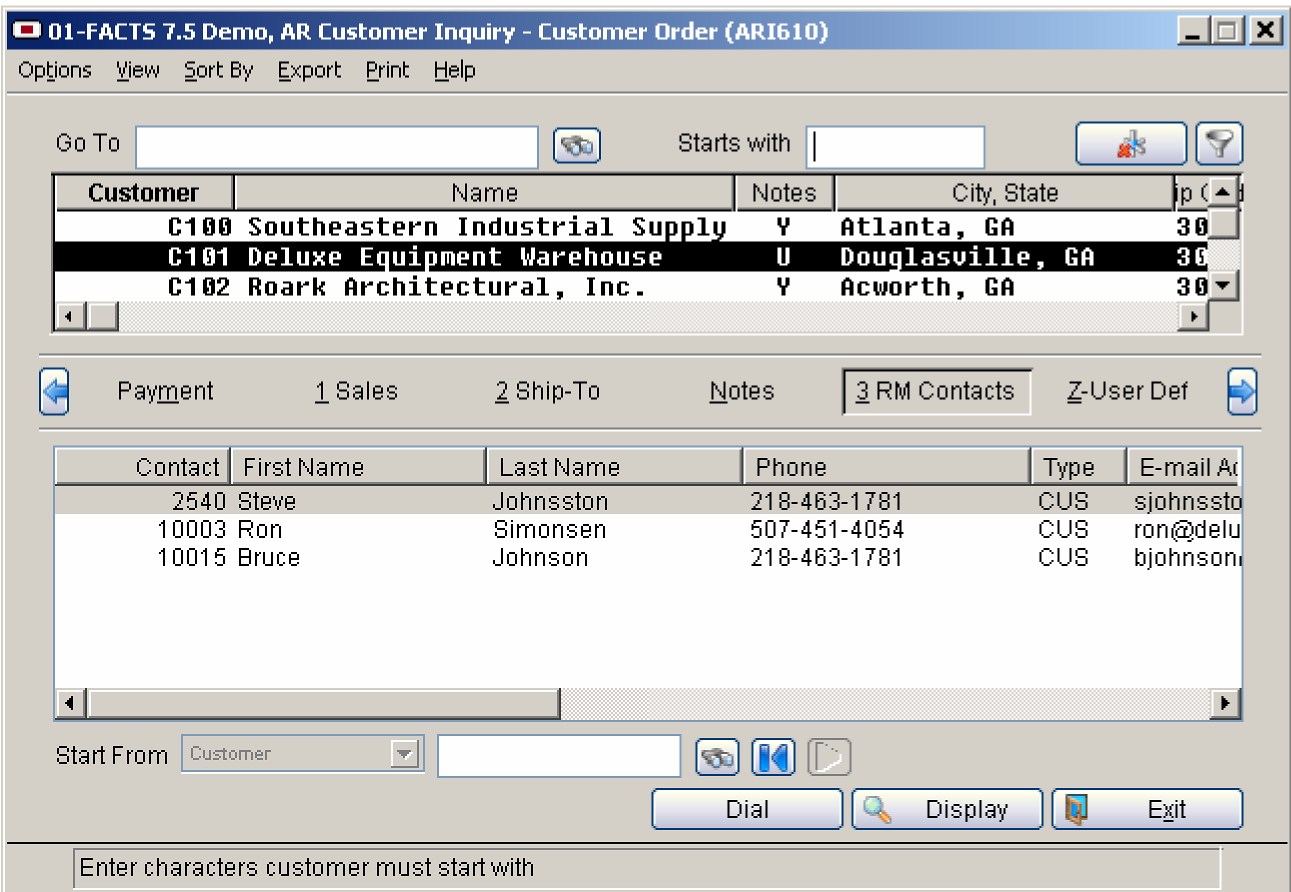


# Customer & Vendor Inquiry Views for RM Contacts

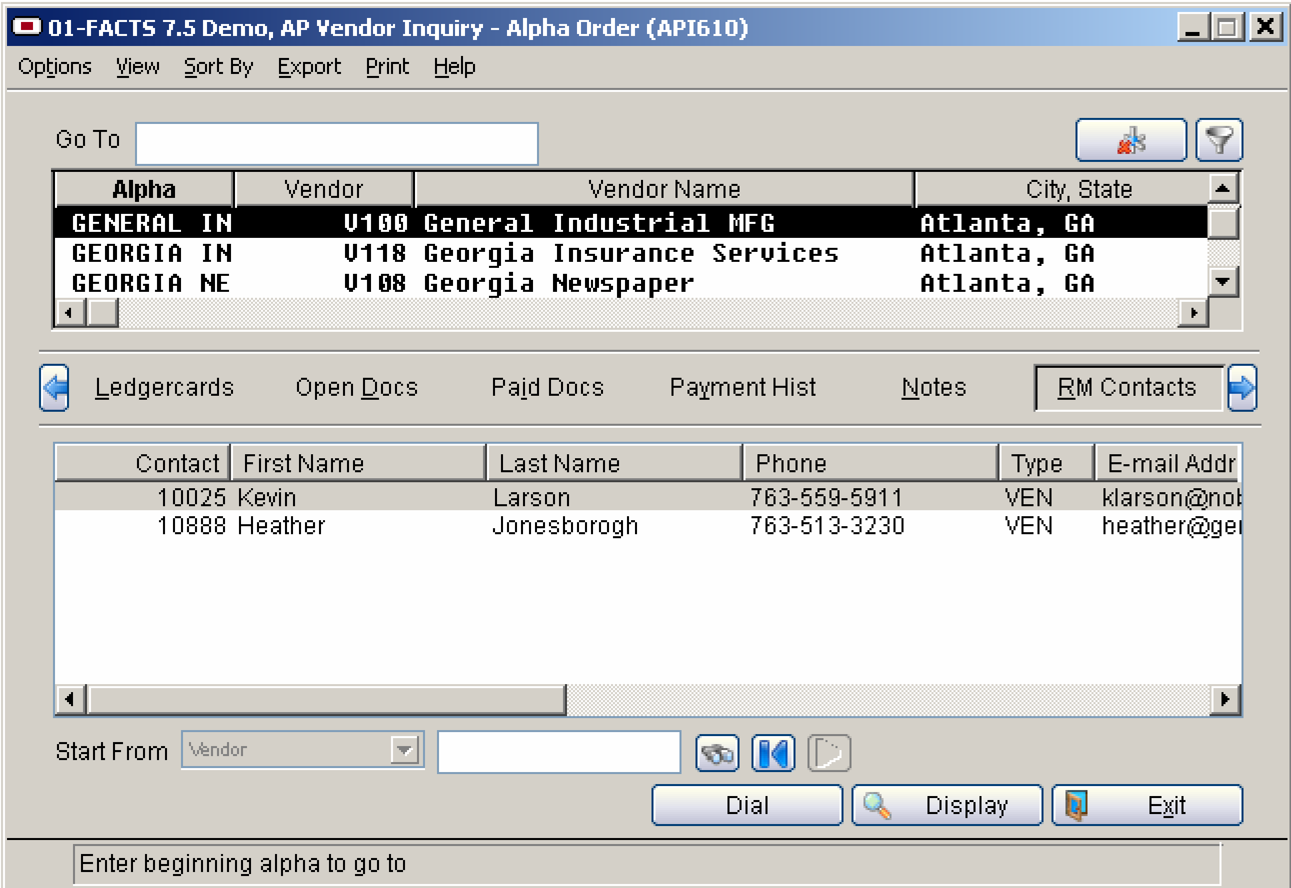
RM Contact views are available from both the AR customer and the AP vendor inquiry programs. Both of these views call the Contact Display program with the list of contacts displayed in the view window. Once in the Contact Display, all of the functionality of the pull down menus is available. The 'Filter'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

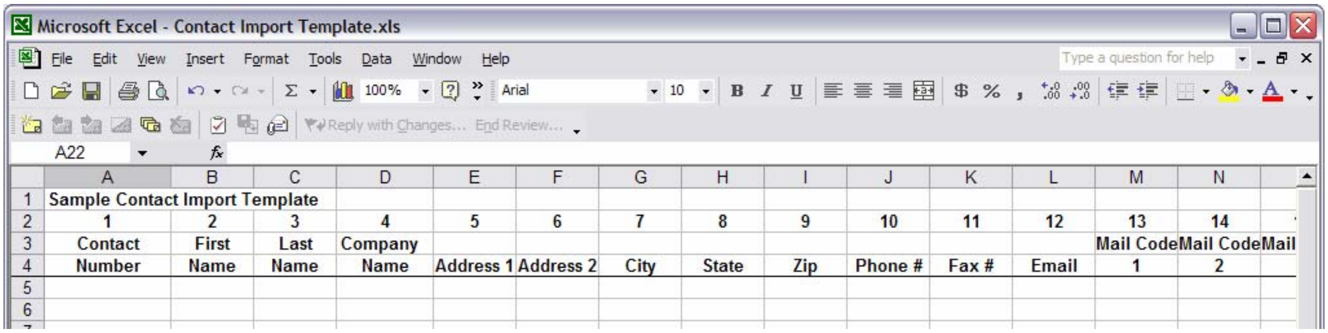


## Vendor Inquiry



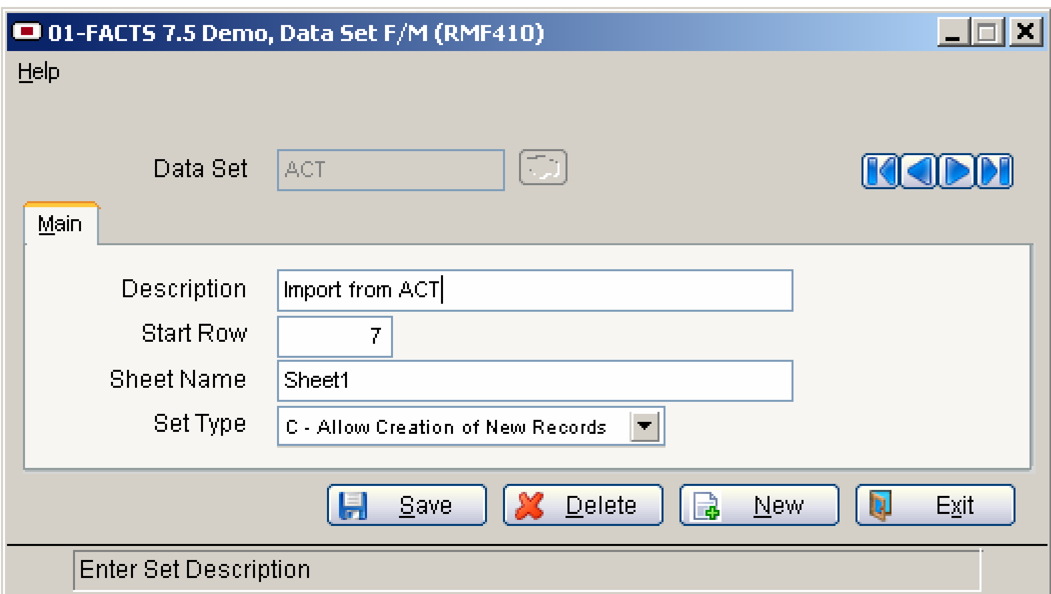
# Contact Import

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.




## Data Set File Maintenance

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



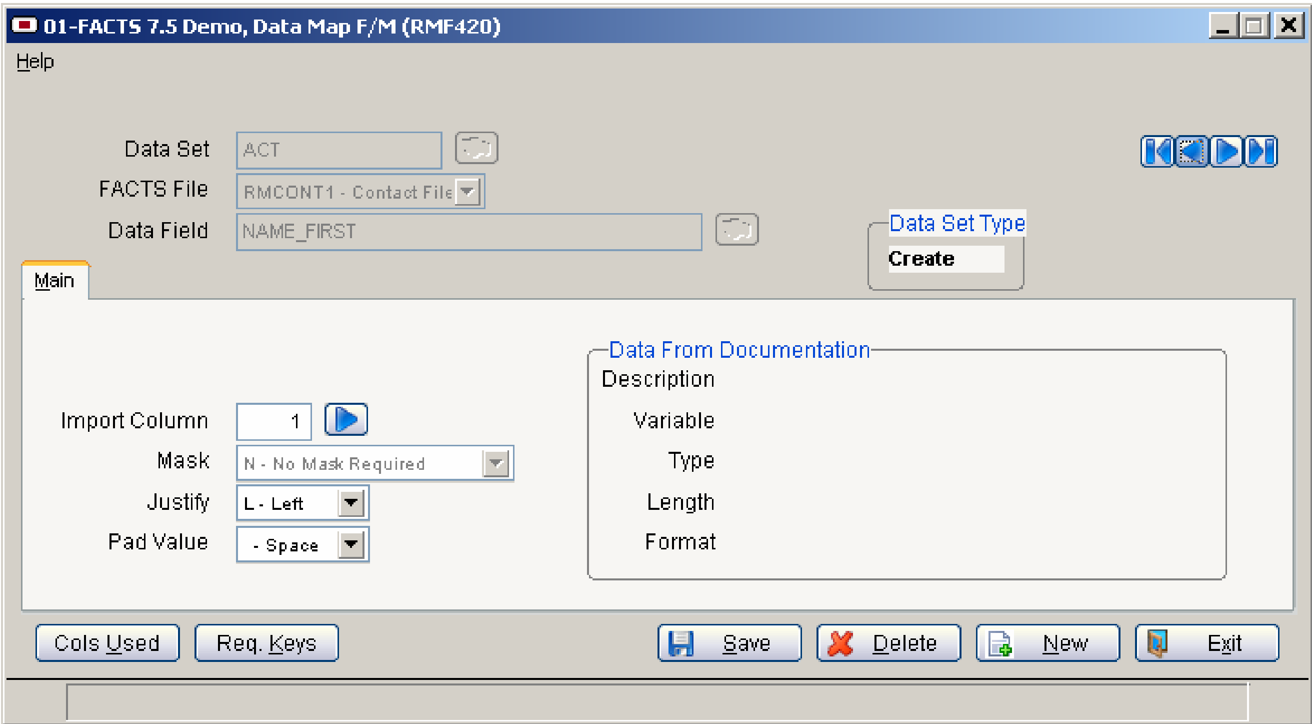

You can create a name by entering a Data Set name not already on file and adding the following fields:
**Description** – Enter a meaningful description for this definition.
**Start Row** – Indicates the starting column number of data to be imported. This is typically the first row after column headers.
**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

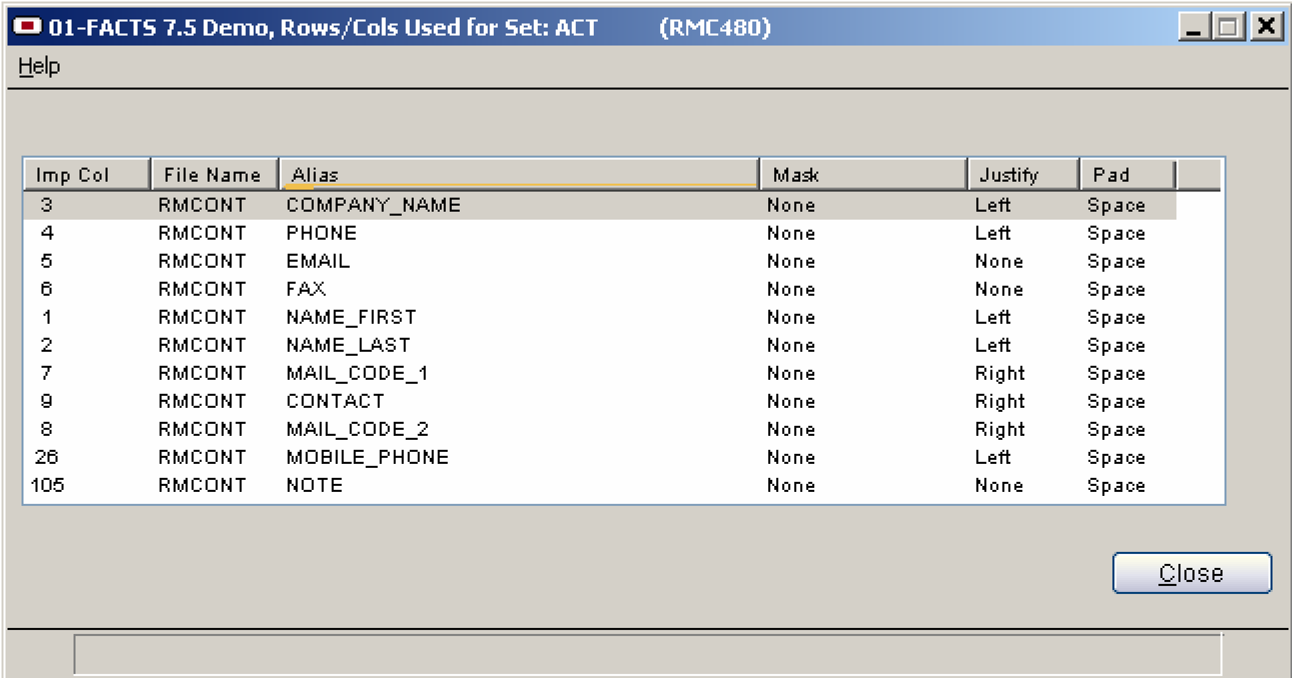
In the Header you identify:
**Data Set** – As defined in the Data Set F/M
**FACTS File** – The FACTS file to receive the data from the import (Contacts, Notes or To Do)
**Data Field** - The destination field in the FACTS file where the data will be placed.




## Detail Information

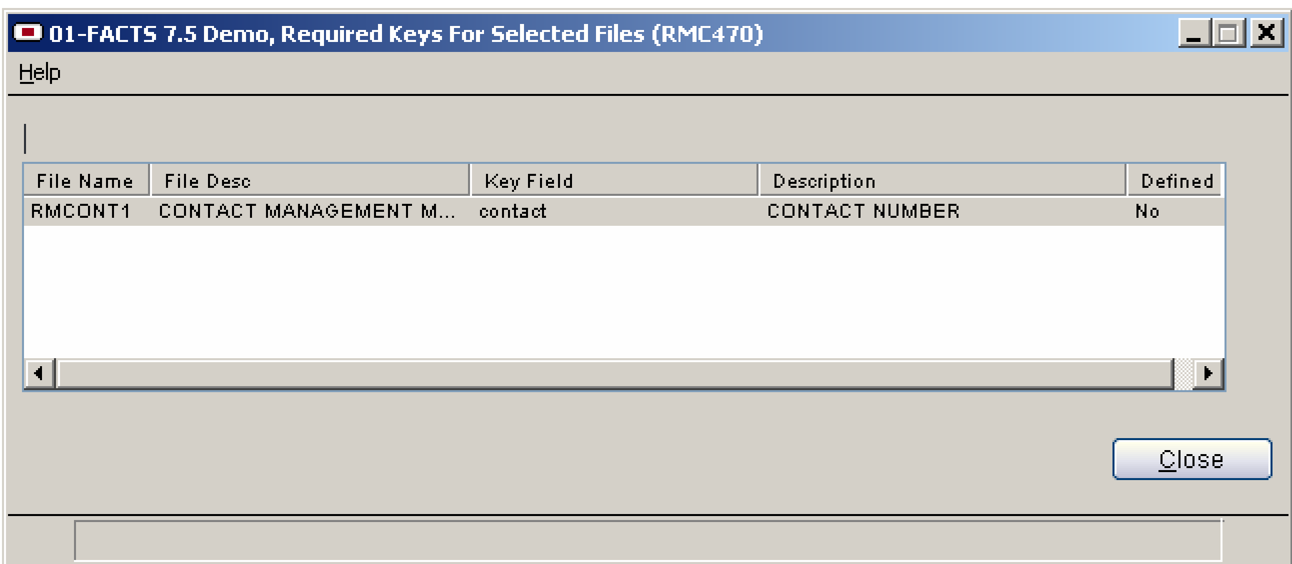
The following information defines the data in a particular column:
**Import Column** – The specific column number in the spreadsheet where data will be imported and assigned to a field in FACTS
**Mask** – Used for formatting numeric fields. You can select from any of the standard FACTS masks
**Justify** – 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 it's 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.




| 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 |

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




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

## 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:

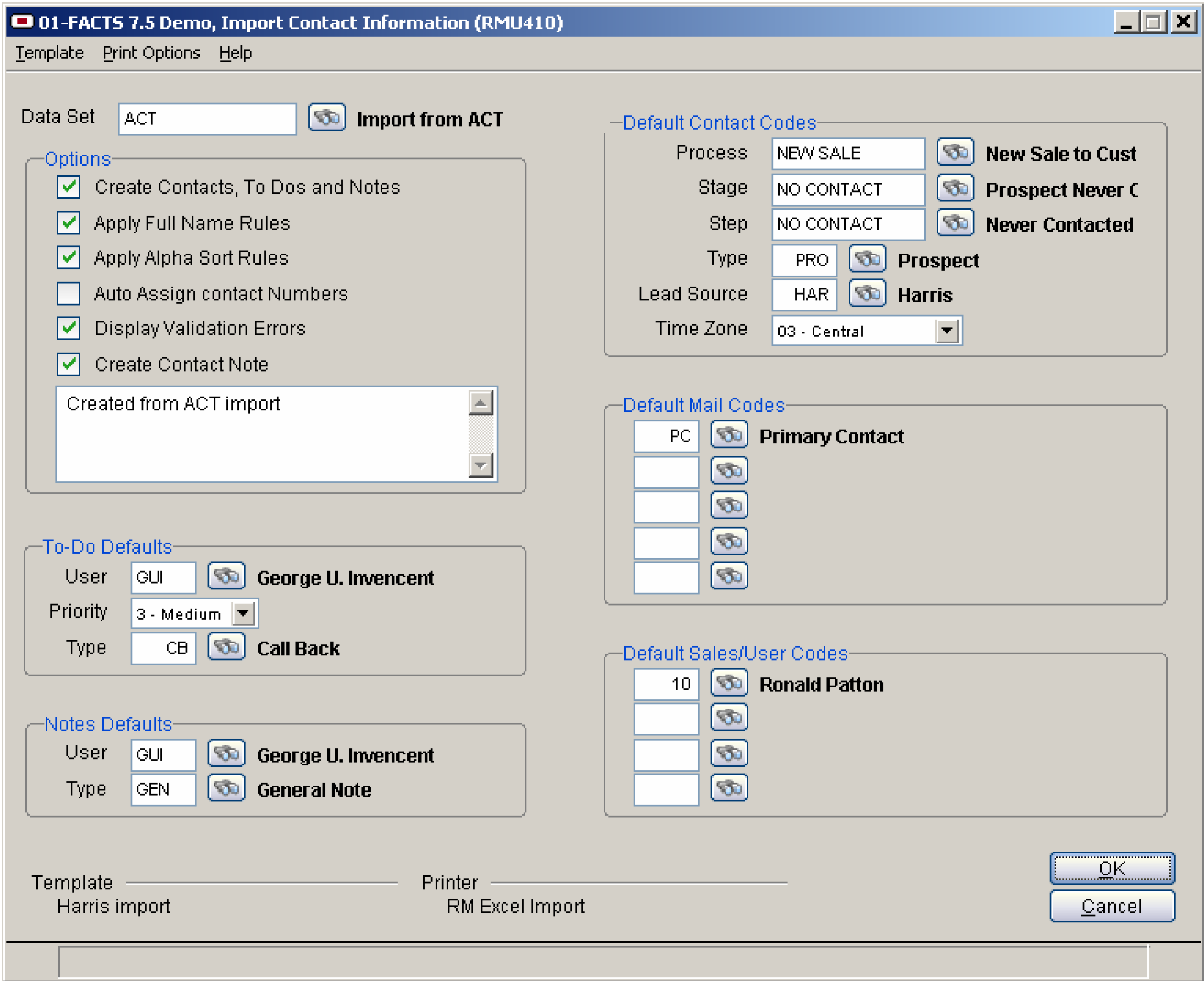
**Create contacts** – If the Data Set allows contact creation, checking this box will allow the creation of a new contact. If the Data Set is set to update only or the create contact box is un-checked, no new contact will be created.
**Apply Full Name Rules** – This option formats the full name field 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 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

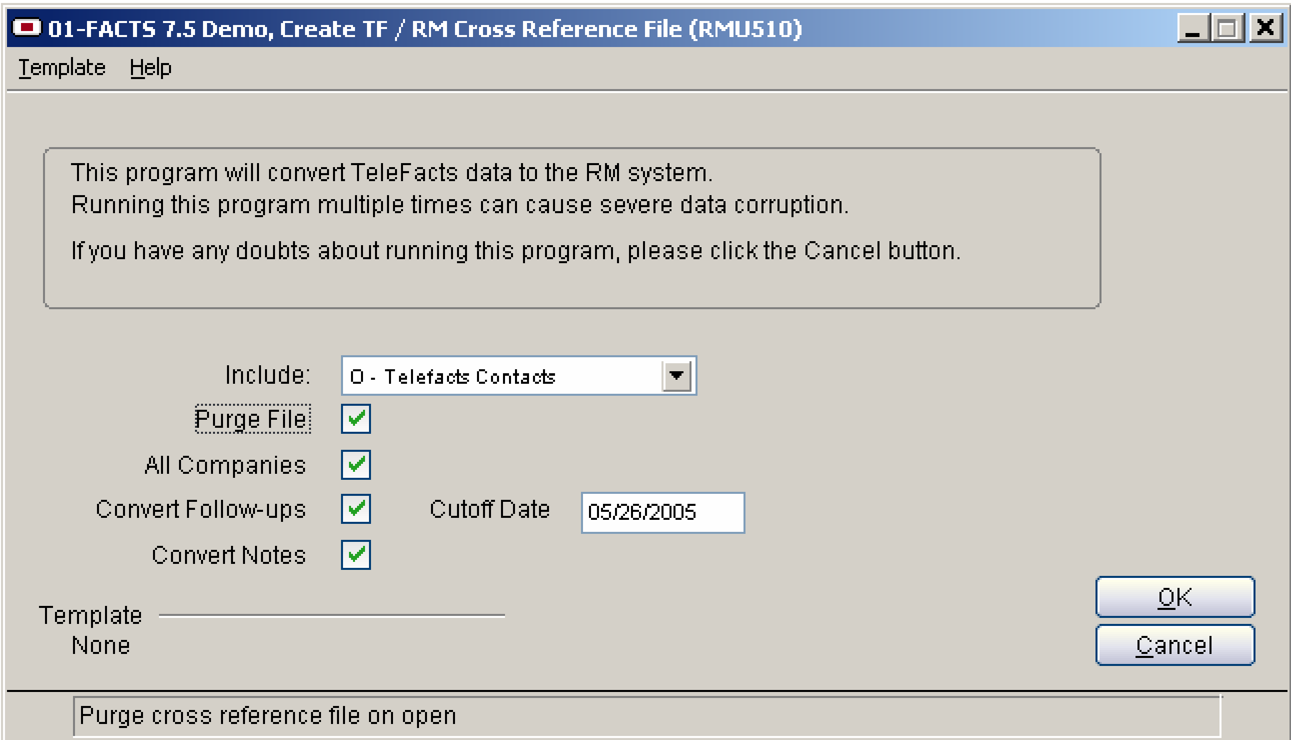
Notes Defaults – These are the default values to be used when creating Notes. If no note fields are mapped or the Create Contact Note box is un-checked, this section does not need to be populated

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 ACT
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
Created from ACT import
To-Do Defaults
User GUI George U. Invencent
Priority 3 - Medium
Type CB Call Back
Notes Defaults
User GUI George U. Invencent
Type GEN General Note
Default Contact Codes
Process NEW SALE New Sale to Cust
Stage NO CONTACT Prospect Never C
Step NO CONTACT Never Contacted
Type PRO Prospect
Lead Source HAR Harris
Time Zone 03 - Central
Default Mail Codes
PC Primary Contact
Default Sales/User Codes
10 Ronald Patton
Template
Harris import
Printer
RM Excel Import
OK
Cancel

## 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.




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