Relationship Management Release Notes

FACTS 7.8.3 Incremental Update
November 2013

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Installation/Upgrade Notes

The steps below are very important, please read carefully and understand them before applying the incremental update. Contact us at support@pivotalsystems.com for answers to your questions.

1. SMFLUP records pertaining to standard RM Work Centers should be carefully applied. It's recommended to remove any SMFLUP records pertaining to standard RM Work Centers prior to merging SMFLUP unless they are known to be related to a custom modification.

2. The UPRM78INC program is automatically run by UP78INC. However, it can be run by itself if necessary and it will do no harm if run more than once.

3. The ranking files, new at 7.7.4, can optionally be initialized with historical data by performing the procedures below. This should be considered when upgrading from 7.7.3 or prior.

```
perform "prog/RM/RMC899;init_ranking_from_pi"
perform "prog/RM/RMC899;init_ranking_from_ppo"
perform "prog/RM/RMC899;init_ranking_from_prd"
```

4. Run the Data Dictionary Update found on the DO menu when ODBC will be used with RM.

Overview

This update resolves minor issues found in the previous update and introduces the following enhancements:

- Note Type based Amount/Date fields supported throughout the system where notes are displayed and entered.
- New Calendar style Scheduling and Last Contact Date tracking with a user-defined Contact Frequency that is assigned to each Contact.

Application Enhancements

RM Module

API: RMAddNote

7.8.1

- Added the following request data tags:
  - <Base64> - A data value of “Y” indicates that the note text is base64 encoded.
  - <Hold_Flag> - A value of “Y” indicates that the note is to be held even if the contact is known.
  - <Select_Flag> - A value of “Y” indicates that a list of users or contacts will be returned when multiple matches are found. Otherwise, when multiple users are found, the note will be rejected and when multiple contacts are found, the note will be held.

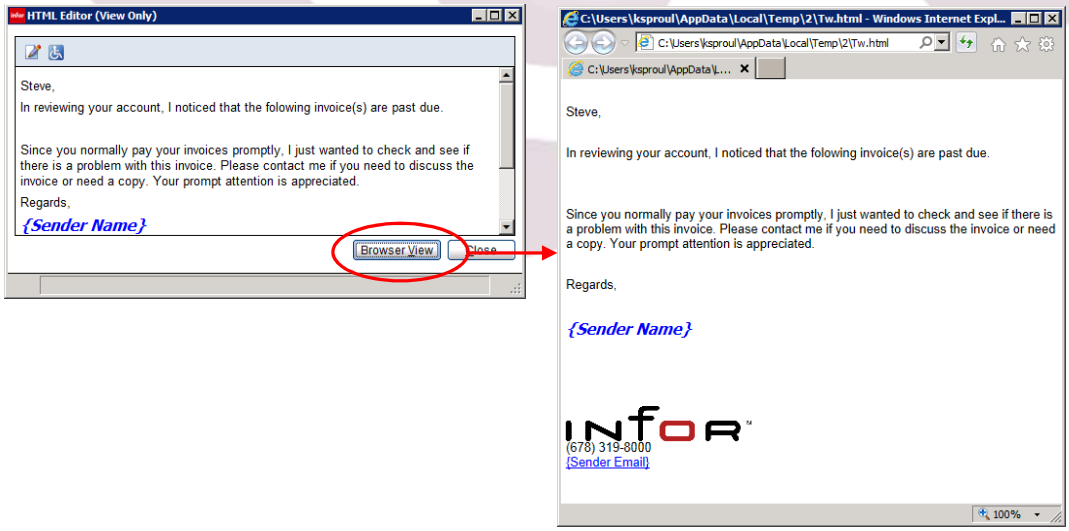
7.8.3

- The <PercentClosed> tag was replaced by <OtherAmount> to facilitate the Note Type based amount/date definitions. Likewise the <ClosedDate> tag was replaced by <OtherDate>.

Email Processor & Broadcast Fax Entry (RMC110)

7.8.1

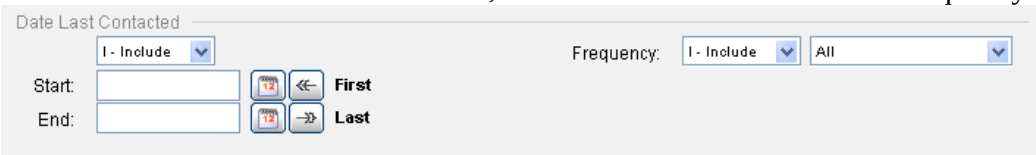
- Logic to support emailing resources from the resource manager was added.
- A button was added to the HTML preview window to view the HTML in the system default browser associated with the .html extension. This can be helpful when viewing HTML from an external source and to follow hyperlinks.



Contact Filters (RMC410)

7.8.3

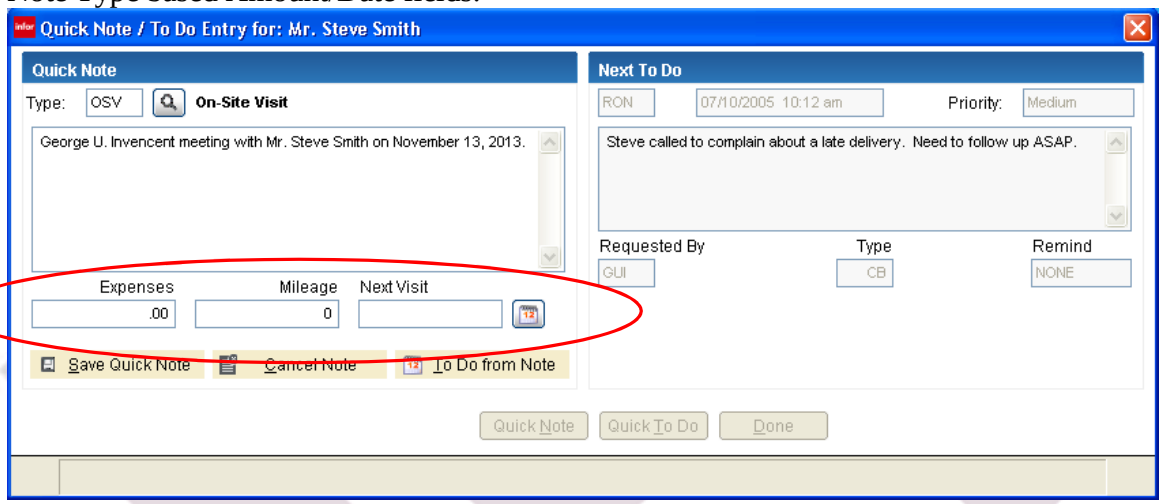
- Added filters for the new contact fields, Last Contact Date and Contact Frequency.



Quick Note/To Do Entry (RMC500)

7.8.3

- Note Type based Amount/Date fields:



Scheduling (RMC640) *New for 7.8.3*

A calendar style scheduling program provides a more user-friendly and visual method of creating appointments and events for contacts and users. It enables users to track the last date contact was made with their contacts and to manage future contact using user-defined frequencies (i.e. Weekly, Monthly, etc.).

Contacts associated with the user's assigned salesperson code, or the salesperson code entered (if security settings permit), are filtered by the user's current contact filters, then grouped by the past due and current status, as defined by the contact frequency. Within each group, the contacts are listed from the most past due to the least past due with current being zero or not past due, then by frequency order.

The weekly view (initial view), shows a list of contacts on the left and five calendar days to the right, Mon-Fri, consisting of the working hours defined by the user's preferences. The monthly view replaces the list of contacts and the five calendar days with all of the days of the month, Mon-Fri. Only To Dos with scheduling dates/times for the user associated with the salesperson code will be shown. Unlike all-day events, appointments that are entirely outside of the user's working hours will not be shown.

The Previous/Next buttons above the calendar are used to navigate the weeks and months in either direction. The Today button, to the left of the Previous button, returns to the week/month of today's date. A yellow background indicates the column or day of today's date.

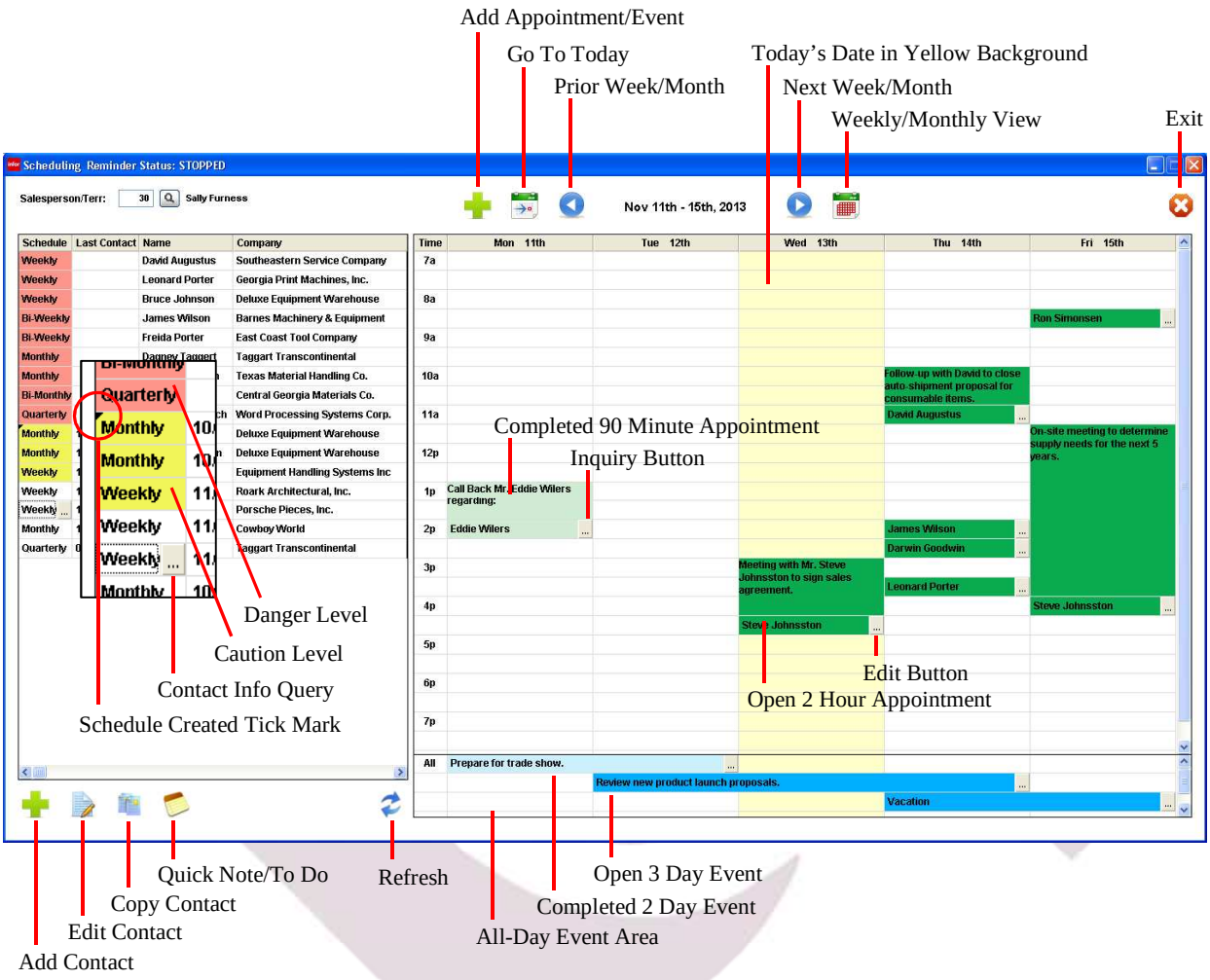
Appointments are created in either of two methods at the top or bottom of an hour for durations in multiples of 30 minutes. The first method is by dragging a contact from the list of contacts, to the interval of the desired day, or to the day in the all-day event area at the bottom of the calendar. For all-day events, the To Do maintenance window will automatically open to enter the ending date. Appointments will be automatically created for the default duration specified in the user's scheduling preferences. A black tick mark will appear in the upper left corner of the schedule cell to indicate that an appointment or event was created using the drag-n-drop technique. The second method is by using the New button above the calendar which opens the To Do maintenance window for manual entry of the schedule. Appointments may not conflict with one another, but there are no restrictions on events.

A query button is visible for each appointment in the weekly view and for the selected appointment row in each day of the month view. This button is used to open the To Do maintenance window to view completed appointments/events and to view, change, or delete open appointments/events. Appointments can also be changed by dragging them to another hour and/or day. All-day events cannot be changed using this method.

A query button is visible in the schedule column for the selected contact row. This button is used to open a window with additional information and links for the contact such as the last Note, next To Do, vCards, etc.

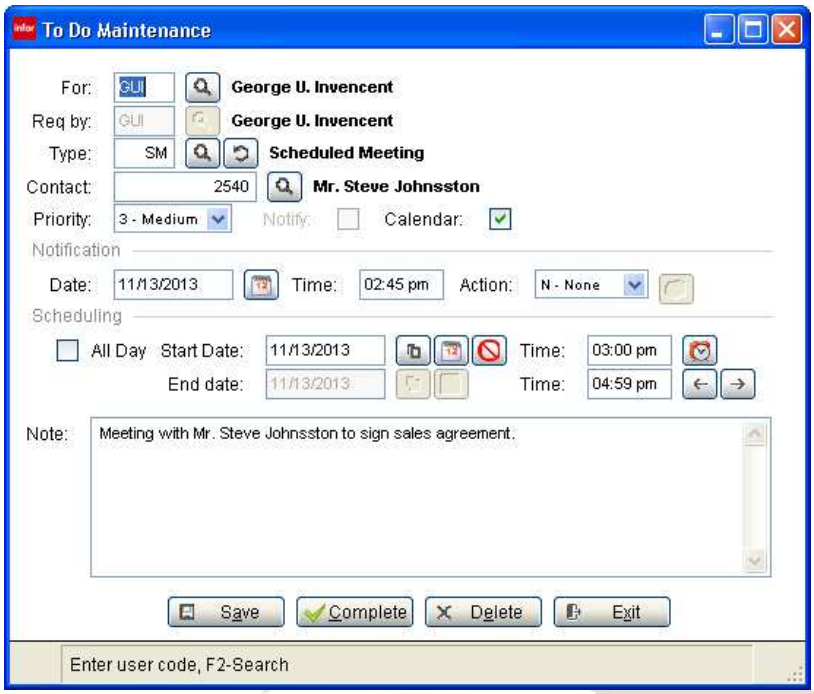
The buttons below the list of contacts, on the left side, provide the ability to Add contacts, Edit or Copy the selected contact, and open the Quick Note/To Do window for the selected contact. The Refresh button on the right will refresh the contact list and calendar views.

Open appointments have a darker green colored background while completed ones have a lighter/pale green background. Likewise, open all-day events have a darker blue background while completed ones have lighter/pale blue background.

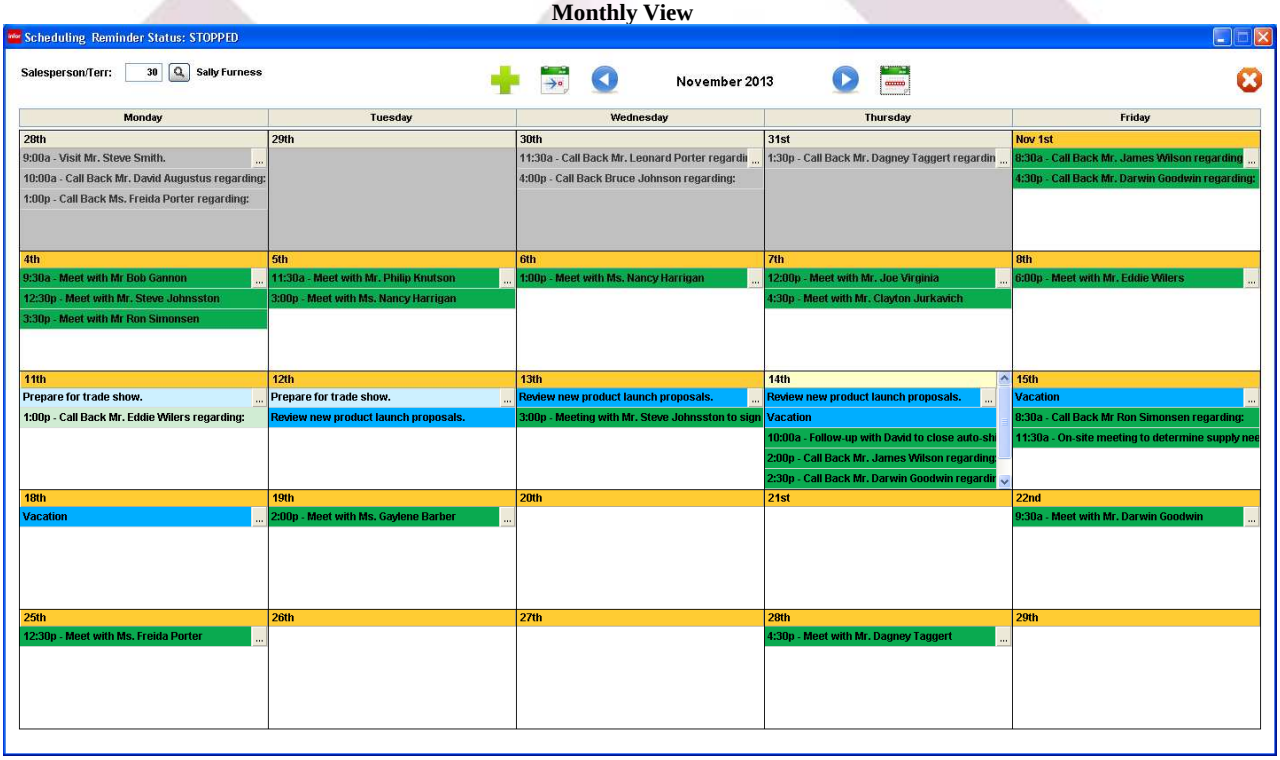


Contact Information Window

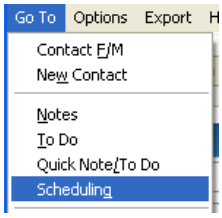
To Do Maintenance Window



Monthly View



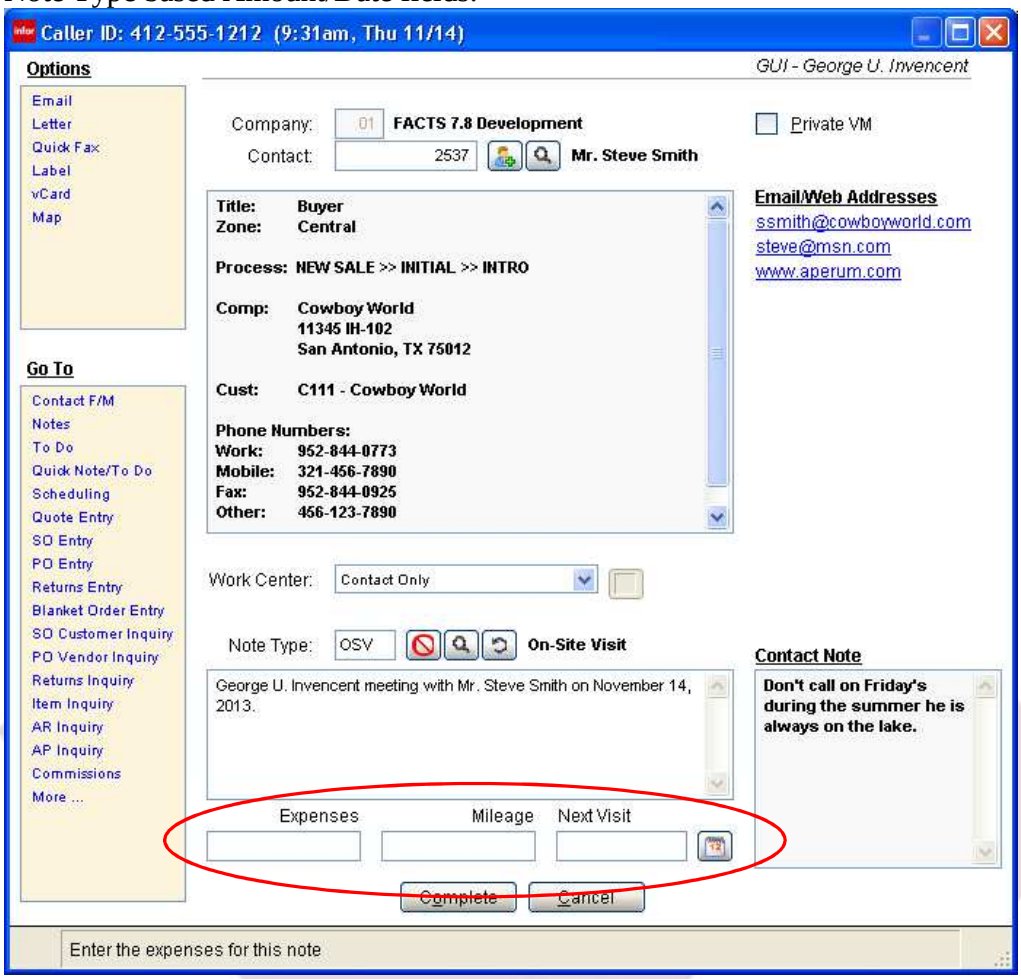
The Scheduling program is also in the Go To menu everywhere it is available.



Telephony Caller-ID Window (RMC988)

7.8.3

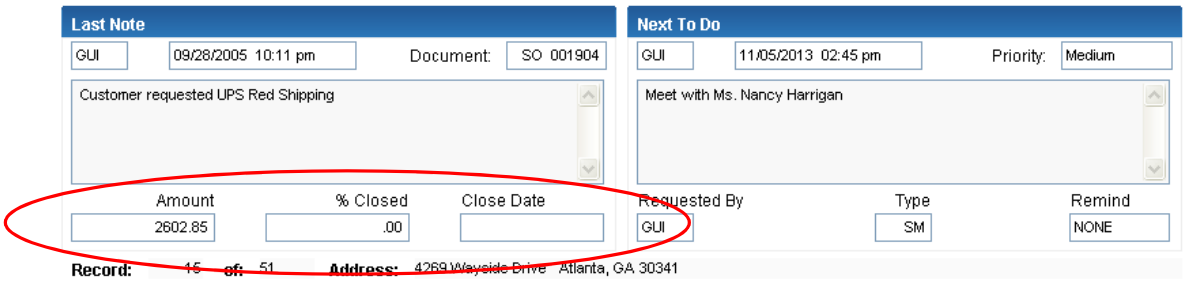
- Note Type based Amount/Date fields:



Contact Display (RME210)

7.8.3

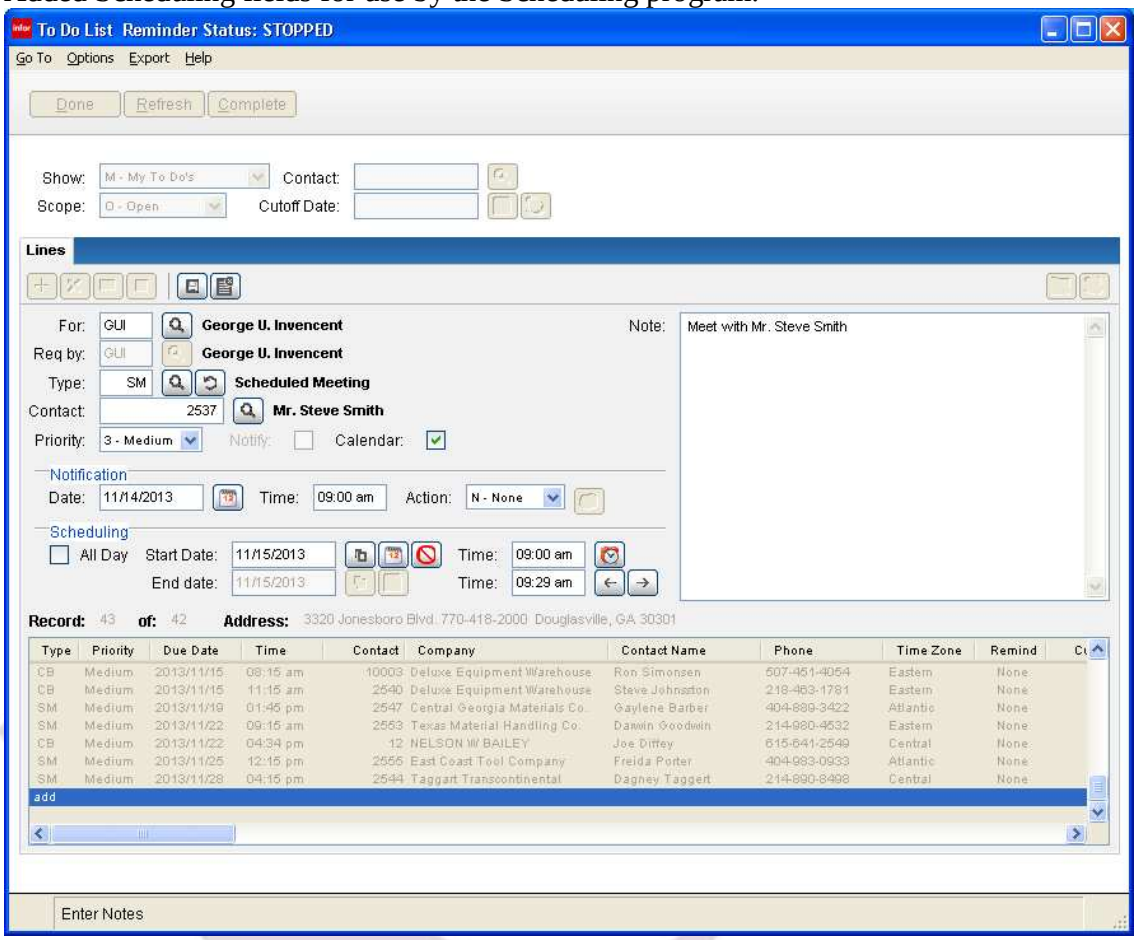
- Note Type based Amount/Date fields:



To Do Entry (RME220)

7.8.3

- Added Scheduling fields for use by the Scheduling program.



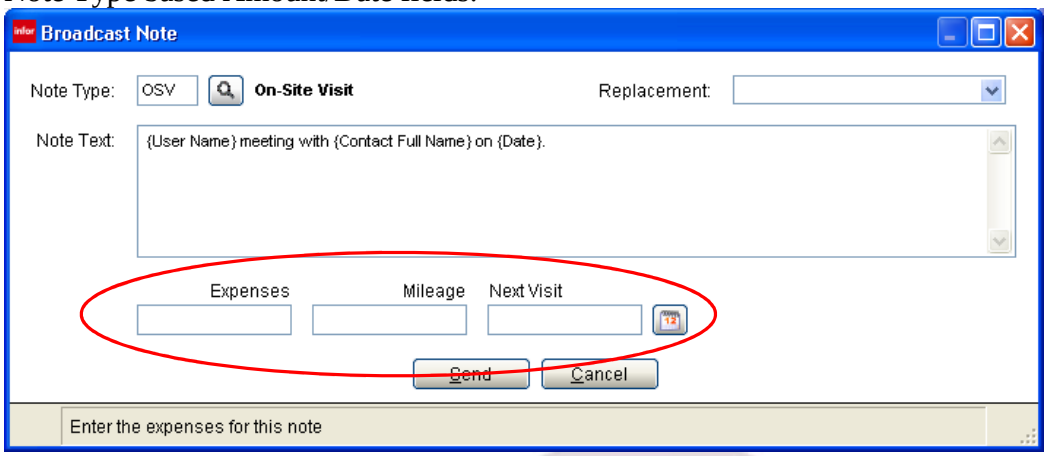
All Day – Select to create an all-day event. The End Date field will be enabled and the Start Time and End Time fields will be hidden.
Start Date – Enter the starting date for a scheduled appointment or all-day event. The F1 button will set the schedule to the notification date and time and adjust the notification date, time, and duration according to the user's preferences. The F3 button will clear the schedule.
End Date – Enter the ending date for an all-day event. The F1 button will set the end date to the start date.
Start Time – Enter the starting time for a scheduled appointment. The F1 button will set the notification date and time according to the user's preferences.
End Time – Enter the ending time for a scheduled appointment. The F2 and F3 buttons will subtract or add 30 minutes to the current end time.

All-day events are permitted to conflict with other schedules, but appointments may not.

Broadcast Lists (RME230)

7.8.3

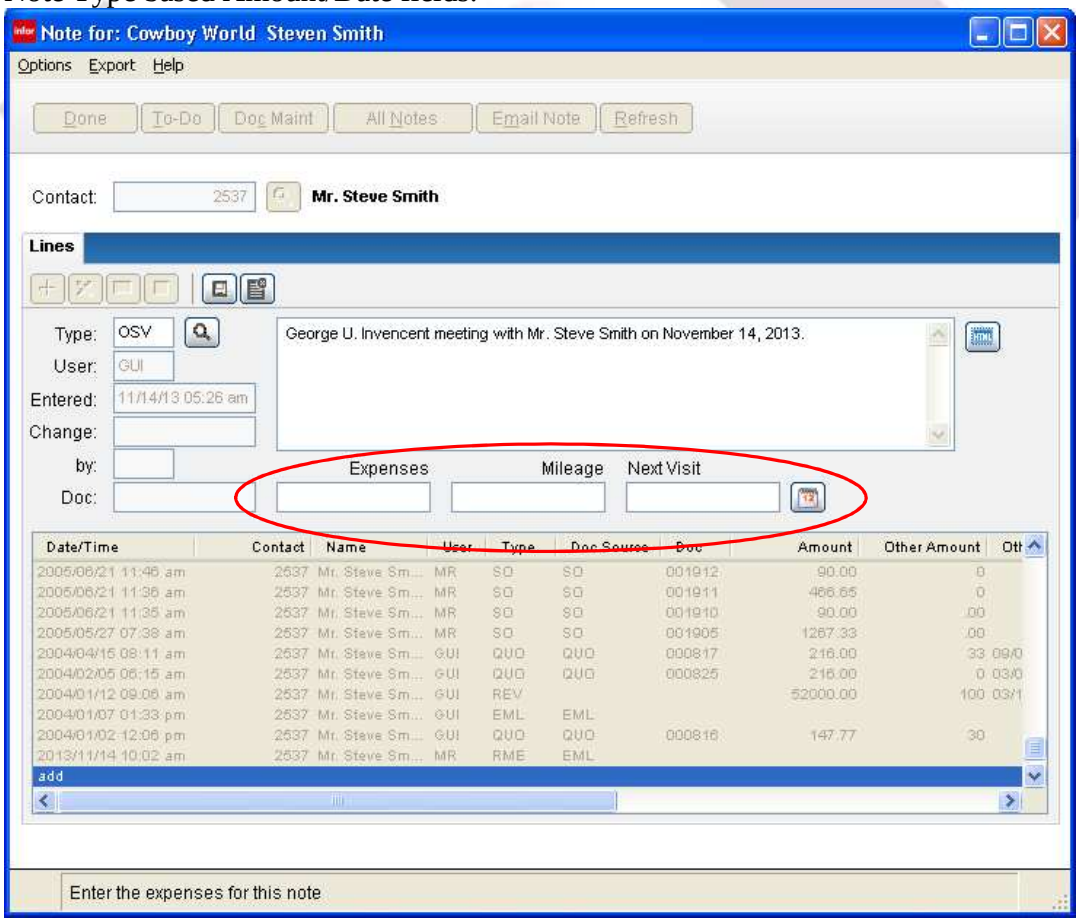
- Note Type based Amount/Date fields:



Note Entry (RME250)

7.8.3

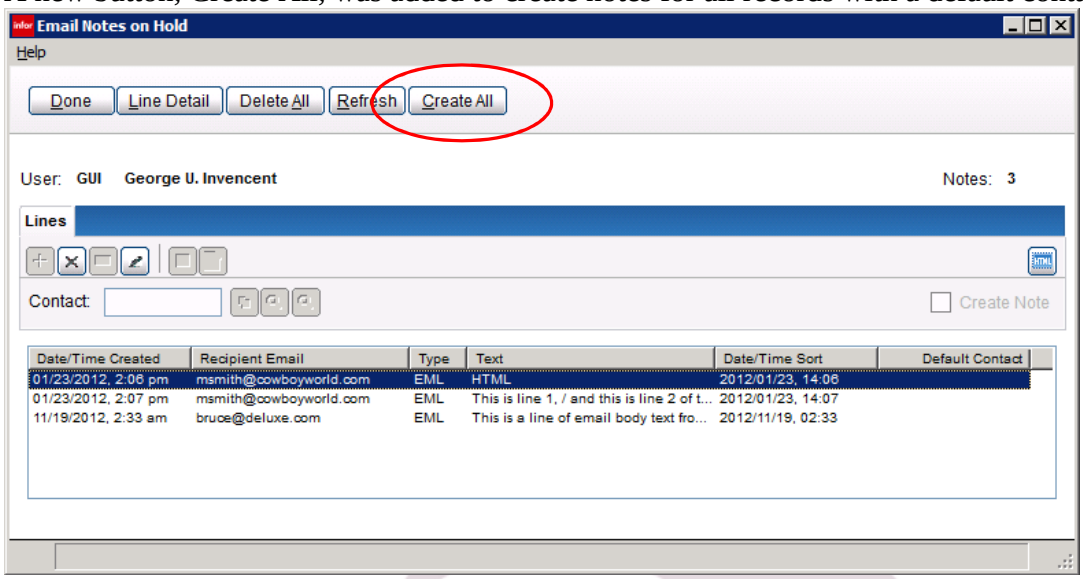
- Note Type based Amount/Date fields:



Email Notes on Hold (RME255)

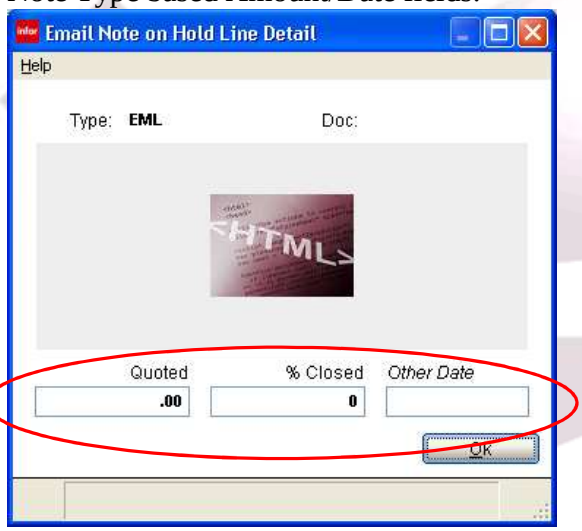
7.8.1

- A new button, Create All, was added to create notes for all records with a default contact.



7.8.3

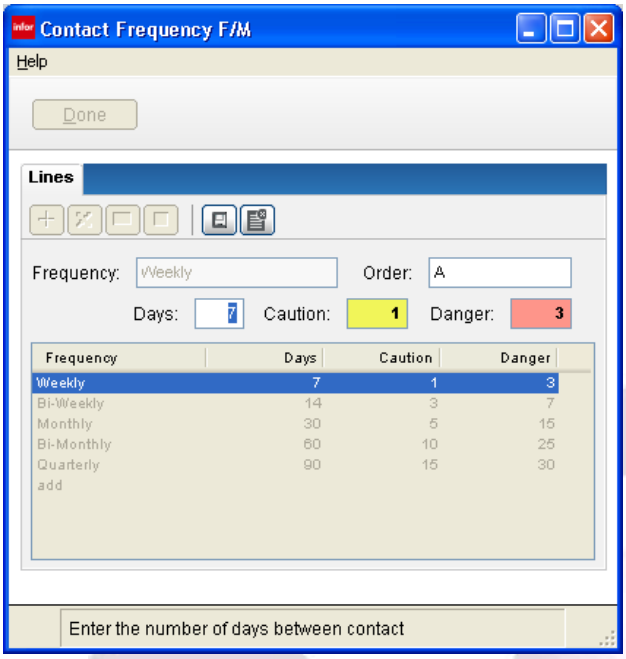
- Note Type based Amount/Date fields:



Contact Frequency F/M (RME640) *New*

7.8.3

Use this new program to create the contact frequencies you wish to use with the new scheduling program. Then assign them to the appropriate contacts.

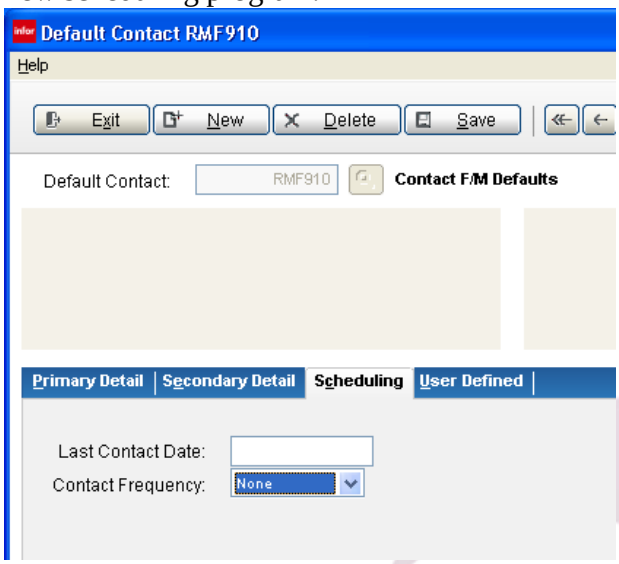


Frequency – Enter a code that describes the desired contact frequency.
Order – Enter an optional alpha code that will be used to sort the frequencies in the drop-down box and contact list in the scheduling program.
Days – Enter the number of days between contact.
Caution – Enter the number of days past due for the contact to be listed in the caution level.
Danger – Enter the number of days past due for the contact to be listed in the danger level.

Default Contact F/M (RMF810)

7.8.3

- Added the Scheduling tab for the Last Contact Date and Contact Frequency fields used by the new scheduling program.



Contact F/M (RMF910)

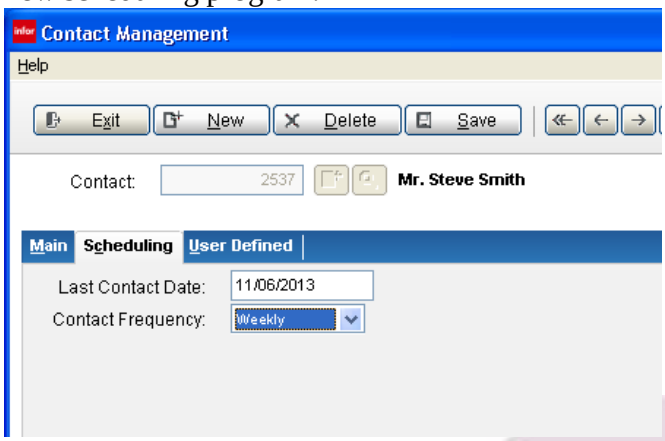
7.8.3

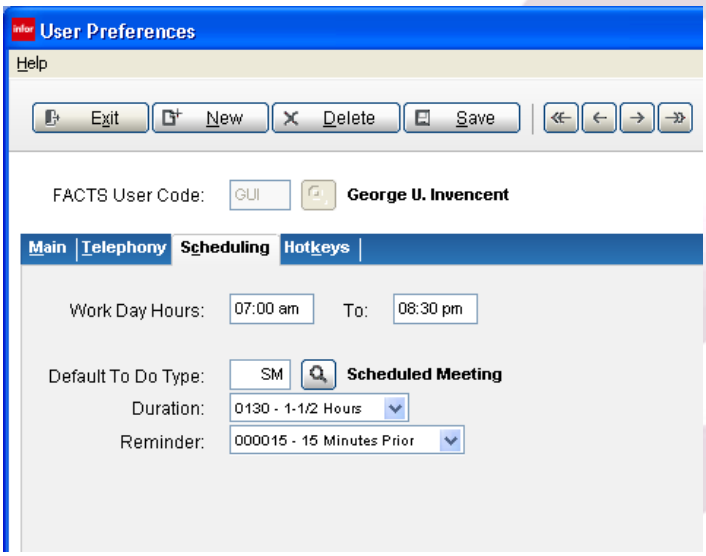
- Added the Scheduling tab for the Last Contact Date and Contact Frequency fields used by the new scheduling program.

Quick Contact F/M (RMF911)

7.8.3

- Added the Scheduling tab for the Last Contact Date and Contact Frequency fields used by the new scheduling program.

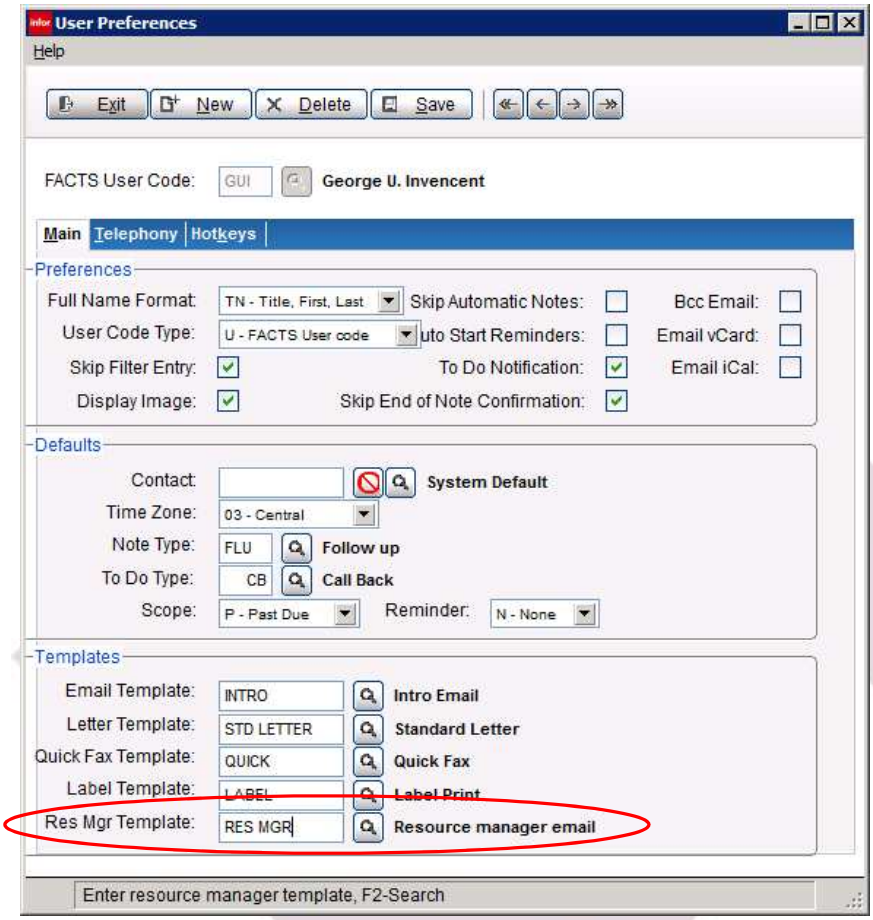




User Preference F/M (RMF935)

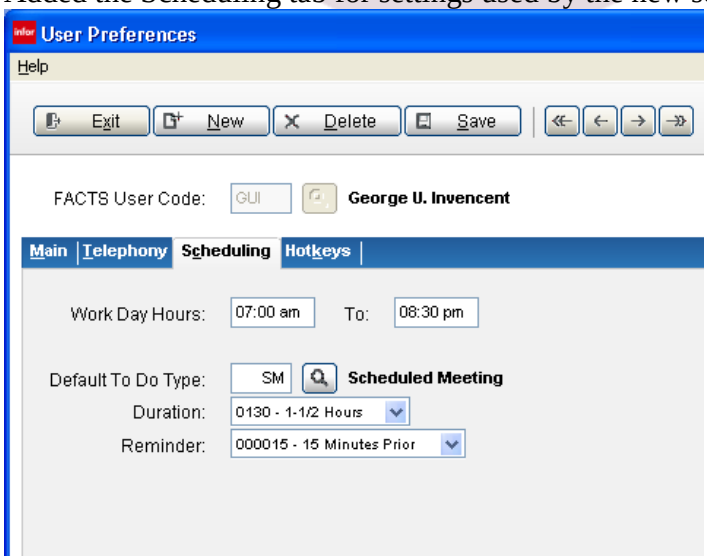
7.8.1

- A new default template for use by the Supplemental Resource Manager was added. See the SO Module section for the Supplemental Resource Manager (SMC910).



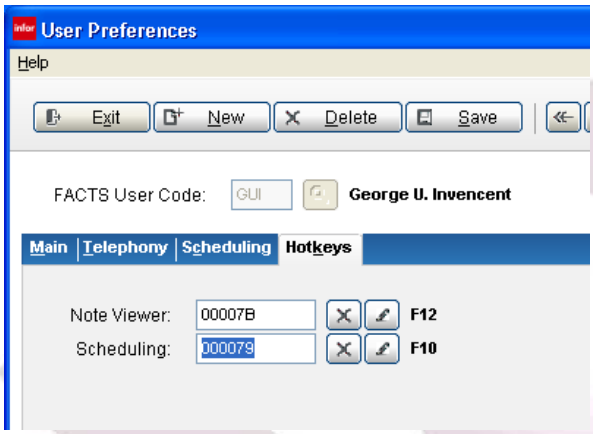
7.8.3

- Added the Scheduling tab for settings used by the new scheduling program.



Work Day Hours – Enter the starting and ending work day hours. This will determine the time frame in which scheduled appointments can be created and shown on the calendar in the scheduling program.
Default To Do Type – Enter the default To Do Type that will be used when creating appoinments and events in the scheduling program.
Duration – Enter the default duration that will be used when creating appointments in the scheduling program.
Reminder – Enter the default reminder lead time that will be used when creating appointments in the scheduling program.

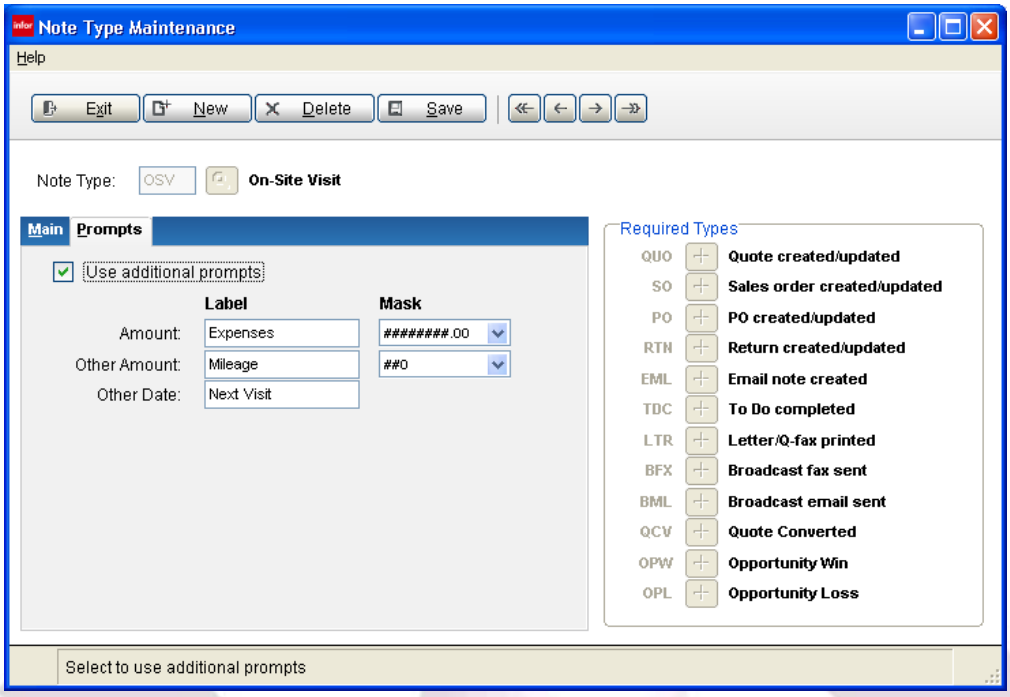
- Added a Hotkey setting to launch the new Scheduling program from virtually anywhere in FACTS.



Note Type F/M (RMF950)

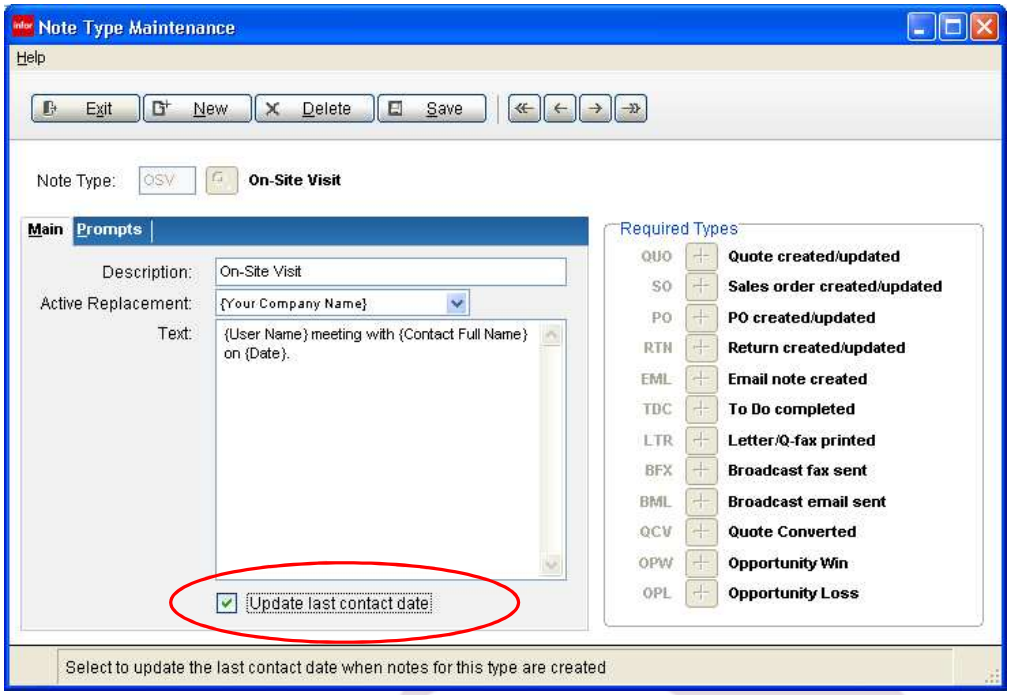
7.8.3

- Added the Prompts tab to configure the optional note Amounts and Other Date fields associated with a note.

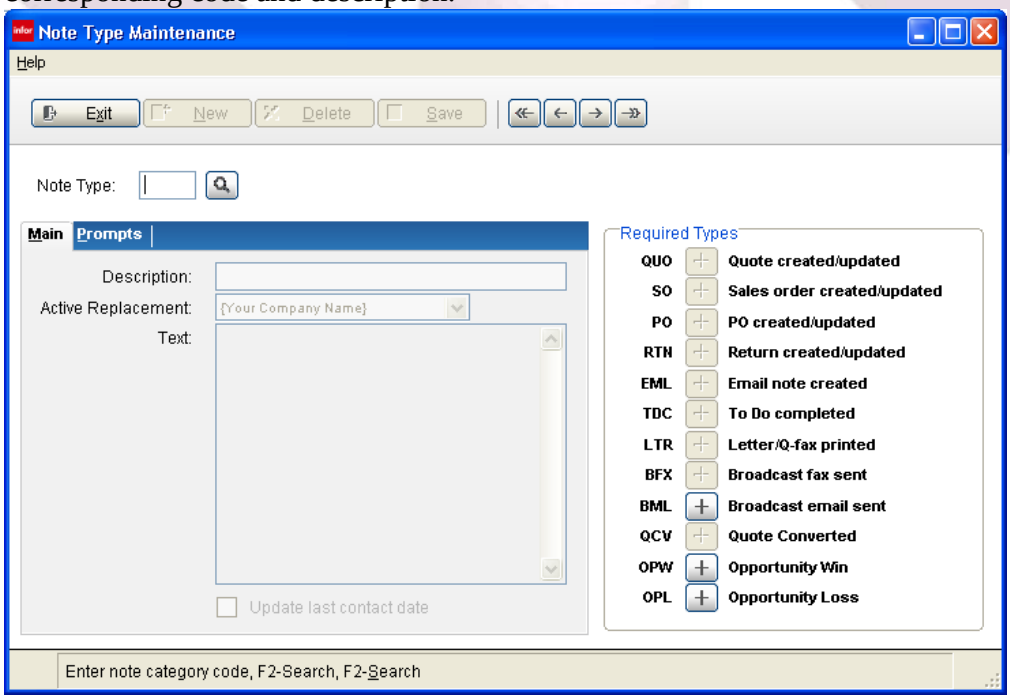


Use additional prompts – Check this box to enable the additional prompts for this note type. This field will be checked and disabled for the required QUO/SO/PO note types.
Amount Label – Enter a label for the amount field. This field will be disabled and populated with the label, "Amount", for the required QUO/SO/PO note types.
Amount Mask – Select a numeric mask from the drop-down list to determine the kind of amount that can be entered. This field will be disabled and populated with the mask, "-#######.00", for the required QUO/SO/PO note types.
Other Amount Label – Enter an optional label field for a secondary amount. If left blank, the other amount field will not be prompted.
Other Amount Mask – Select a numeric mask from the drop-down list to determine the kind of amount that can be entered. This field will be disabled if the label is blank.
Other Date Label – Enter an optional label field for a secondary date. If left blank, the other date field will not be prompted.

- Added the "Update last contact date" check-box. Notes created with types which this option checked will update the Last Contact Date field in the contact file.



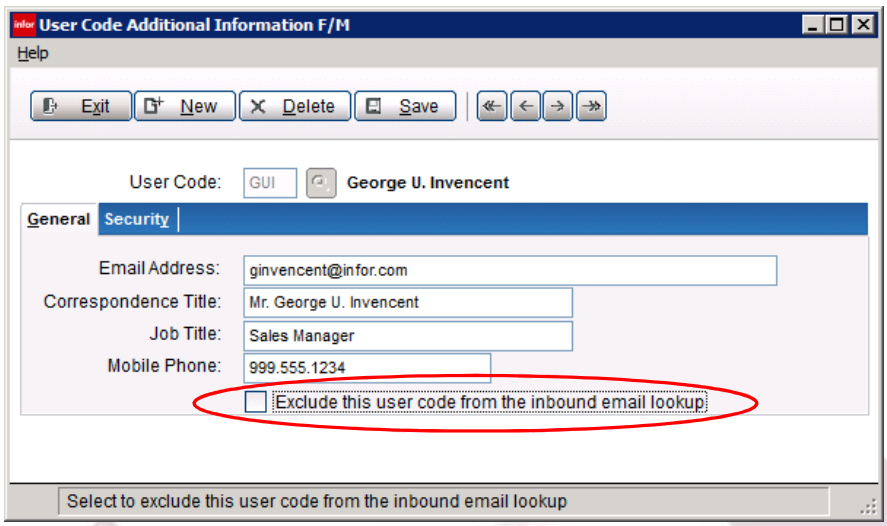
- Changed the list of required note types to indicate the ones that are on file and the ones that need to be created. The Add button is disabled for the ones on file and enabled for the ones that are not. Clicking the Add button will automatically start a new entry with the corresponding code and description.



User Code Additional Information F/M (RMF965)

7.8.1

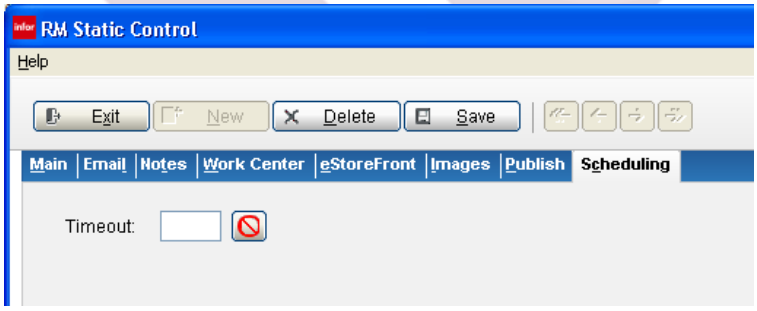
- Added the check-box, “Exclude this user from the inbound email lookup,” to eliminate user codes with the same email address as another user code from consideration in the inbound email lookup of the RMAddNote API lookup.



Static Control F/M (RMF980)

7.8.3

- Added the Scheduling tab for the scheduling program.



Timeout - Enter an optional timeout, in seconds, to have the scheduling program automatically exit when idle for that amount of time.

Note Query/Viewer (RMI270)

7.8.3

- Changed the Excel export to include the columns for the Note Type Amount/Date field descriptions and values.

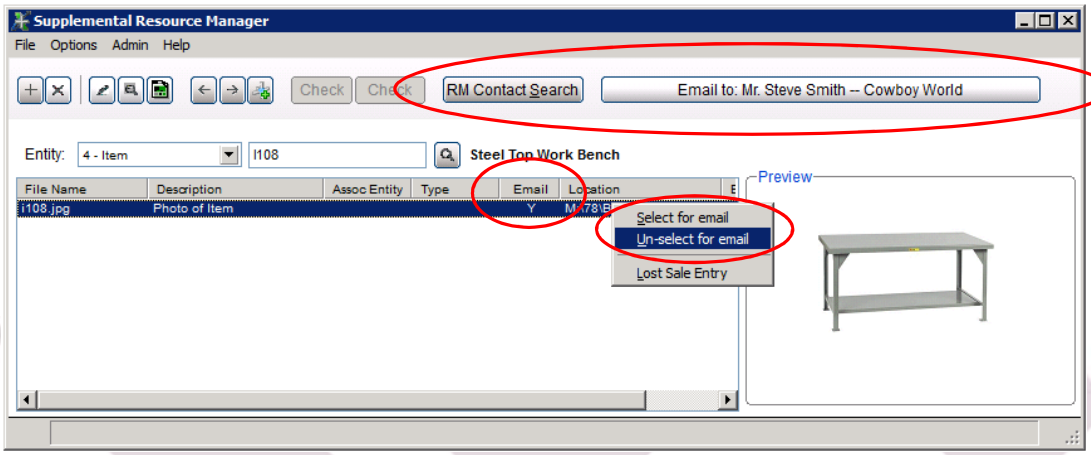
	L	M	N	O	P	Q
1	Amount Desc	Amount	Other Amount Desc	Other Amount	Other Date Desc	Other Date
2	Expenses	15	Mileage	3	Next Visit	11/20/2013
3	Expenses	3.5	Mileage	15	Next Visit	
4						
5						

SM Module

Supplemental Resource Manager (SMC910)

7.8.1

- Added the ability to email resources to a specified or sync'd contact. The Email column was added to the resource list. The right-click menu for the list provides options to select or un-select the highlighted resource for emailing. The RM Contact Search button is used to select a contact. The "Email to:" button is used to bring up the email window, make edits if necessary, and send or cancel the email. These buttons are hidden when no resources are listed. The email will include the resources as attachments and url's as hyperlinks in the body. The default template for the resource manager can be assigned to the user in RM User Preference F/M. See the RM Module section for the User Preference F/M (RMF935).



Application Changes & Resolutions

RM Module

General

7.8.1

- Resolved display issues in miscellaneous programs.

Email Processor (RMC110)

7.8.2

- If an error occurred trying to create/access the email directory specified in the RM Static Control F/M, the user was not being informed of the issue because the code was setting message$ instead of z$.
- An optional numeric argument was added to the enter iolist to receive the error status of the send process:

```
enter
CONTACT$,FROM_ADDRESS$,REPLY_ADDRESS$,TO_ADDRESS$,CC_ADDRESS$,BCC_ADDRESS
$,SUBJECT$,MAIL_MESSAGE$,ATTACHMENTS$,PRIORITY$,TITLE$,RECIPIENT$,SMTPSER
VER$,SERVER_TIMEOUT,LINE_WRAPS_AT,BODY_ENCODING$,ERASE_IT,SENT_DIRECTORY$
,SAVED_FILE_NAME$,Z8$,RECEIPT$,NO_REPLACEMENTS,HTML$,SEND_ERROR,err=*next
```

Contact Filters (RMC410)

7.8.3

- Resolved an issue with the Stage filter which would return incorrect results when using the exclude option.

Telephony Call Monitor / Contact Handler (RMC988)

7.8.2

- Launching the contact handler session was taking a long time to occur for an unknown reason. Adding a wait 0 after launching the new session resolved it.

To Do Entry (RME220)

7.8.2

- The calendar application integration was not working with email clients due to an issue with the encoding of the meeting request. Added a meaningful subject and attachment file name for email clients that present meeting requests as an attachment (i.e. Outlook 2010).
- Corrected the precision of the time fields which was causing the time to be occasionally off by a minute.

Data Set Entry (RME410)

7.8.2

- The Data Field search was not restricting the list to the selected file due to a filter variable name change.

Email/Letter F/M (RMF960)

7.8.1

- Resolved an error 46 in RMC110 at 26570 which could occur when importing over 32,000 bytes of HTML from other templates and the Pro version of the XStandard XHTML Editor is being used in a Windx client/server environment.

Note Query/Viewer (RMI270)

7.8.2

- Improved the viewer synchronization.
- Added hook points to facilitate custom load filters. See the Technical Documentation / Coding section and documentation that can be downloaded from the RM Wiki.

Import Contact Information (RMU410)

7.8.3

- The program was trying to read the IC static control record from SMCNTL instead of the ICSTAT file.
- Corrected an issue with the data set validation procedure.

RM Work Centers

Driver (RMC998)

7.8.2

- Resolved an error 14 that could occur in any work center when refreshing the data.
- Due to a metadata issue in RMEACT, the history note text for a new entity was not working correctly.

Collection Manager (RME320)

7.8.2

- The aging logic was failing when the AR Aging Control setting for Credits was set to Off Oldest because it was being applied per invoice instead of in total. They will now be applied in total based on each view level. This applies to the company totals as well, which differs from the company totals on the aging reports because the report applies the credits to the customer totals and then accumulates the customer totals to derive the report totals.

Sales Order Manager (RME340)

7.8.3

- Corrected an issue with the right-click menu defintion which wasn't allowing the Confirm Order menu item to function.

UP Module

RM 7.8 Incremental Update (UPRM78INC)

7.8.1

- Populates the new fields added to RMHNOT, RMUPRF, and RMZART.

7.8.3

- Populates the new fields added to RMUPRF, RMNCAT, RMSTCF, RMTODO, RMCONT, RMDNCT, RMFPRF, RMLSTP, RMUFFS, and RMUFSV.
- Installs the new file RMFREQ.

Technical Documentation

New Files

RMFREQ – Contact Frequency File

Key	Variable	Description	Length	Fixed
*	A0$	Company	2	Y
*	CONTACT_FREQUENCY$	Contact Frequency Code	15	Y
	DAYS_INTERVAL$	Interval in Days	4	-999
	DAYS_PAST_L1$	Days Past Level 1 (caution)	5	-9999
	DAYS_PAST_L2$	Days Past Level 2 (danger)	5	-9999
	ALPHA_SORT$	Alpha Sort Order	10	Y

Alternate Sort Key 1: ALPHA_SORT$ + A0$ + CONTACT_FREQUENCY$

File Changes

RMCONT – Contact File

7.8.3

New Fields

Key	Variable	ODBC Alias	Description	Length	Fixed
	LAST_CONTACT_DATE$	last_contact_date	Date of Last Contact	6	Y
	CONTACT_FREQUENCY$	contact_frequency	Contact Frequency Code	15	Y

RMDCNT – Default Contact File

7.8.3

New Fields

Key	Variable	ODBC Alias	Description	Length	Fixed
	LAST_CONTACT_DATE$	last_contact_date	Date of Last Contact	6	Y
	CONTACT_FREQUENCY$	contact_frequency	Contact Frequency Code	15	Y

RMFPRF – Filter Preferences

7.8.3

Changed Fields

Field	Attribute	Original Value	New Value
NOT_USED_11$	Description	Not Used	Contact Frequency Code
	Fixed	Y	N
	Length		15
	ODBC Alias	not_used_11	contact_frequency
	Variable	NOT_USED_11$	CONTACT_FREQUENCY$
NOT_USED_12$	Description	Not Used	Beginning Date of Last Contact
	Fixed	Y	N
	Length		6
	ODBC Alias	not_used_12	beg_last_contact_date
	Variable	NOT_USED_12$	BEG_LAST_CONTACT_DATE$
NOT_USED_13$	Description	Not Used	Ending Date of Last Contact
	Fixed	Y	N
	Length		6
	ODBC Alias	not_used_13	end_last_contact_date

Field	Attribute	Original Value	New Value
	Type	A	D
	Variable	NOT_USED_13$	END_LAST_CONTACT_DATE$

New Fields

Key	Variable	ODBC Alias	Description	Length	Fixed
	IE_CONTACT_FREQUENCY$	ie_contact_frequency	Inc/Exc Contact Frequency	1	Y
	IE_LAST_CONTACT_DATES$	ie_last_contact_dates	Inc/Exc Last Contact Dates	1	Y

RMHNOT – Hold Note File

7.8.1

New Fields

Key	Variable	ODBC Alias	Description	Length	Fixed
	CONTACT$	contact	Contact Number	10	Y

7.8.3

Changed Fields

Field	Attribute	Original Value	New Value
PCT_CLOSED$	Description	PERCENT CLOSED	Other Memo Amount
	Mask	##0	
	Length	3	11
	ODBC Alias	pct_closed	other_amount
	Variable	PCT_CLOSED$	OTHER_AMOUNT$
AMOUNT$	Mask	-#######.00	
CLOSE_DATE$	Description	EXPECTED CLOSE DATE	Other Memo Date
	ODBC Alias	close_date	other_date
	Variable	CLOSE_DATE$	OTHER_DATE$

RMLSTP – List Filter

7.8.3

Changed Fields

Field	Attribute	Original Value	New Value
NOT_USED_11$	Description	Not Used	Contact Frequency Code
	Fixed	Y	N
	Length		15
	ODBC Alias	not_used_11	contact_frequency
	Variable	NOT_USED_11$	CONTACT_FREQUENCY$
NOT_USED_12$	Description	Not Used	Beginning Date of Last Contact
	Fixed	Y	N
	Length		6
	ODBC Alias	not_used_12	beg_last_contact_date
	Variable	NOT_USED_12$	BEG_LAST_CONTACT_DATE$
NOT_USED_13$	Description	Not Used	Ending Date of Last Contact
	Fixed	Y	N
	Length		6
	ODBC Alias	not_used_13	end_last_contact_date
	Type	A	D
	Variable	NOT_USED_13$	END_LAST_CONTACT_DATE$

New Fields

Key	Variable	ODBC Alias	Description	Length	Fixed
	IE_CONTACT_FREQUENCY$	ie_contact_frequency	Inc/Exc Contact Frequency	1	Y
	IE_LAST_CONTACT_DATES$	ie_last_contact_dates	Inc/Exc Last Contact Dates	1	Y

RMNCAT – Note Type (Category) File

7.8.3

New Fields

Key	Variable	ODBC Alias	Description	Length	Fixed
	UPDATE_LAST_CONTACT_DATE$	update_last_contact_date	Update Last Contact Date (Y/N)	1	Y
	USE_PROMPTS$	use_prompts	Use Prompts? (Y/N)	1	Y
	AMOUNT_LABEL$	amount_label	Amount Label	12	N
	AMOUNT_MASK$	amount_mask	Amount Mask	11	N
	OTHER_AMOUNT_LABEL$	other_amount_label	Other Amount Label	12	N
	OTHER_AMOUNT_MASK$	other_amount_mask	Other Amount Mask	11	N
	OTHER_DATE_LABEL$	other_date_label	Other Date Label	12	N

RMNOTE – Note File

7.8.3

Changed Fields

Field	Attribute	Original Value	New Value
PCT_CLOSED$	Description	PERCENT CLOSED	Other Memo Amount
	Length	3	11
	Mask	##0	
	ODBC Alias	pct_closed	other_amount
	Variable	PCT_CLOSED$	OTHER_AMOUNT$
AMOUNT$	Mask	-#######.00	
CLOSE_DATE$	Description	EXPECTED CLOSE DATE	Other Memo Date
	ODBC Alias	close_date	other_date
	Variable	CLOSE_DATE$	OTHER_DATE$

RMSTCF – Static Control File

7.8.3

New Fields

Key	Variable	ODBC Alias	Description	Length	Fixed
	SCHED_TIMEOUT	sched_timeout	Timeout for Scheduling App	3	##0

RMTODO – To Do File

7.8.3

New Fields

Key	Variable	ODBC Alias	Description	Length	Fixed
	SCHED_START_DATE$	sched_start_date	Scheduling Start Date	6	Y
	SCHED_START_TIME$	sched_start_time	Scheduling Start Time (HHMM)	4	Y
	SCHED_END_DATE$	sched_end_date	Scheduling End Date	6	Y
	SCHED_END_TIME$	sched_end_time	Scheduling End Time (HHMM)	4	Y
	SCHED_ALL_DAY$	sched_all_day	Scheduling All Day Event (Y/N)	1	Y

New Keys

10. A0$ + USER$ + SCHED_ALL_DAY$ + SCHED_START_DATE$ + SCHED_START_TIME$ + REQUESTED_BY$ + SEQUENCE$
11. A0$ + USER$ + SCHED_ALL_DAY$ + SCHED_END_DATE$ + SCHED_END_TIME$ + REQUESTED_BY$ + SEQUENCE$

RMUFFS – User Filter Field Security

7.8.3

New Fields

Key	Variable	ODBC Alias	Description	Length	Fixed
	CONTACT_FREQUENCY$	contact_frequency	Contact Frequency Code	1	Y
	BEG_LAST_CONTACT_DATE$	beg_last_contact_date	Beginning Date of Last Contact	1	Y
	END_LAST_CONTACT_DATE$	end_last_contact_date	Ending Date of Last Contact	1	Y

RMUFSV – User Filter Field Secure Values File

7.8.3

New Fields

Key	Variable	ODBC Alias	Description	Length	Fixed
	CONTACT_FREQUENCY$	contact_frequency	Contact Frequency Code	15	Y
	BEG_LAST_CONTACT_DATE$	beg_last_contact_date	Beginning Date of Last Contact	6	Y
	END_LAST_CONTACT_DATE$	end_last_contact_date	Ending Date of Last Contact	6	Y
	IE_CONTACT_FREQUENCY$	ie_contact_frequency	Inc/Exc Contact Frequency	1	Y
	IE_LAST_CONTACT_DATES$	ie_last_contact_dates	Inc/Exc Last Contact Dates	1	Y

RMUPRF – User Preference File

7.8.1

New Fields

Key	Variable	ODBC Alias	Description	Length	Fixed
	RES_MGR_TEMPLATE$	res_mgr_template	Default Resource Manager Template	10	Y

7.8.3

New Fields

Key	Variable	ODBC Alias	Description	Length	Fixed
	SCHED_DEF_TODO_TYPE$	sched_def_todo_type	Scheduling Def To Do Type	3	Y
	SCHED_DEF_TODO_DURATION$	sched_def_todo_duration	Scheduling Def To Do Duration (HHMM)	4	Y
	SCHED_DEF_TODO_REMINDER$	sched_def_todo_reminder	Scheduling Def To Do Reminder (DDHHMM)	6	Y
	SCHED_WORK_DAY_START$	sched_work_day_start	Scheduling Work Day Start Time(HHMM)	4	Y
	SCHED_WORK_DAY_END$	sched_work_day_end	Scheduling Work Day End Time (HHMM)	4	Y
	SCHED_EMAIL_VCALS$	sched_email_vcals	Email iCal Files for Schedule?	1	Y
	SCHED_HOTKEY$	sched_hotkey	Scheduling Hotkey (HEX)	20	N

RMZART – User Code Additional Info File

7.7.8

New Fields

Key	Variable	ODBC Alias	Description	Length	Fixed
	NO_EMAIL_NOTES$	no_email_notes	Exclude User from Inbound Email Notes	1	Y

Coding

Hook Points

7.8.1

- “prog/SM/SMC91A;post_init_rm”
  - Used for custom initialization of the resource manager for RM.

7.8.2

- "prog/RM/RMI27A;note_load_filter"[1]
- "prog/RM/RMI27A;todo_load_filter"[1]
- "prog/RM/RMI27A;post_preferences"[1]
- "prog/RM/RMI27A;post_read_rmnprf"[1]
- "prog/RM/RMI27A;init_rmnprf"[1]
- "prog/RM/RMI27A;write_rmnprf"[1]
- "prog/RM/RMI27A;apply_secure_filter_values"[1]
- "prog/RM/RMI27A;load_filter_defaults"[1]

7.8.3

- "prog/RM/RMC64A;post_read_select"
  - Used to impact the filter values when loading contacts in the scheduling program.
- "prog/RM/RMC64A;todo_validation"
  - Used to apply custom To Do record validation when To Dos are added/changed in the scheduling program.

Colors

7.8.3

- Colors used in the scheduling program.

	Appointments	All Day Events
Open:	RGB: 10,170,80	RGB: 0,174,255
Completed:	RGB: 208,236,211	RGB: 205,240,255

[1] These hook points are used to facilitate custom load filters. Refer to the document on the RM Wiki for more details.