FACTS 7.7 Training

Relationship Management

Pivotal Systems, LLC

7230 Metro Blvd. • Minneapolis, MN

Phone 952-844-0773 • Fax 952-844-0925

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Includes Facts 7.7.2 Release Notes

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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.

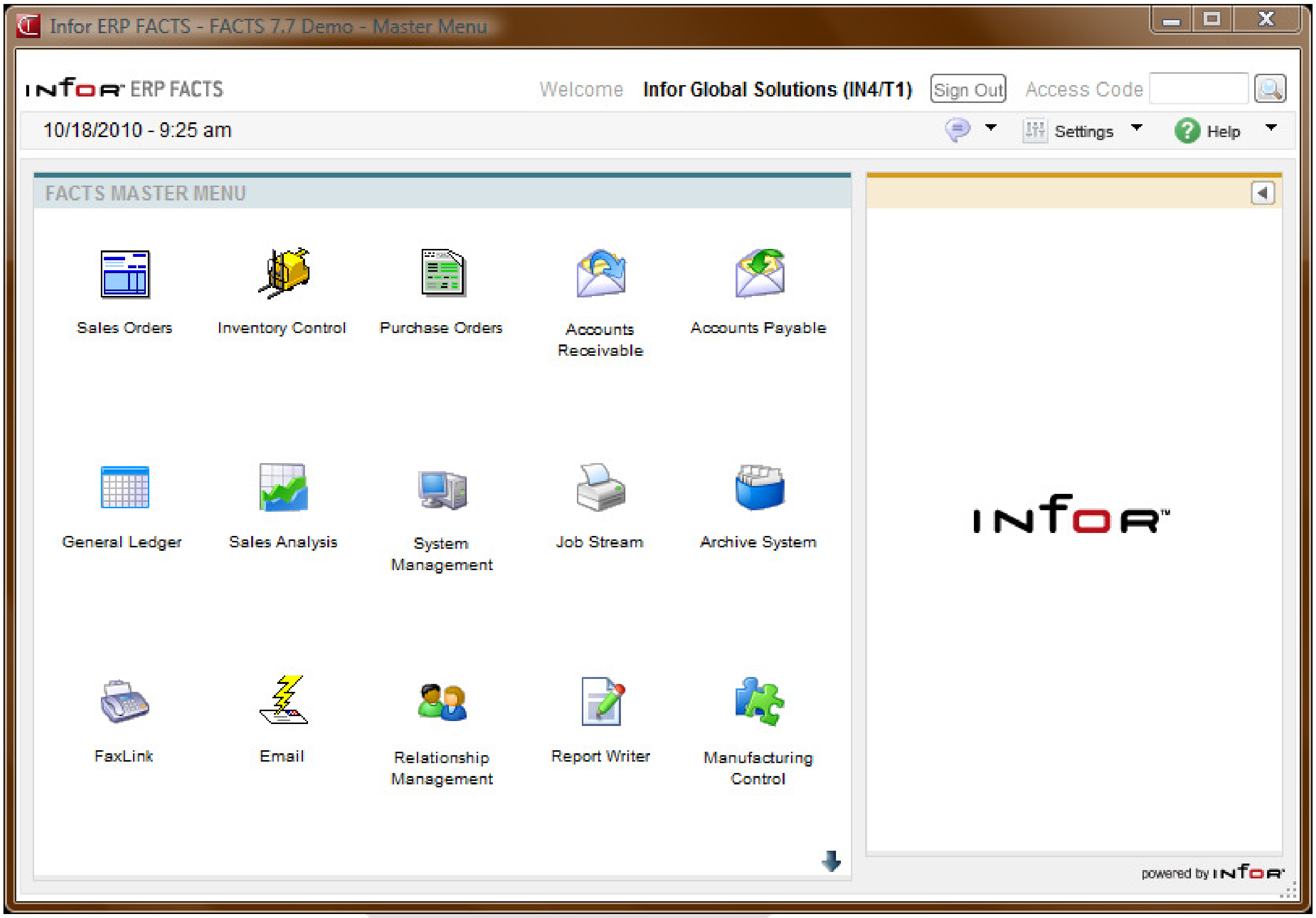
Multiple work flow models

- **Targeted lists** – Use powerful filtering capability to generate detailed lists of contacts meeting your specific criteria
- **Contact Display** – search for contacts and view last note and next To Do
- **Calendar/Task** – Work from scheduled activities that are date and time oriented
- **Work Centers** – Job focused single window to all of the tools needed to perform a job
- **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

A phrase that we like to use is, “If it didn’t happen in RM, it didn’t happen.” All work done within Relationship Management Work Centers automatically create notes. Those notes show the work done. Think of it as Ledgercards but on steroids.

SYSTEM SETUP

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



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

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

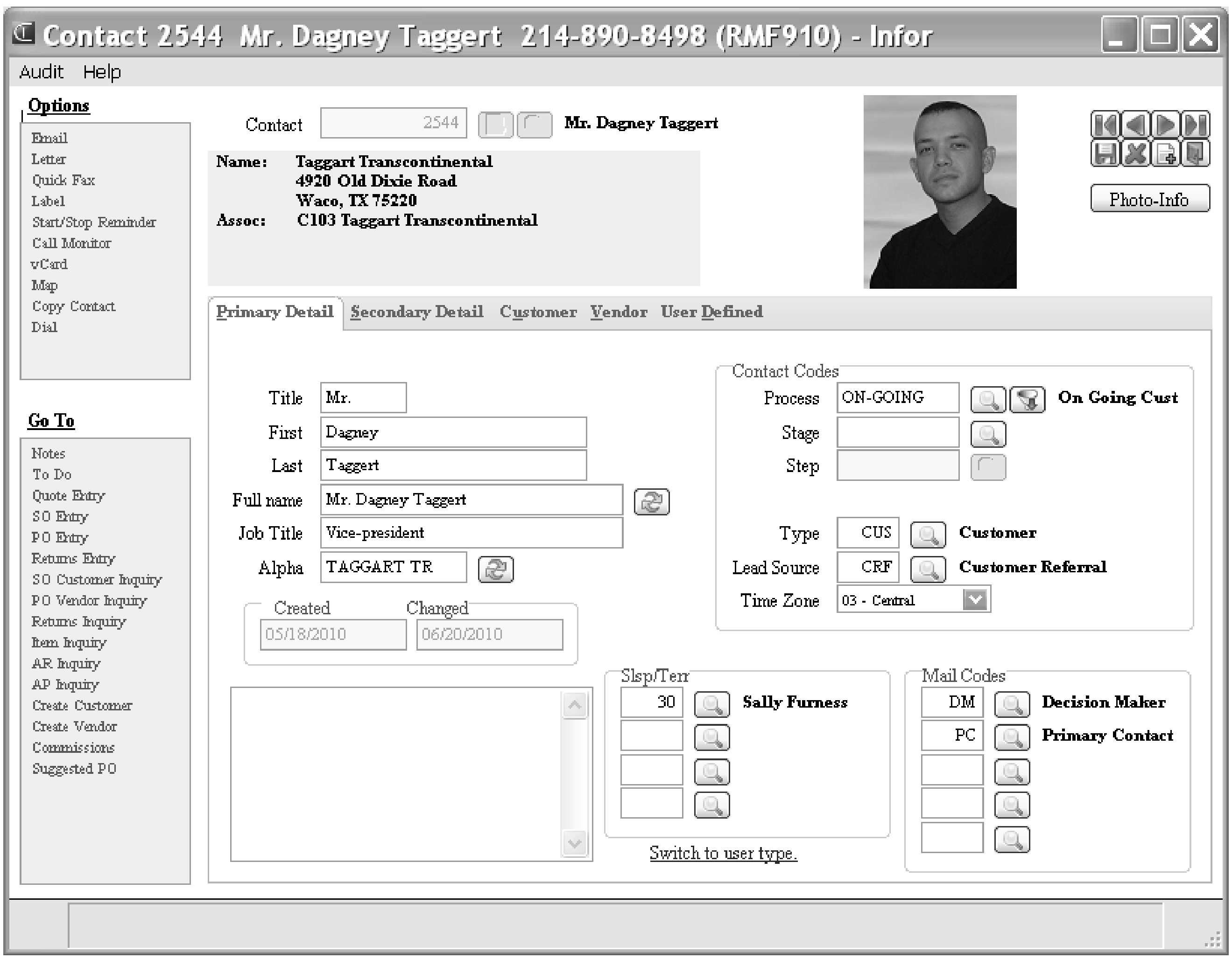
All of the setup functions will be discussed in their respective sections.

File Maintenances

CONTACT FILE MAINTENANCE

The Contact File Maintenance screen includes the following basic areas:

Header – Displays basic contact information
Hyperlinks – Displays hyperlinks for quick access directly to RM and FACTS programs without leaving Contact File Maintenance
Copy – Allows copy of an existing contact to a new contact
Tabs – Primary Detail, Secondary Detail, Customer Information and Vendor Information



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 (requires FacetPhone, will 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 (see RM Static Control) and optionally by user (see RM User Preference F/M) 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 (see RM Static Control). 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.
Having the correct Time Zone will make it easier for outbound phone calls. If you know that the contact that you are calling is not available it makes it easier to plan your time around. This can also be used in filtering.

Personal Notes

This is a free-form text field to enter any personal or relevant notes about the contact.
While these are not printed remember that at a glance these will be the first notes seen. Do not confuse these notes for "urgent" notes used within standard FACTS. Example: if this is a collections contact and they tell you in passing that they print checks only on the 15th and 30th of the month that is an important note that you would want to view while trying to collect and update notes on when you will be paid.

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.
This is not about the salesman who gets commissions or credit for the sale. This is merely someone associated with this contact/customer combination. Think of an Inside Salesperson, District Manager and or Regional Sales Manager. Each can be listed as a salesman and with various tools can be exported or reported on by any or all of them.
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.

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.

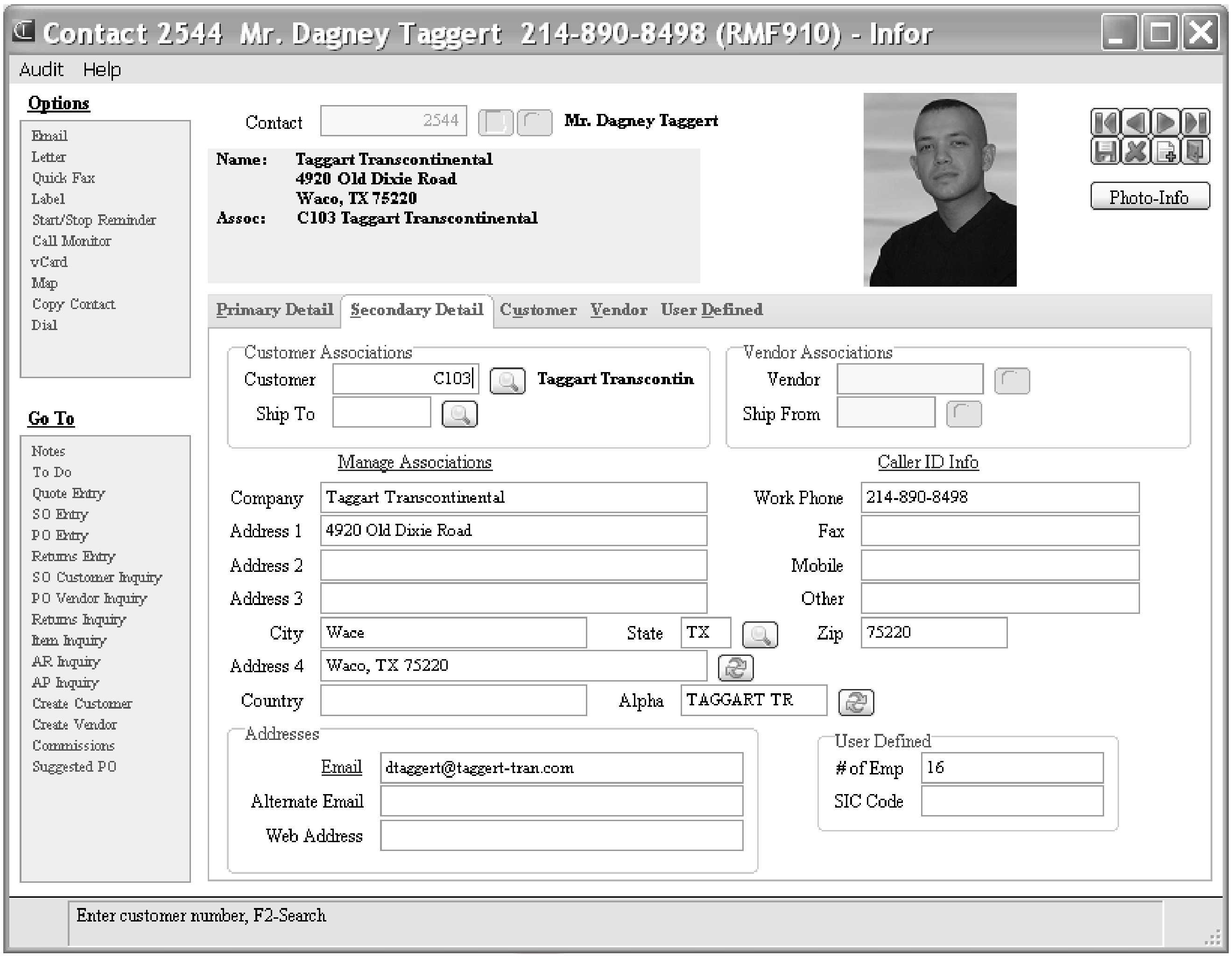
Some contacts will not have mail codes while others may have multiple codes. While most will not want to commit when first setting up RM this is something that really should be thought through in the initial creation. This is a valuable tool for using Broadcast Lists (marketing, collections, etc.)

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.

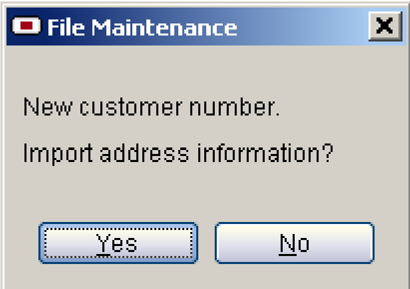
Secondary Detail

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:



The address will default to Ship To/From address listed. If that Ship To/From Address is set SAME or Blank the program assume the address associated with the master record.

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.
The company name can be overwritten even though it is associated with a particular customer/vendor. However, there are times when the company associated with is not the company name you wish to use.

Address 1, 2, 3

You have three full address lines for street address or PO box information.
The address 1,2,3 can be overwritten even though it is associated with a particular customer/vendor. However, there are times when the address is different than the Ship To/From or the primary address associated with the Customer/Vendor.

City, State, Zip

Enter the City, State and Zip Code for the prospect.
The City, State Zip can be overwritten even though it is associated with a particular customer/vendor. However, there are times when the City, State, Zip is different than the Ship To/From or the primary address associated with the Customer/Vendor.

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, Other

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.

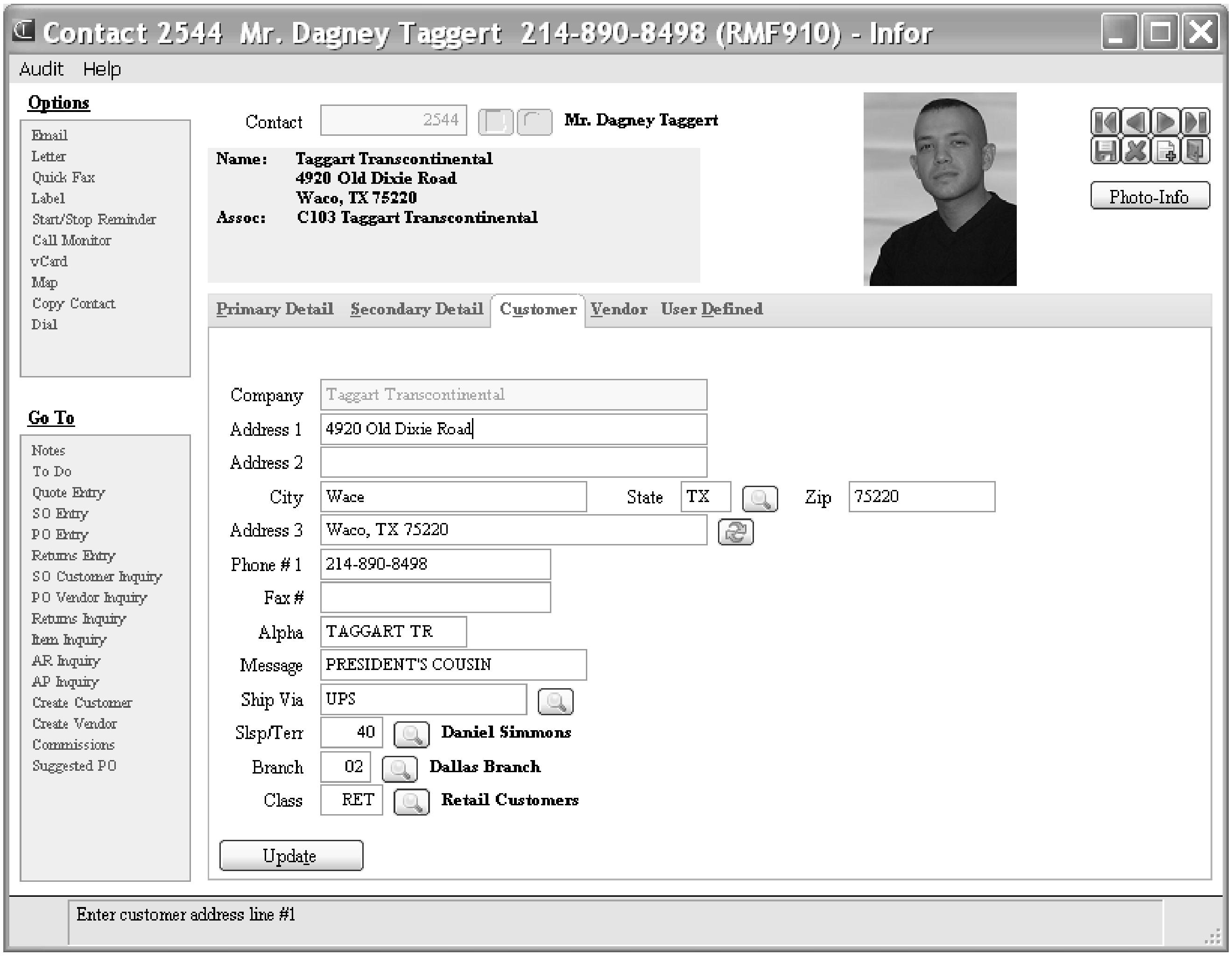
Filterable User-Defined Fields

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.

Changing the Email address or the Fax number will now update all Broadcast Lists in which the Contact is present and the Update Contact check-box is selected.

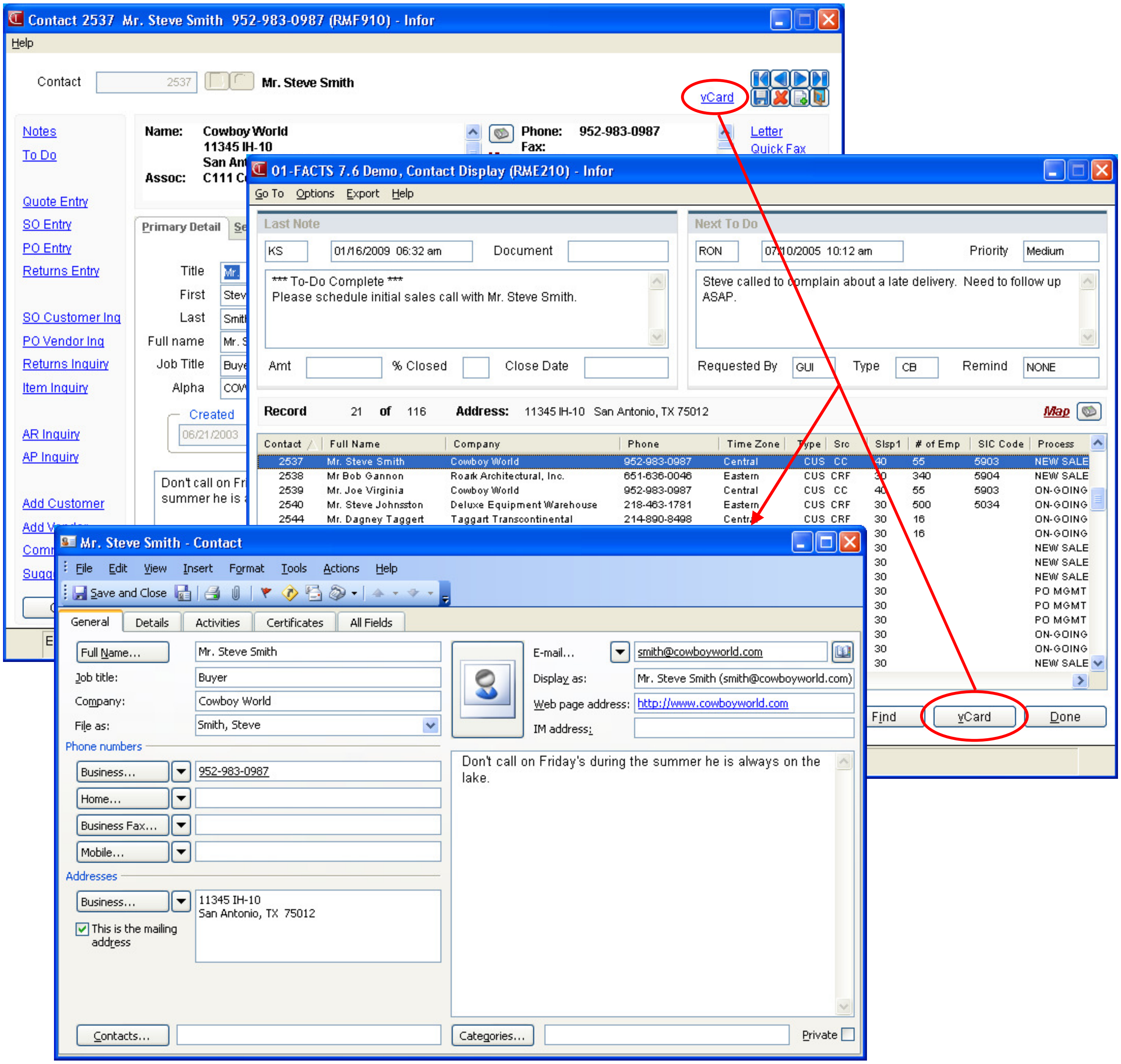
Customer Information

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.**



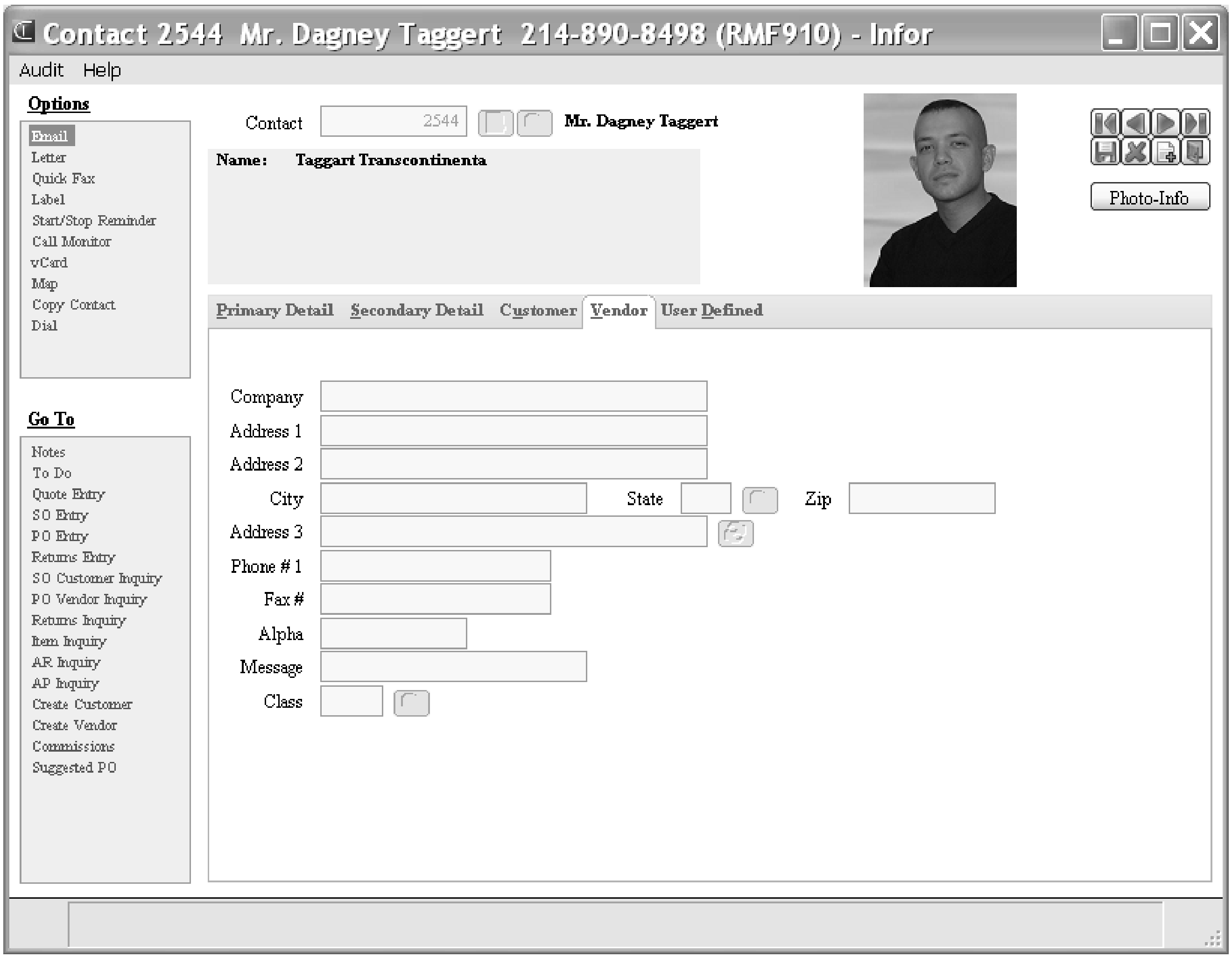
Create / Update Contacts in your Windows-based Contact Application

Buttons and hyperlinks labeled, vCard, have been added to the various contact maintenance programs available in RM. They will add or update contact information to any Windows-based contact application compatible with the vCard specification and is mapped to the .vcf file extension. The example shown below is from Microsoft Outlook. The Windows-based contact application is responsible for managing duplicate contacts.



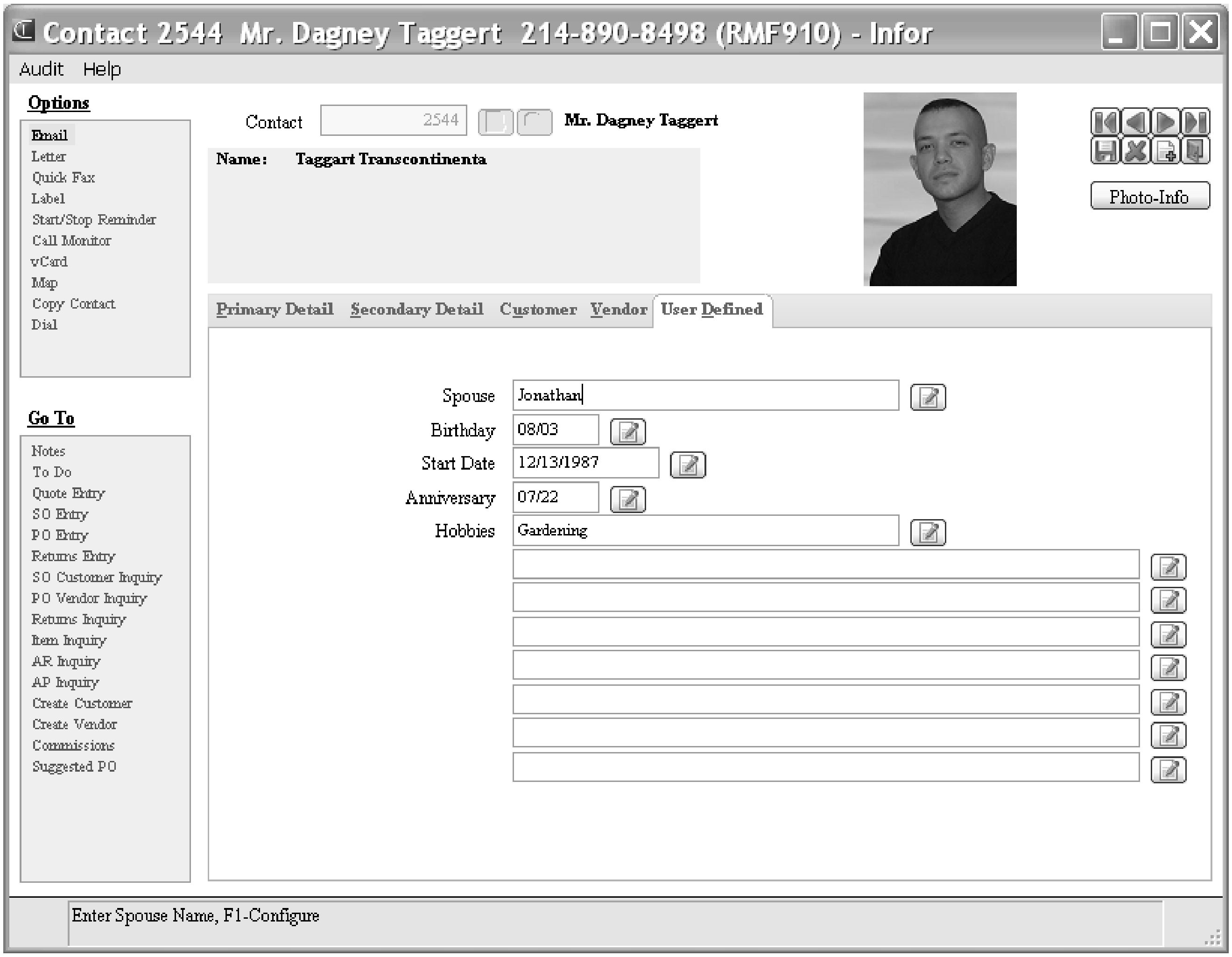
Vendor Information

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 user defined fields have been added to the contact file. The 2 existing user defined located on the Secondary Detail page are now defined the same way. This will give greater flexibility to the end user. All of the 14 fields will be searchable within contact filter.



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

In each of the entry screens the program will default the customer/vendor and the contact number automatically. currently

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 name
Last name in relation to a customer or vendor association.

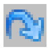
The message box will display the existing contact number and customer/vendor association information.

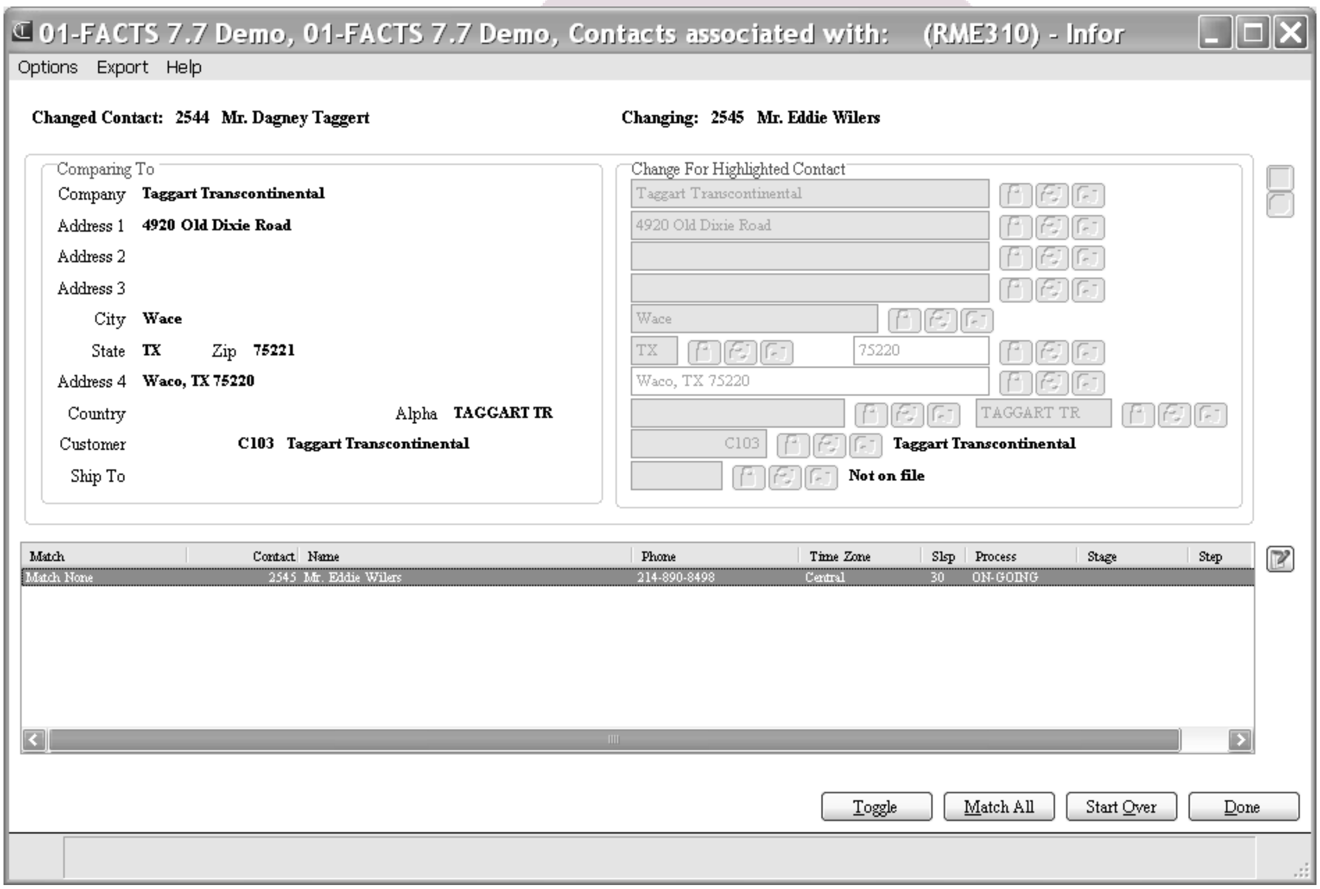
Delete a Contact

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 addresses 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.

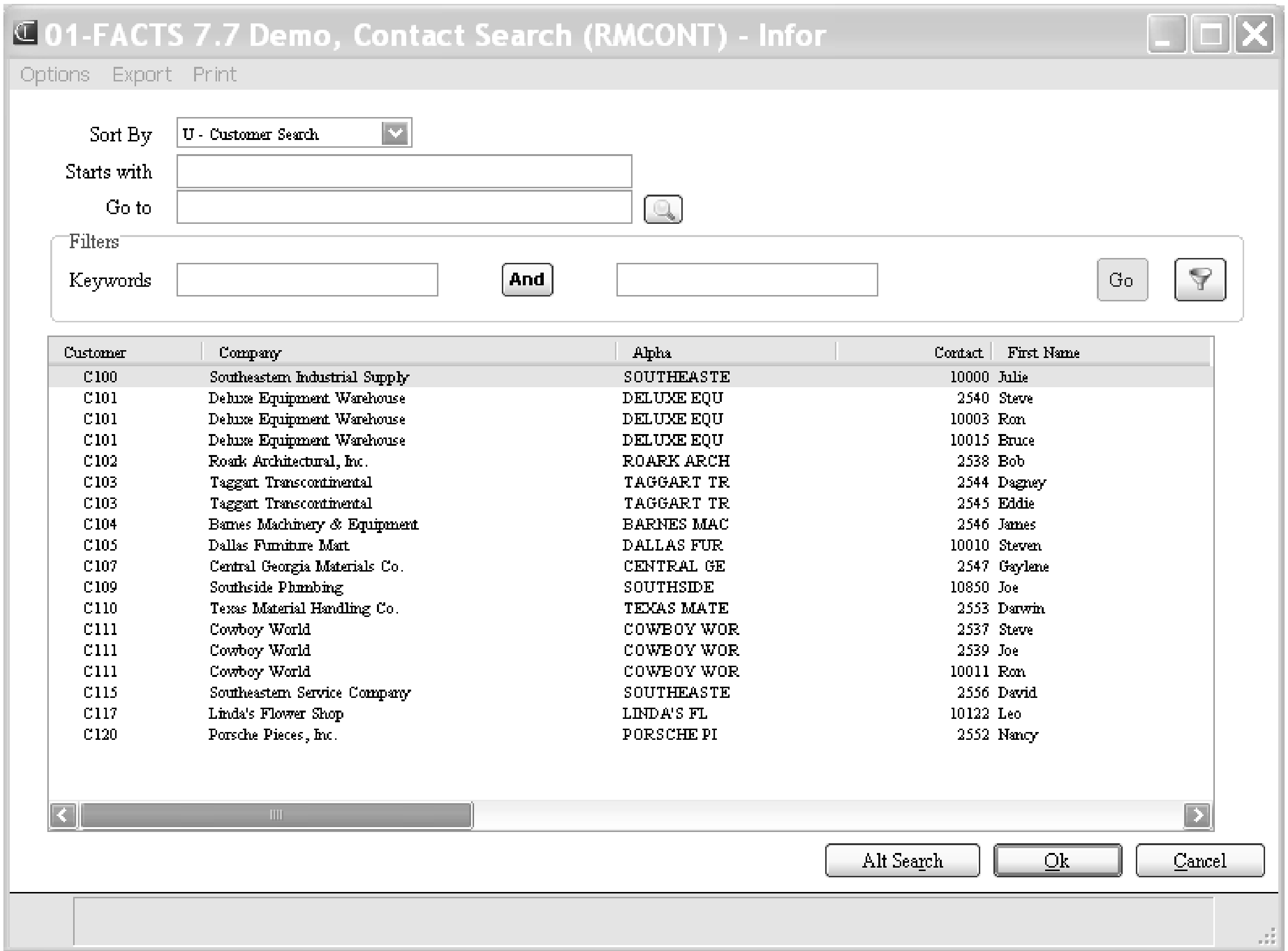
Contact Search

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 (this stems from the Secondary Detail Screen)
- User Defined 2 (this stems from the Secondary Detail Screen)
- Process
- First Name

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


01-FACTS 7.7 Demo, Contact Search (RMCONT) - Infor

Options Export Print

Sort By: U - Customer Search

Starts with

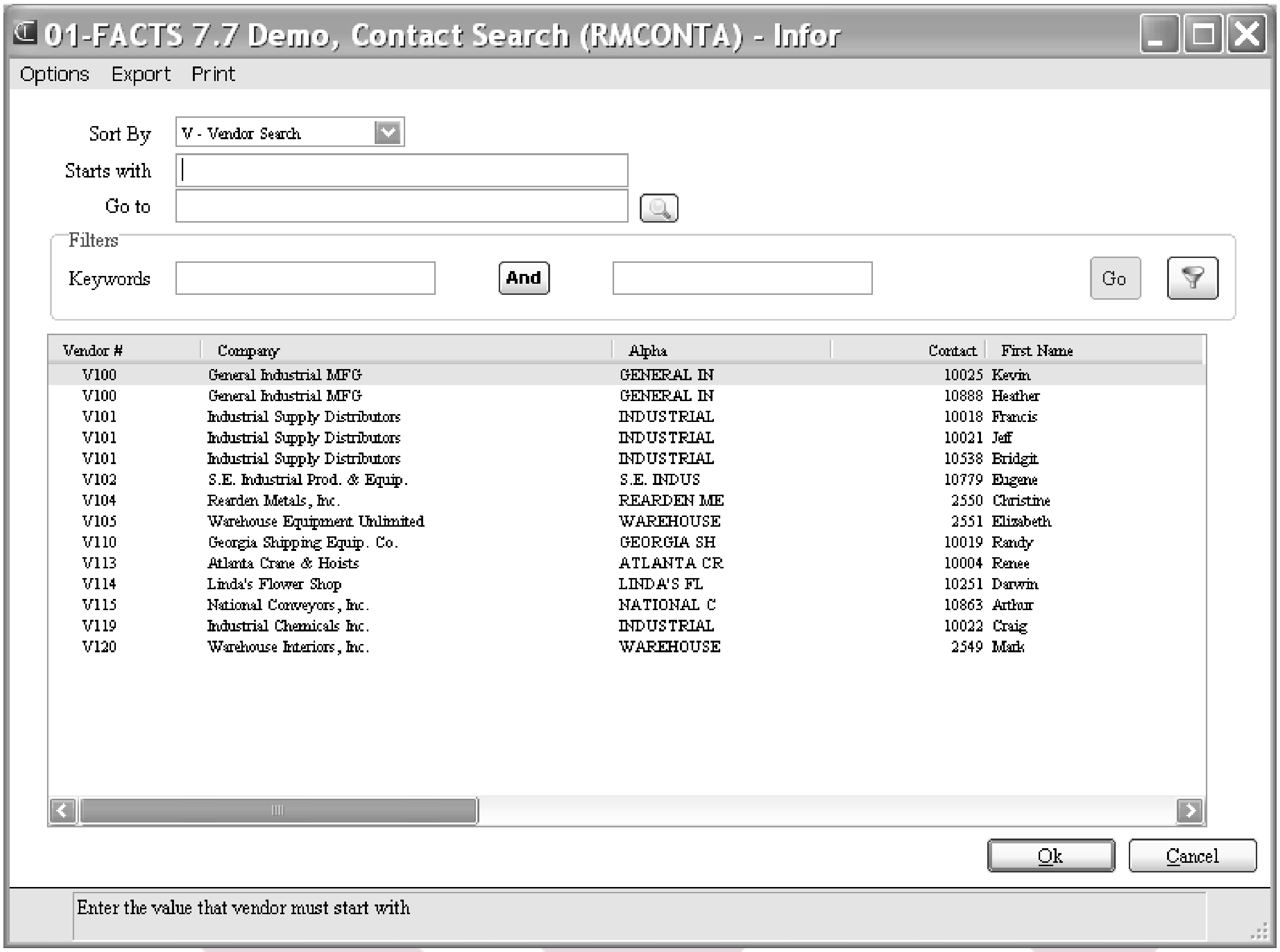
Go to

Filters

Keywords And Go

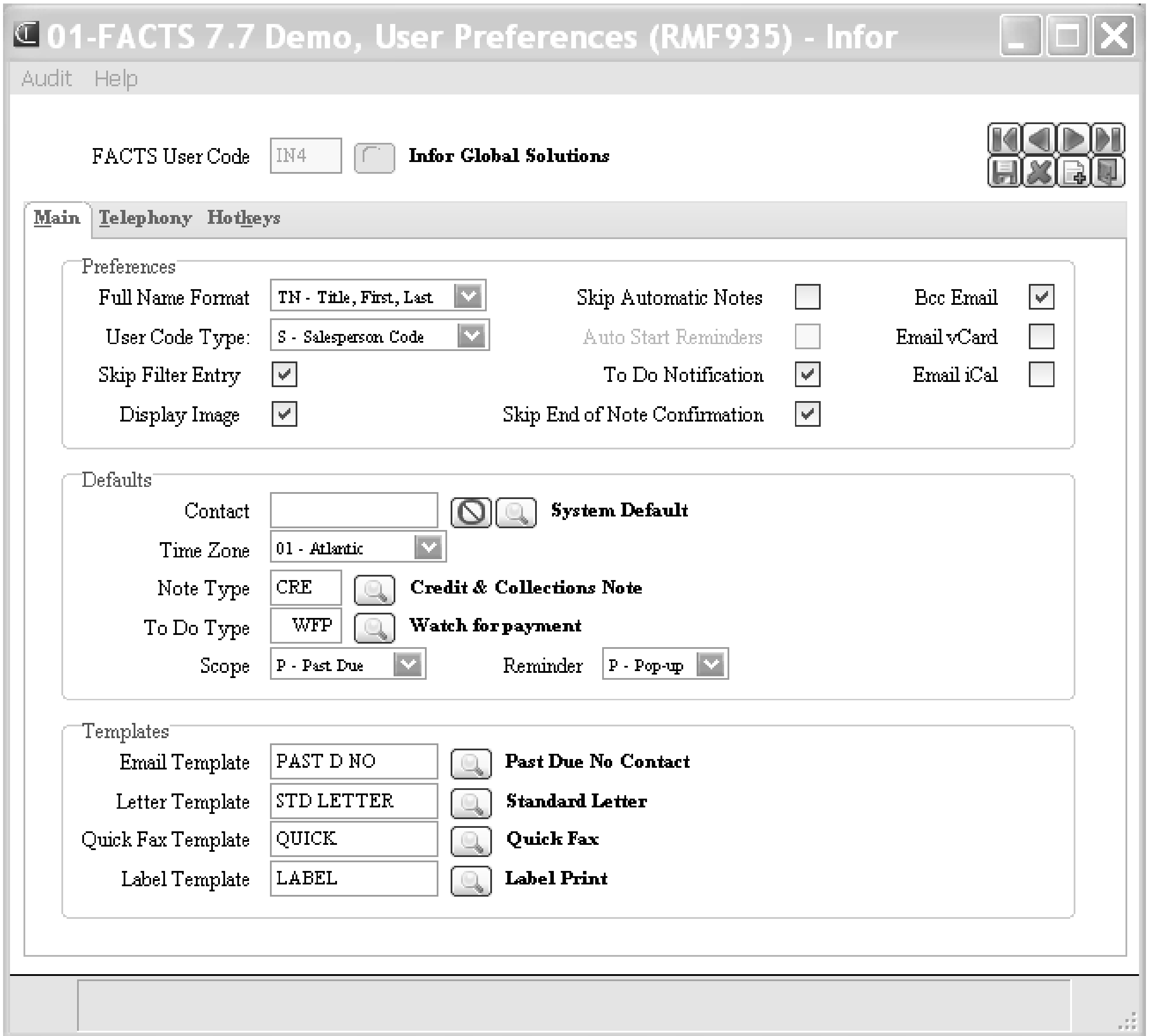
Customer	Company	Alpha	Contact	First Name
C100	Southeastern Industrial Supply	SOUTHEASTE	10000	Julie
C101	Deluxe Equipment Warehouse	DELUXE EQU	2540	Steve
C101	Deluxe Equipment Warehouse	DELUXE EQU	10003	Ron
C101	Deluxe Equipment Warehouse	DELUXE EQU	10015	Bruce
C102	Roark Architectural, Inc.	ROARK ARCH	2538	Bob
C103	Taggart Transcontinental	TAGGART TR	2544	Dagney
C103	Taggart Transcontinental	TAGGART TR	2545	Eddie
C104	Barnes Machinery & Equipment	BARNES MAC	2546	James
C105	Dallas Furniture Mart	DALLAS FUR	10010	Steven
C107	Central Georgia Materials Co.	CENTRAL GE	2547	Gaylene
C109	Southside Plumbing	SOUTHSIDE	10850	Joe
C110	Texas Material Handling Co.	TEXAS MATE	2553	Darwin
C111	Cowboy World	COWBOY WOR	2537	Steve
C111	Cowboy World	COWBOY WOR	2539	Joe
C111	Cowboy World	COWBOY WOR	10011	Ron
C115	Southeastern Service Company	SOUTHEASTE	2556	David
C117	Linda's Flower Shop	LINDA'S FL	10122	Leo
C120	Porsche Pieces, Inc.	PORSCHE PI	2552	Nancy

Alt Search Ok Cancel


01-FACTS 7.7 Demo, Contact Search (RMCONTA) - Infor
Options Export Print
Sort By
V - Vendor Search
Starts with
Go to
Filters
Keywords
And
Go
Vendor # Company Alpha Contact First Name
V100 General Industrial MFG GENERAL IN 10025 Kevin
V100 General Industrial MFG GENERAL IN 10888 Heather
V101 Industrial Supply Distributors INDUSTRIAL 10018 Francis
V101 Industrial Supply Distributors INDUSTRIAL 10021 Jeff
V101 Industrial Supply Distributors INDUSTRIAL 10538 Bridgit
V102 S.E. Industrial Prod. & Equip. S.E. INDUS 10779 Eugene
V104 Rearden Metals, Inc. REARDEN ME 2550 Christine
V105 Warehouse Equipment Unlimited WAREHOUSE 2551 Elizabeth
V110 Georgia Shipping Equip. Co. GEORGIA SH 10019 Randy
V113 Atlanta Crane & Hoists ATLANTA CR 10004 Renee
V114 Linda's Flower Shop LINDA'S FL 10251 Darwin
V115 National Conveyors, Inc. NATIONAL C 10863 Arthur
V119 Industrial Chemicals Inc. INDUSTRIAL 10022 Craig
V120 Warehouse Interiors, Inc. WAREHOUSE 2549 Mark
Ok
Cancel
Enter the value that vendor must start with

SUPPORTING FILE MAINTENANCES

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.
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.

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.

Bcc Email
When checked, a blind-carbon-copy of email sent from RM will be sent to the user's email address. This does not include broadcast email. The default value comes from the Bcc Sender check-box in the Email frame on the Main tab in Static Control F/M. See the Static Control F/M enhancements for more details.

Email vCard
When checked, an email is sent to the user's email address with the Contact information included as a vCard attachment. This is typically needed when the user's address book software is not accessible where the user is running FACTS.

Email Ical
When checked, an email is sent to the user's email address with the calendar information in iCalendar format. This is typically needed when the user's calendar software is not accessible where the user is running FACTS.

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.

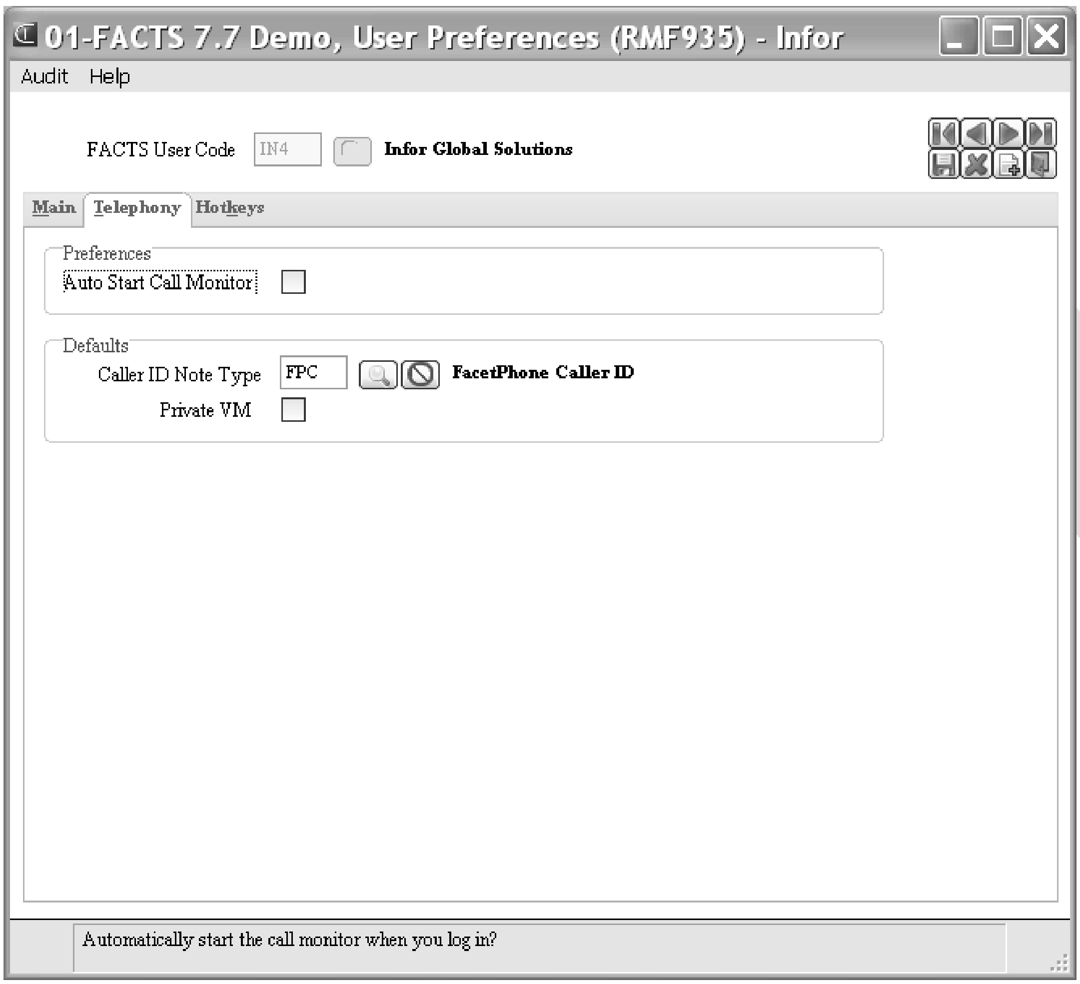
To Do Delete/Change Notification
If checked, the system will send an email notification indicating the user code, date and time of the action.

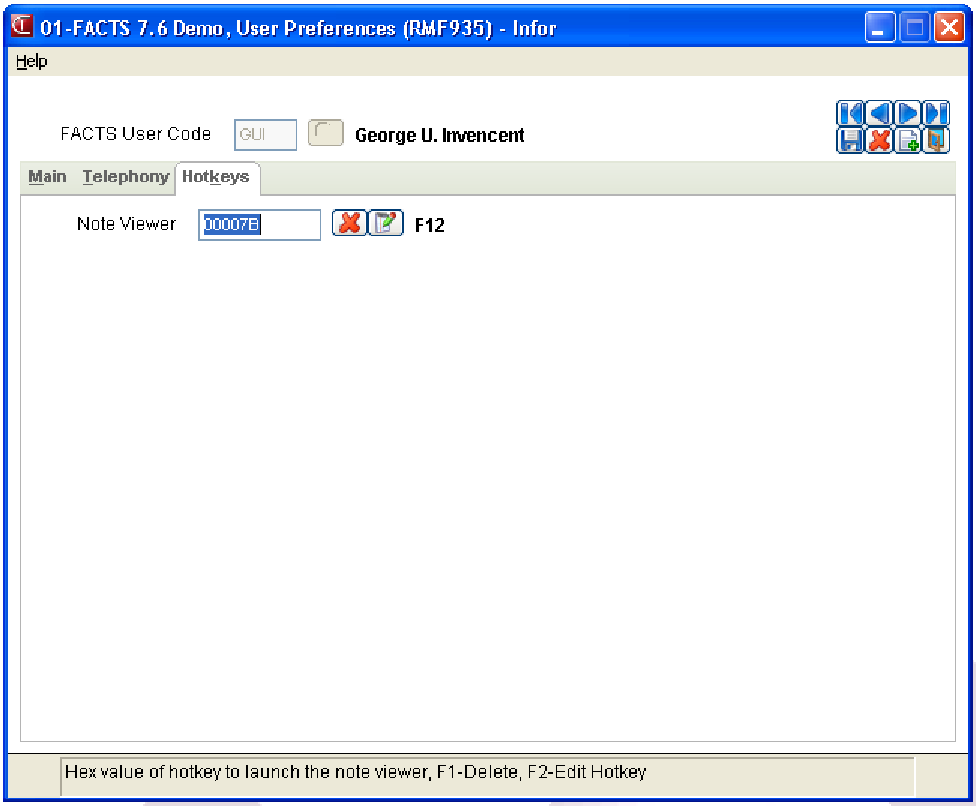
Defaults

Contact, 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.
Reminder: Select Pop-UP, Email, Both, None

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.





The Note Viewer hotkey preference has been added to this new tab. This field is enabled when the FACTS User Code is the same as the logged in user. It displays the hexadecimal value of a hotkey byte sequence. For Windows user-defined function keys (F5 → F24), the key combination associated with the byte sequence is displayed beside the field.

The F1-Delete button is used to delete a selected hotkey.

The F2-Edit button allows Entry of a hotkey. It is recommended that only the F5 → F24 function keys are used for the hotkey, but other specialty keys may also work. The shift and/or control modifier keys may be used in combination with a function key if necessary (i.e. Shift-F12, Control-F12, or Shift-Control-F12). Only key combinations that have not already been utilized for other purposes will be accepted.

Email/Letter Template File Maintenance

Common Elements

Create Note

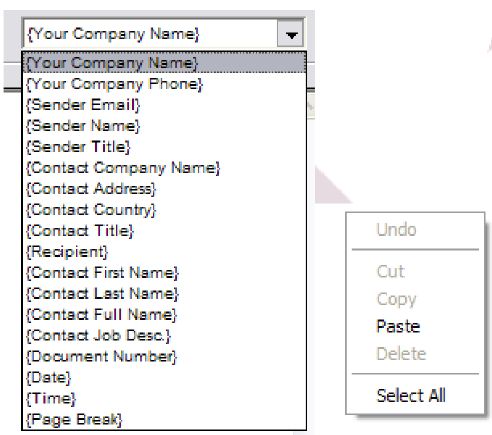
If checked, the system will create a note with the type specified in the Note Type field and the text of the subject line (email) or a message indicating what was sent.
Only in rare occasions would you not want to check this field. Remember that if you have the note that means that you have the action that was taken.

Include Text

If the include text box is checked, the entire content is included in the note.
Only in rare occasions would you not want to check this field. Remember that if you have the note that means that you have the action that was taken.

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.



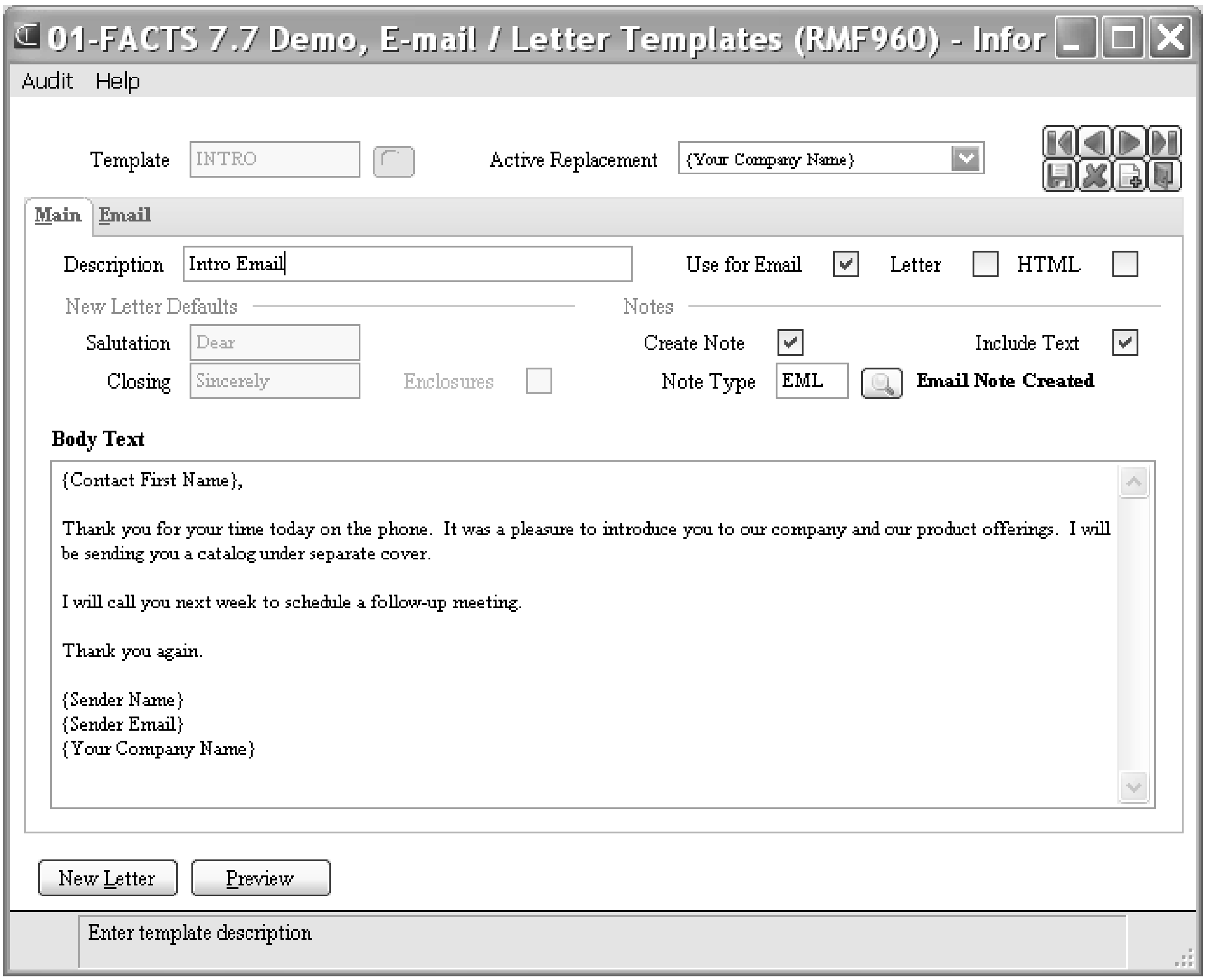
Email/Letter Template F/M is used for creating pre-defined formats for email, fax cover pages and broadcasts.

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.

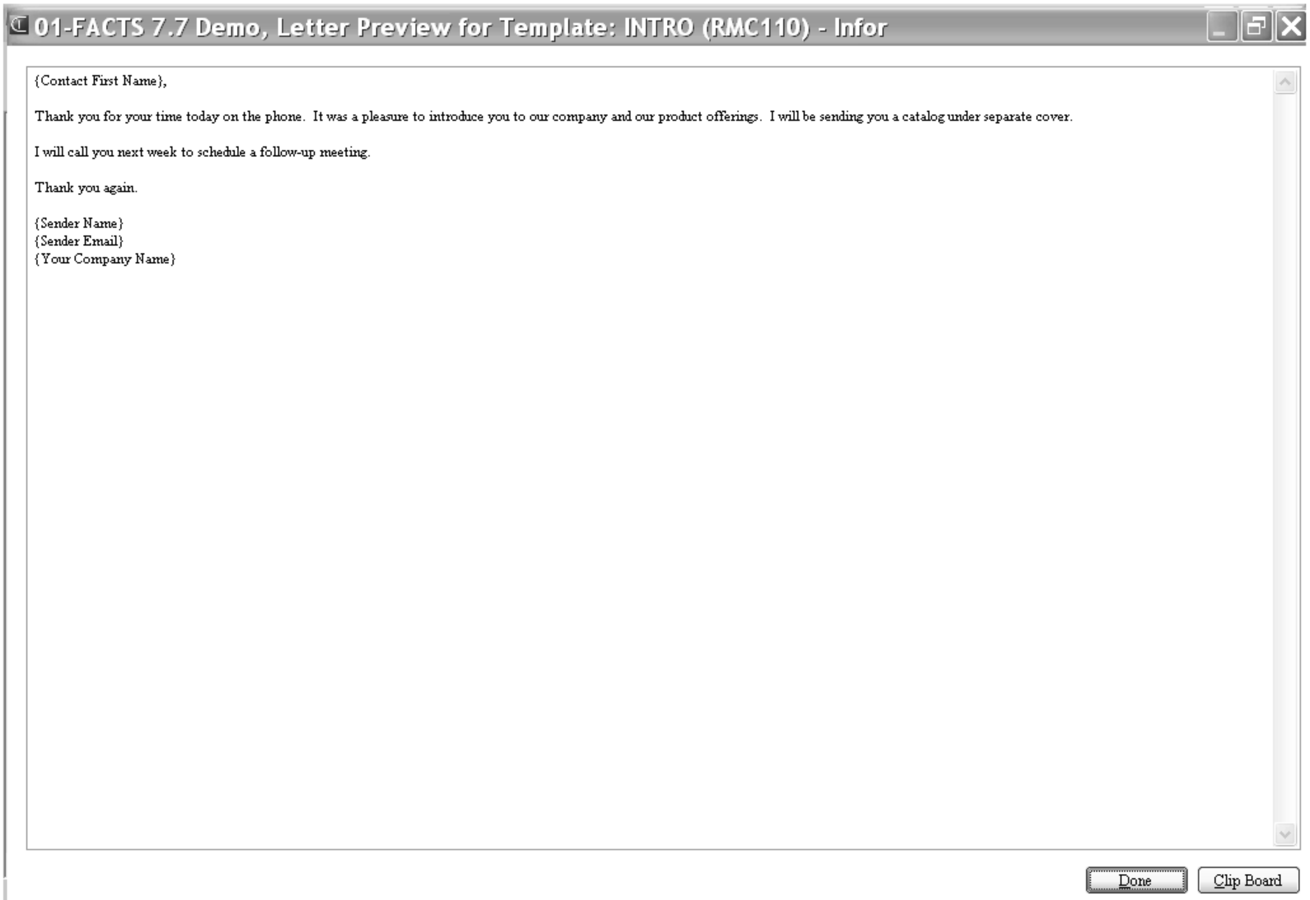
Letter

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.

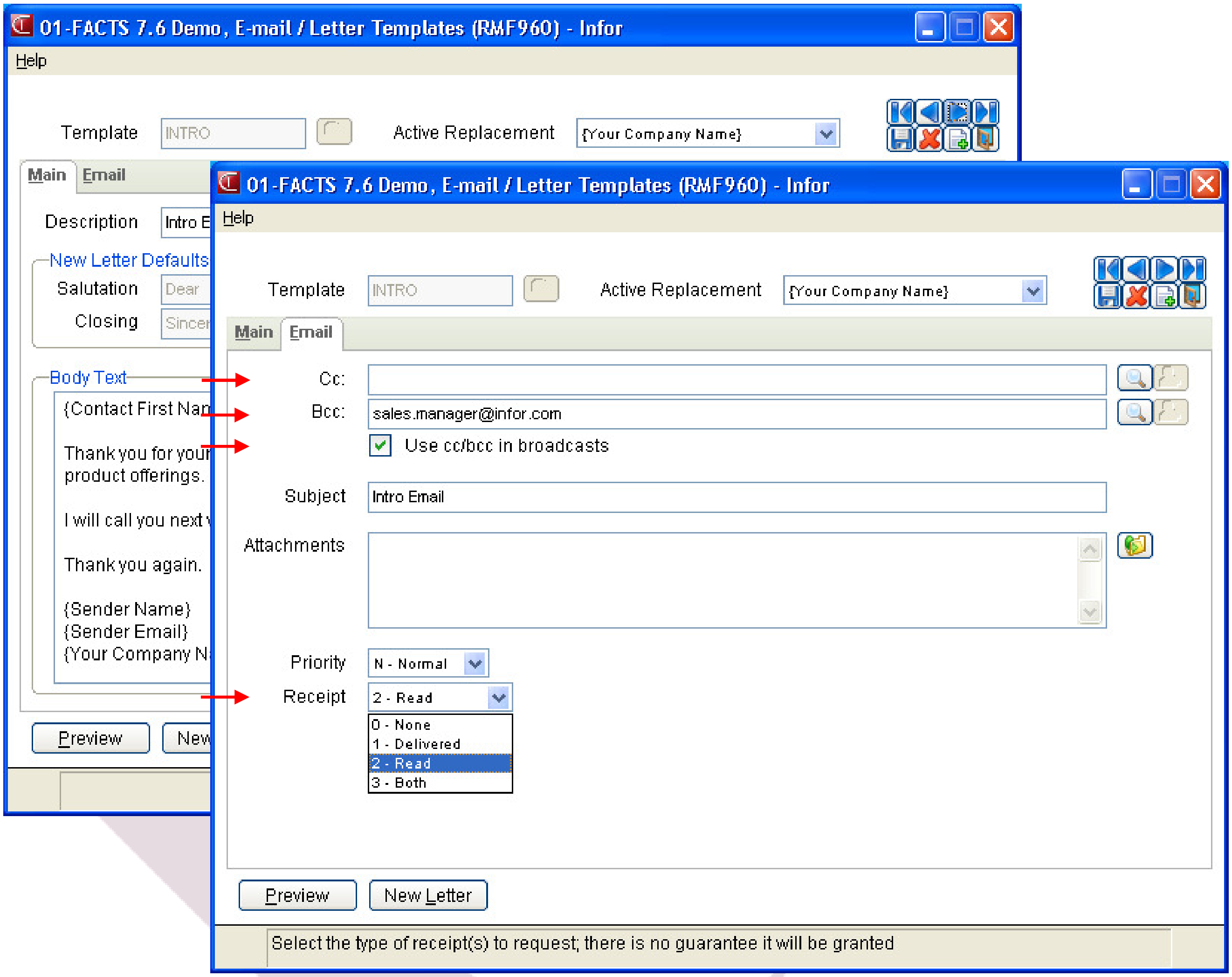
Preview Button – Display the current template in a larger window for viewing. To copy the text to the clipboard, click the 'Clip Board' button and paste it into another application such as Microsoft Word. Text from other applications can also be pasted into your letter.



The maintenance has been organized into two tabs to expand the email properties. New defaults have been added for Cc/Bcc email addresses and Receipt options. The “Use cc/bcc in broadcasts” check-box determines whether the Cc/Bcc email addresses are automatically used during email broadcasts. Three receipt request options[1] are available:

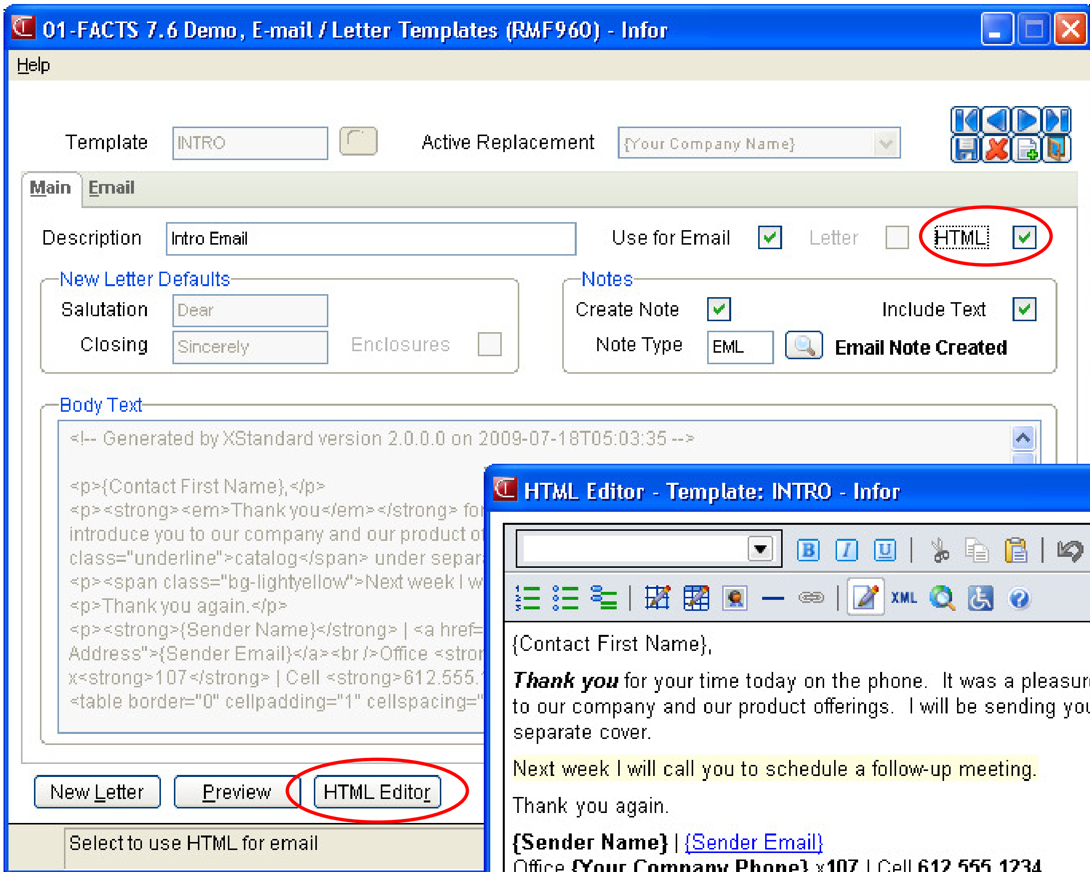
- Delivered – Requests a receipt when the email has been delivered.
- Read – Requests a receipt when the email has been read.
- Both – Requests both a Delivered and Read receipt.

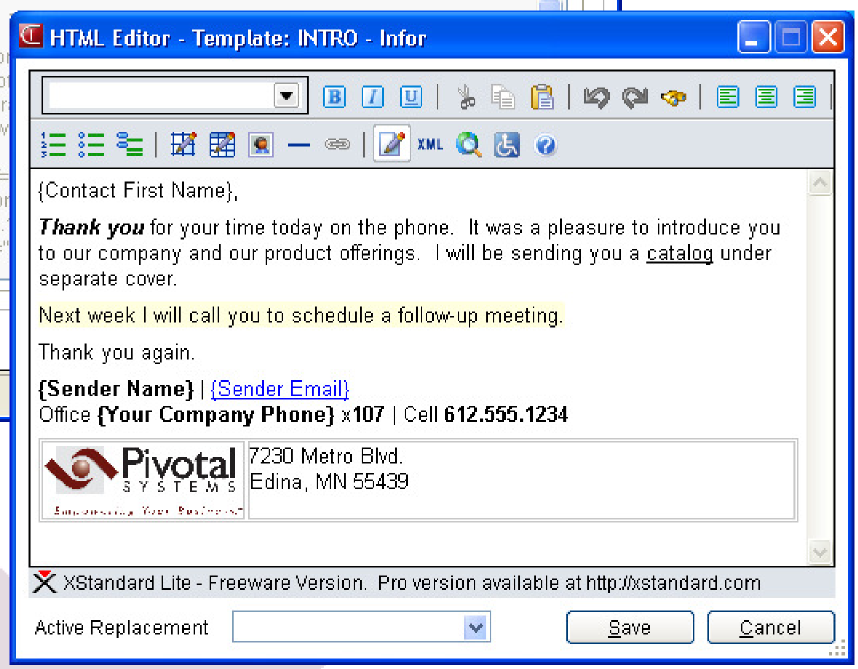
[1] Receipt requests are not guaranteed to be received because they depend on whether the receiving email client/server actually has the ability or is configured to respond to them.



HTML Email is now supported for templates designated for email only. A new checkbox has been added to the Main tab to activate the template for HTML. An interface for the XStandard®[i] XHTML WYSIWYG[1] Editor has also been added. When this free product is installed[2] on the client PC and configured in the HTML Email Control F/M, the HTML Editor button becomes available and the Body Text field is disabled.

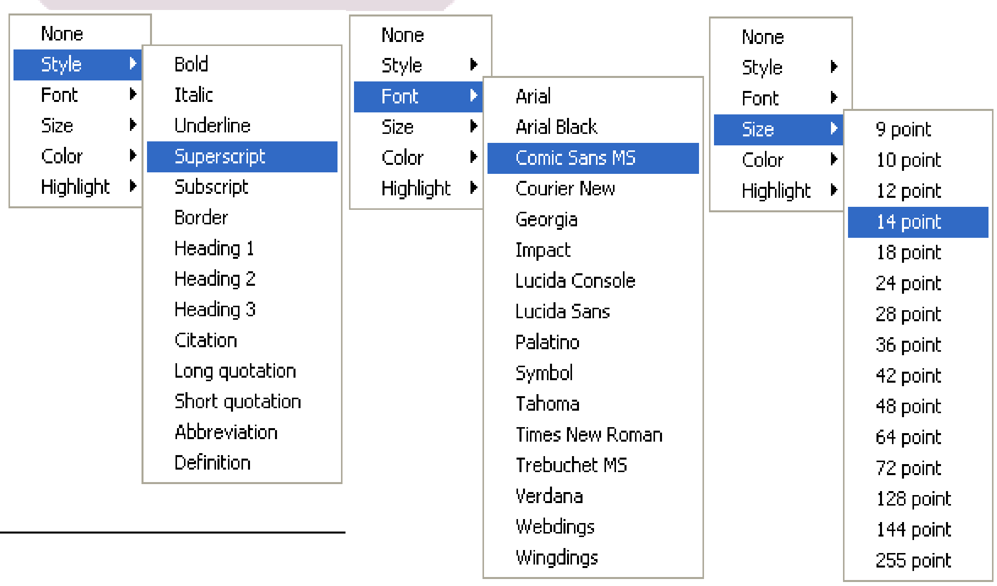
[1] An acronym for "What you see is what you get."
[2] Visit www.xstandard.com for installation, user, and developer documentation.





The editor window is resizable and includes the Active Replacement drop-down box.

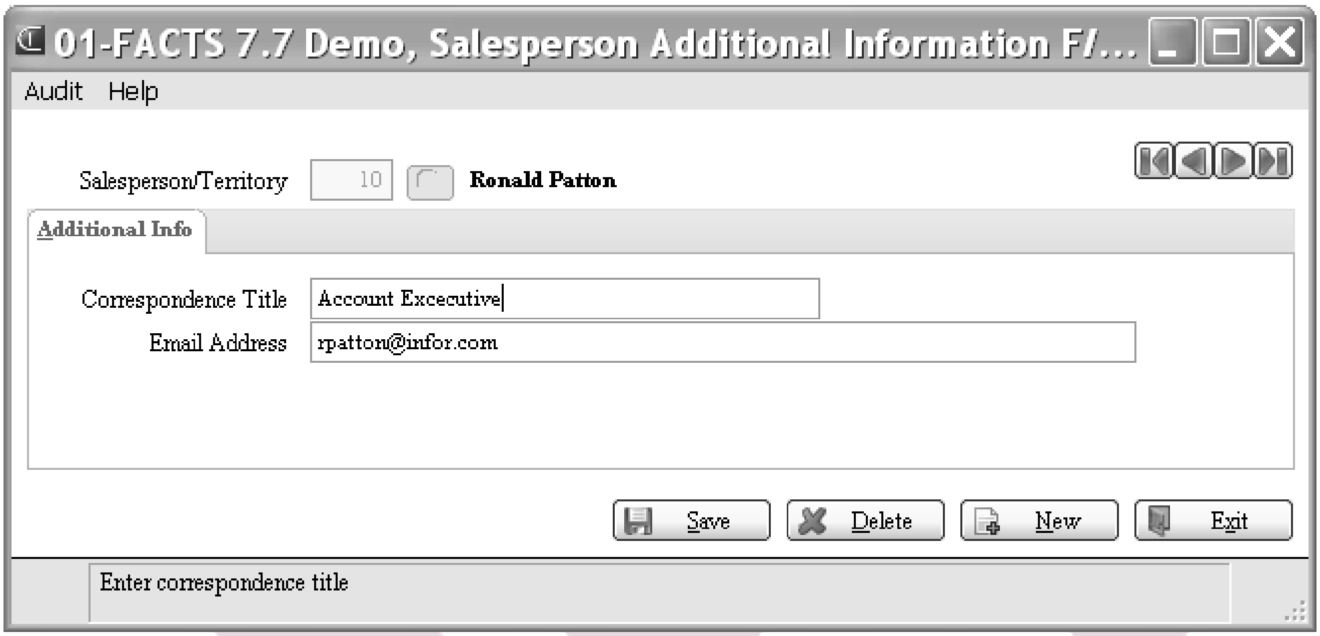
The text style drop-down menu is defined to the editor through a cascading style sheet and an XML file. The menu shown at right is defined by the included files, format.css and styles.xml. They are provided in the rmgear directory. Simply modify to suite and upload them to your website.



Infrequent File Maintenances

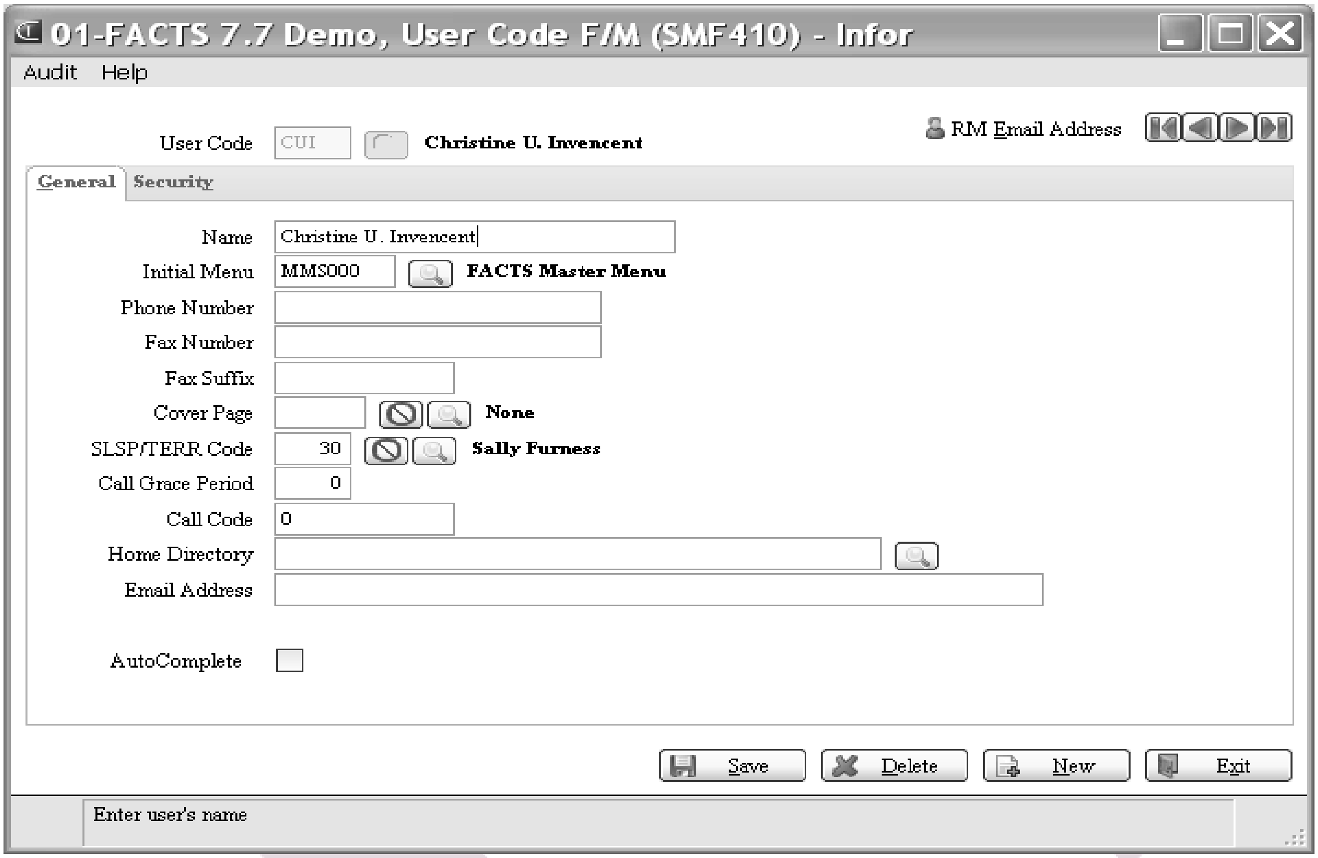
Salesperson Additional Info File Maintenance

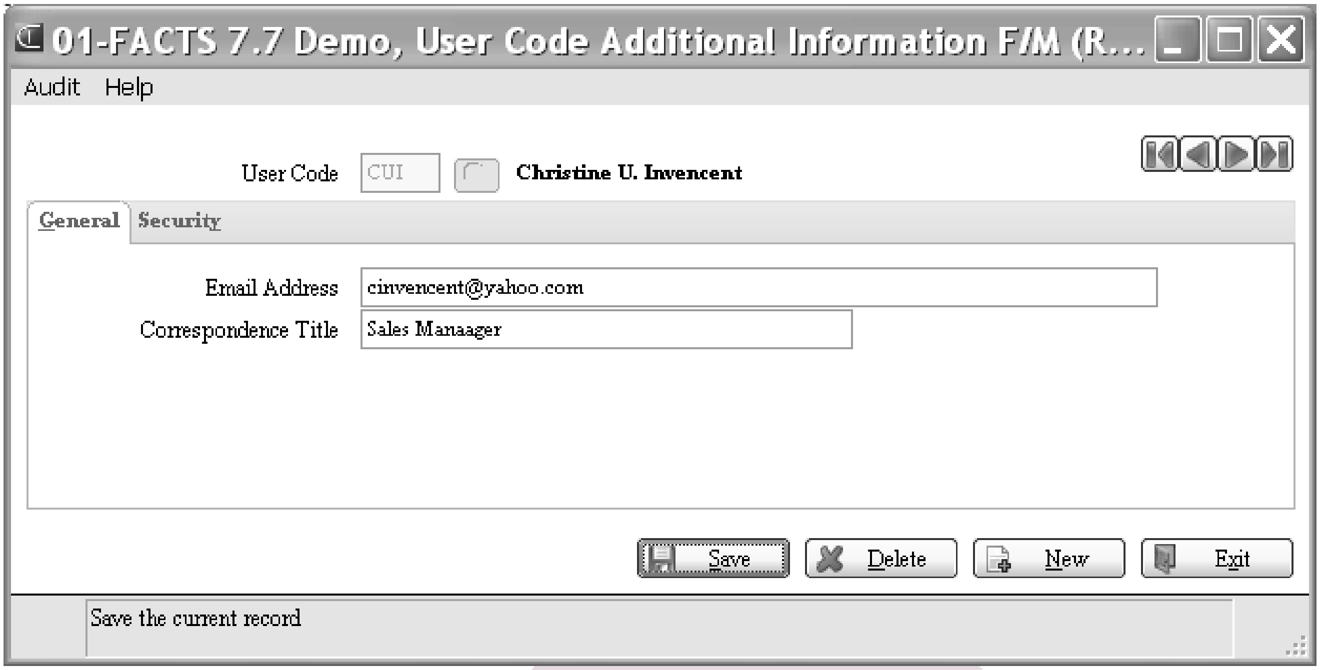
Enter a valid salesperson code and that person's correspondence title if applicable and email address. There is also a link in the Salesperson/Territory Code F/M that will allow you to add or change the email address directly from that program.



User Code Additional Info File Maintenance

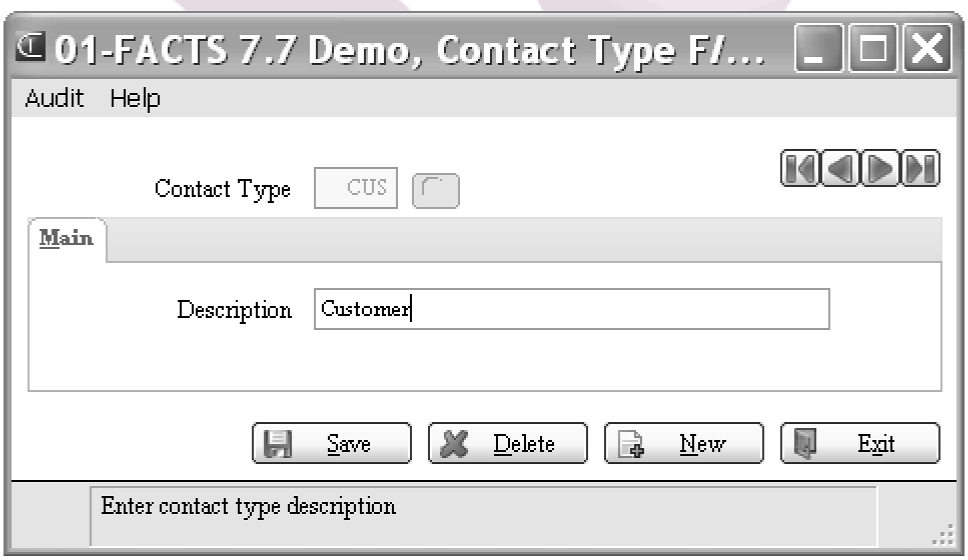
Enter the FACTS user code, that person's correspondence title, and email address. There is also a link in the User Code F/M that will allow you to add or change this information directly from that program.





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.



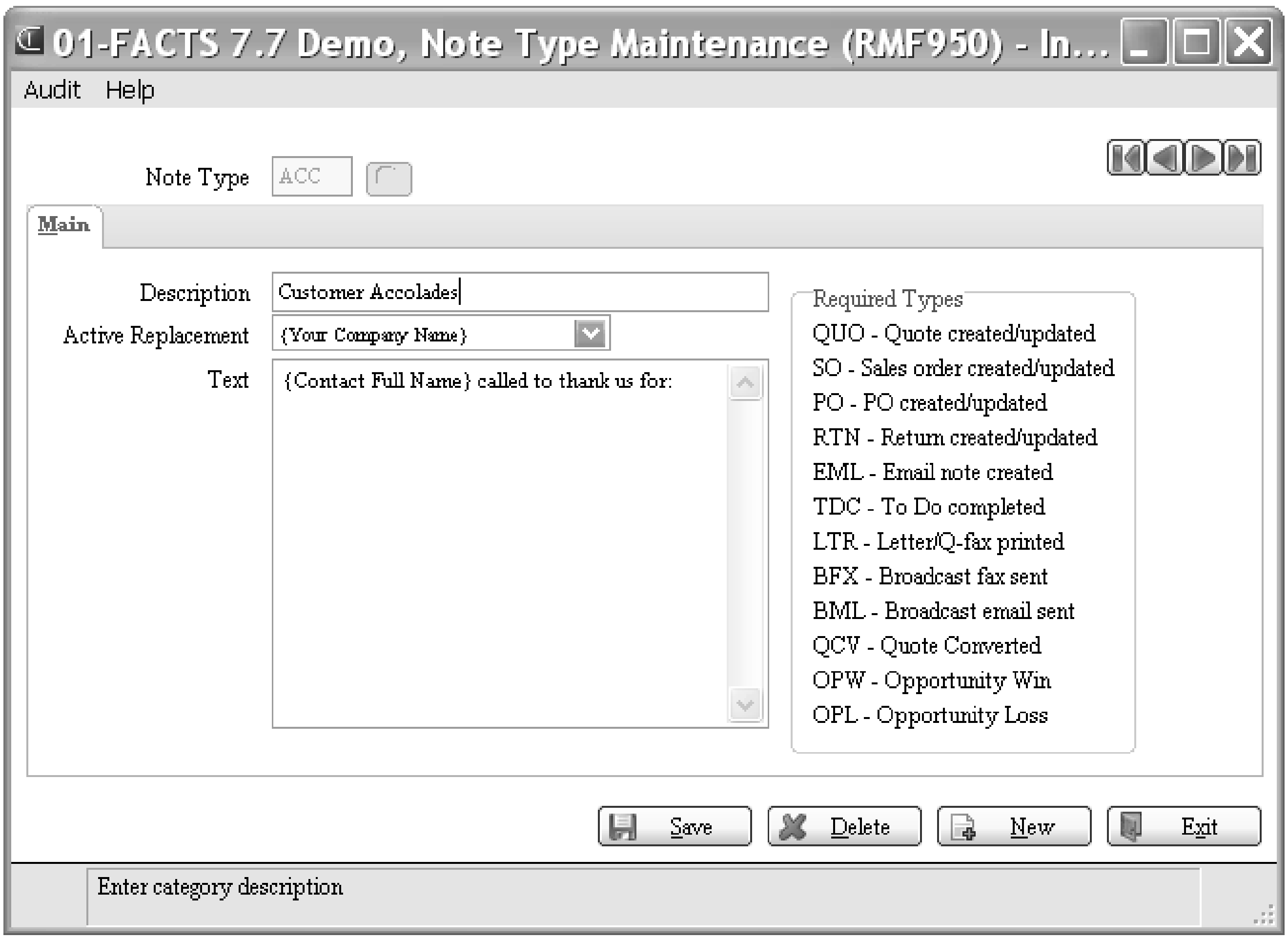
It is strongly recommended that the contact types include at a minimum: Customer, Prospect, Collections, Other and Vendor. Types are available to be used as filtering throughout the system. So often people think about contacts as being Vendor or Customer related, however, a contact could be the other type. Think of a personal Rolodex and having access to contact information outside the realm of Vendor and or Customers. This could be *anything from restaurants in the area that you use to bring in food for your staff, handy men that are used to repair things around the house or even staff phone numbers to be made available to others.*

Also, when thinking about the Opportunity Work Center storing information on the secretary, receiptionist, or IT person that you first must encounter before you can speak to someone who can actually make decisions. This means that if you create a type for them they will not be part of any of the lists that might be created later because they were part of the sales process. However, storing information on their likes/dislikes, work - schedules etc is important until you can get to the decision maker.

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.

Remember that Notes can be viewed and or filtered easily by the note type. Do not overwhelm your end user with a ton of choices. However, do include things that you feel are important. Examples: complaints (shipping, pricing etc) being non-specific complaints means that you will need to read through those notes. However, if you were to create pricing notes that would give everyone the ability to zoom to pricing issues. This gives you something to measure internally. The measurement could be did someone create contract pricing correctly for this customer.



Store Statistics

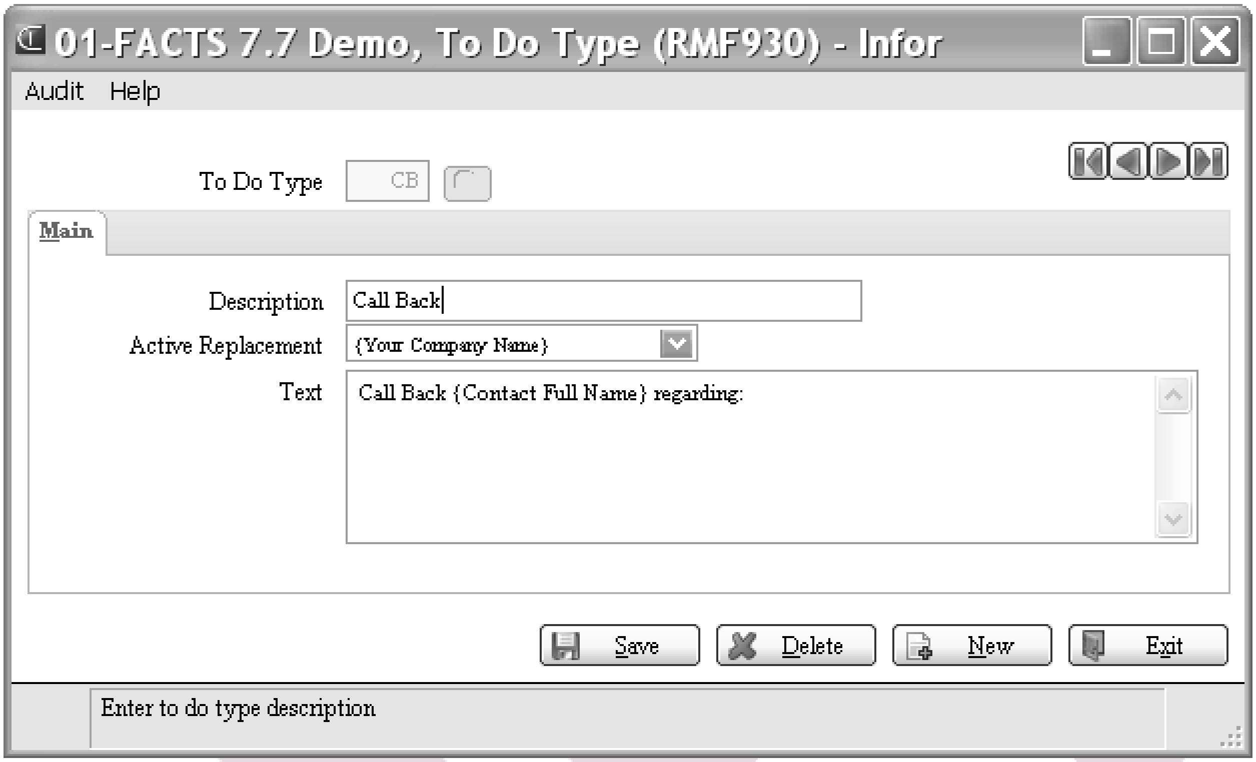
This feature is for future release

Required Types

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

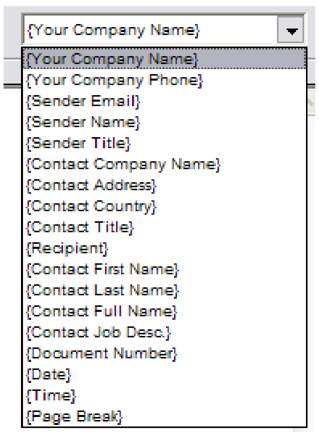
To Do Type File Maintenance

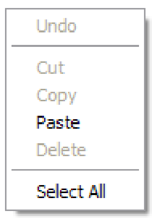
You can define different To Do Types in the File Maintenance program. This is useful for automating text descriptions and for inquiring and analysis. There is also the option to have an active replacement within the text that is entered. File Types are three alphanumeric characters; a search is available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

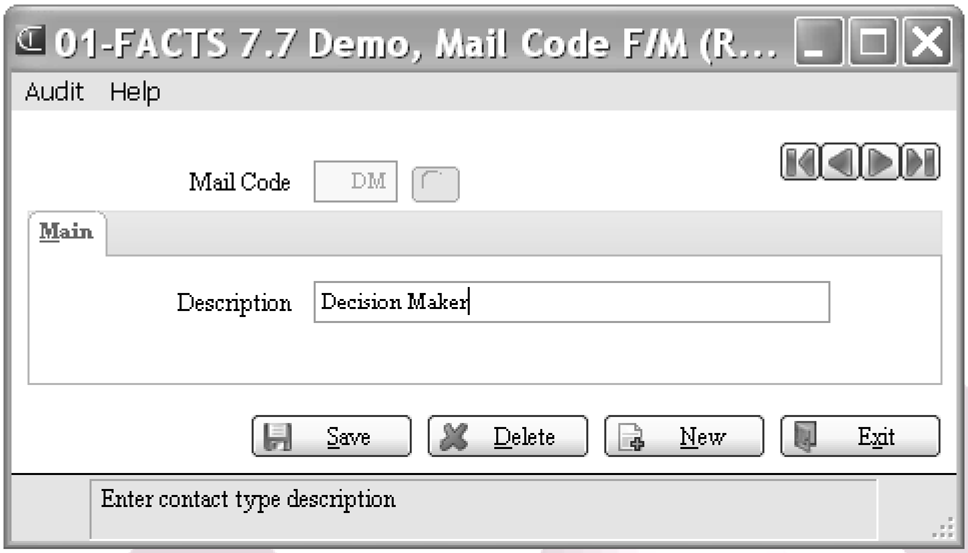




New technology has been added that will allow adding Active Replacement Fields much easier. So if there is something that you would like to add please contact your affiliate.

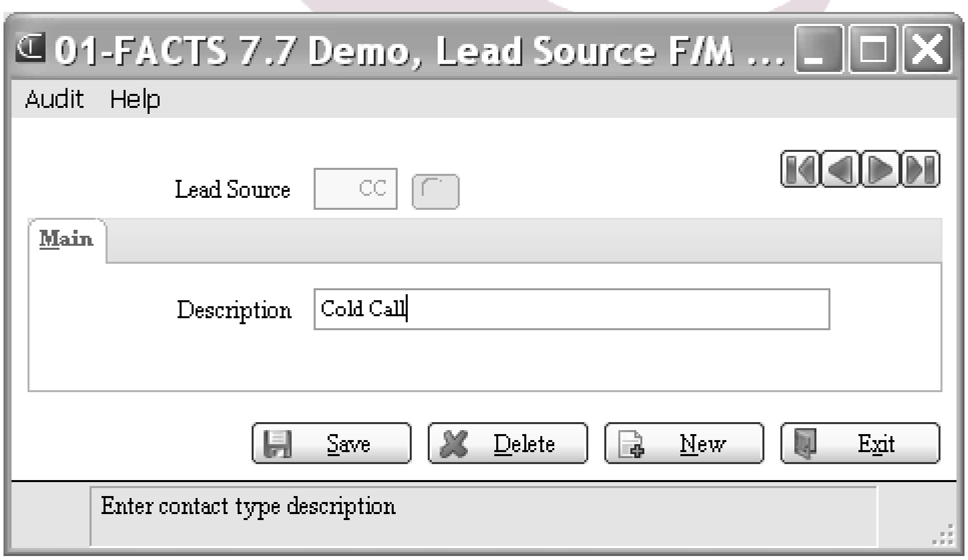
Mail Code File Maintenance

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.



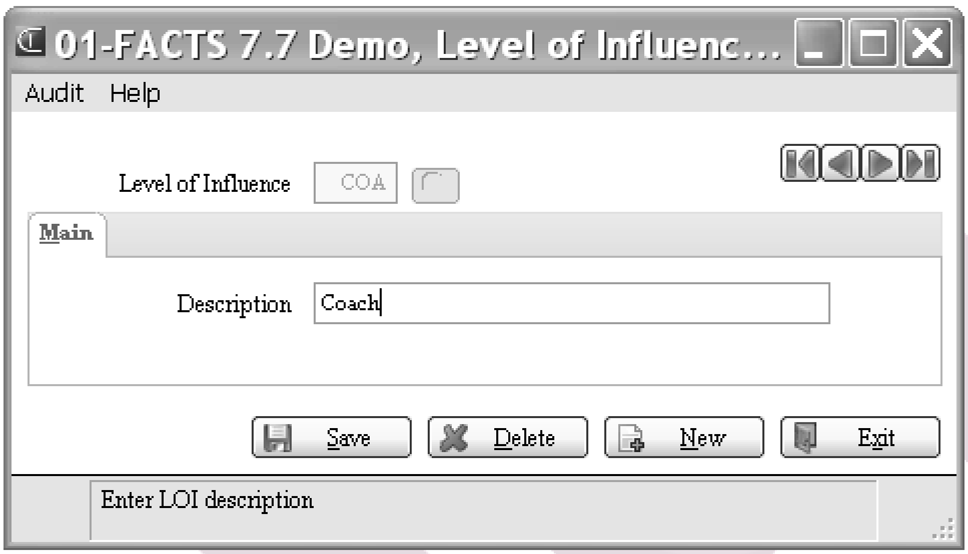
Lead Source File Maintenance

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.
This could be used for purchased leads because you could then back into the sales generated by each lead source.



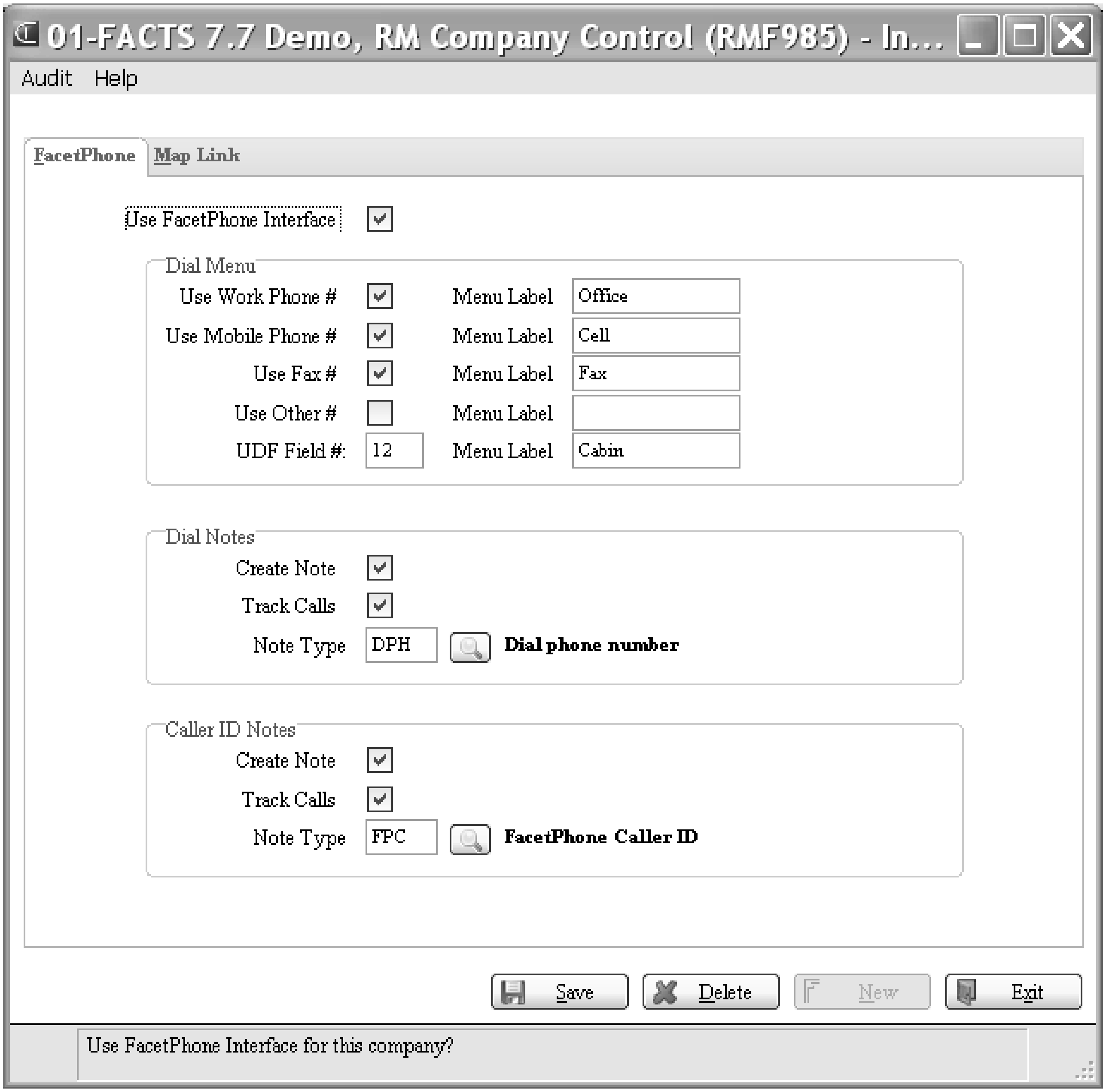
Level of Influence File Maintenance

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.
When an Opportunity is started sometimes the person being spoken to has influence to get you to the appropriate person but cannot sign the actual contract. However, giving complete visibility within RM Opportunity Manager is very important so that all parties understand the likelihood of closing the sale. We recommend using at least the following types: Coach, Decision Maker, Influencer, Product Champion, Undefined Role, Vendor on Opportunity.



RM Company Control File Maintenance

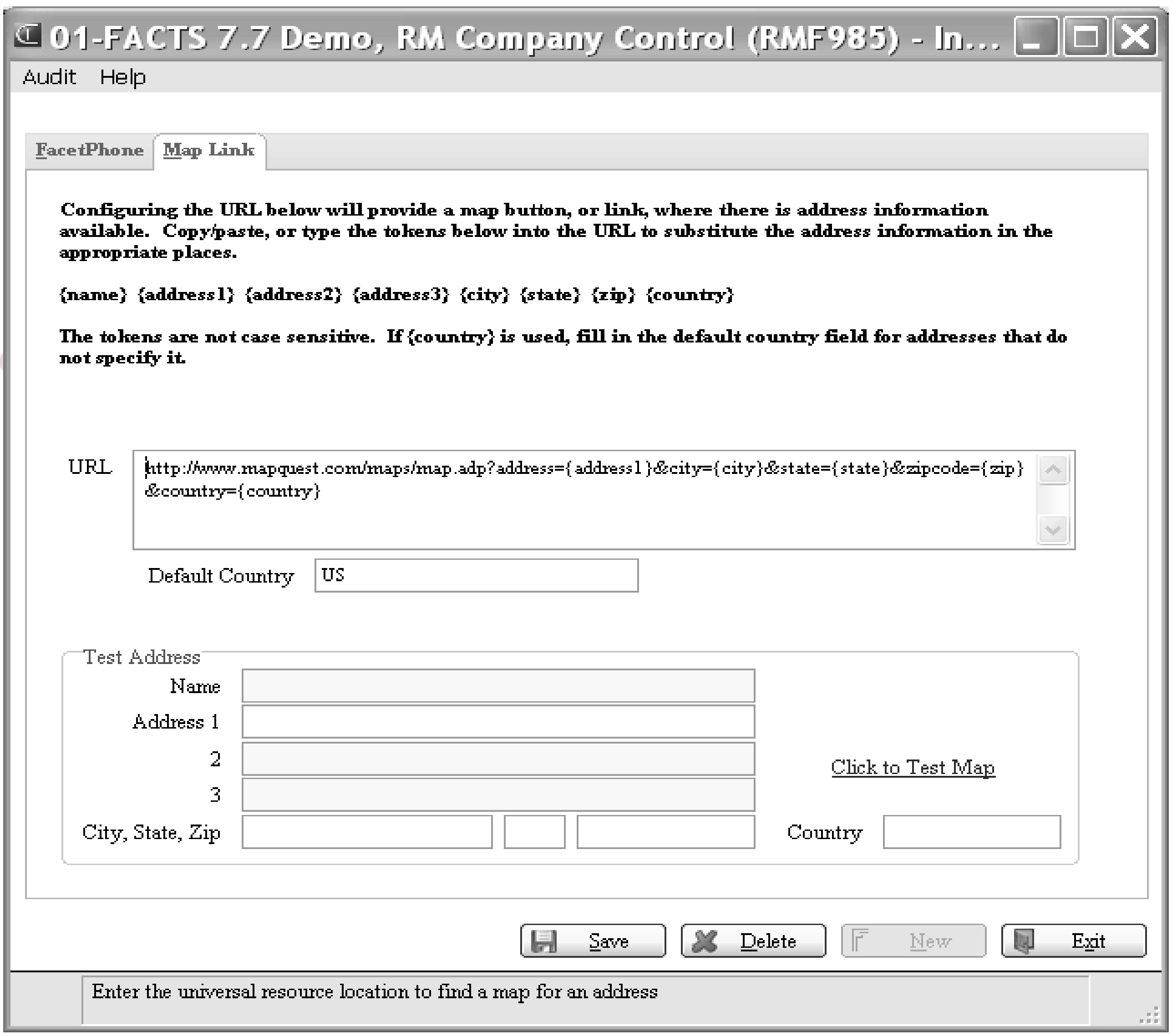
Use the FacetPhone Control to turn on and configure the FacetPhone integration with relationship management. This file maintenance allows the system administrator to define the labels that display for the phone numbers when using the auto dial button. As well as specify if they want to create a note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

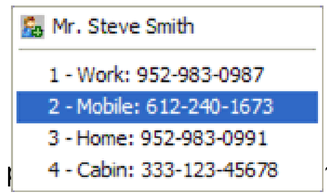
Map configuration:



- **URL –** Enter the web address and parameters inserting the address tokens in the appropriate places. The tokens will be replaced with the corresponding address information when the link or menu item is chosen.
- **Default Country –** Enter the country to use when it's not specified by the address.
- **Test Address –** To test the URL, enter an address. Only the fields corresponding to the tokens inserted in the URL will be enabled for entry. Click the hyperlink to test the Map access.

RM FACTS FacetPhone® Caller ID Interface

The FacetPhone® interface supports outbound dialing as well as inbound caller id and phone number recognition. In addition, it provides a portal to all of the Relationship Management features and functionality within FACTS.

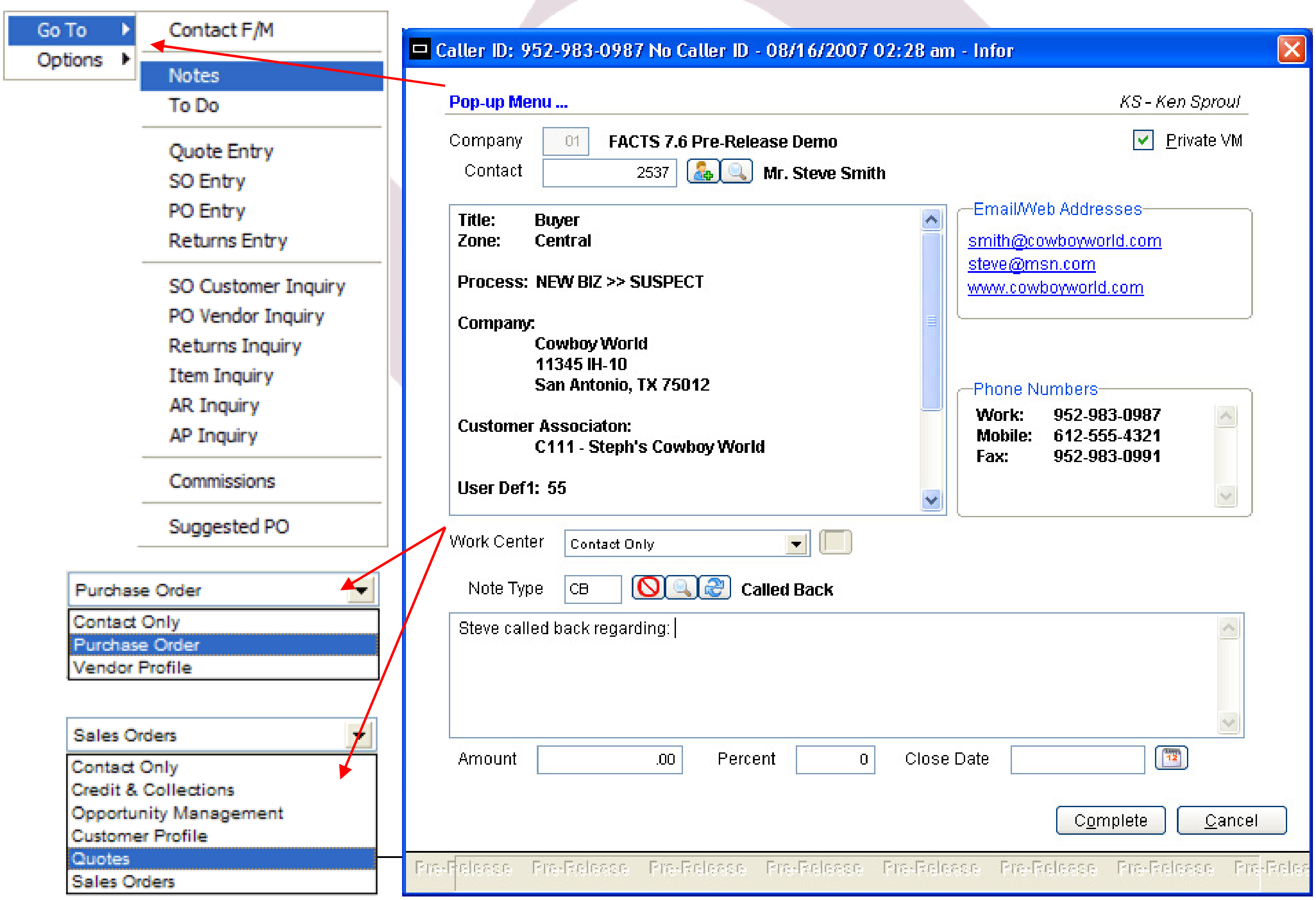


Outbound Dialing:

- Select from up to 4 phone numbers when dialing
- Automatic contact note created recording call duration and status
- Optional contact note relating to call content
- Dial icons / buttons are available in all RM programs, order entry, quotes, and vendor inquiries

Inbound Calls:

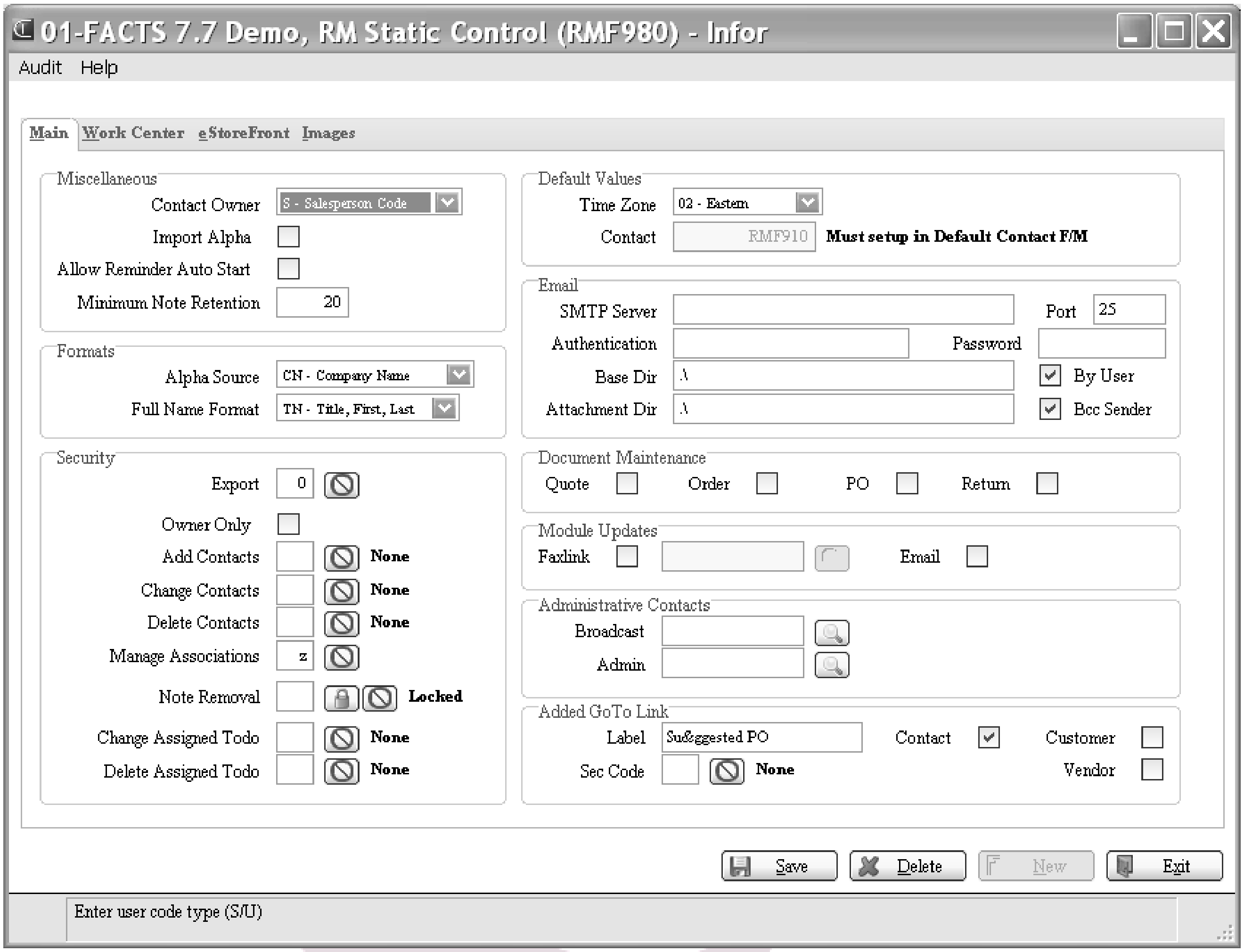
- Automatic contact note created recording call duration and status
- Context specific note
- Contact lookup by phone #, company name and contact search if no matches are found
- Automatic association of phone # to contact, customer or vendor
- Supports multiple phone numbers for a single contact
- Full featured, association specific contact pop-up – see next page



- The **Pop-up Menu..** button provides access to the same Go To & Options menus found throughout Relationship Management
- Work Center drop box is association specific and provides direct access to customer or vendor related Work Centers
- When a Work Center item is selected, both the call duration note and the pop-up note are written back to the Work Center
- Recorded calls can be attached to the item selected from the Work Center
- Send email or access a contact's web site with hyperlinks
- See useful contact information in scrollable info box

For all the details of this new feature, see the RM 7.6 FacetPhone® Interface manual.

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.

Import Alpha - check-box was added to import the customer/vendor alpha sort when importing the address information. The **Minimum Note Retention** field was added to the Miscellaneous frame on the Main tab. The Note Removal program and the menu option in Note Query utilize this value to retain the specified number of notes per contact.

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

Formats

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

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

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

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

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.

Manage Associations: Controls access to the Manage Associations window in Contact F/M. The hyperlink will not appear when the user does not have the specified security.

Note Removal: Controls whether notes can be removed in Note Entry and Notes Query programs. The lock option prohibits the removal of notes, which is the default setting.

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:

- Time Zone
- Default Contact File Maintenance

Email

The information will be entered regarding outgoing email:

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

- Bcc Sender - has been added to the Email frame of the Main tab. It is the default setting for automatically sending a blind-carbon-copy of email sent from RM to the sender (user's email address). This does not include broadcast email. The check-box, Bcc Email, in User Preference F/M, will override this default setting.

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

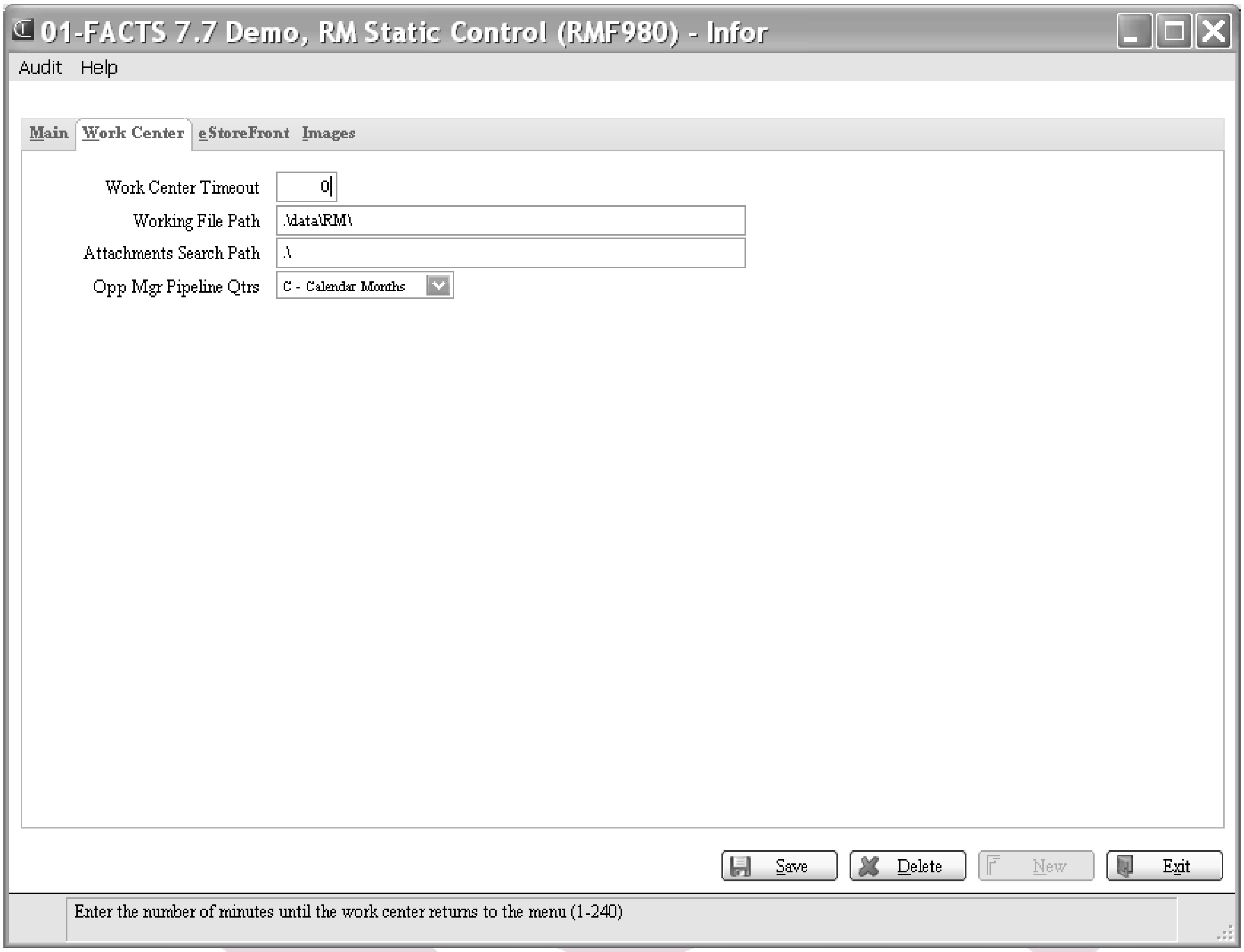
Admin

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.

Opportunity Manager Pipeline Quarters

Controls how the quarters in the Pipeline by Process/Stage pane are calculated in the Opportunity Manager.

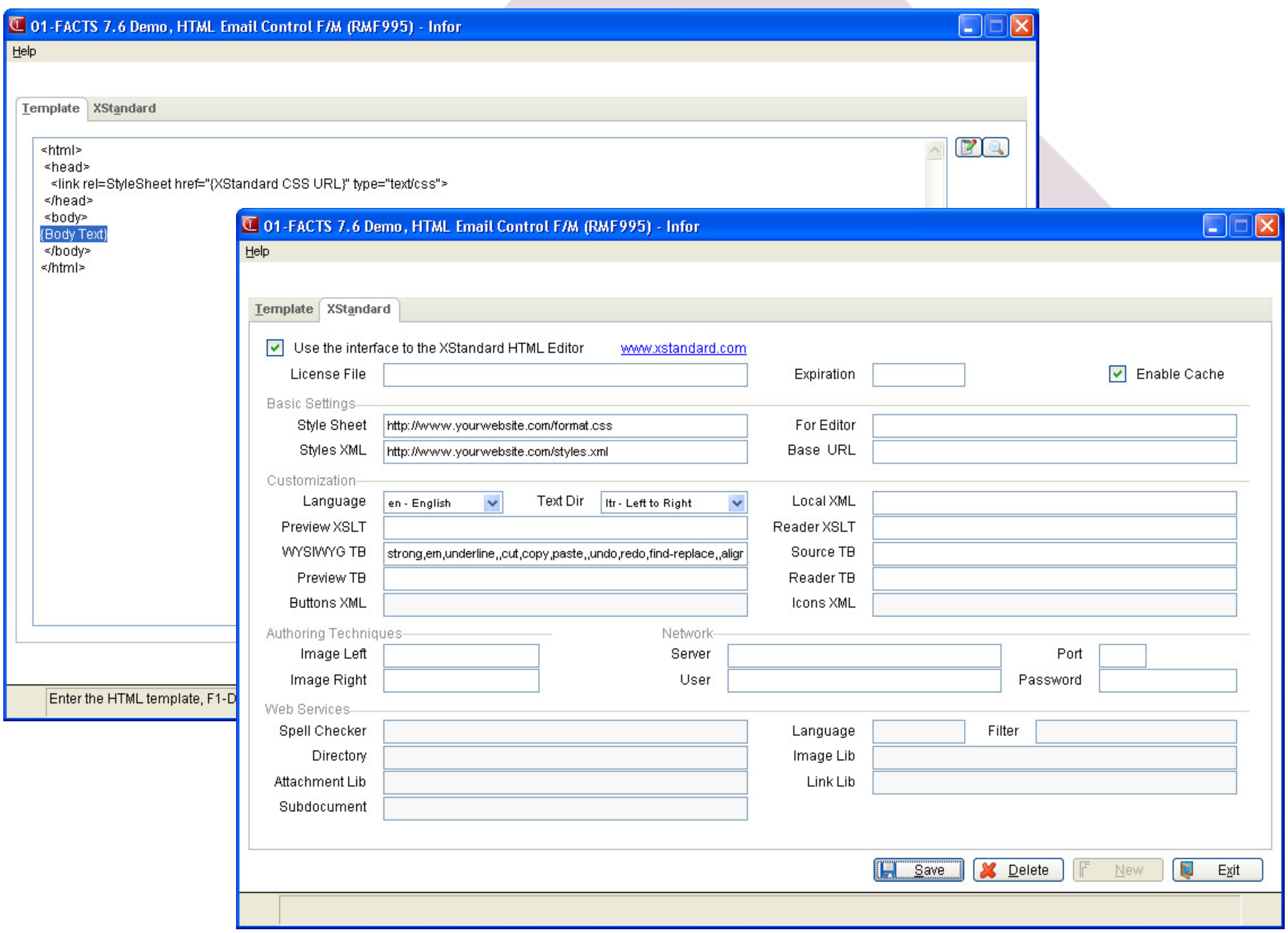
Calendar Months –The quarters end of the last of the month for the 3^{rd}, 6^{th}, 9^{th}, and 12^{th} months. The first quarter would end March 31^{st}, the second June 30^{th}, the third September 30^{th}, and the fourth December 31^{st}.
Fiscal Months –The quarters end on the last day of the month for the 3^{rd}, 6^{th}, 9^{th}, and 12^{th} periods. If the first period is September, the first quarter would end November 30^{th}, the second February 28^{th} or 29^{th}, the third May 31^{st}, and the fourth August 31^{st}.
Fiscal Periods – The quarters end on the period ending date for the 3^{rd}, 6^{th}, 9^{th}, and 12^{th} periods. The ending dates are determined by the future ending dates in the G/L Standard Pd Ending Dates F/M. This option requires that a full year of future period ending dates are available at all times.

HTML Email Control F/M (RMF995)

This optional new file maintenance is used to define the HTML template and use of the XStandard XHTML WYSIWYG Editor including its properties.

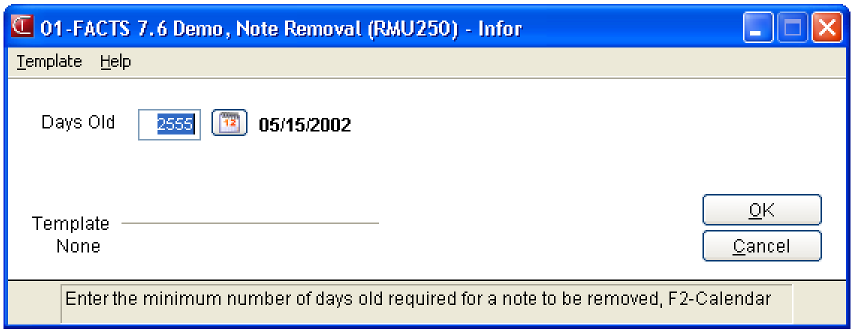
In the Template tab, enter the HTML needed excluding the body. The body is defined in each Email template. This is where styles or a cascading style sheet reference can be specified. There is an active replacement, {XStandard CSS URL}, which can be used to insert the cascading style sheet specified for the XStandard HTML Editor. Insert the active replacement text, {Body Text}, between the <body> and </body> tags.

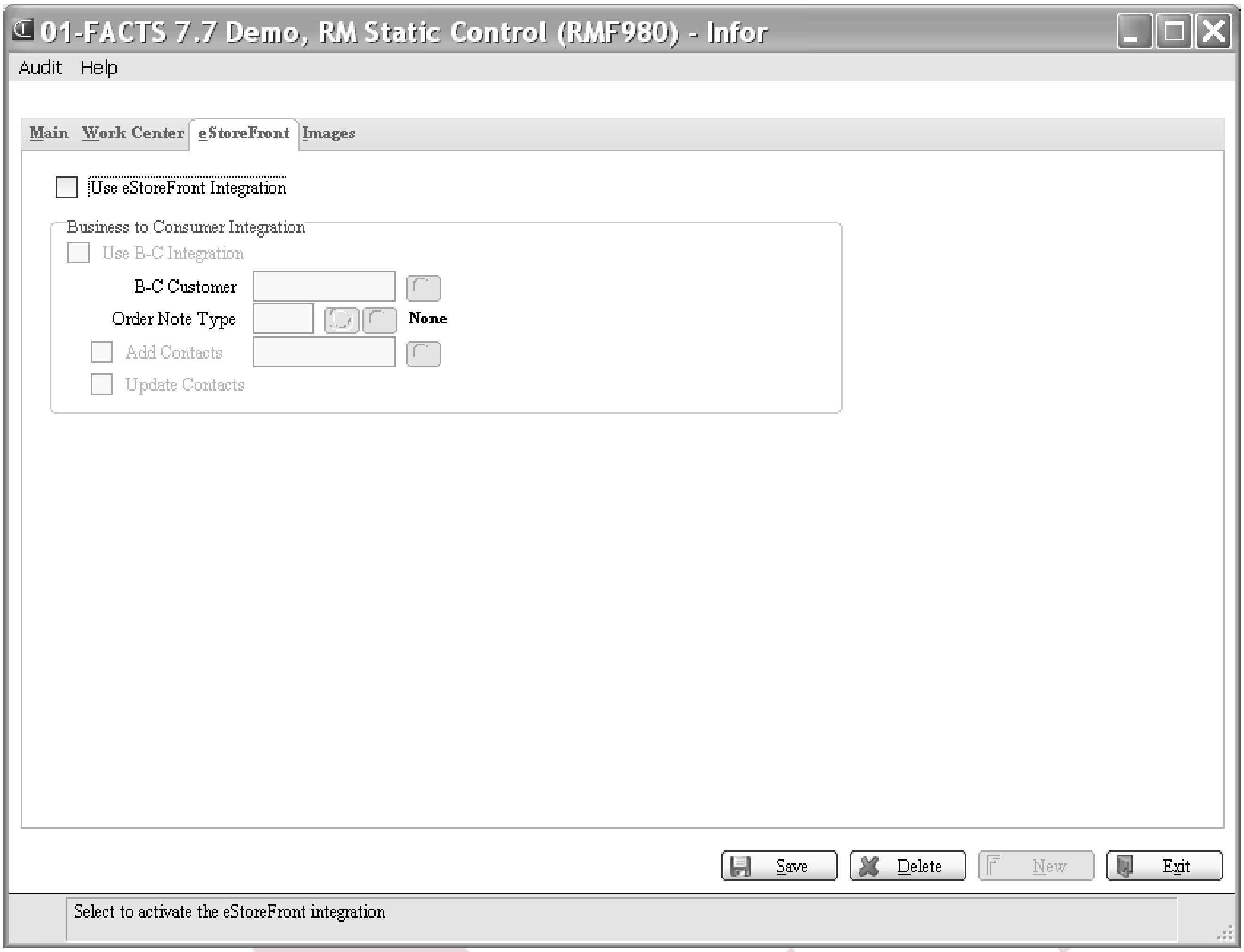
To utilize the XStandard HTML Editor, check the "Use …" box and configure the properties applicable to your needs. The editor is available from the XStandard website, www.xstandard.com, in both a "lite" version for free commercial use, and a "pro" version for a nominal fee per user. It must be installed on each client PC. Refer to the developer documentation on the website for an explanation of the properties. Most of the "pro" version features are geared for website development. Included in the rmgear directory are default Style Sheet (format.css) and Styles XML (styles.xml) files which provide a useful variety of text styles, fonts, font sizes, font colors, and font background colors. Simply modify them to suite your needs (if necessary), upload them to your website, and specify the URL for each in the Style Sheet and Styles XML property fields.



Note Removal (RMU250)

This program will remove notes that are a specified number of days old or older. It respects the Minimum Note Retention number specified in the RM Static Control F/M. A Calendar option is available to select a date. The days old will be calculated as the number of days between today's date and the date selected. The default value is 2555 which is approximately 7 years.

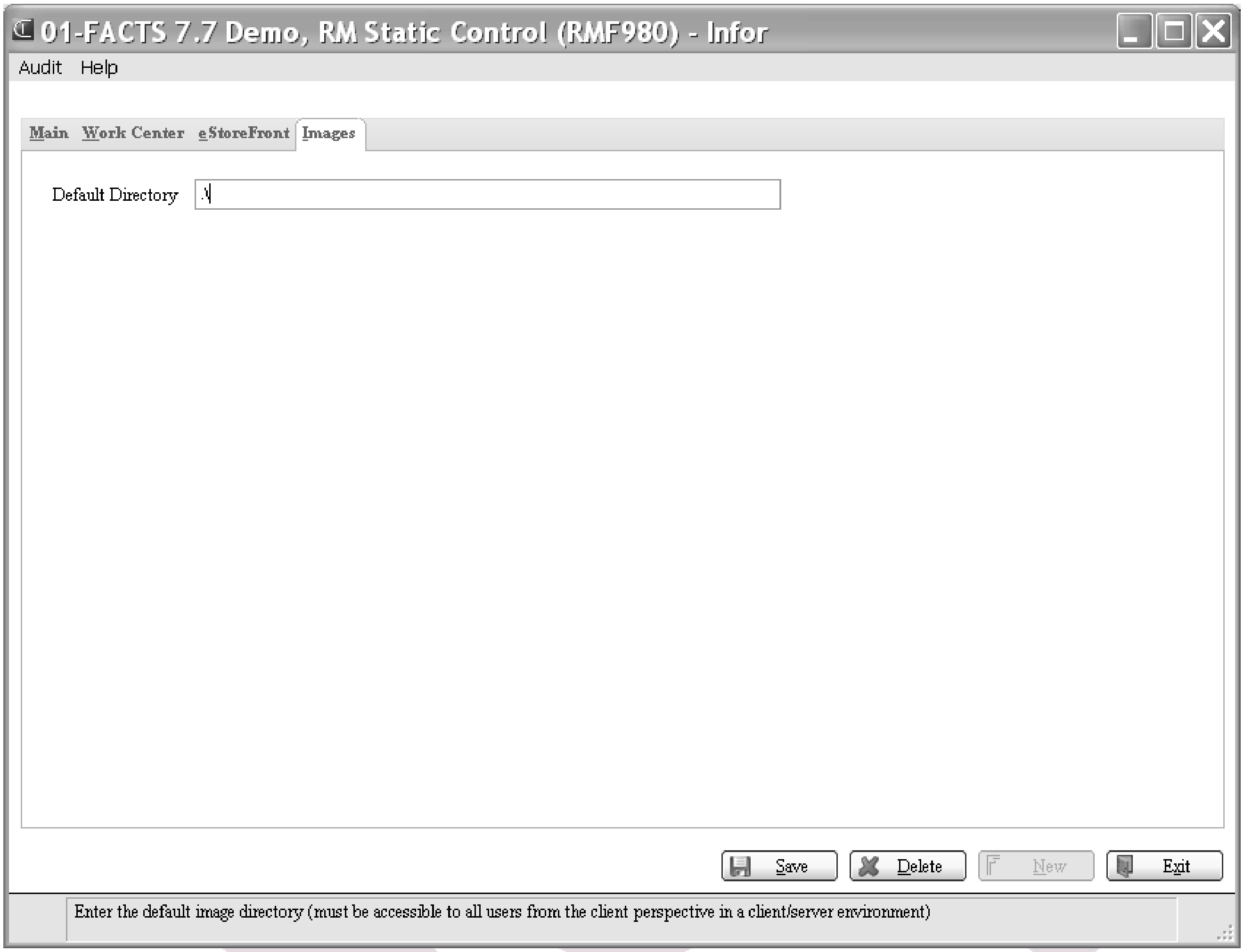




On B-C transactions, you will now be able to create RM contacts automatically when a web order is created in FACTS. RM will use the email address to check for duplicate contacts. With this new capability, you will able to use all of the power of RM for broadcasts and other post sale marketing activity.

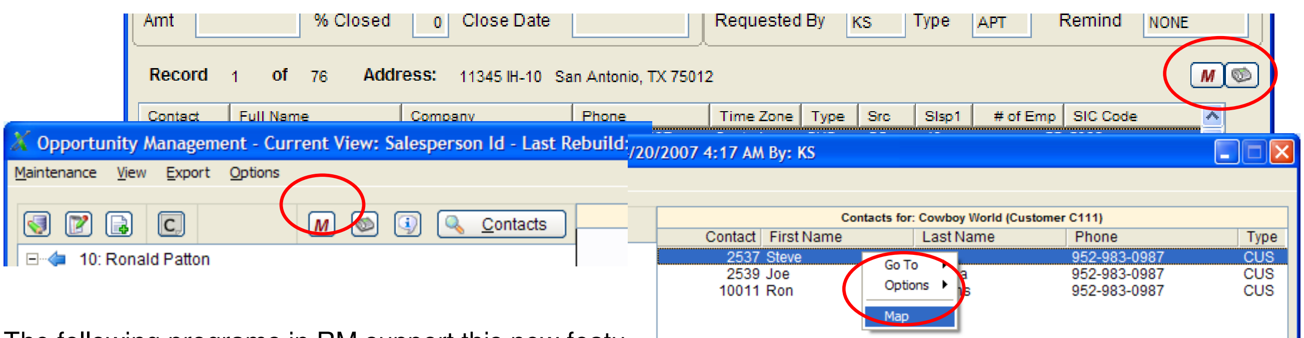
This tab has the following fields:

- Create contacts for B-C orders? All other fields will be disabled if this is not checked.
- Update information for existing contacts where the email address is the same?
- Note type for an automatic note to be created when an order is placed. A 'None' option will be available if no note is to be created. All standard note functionality, including run time replacements, will be supported.
- Contact default profile. See below for a full explanation.
- Customer number use for association. Since the B-C customer number is designated in the Storefront setup, we have to designate the customer that represents the B-C transaction.



Map Link

It's now possible to access internet based maps for a contact's address. In most cases a button is provided, as shown. It may also be found in right-click pop-up menus. See the company F/M example below for configuration details.



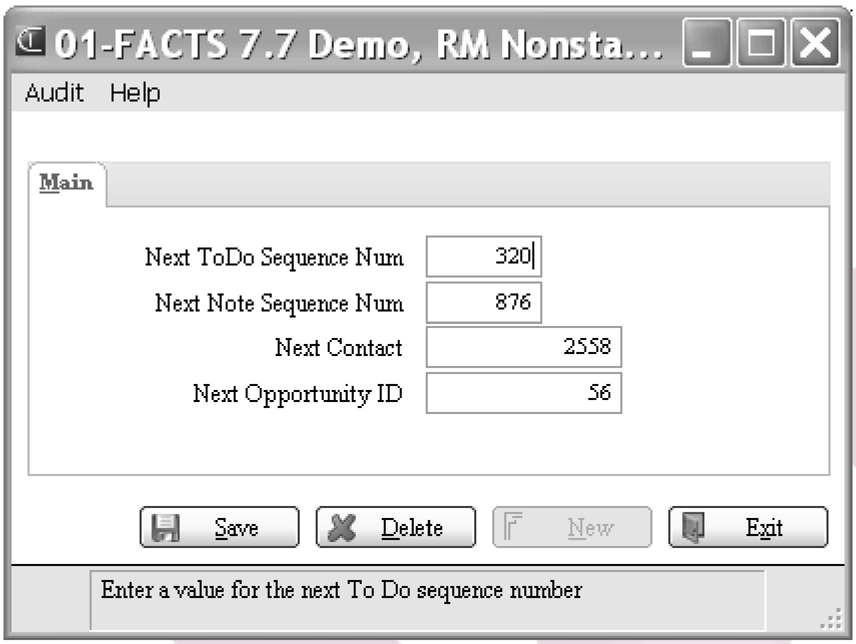
The following programs in RM support this new feature:

- Contact Display (shown above)

- To Do's
- Work Centers
- Contact F/M

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.



PROCESS FLOW

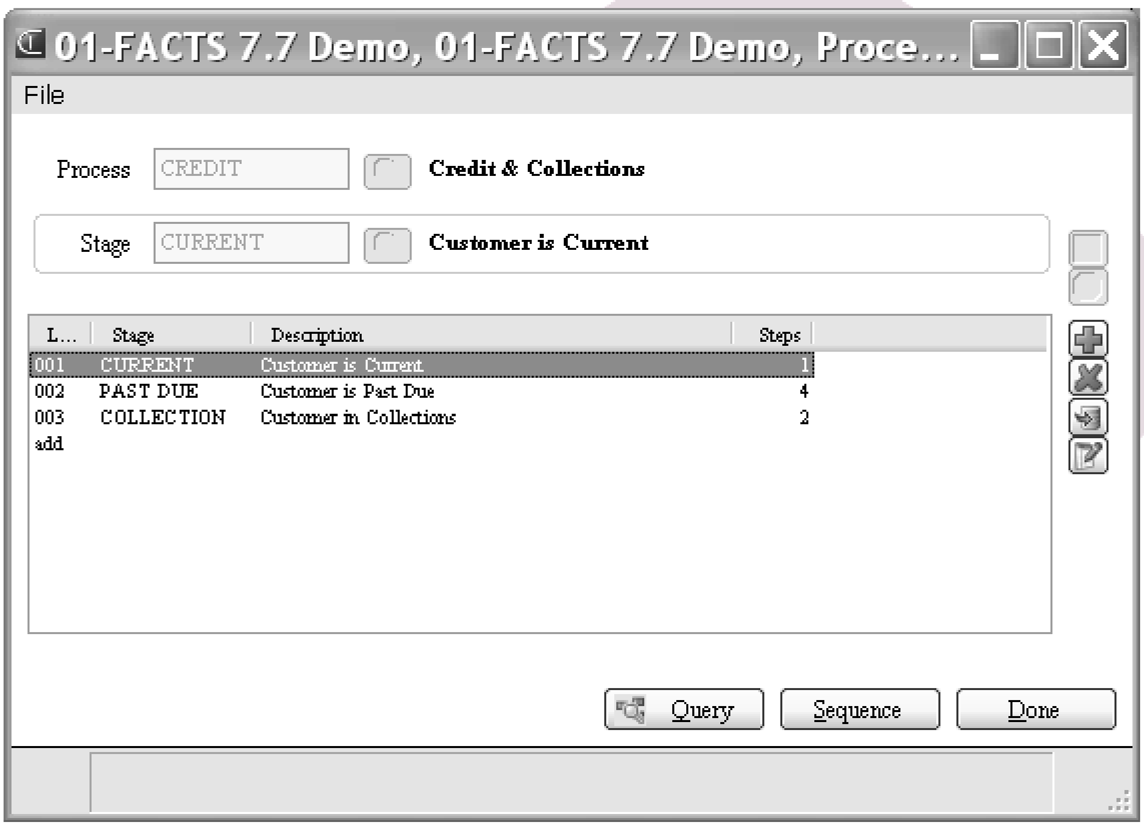
RM includes a Process Flow Management system. A process flow contains stages and steps. A process can contain multiple stages. A stage can contain multiple steps. These can be used for tracking and filtering on any function or process within your company.

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

Process Flow Entry

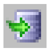
Once you have set up all the processes, stages and steps, you need to hook them together.
The Process Flow Entry allows you to identify what stages are associated with the process and what steps are associated with each stage.

The Action field is for a future release.

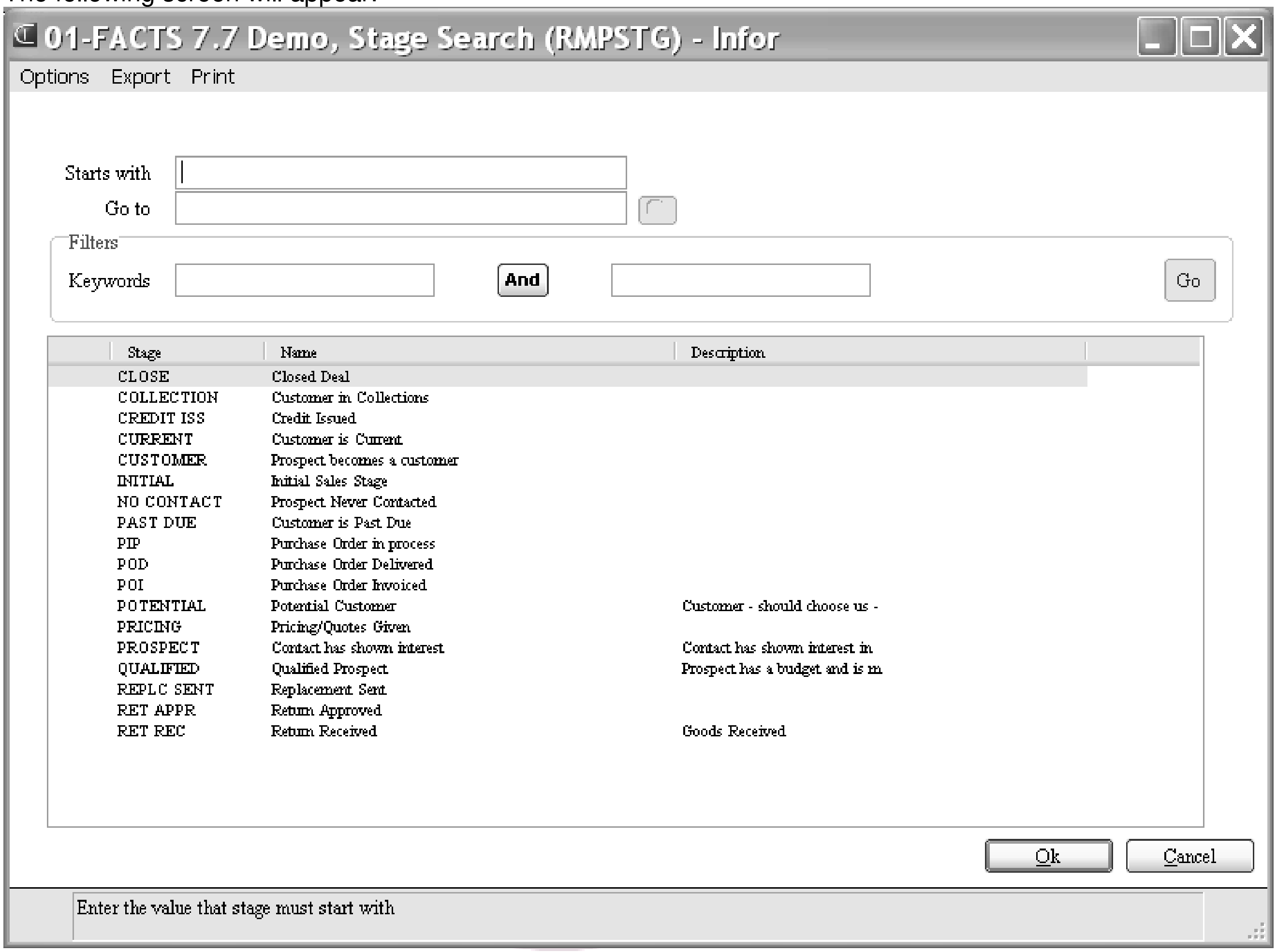


Assign Stages

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.

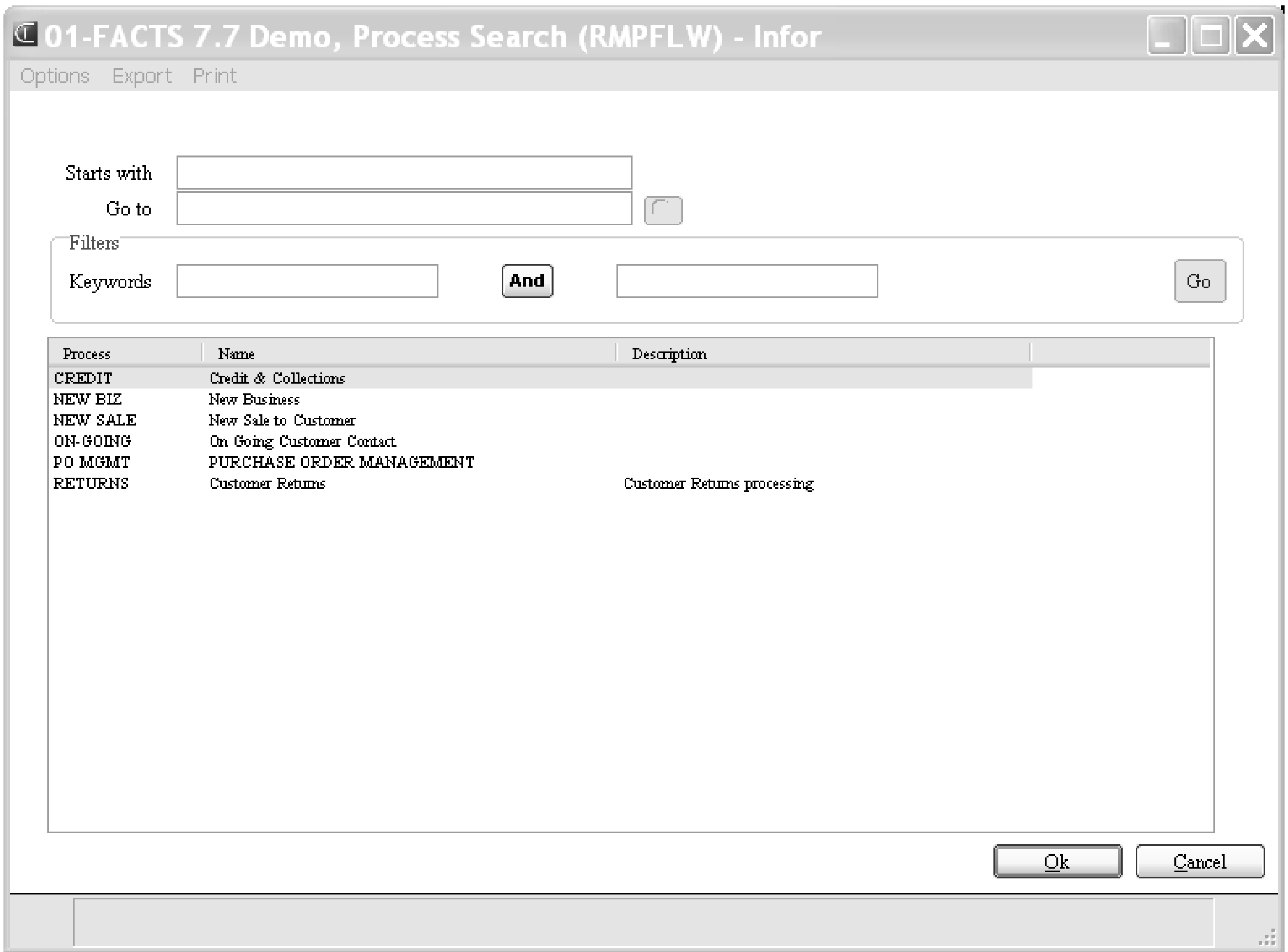
Arrow key usage

- 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

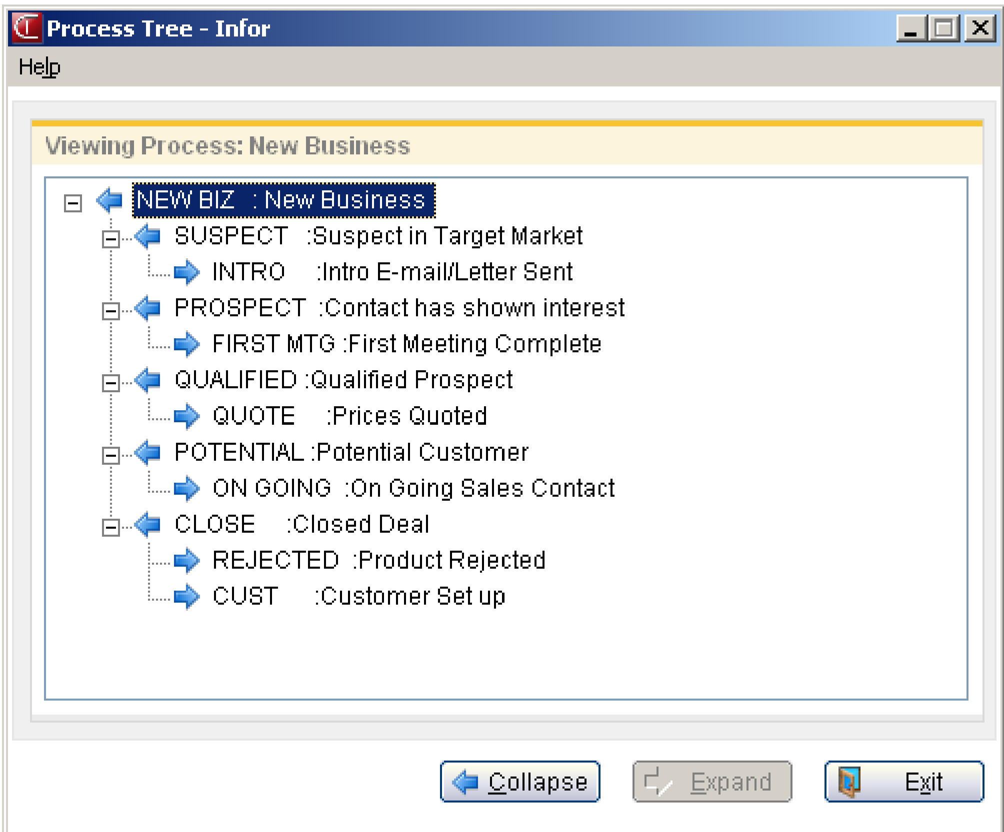
1. Call up the stage to which you want to assign steps.
2. Select the set sequence icon for the steps.

The following screen will appear:



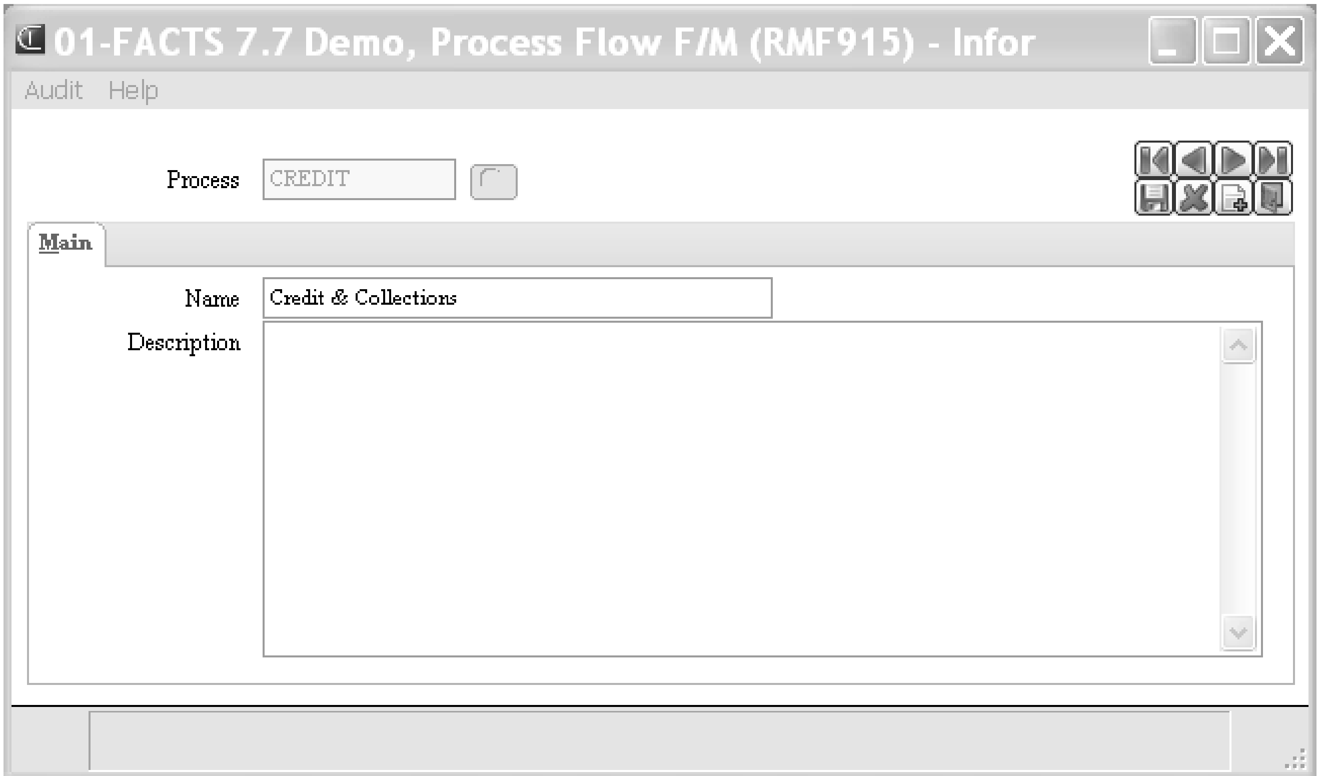
Process Flow Tree-view

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.



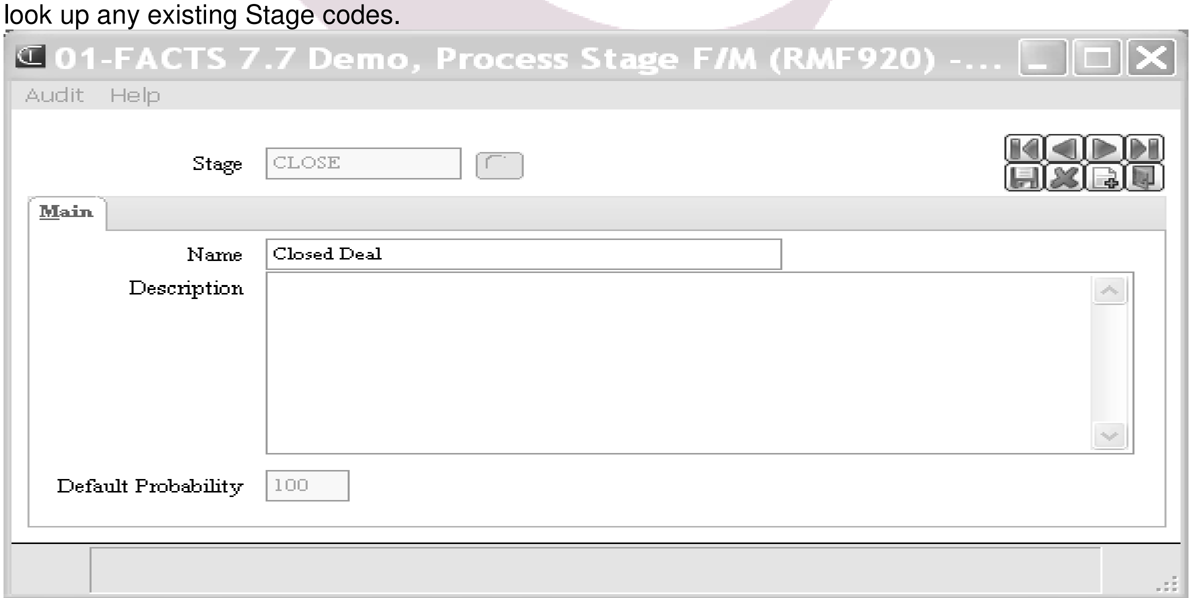
Process File Maintenance

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.



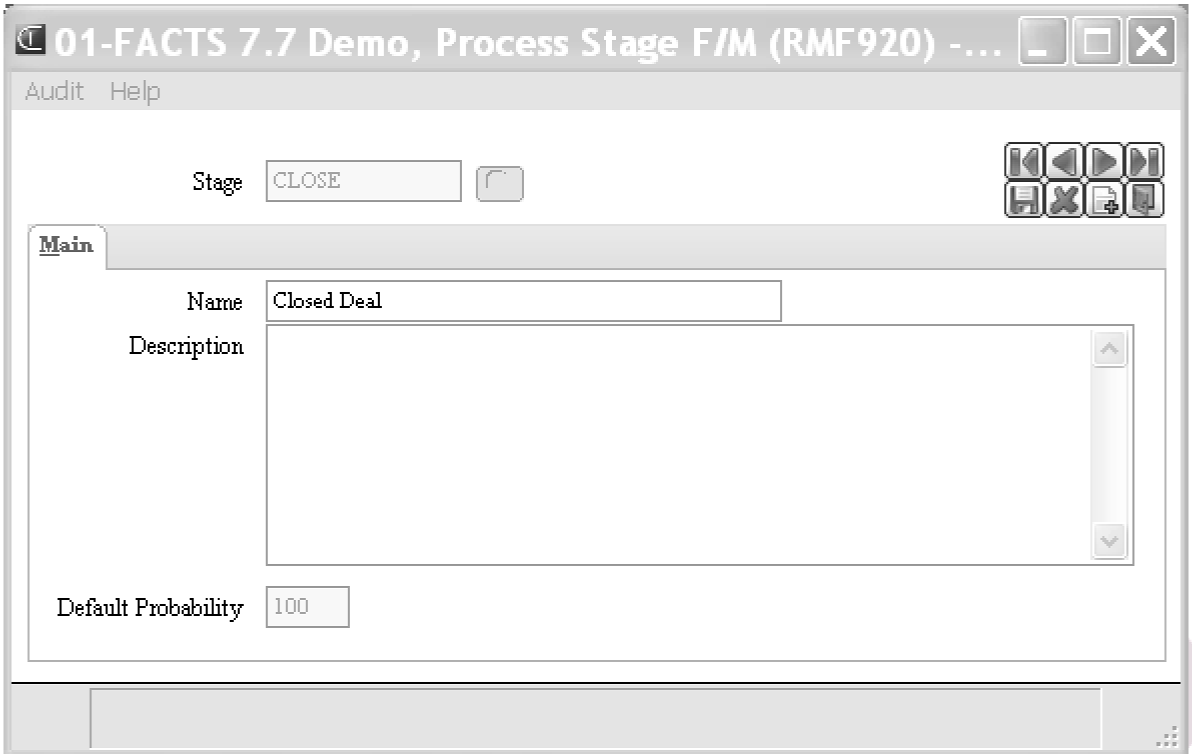
Stage File Maintenance

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.



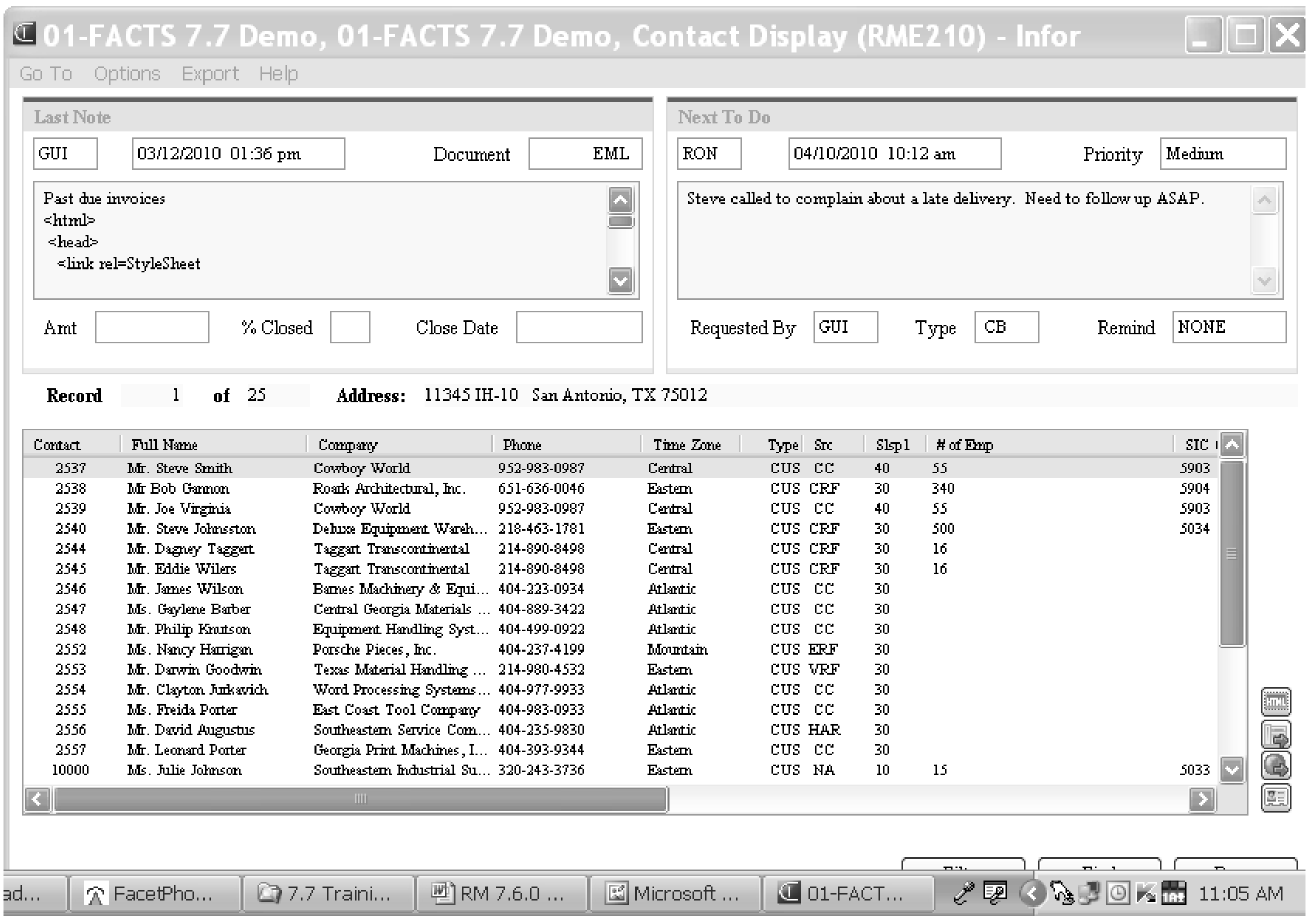
Process Step File Maintenance

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.



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.



Column Width & Sort-By Changes

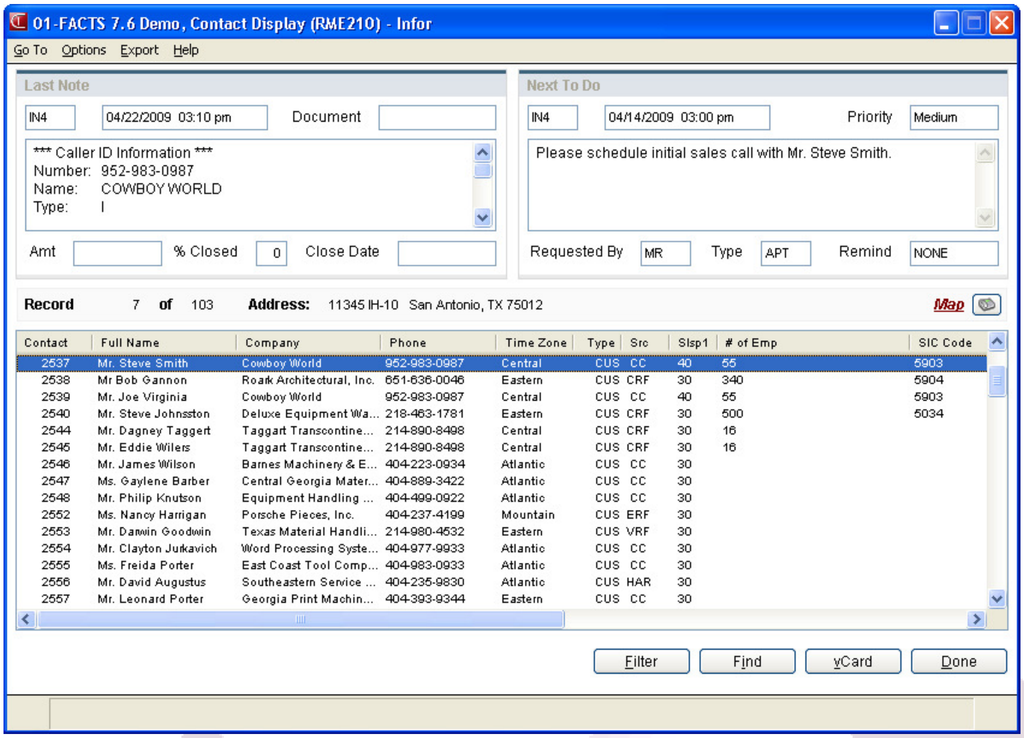
The following RM programs will remember, by user, both column width changes and the column to sort-by[1]:

- RME210 Contacts
- RME220 To Do
- RME230 Broadcast Lists
- RME250 Notes

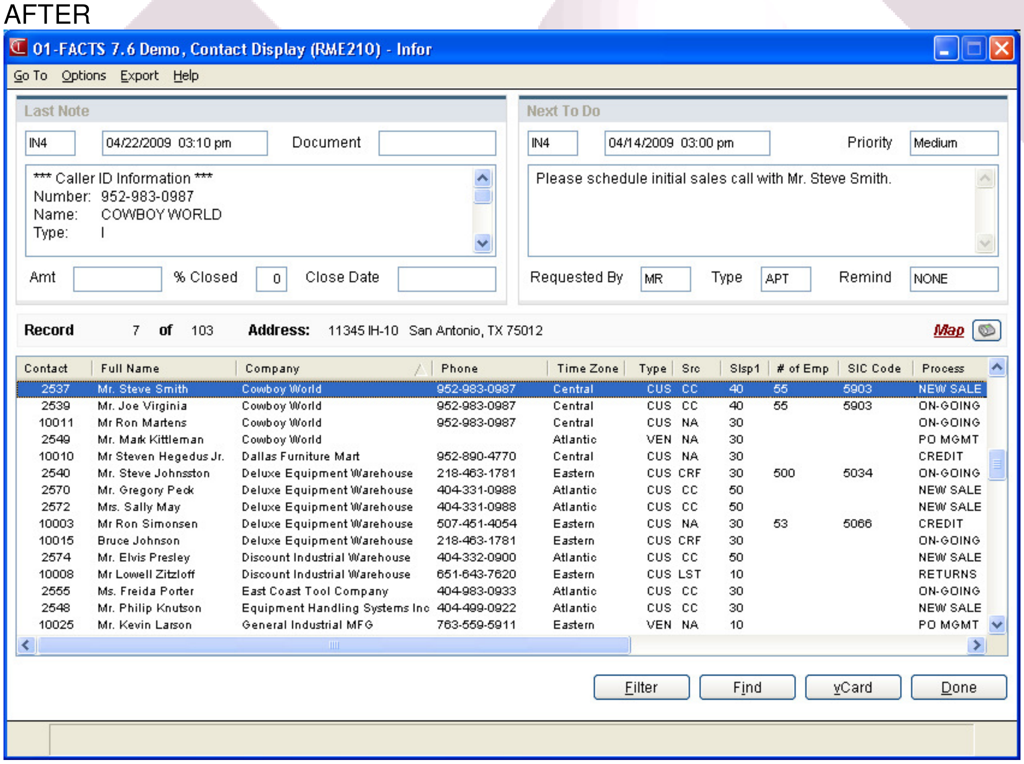
For example, in Contacts the standard column width of the Company column is typically not wide enough to display the entire company name. By contrast, the column width of the User Defined fields, in this case “# of Emp” and “SIC Code”, may be too wide. And suppose the list is usually sorted by the Company column.

[1] Settings will be lost if the title of a column is changed, or if two or more columns share the same title.

BEFORE



AFTER



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

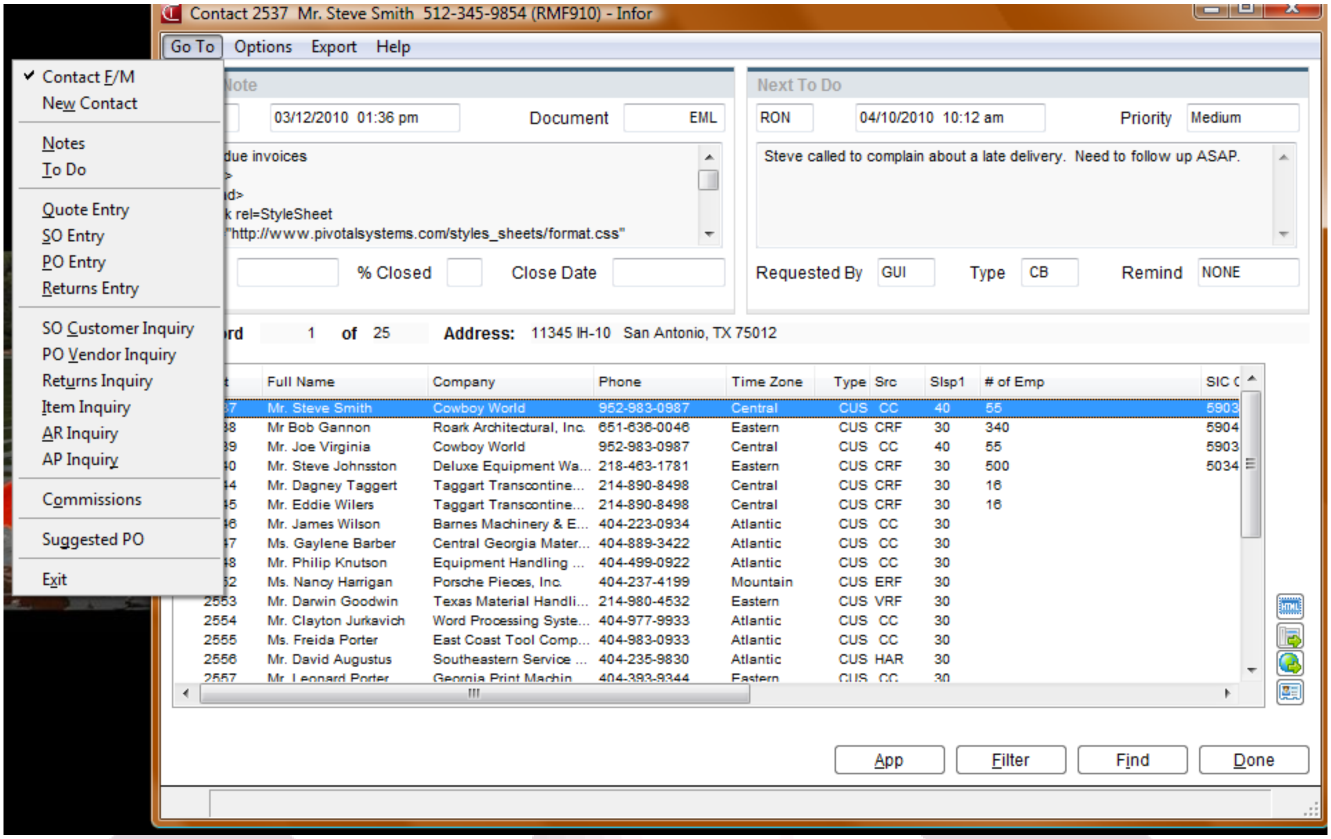
Executes the Contact Search and adds selected contact to the browser. If the contact selected in the search is already in the list, the browser focus is shifted to the selected contact.

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.

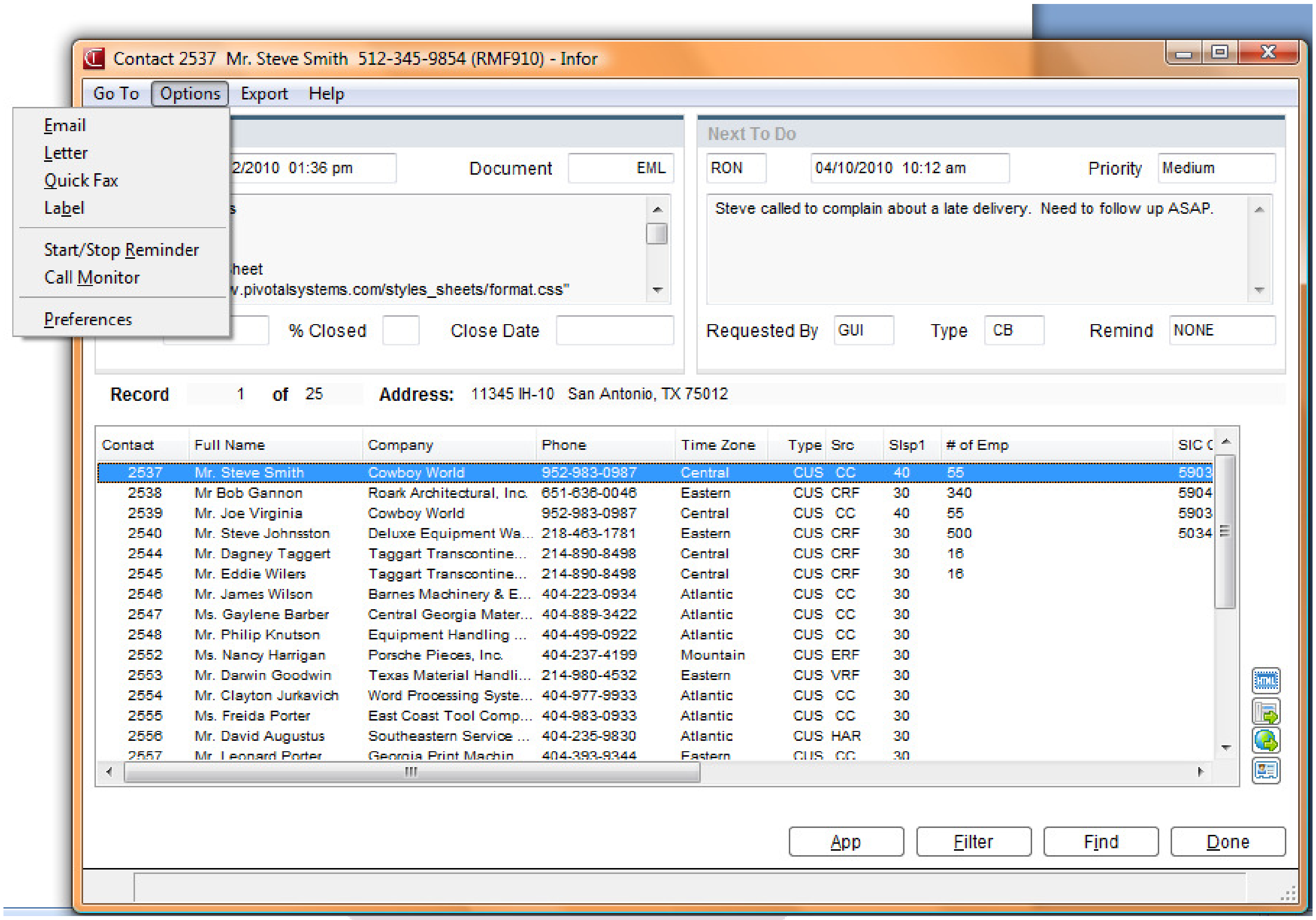


Vendor related programs are available for contacts associated with vendors, customer related programs are available for contacts associated with customers. Quotes are available for any type of contact. Closing those applications when done returns you to this screen.

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.



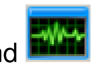
Start/Stop Reminders

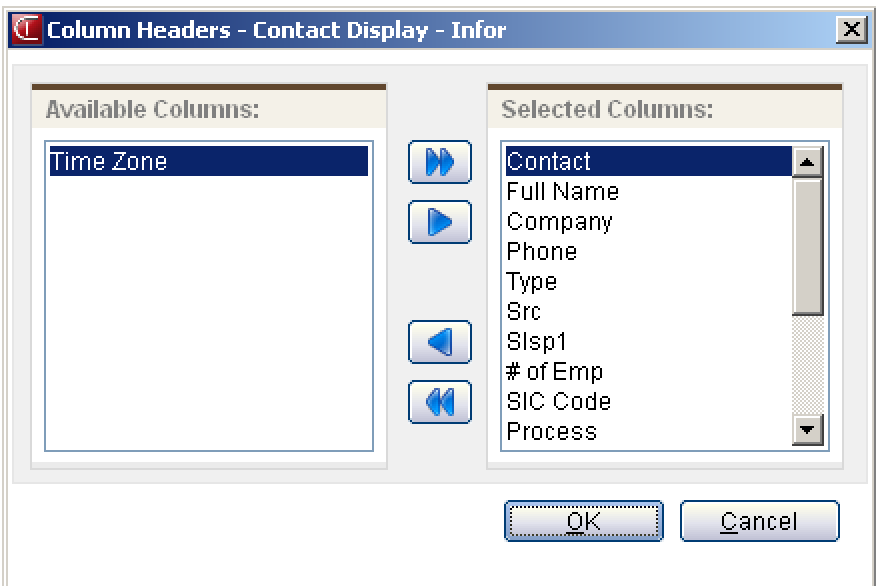
Each To Do item has a scheduled date and time the system can use to remind you of deadlines. You can start or stop the reminder program manually by selecting the Start/Stop Reminder option on the Options pull down menu. You can also stop the reminder program by clicking the Stop Reminder (All) button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

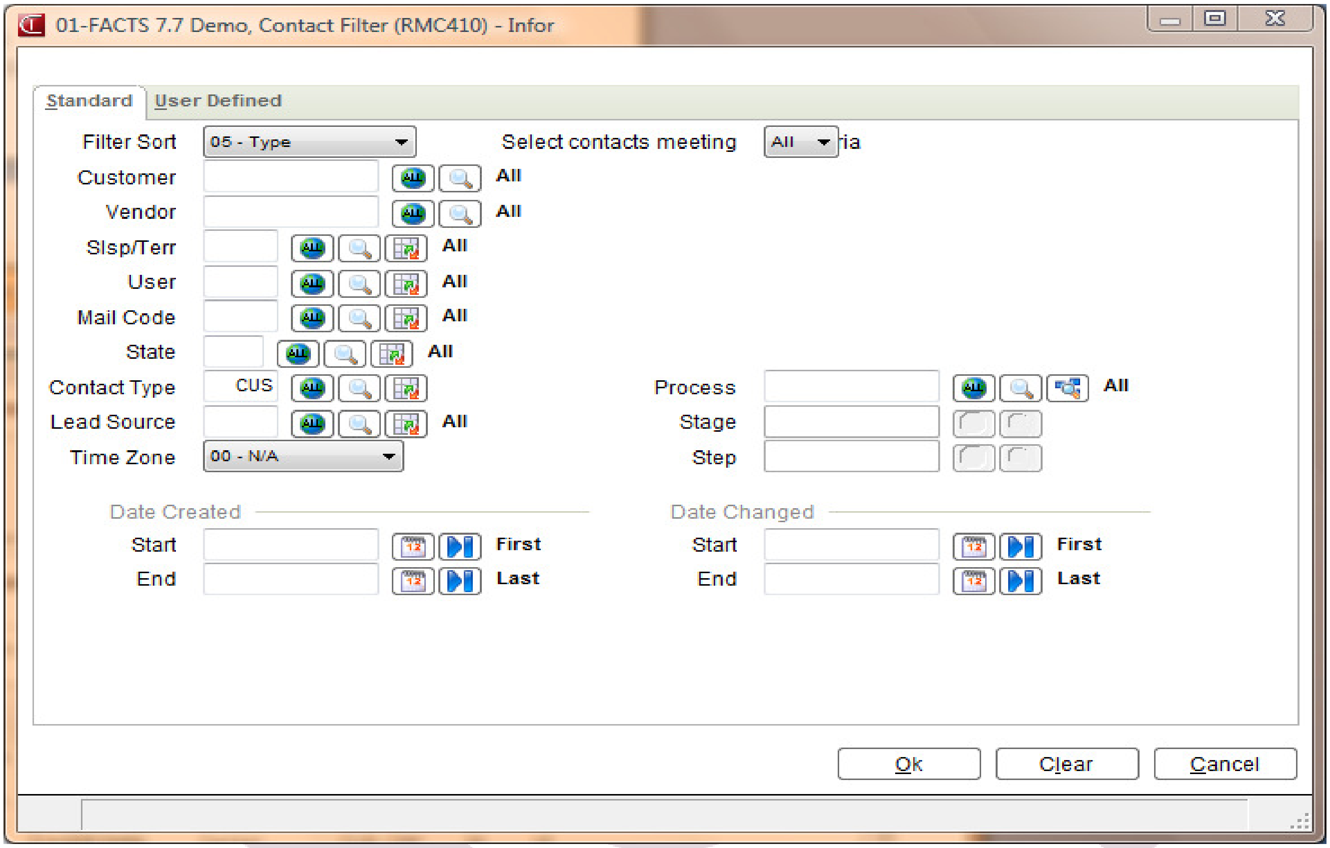
Preferences are available in the  Contact Display,  To Do entry,  Note Entry and  Broadcast List Entry programs.

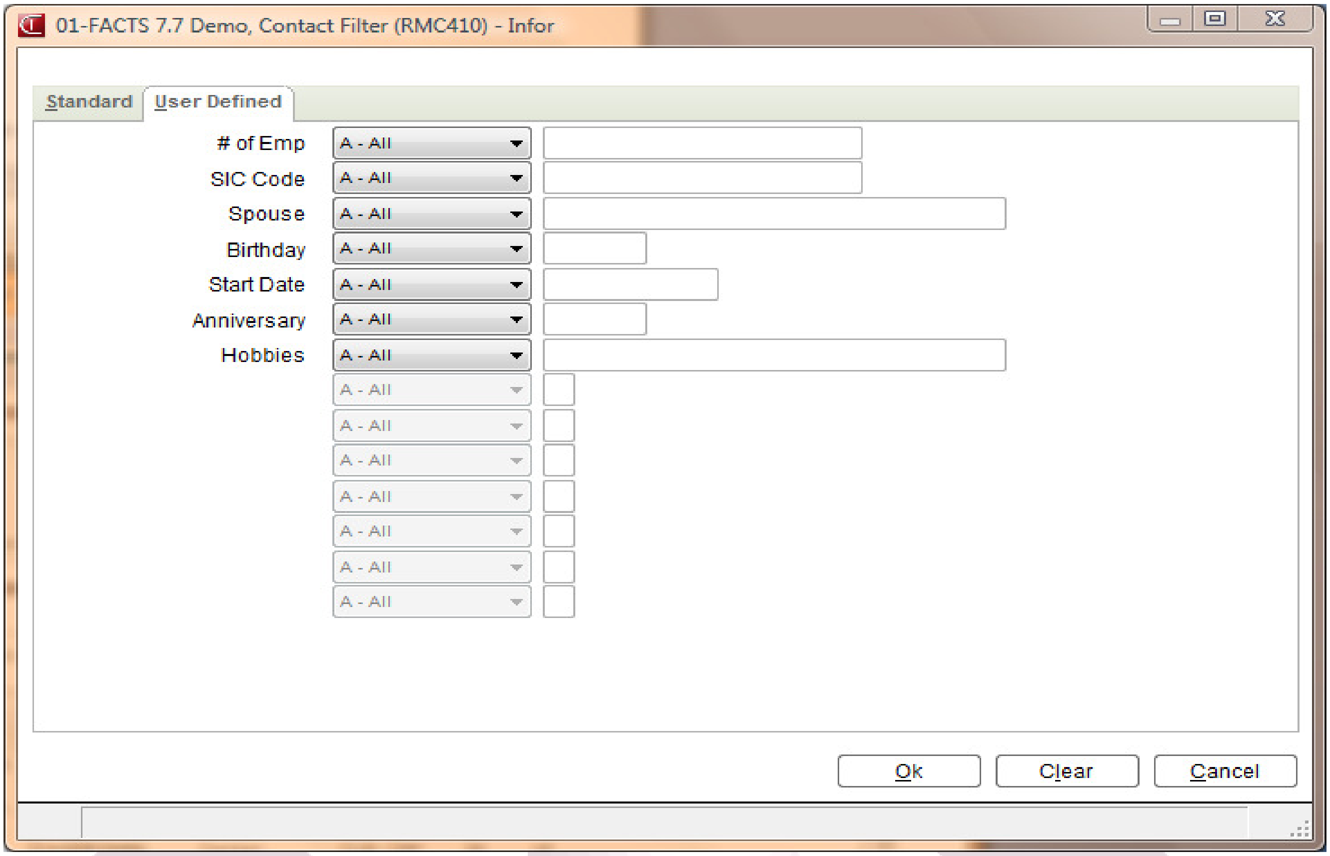


You also can drag and drop any columns you wish. Dragged columns will be inserted before the dropped on column. Changes will take effect when you click the OK button.

Filter

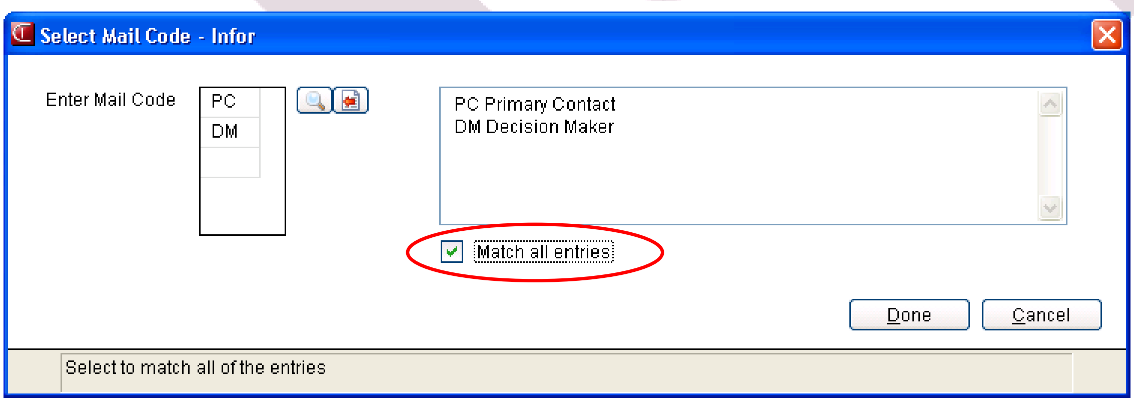
By Filtering you can narrow down the list of contacts that you see displayed.



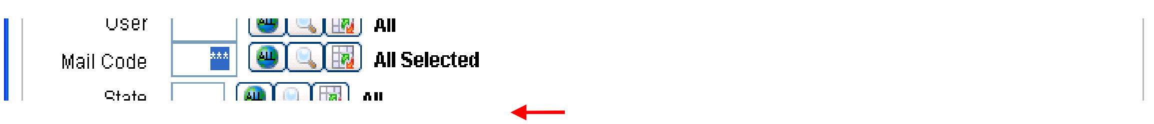


Selected Mail Codes

A new check-box, “Match all entries”, has been added to control whether all of the mail codes entered must be assigned to the contact rather than any of them. In the example below, only contacts assigned to both the PC and DM mail codes will be selected.



The setting is indicated with either “Any Selected” or “All Selected” in the filter window as shown below:



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

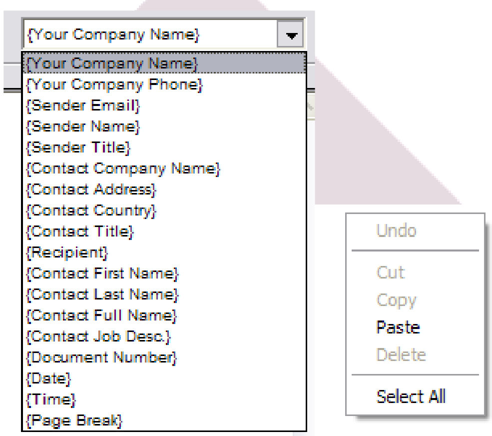
If checked, the system will create a note with the type specified in the Note Type filed and the text of the subject line (email) or a message indicating what was sent.
It is highly recommended to always check.

Include Text

If the include text box is checked, the entire content is included in the note.
It is highly recommended to always check.

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

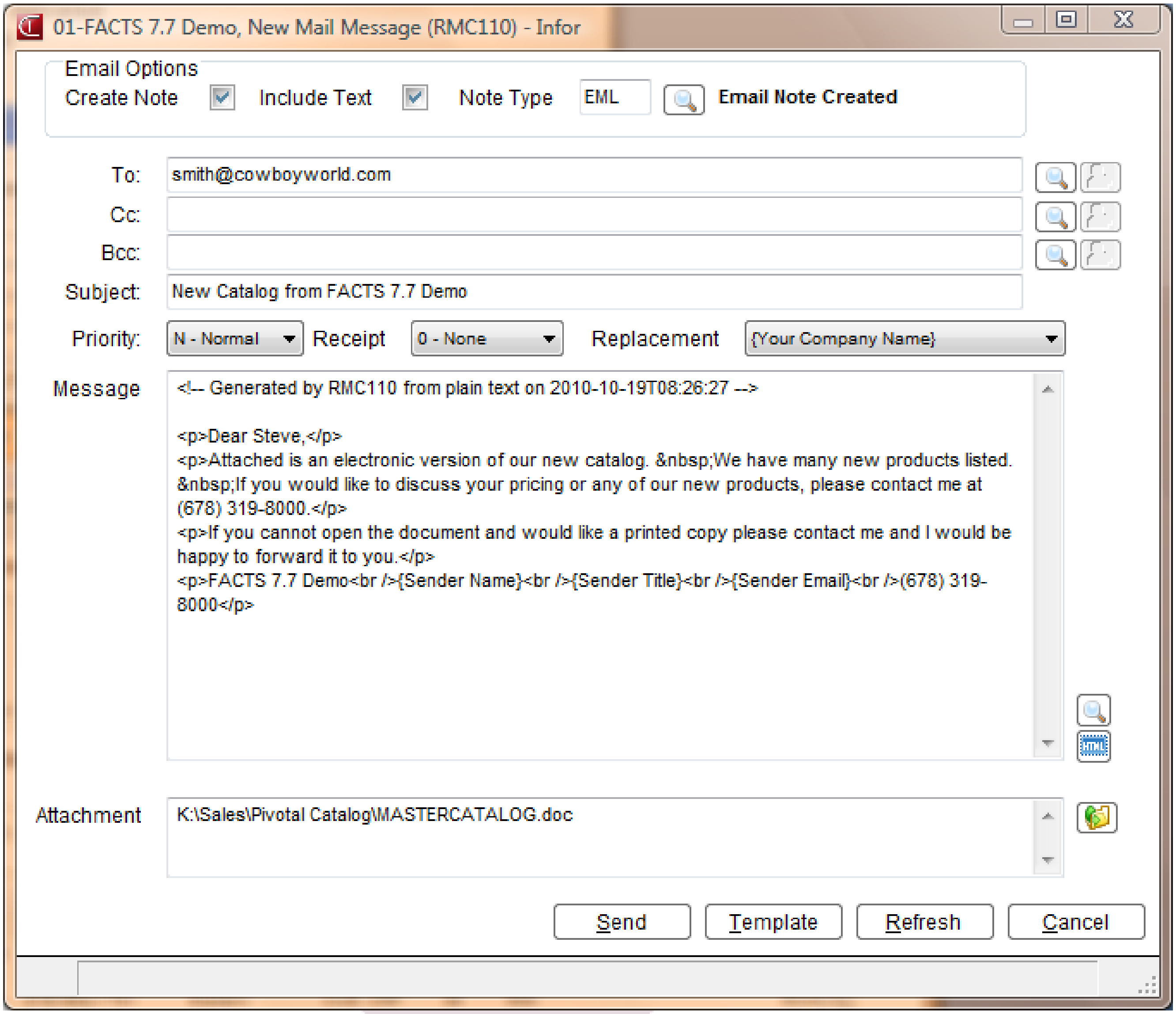
When creating a new email or letter, the default templates defined in the user preferences F/M are read and the content pre-filled based on the template. Active replacements are made on the fly so that what appears on the screen is as close to the final output as possible. A template search is available 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.
Receipt - The option to specify Receipt requests[1] has been added:

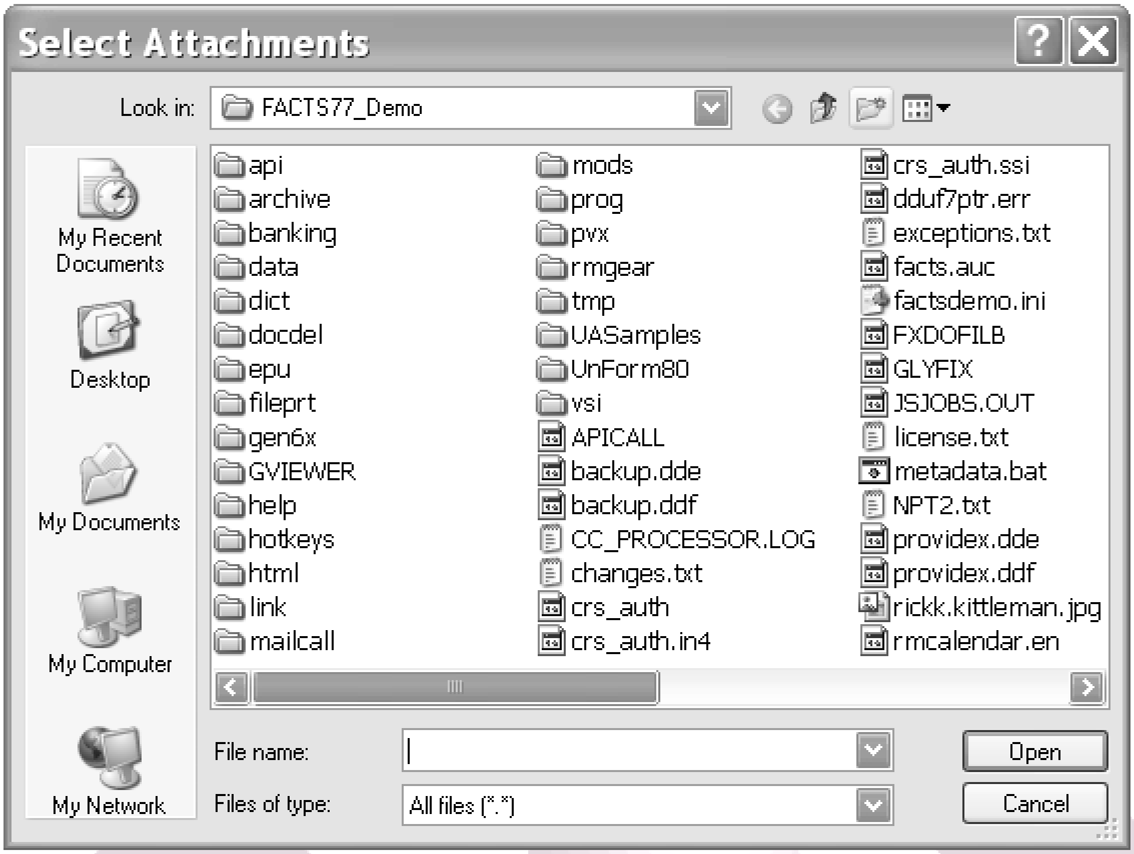
- Delivered – Requests a receipt when the email has been delivered.
- Read – Requests a receipt when the email has been read.
- Both – Requests both a Delivered and Read receipt.

[1] Receipt requests are not guaranteed to be received because they depend on whether the receiving email client/server actually has the ability or is configured to respond to them.

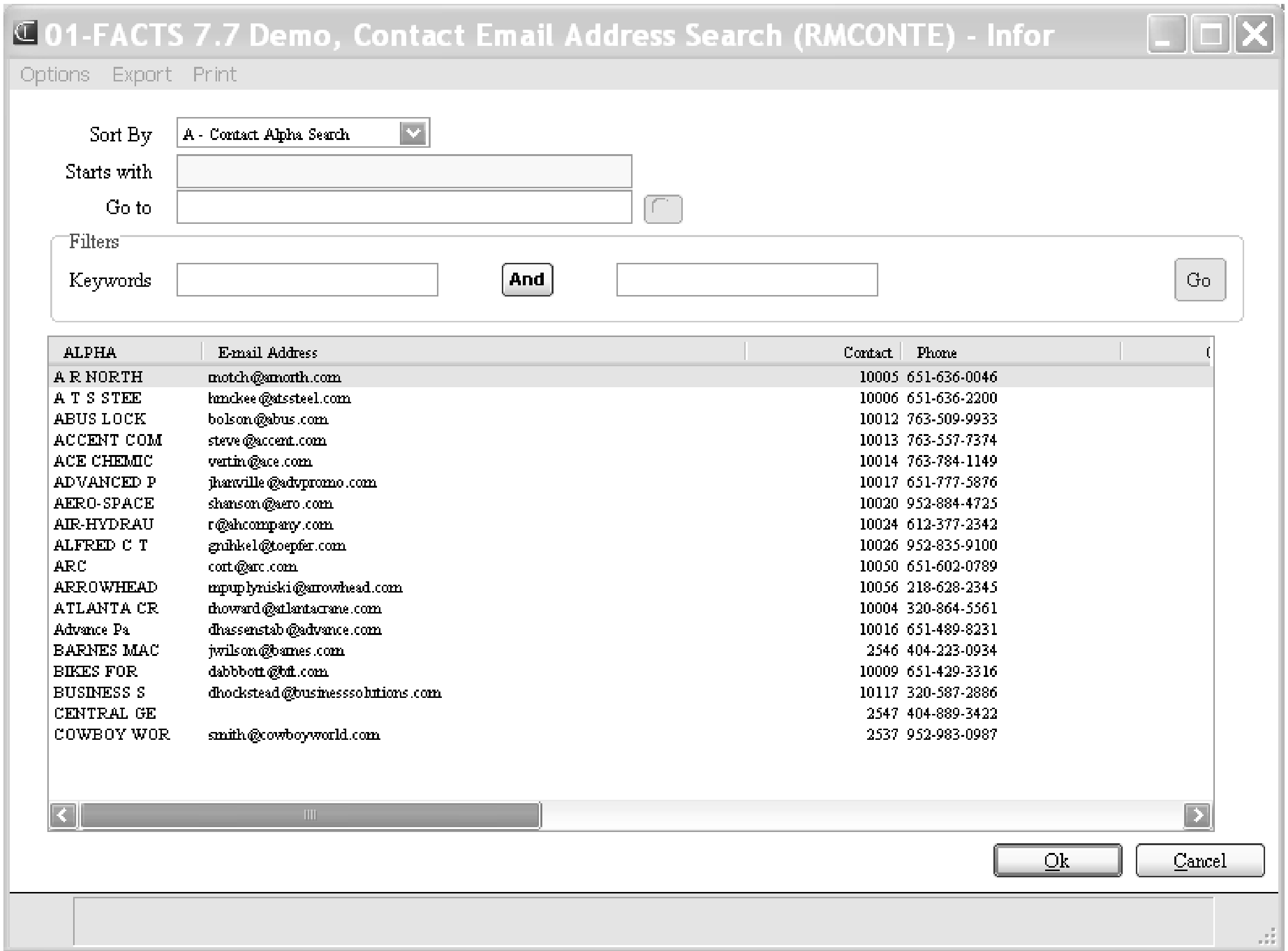


If you click on the HTML button in the lower right hand corner it will display the "preview/edit of the email".
If you click on the magnifying glass in the lower right hand corner the program will display the "preview of the email."

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.***

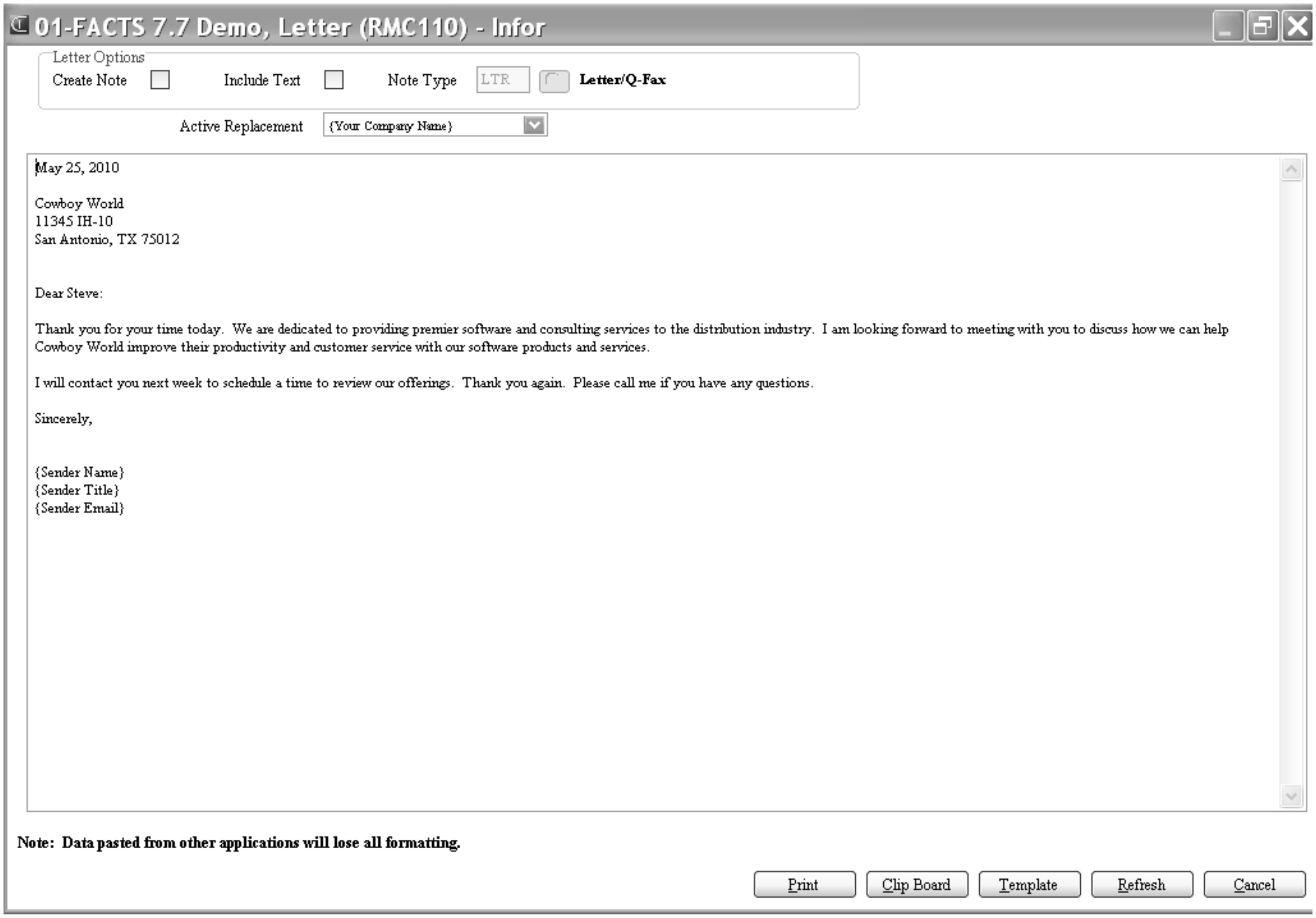


Search – The magnifying glass button will allow you to search for an email address for the To, CC, or BCC fields. You can search by contact, salesperson, or user code email or by contact alpha name or by customer number. If you search for an address on a field where there is an existing address, the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


01-FACTS 7.7 Demo, Contact Email Address Search (RMCONTE) - Infor
Options Export Print
Sort By
A - Contact Alpha Search
Starts with
Go to
Filters
Keywords
And
Go
ALPHA
E-mail Address
Contact
Phone
A R NORTH motch@arnorth.com 10005 651-636-0046
A T S STEE bmckee@atssteel.com 10006 651-636-2200
ABUS LOCK bolson@abus.com 10012 763-509-9933
ACCENT COM steve@accent.com 10013 763-557-7374
ACE CHEMIC vertin@ace.com 10014 763-784-1149
ADVANCED P jhanville@advpromo.com 10017 651-777-5876
AERO-SPACE shanson@aero.com 10020 952-884-4725
AIR-HYDRAU r@ahcompany.com 10024 612-377-2342
ALFRED C T gruhkel@toepfer.com 10026 952-835-9100
ARC cort@arc.com 10050 651-602-0789
ARROWHEAD mpuplyniski@arrowhead.com 10056 218-628-2345
ATLANTA CR dhoward@atlantacrane.com 10004 320-864-5561
Advance Pa dhassenstab@advance.com 10016 651-489-8231
BARNES MAC jwilson@barnes.com 2546 404-223-0934
BIKES FOR dabbbott@bft.com 10009 651-429-3316
BUSINESS S dhockstead@businesssolutions.com 10117 320-587-2886
CENTRAL GE 2547 404-889-3422
COWBOY WOR smith@cowboyworld.com 2537 952-983-0987
Ok
Cancel

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.

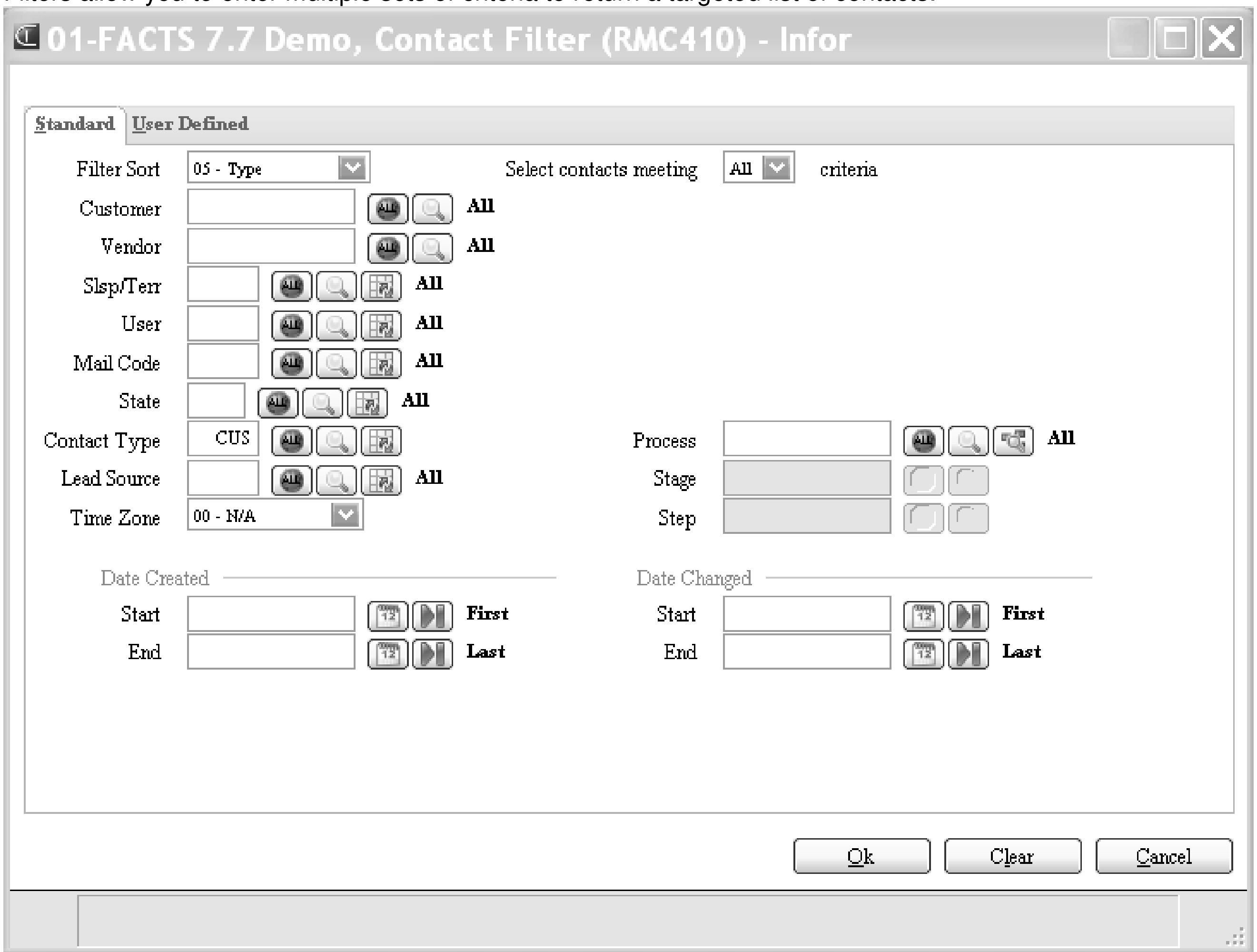


Quick Fax/Labels

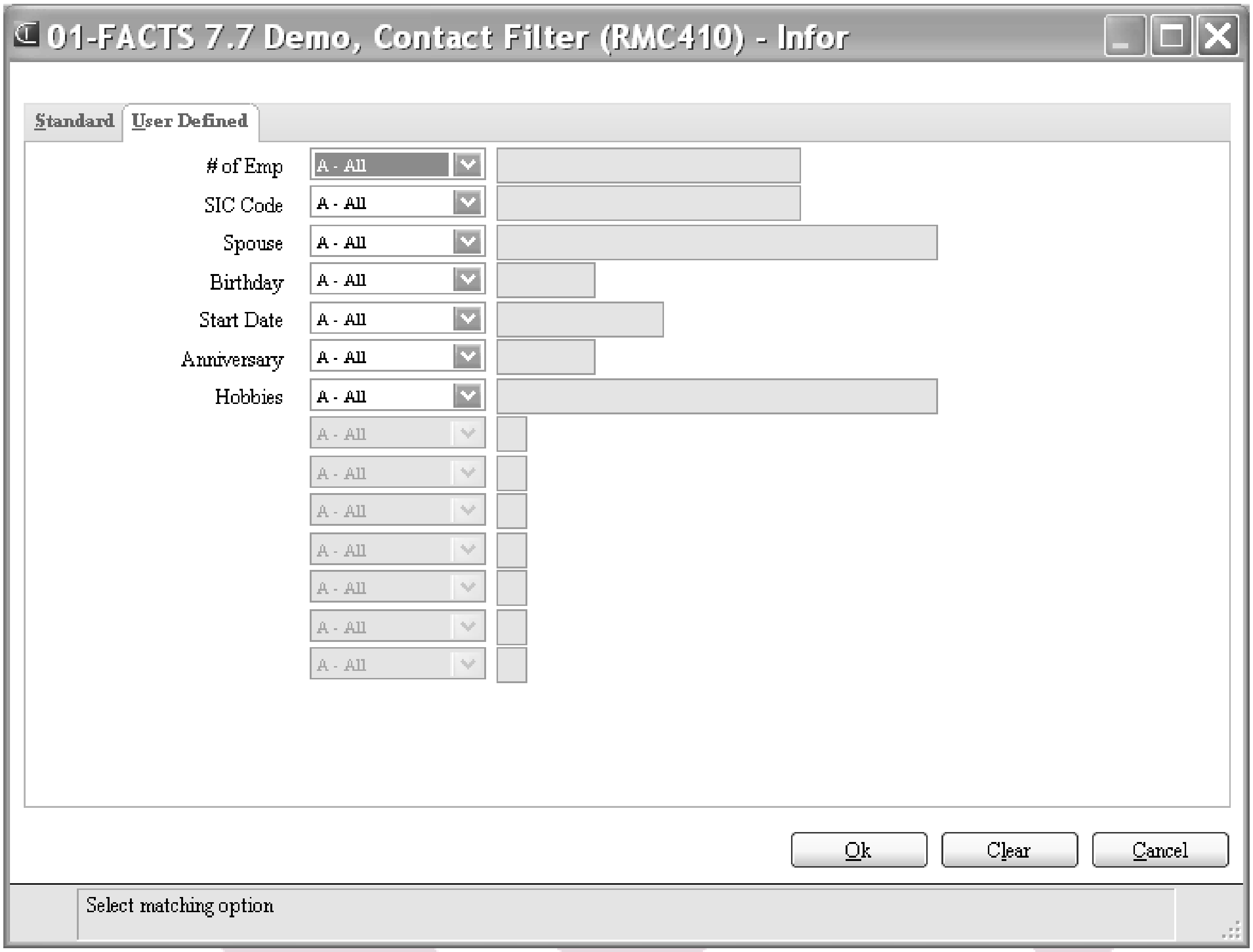
The Quick Fax and Label options have the same functionality as Letters.

CONTACT FILTER

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



User Defined Fields tab: All of the RM Customer / Vendor Profiles user defined fields can now be used in standard and broadcast filters. In addition, the following qualifiers have been added to allow more flexibility:



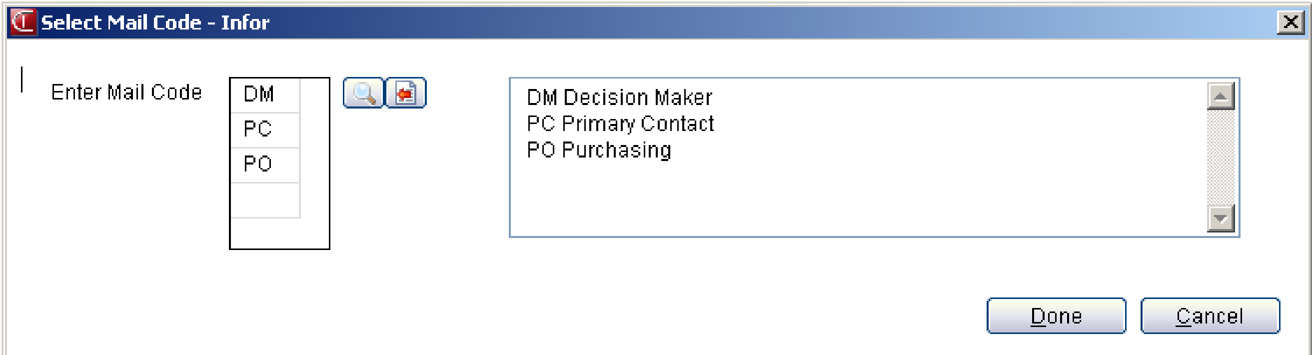
Common Elements

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.



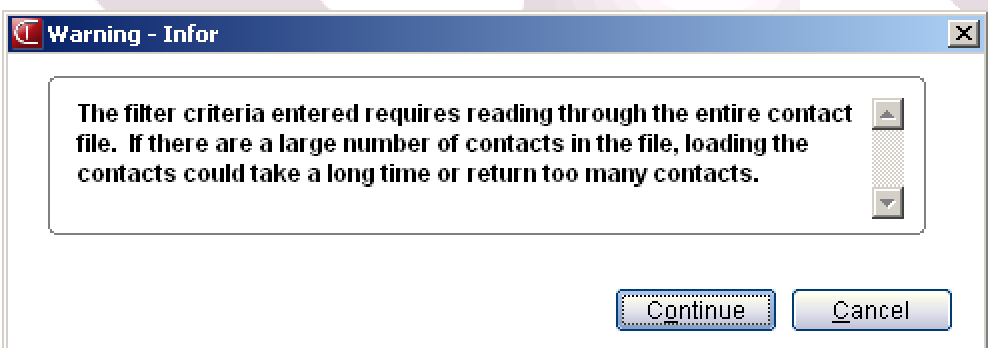
First/Last

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.

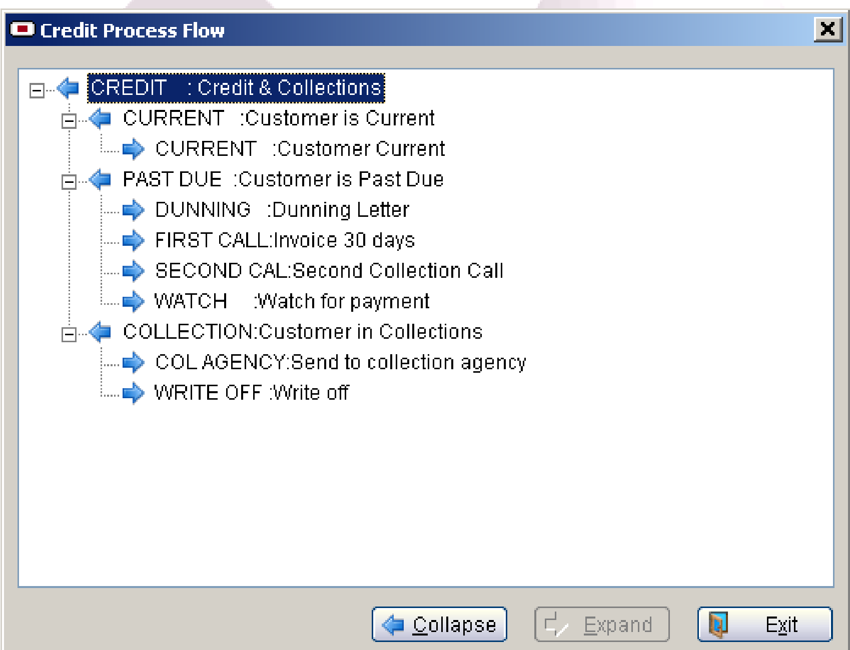
Type – Enter a type code or use the icon to select contacts associated with a specific type code or use icon for all types

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 - 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

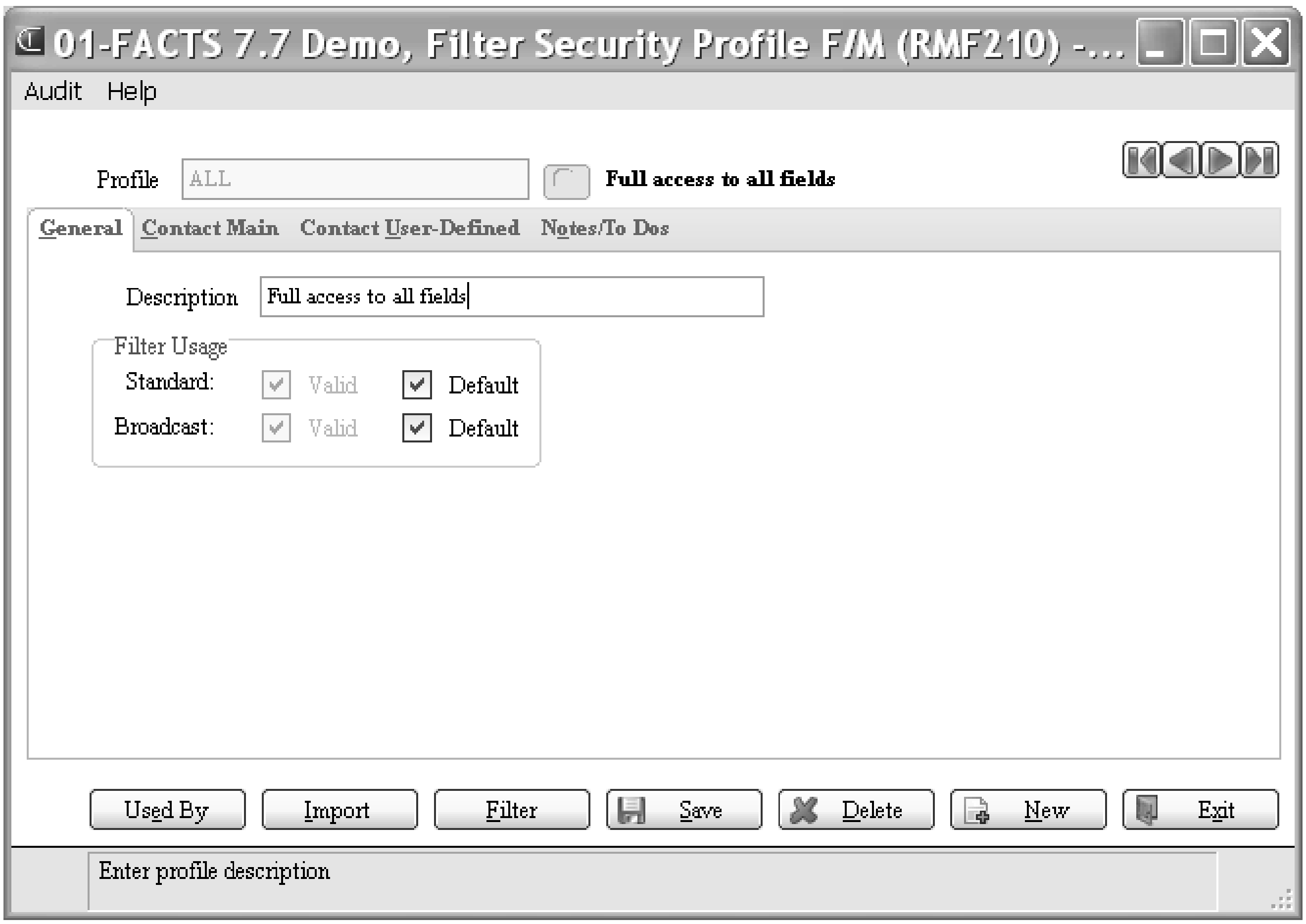
While the system is sorting through your filter a message Interrupt Load... will appear on the screen. You can click on that icon to stop the system from executing your filter.

Clear Button

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

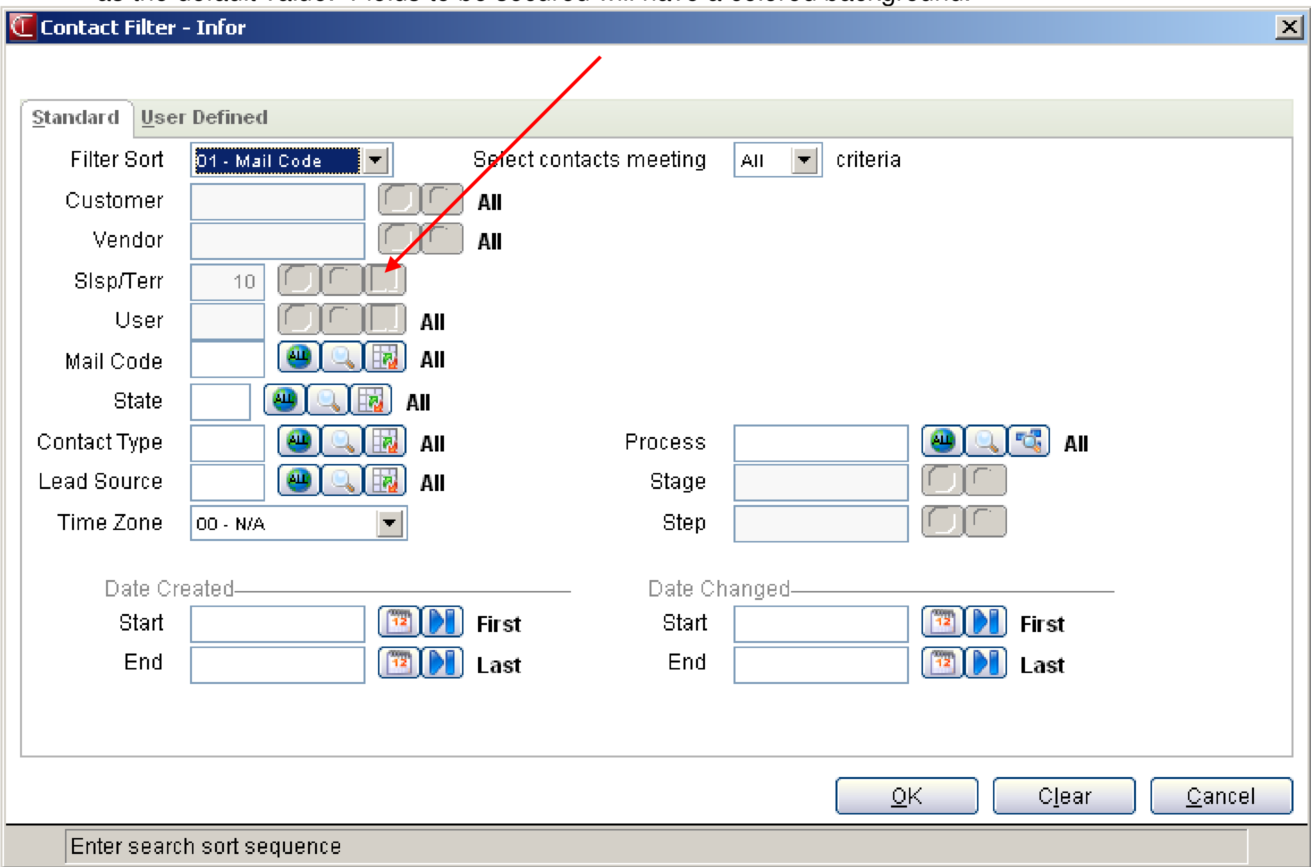
Filter Security Profiles

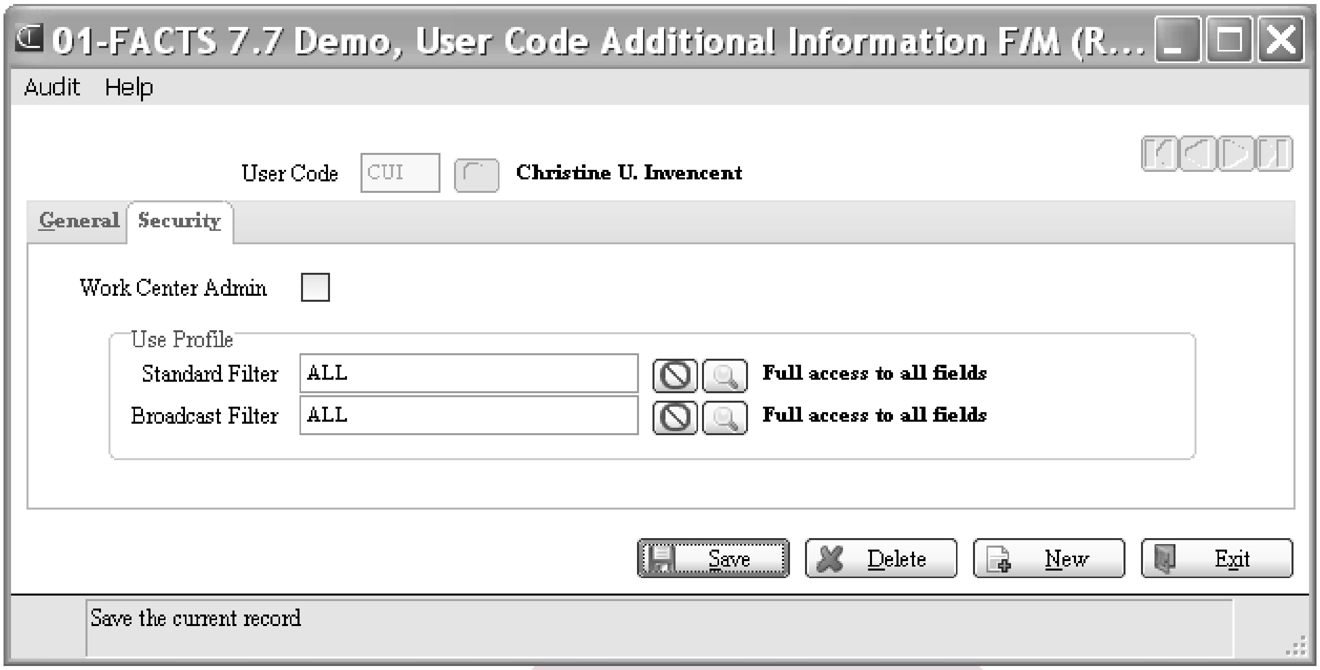
Filter security profiles provide the ability to secure and/or set default values for every field in both the standard and broadcast filters. The idea would be to allow or not allow the end user to filter contacts.



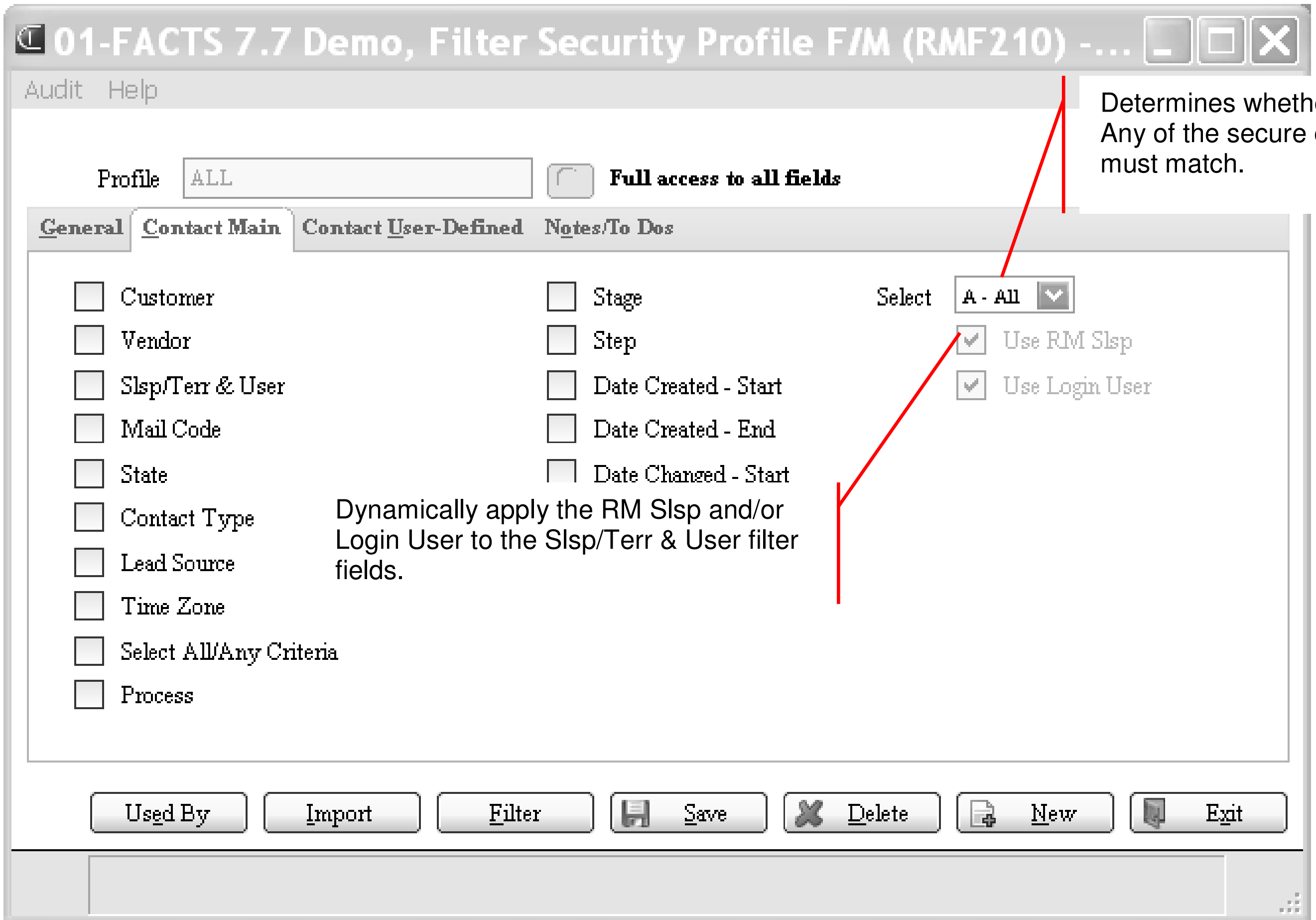
- The ‘Valid’ fields allow for a single profile to be used for standard, broadcast or both filters.
- The ‘Default’ fields allow the designation of any profile as the default for users who do not have a profile assigned to them.
- The ‘Import’ button allows you to import or copy an existing profile.
- The ‘Used By’ button presents a screen showing all of the users who are assigned to this profile.

- The ‘Filter Values’ button presents the filter screen where you can set a default value for any field including those that are to be secured. On the ‘User Defined’ tab, you can set the default criteria as well as the default value. Fields to be secured will have a colored background.



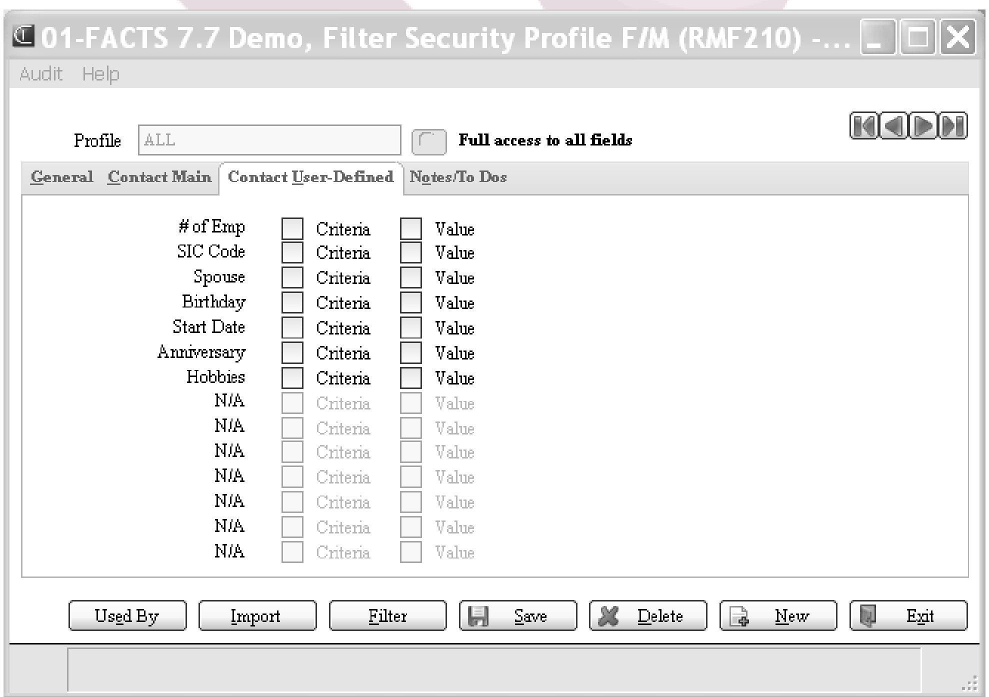


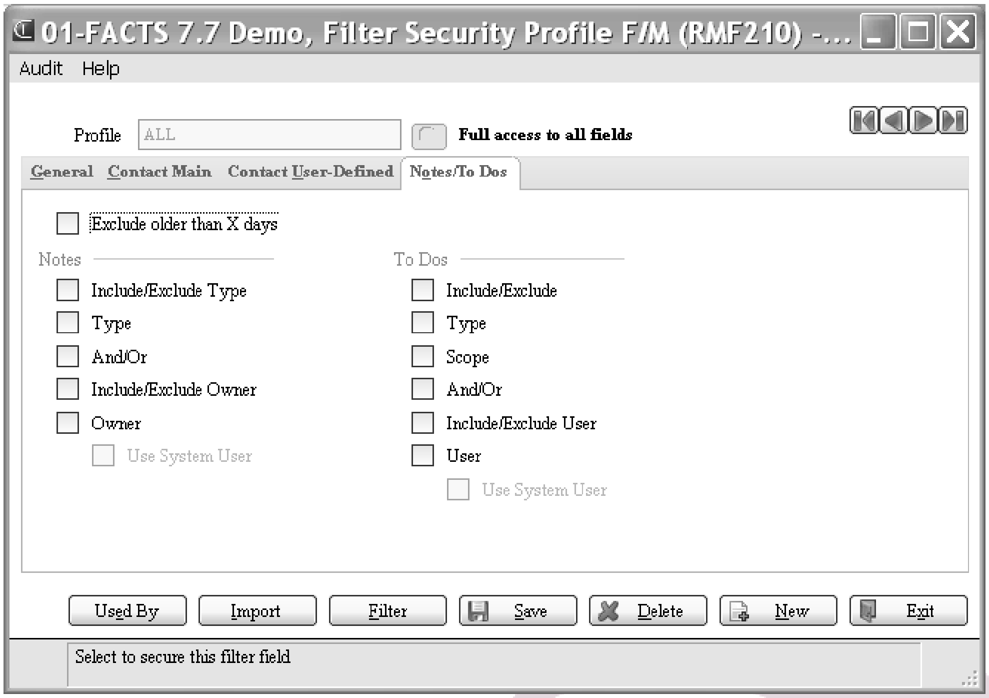
Profiles are assigned to users in the new security tab of the User Code Additional Information F/M. A button is provided to designate use of the default profile for the respective filter.



Determines whether All or Any of the secure criteria must match.

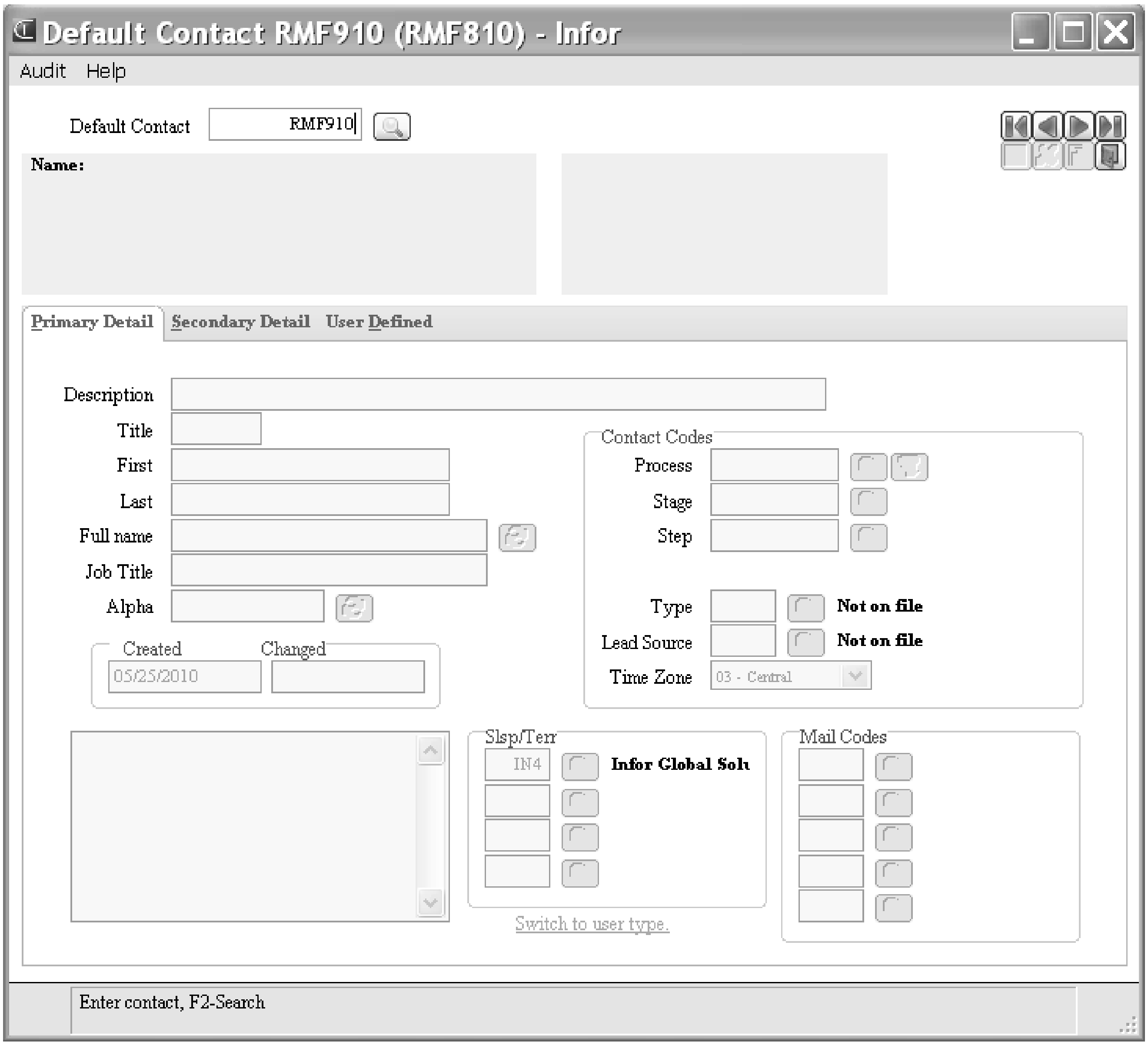
Dynamically apply the RM Slsp and/or Login User to the Slsp/Terr & User filter fields.




01-FACTS 7.7 Demo, Filter Security Profile F/M (RMF210) -...
Audit
Help
Profile
ALL
Full access to all fields
General
Contact Main
Contact User-Defined
Notes/To Dos
Exclude older than X days
Notes
Include/Exclude Type
Type
And/Or
Include/Exclude Owner
Owner
Use System User
To Dos
Include/Exclude
Type
Scope
And/Or
Include/Exclude User
User
Use System User
Used By
Import
Filter
Save
Delete
New
Exit
Select to secure this filter field

Default Contact File Maintenance

The purpose is cut down on keystrokes when creating contacts. Because a salesman's defaults should differ with the person that does collection RM gives the flexibility to setup defaults accordingly. Similar to Customer Defaults F/M, Default Contact File Maintenance gives more flexibility because you can have as many different defaults as you would like.



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)

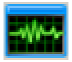
When you access notes from the menu, you must select a contact. If you access it from the Contact Display or file maintenance, the contact number is pre-filled.

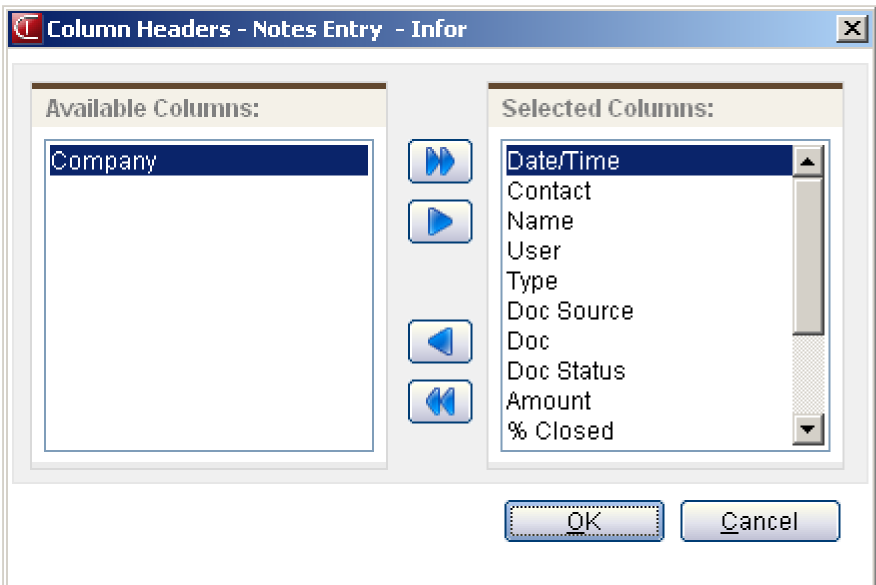
Notes Entry

A new document status column is available in the note list. It displays the status of Quotes, Sales Orders, Purchase Orders, and Customer Returns documents when they are linked to a note.

It is now possible for the user to delete notes if they meet the security specified for the new Note Removal security setting in RM Static Control F/M. The ability to scroll through the Note field without having to edit the line item has also been added.

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

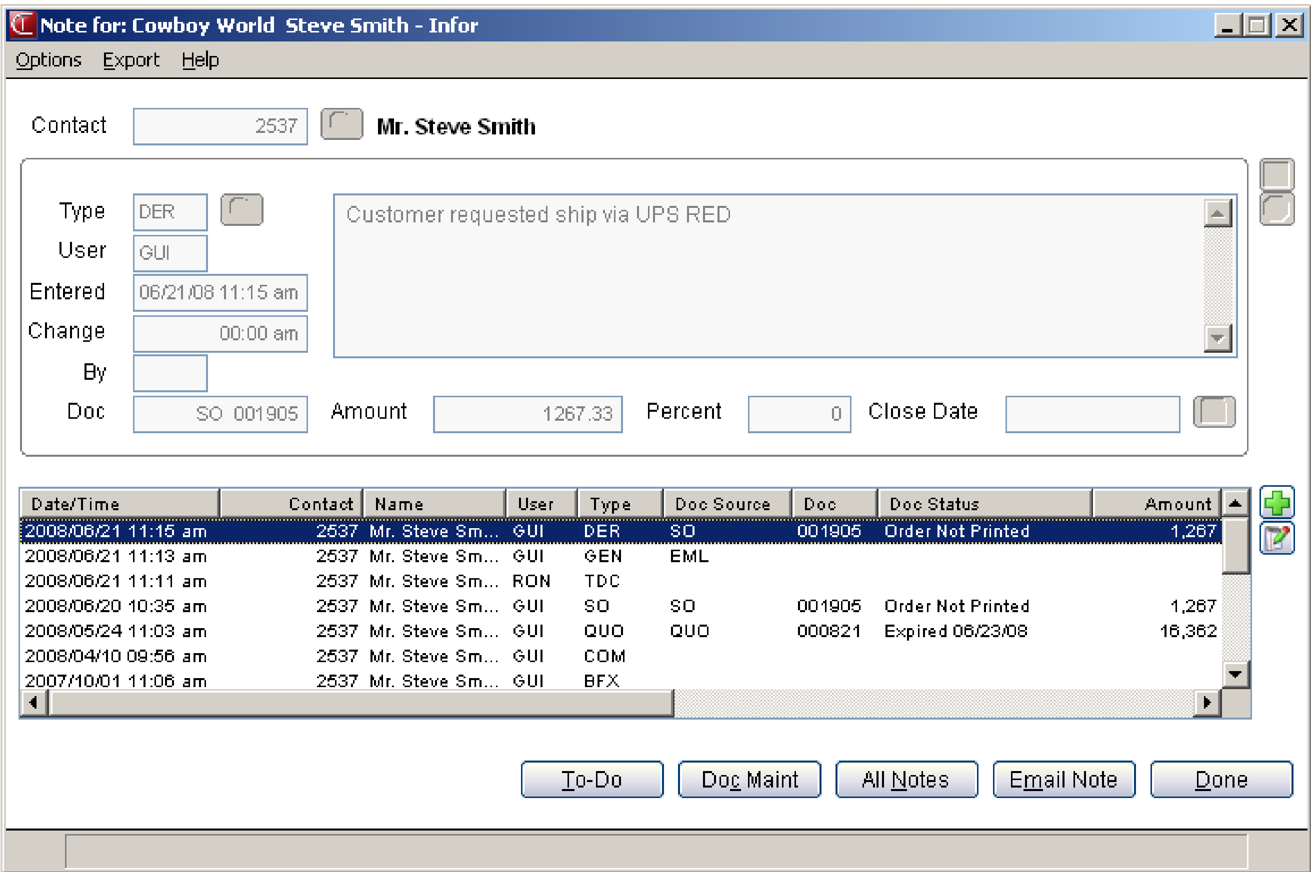
This button will display all the notes for the Customer/Vendor if one is associated to the contact record.

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.

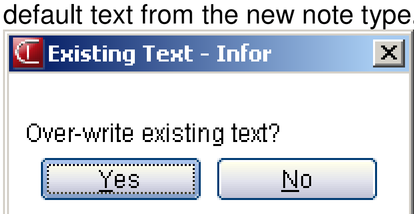
Add a Note

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.

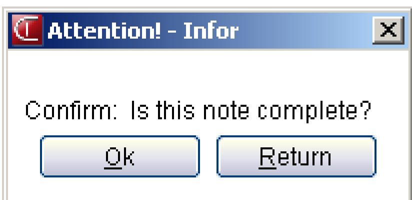


User – This is your user code.
Entered – The date the record was entered or created

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.

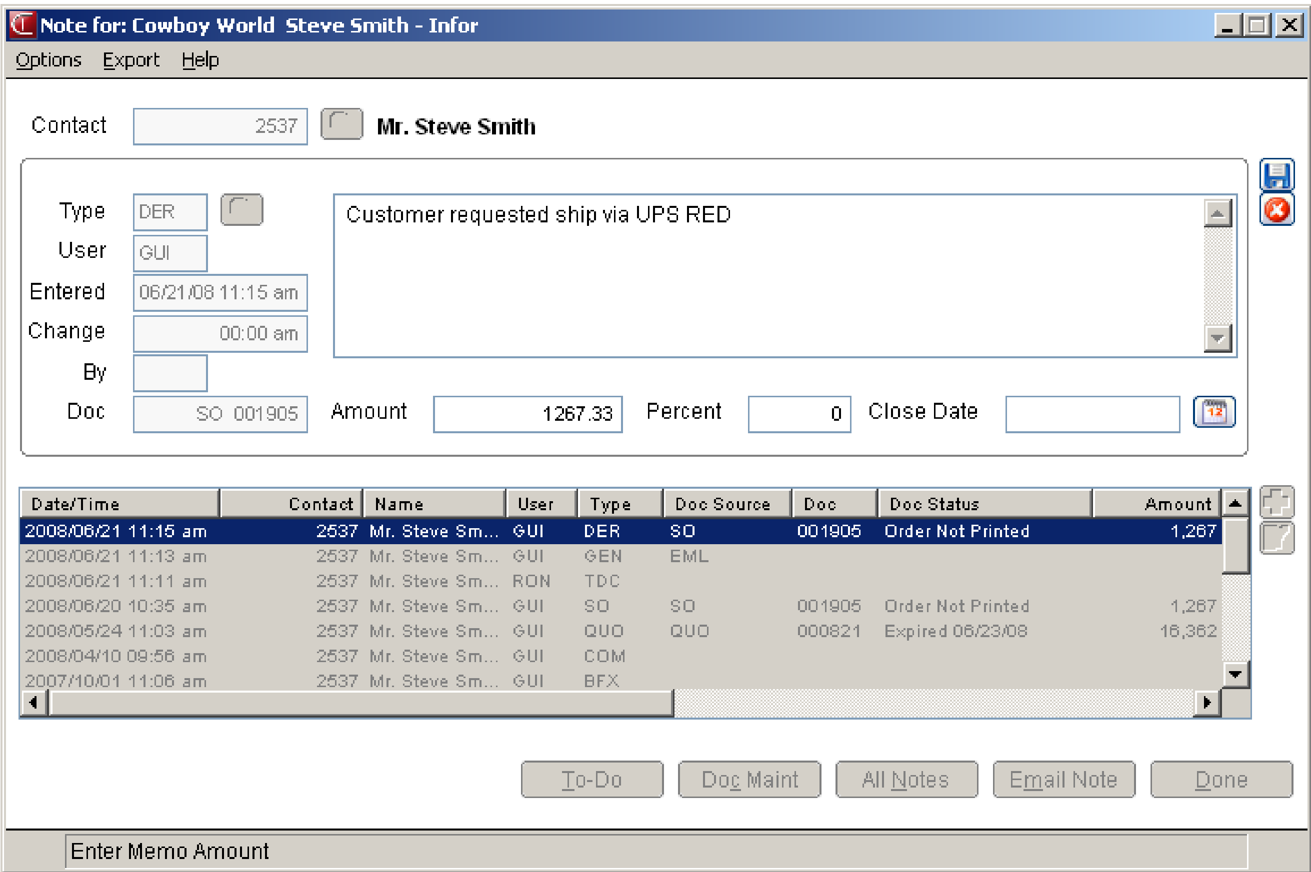
When you are done, click on the Save icon to finish adding or the Cancel icon to discard the entry.

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 cannot 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. The Amount and Percent fields are not used anywhere else in FACTS or RM.



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:

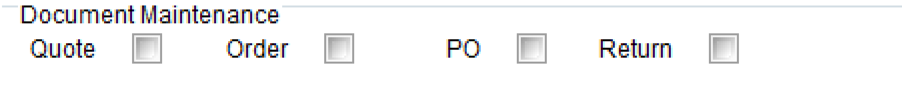
- Quote Entry
- Order Entry
- Customer Returns
- Purchase Orders
- Completed or deleted To-Do
- Email/Fax/Letters
- Broadcast Fax/Email
- Quote Conversions
- OPW – Opportunity Win
- OPL – Opportunity Loss

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

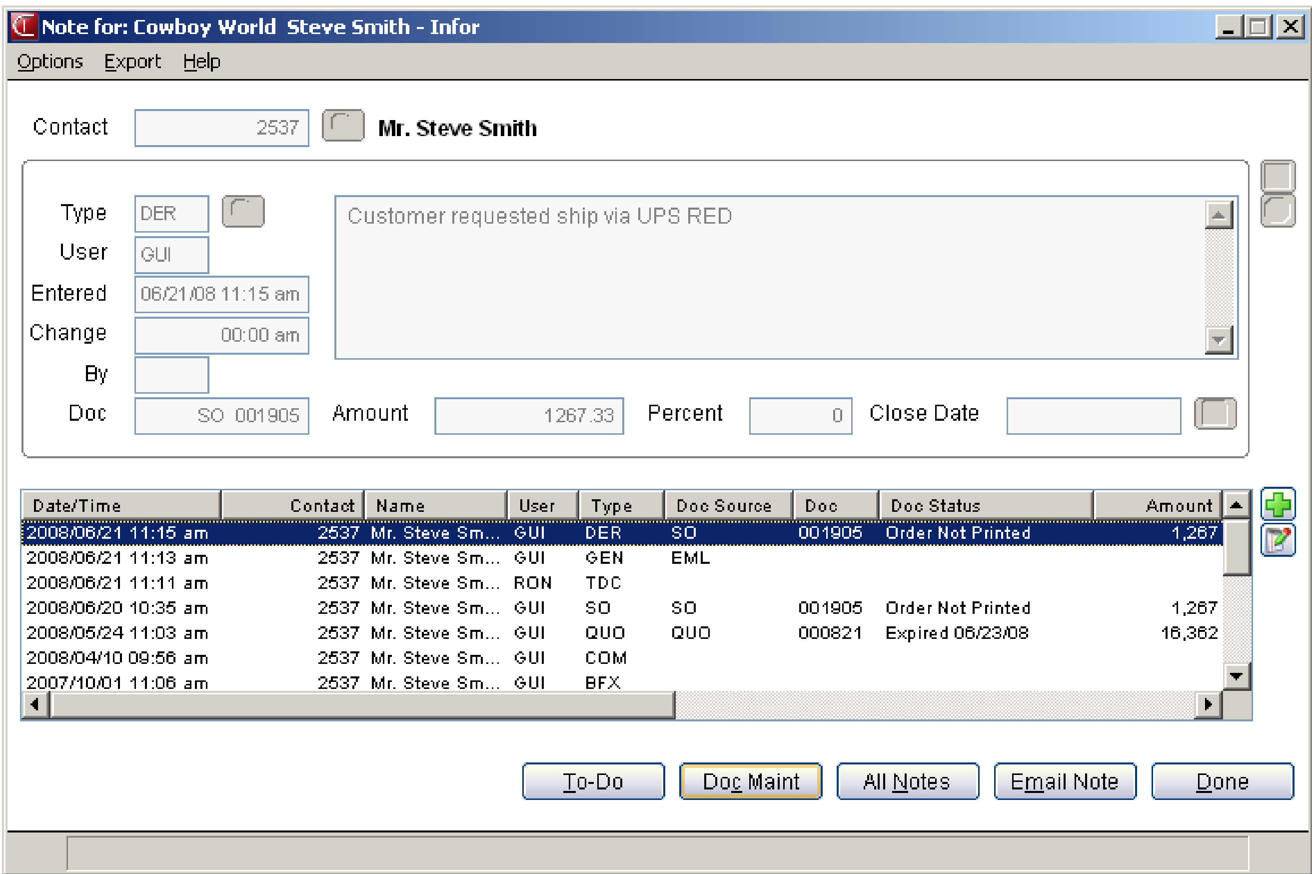
- QUO – Quote
- SO – Orders
- RTN – Customer Return
- PO – Purchase Order
- TDC – To Do Complete
- EML – Email
- LTR - /Fax/Letters
- BFX – Broadcast Fax
- BML – Broadcast Email
- QCV – Quote Converted
- OPW – Opportunity Win
- OPL – Opportunity Loss

Doc Maint button

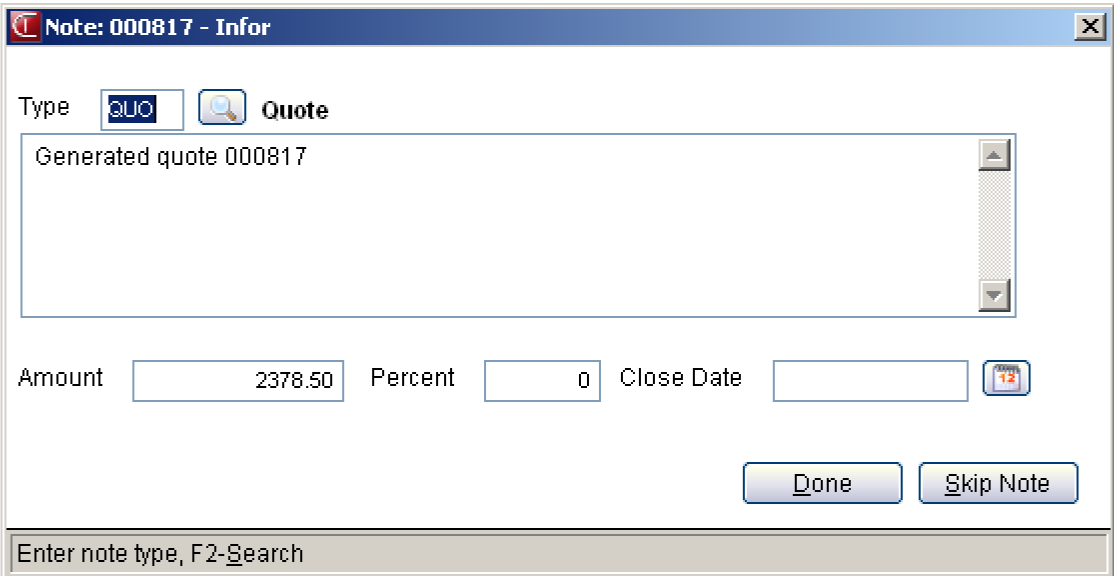
This is only true if the RM Static Control is checked accordingly.



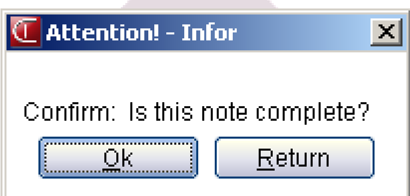
When a note is created from an entry program, a document number is associated with the note. When a note has a document number, the 'Doc Maint' button will be active and when pressed will launch the associated entry program. If the document has been updated, the appropriate inquiry program will be launched.



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.



 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.

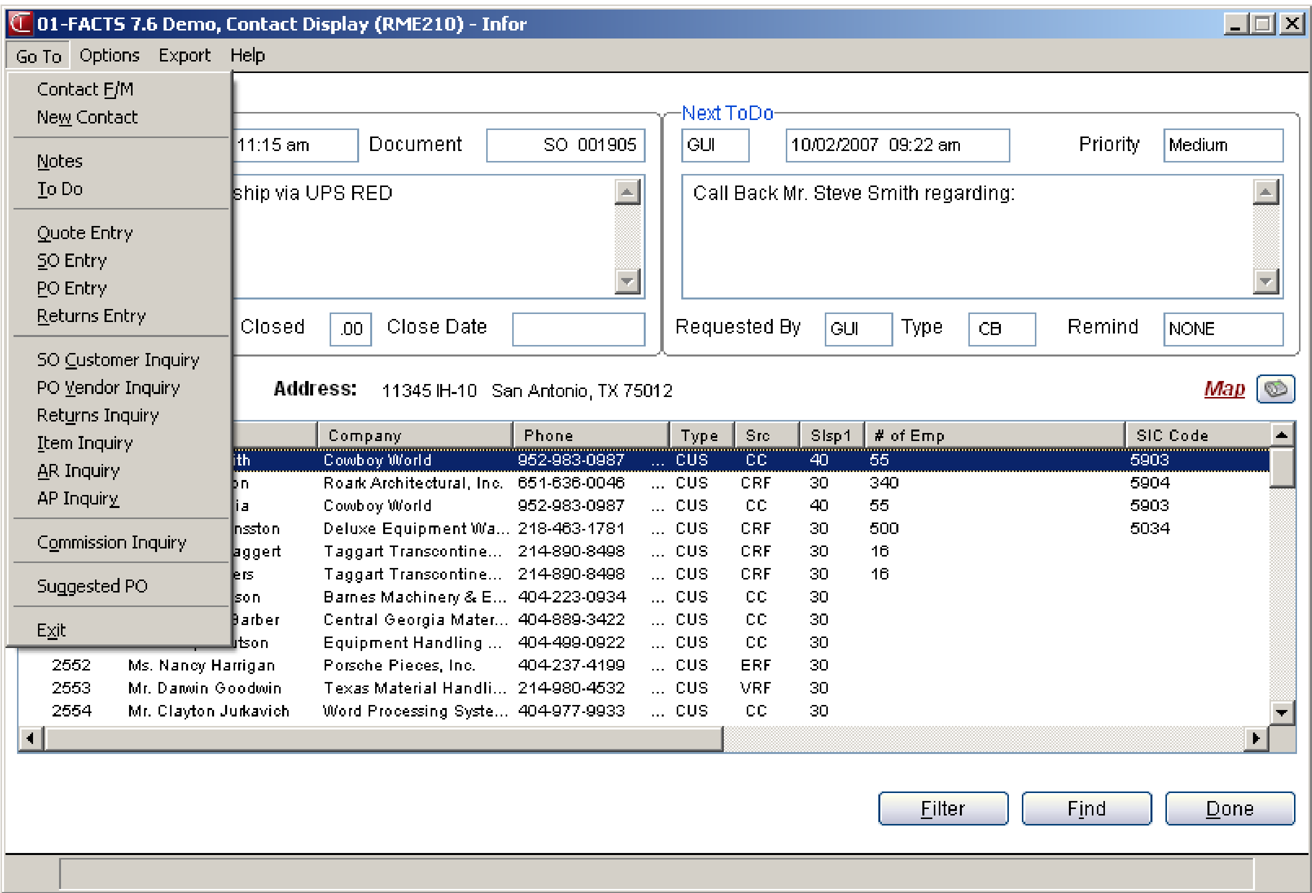
Browser Window

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

Go To Menu

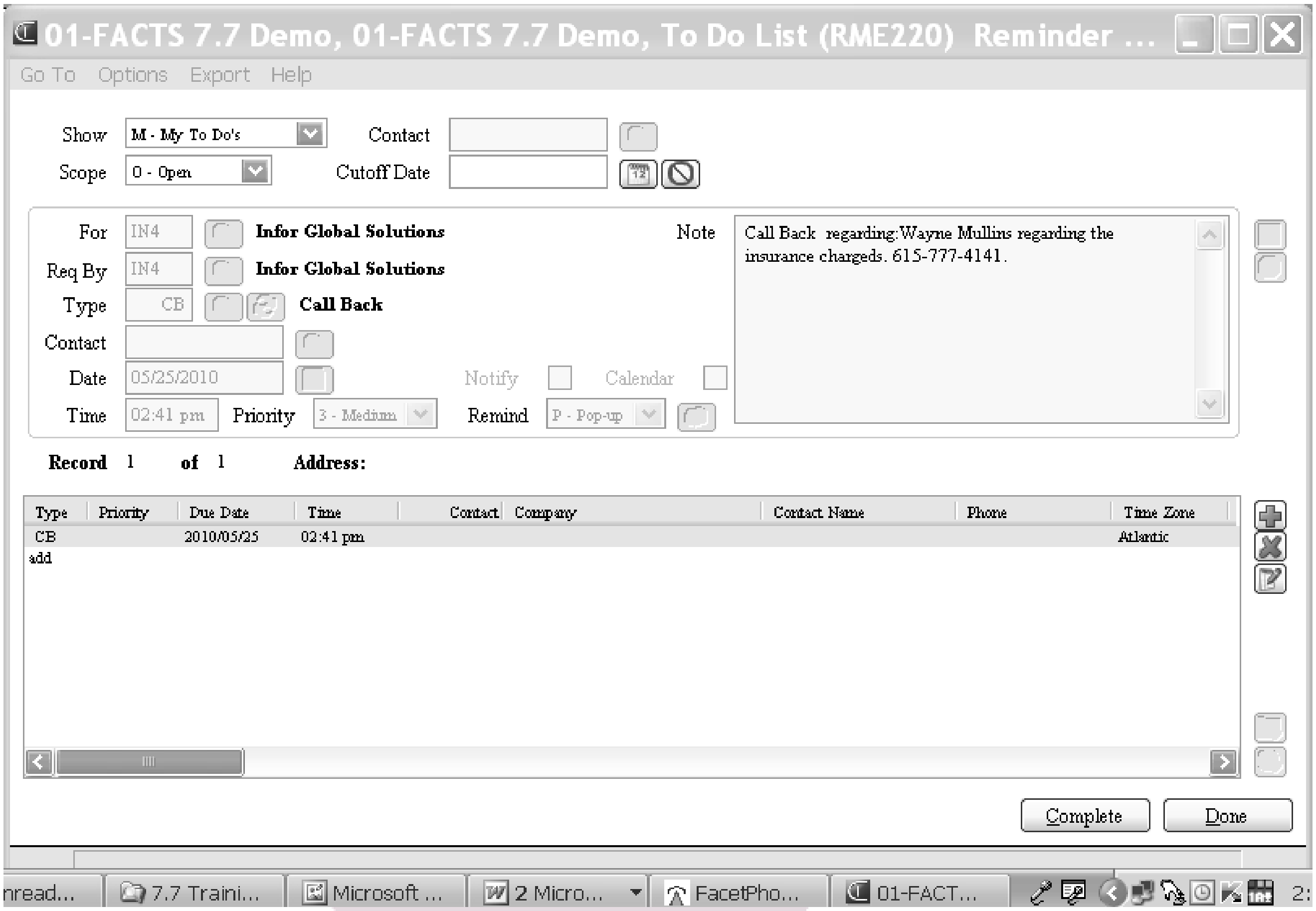
The purpose of the Go To pull down menu is to launch programs for the contact highlighted in the browser window. The application being run will have the contact information pre-filled.
Vendor related programs are available for contacts associated with vendors, customer related programs are available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

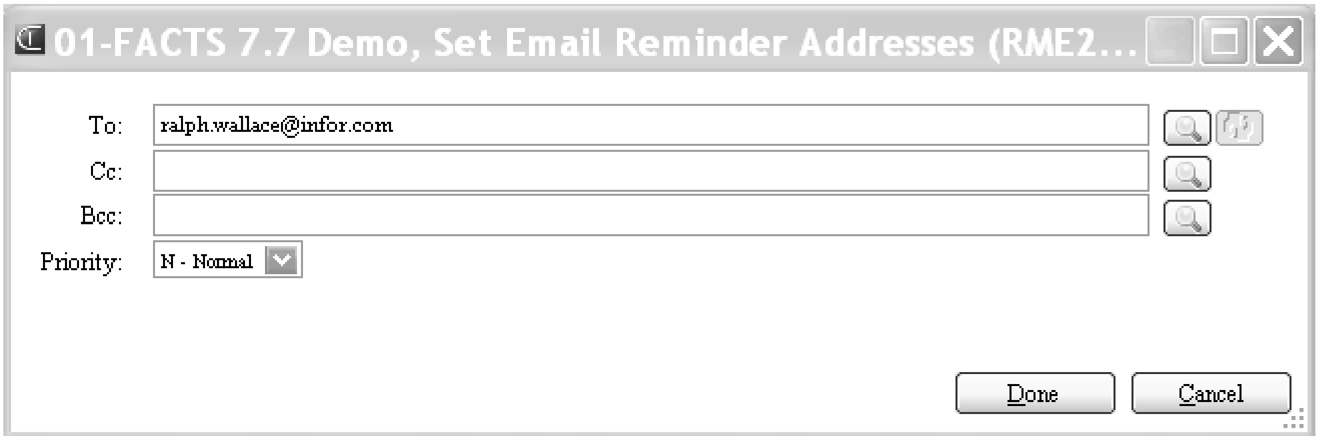
If you are in the View/Edit mode, double click the 'add' line or click the  icon on the right side of the screen. The top part of the screen will be available for editing.



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 <u>cannot</u> <u>be undone</u>. If this To Do item was assigned by another user, you must have the necessary security to delete it.

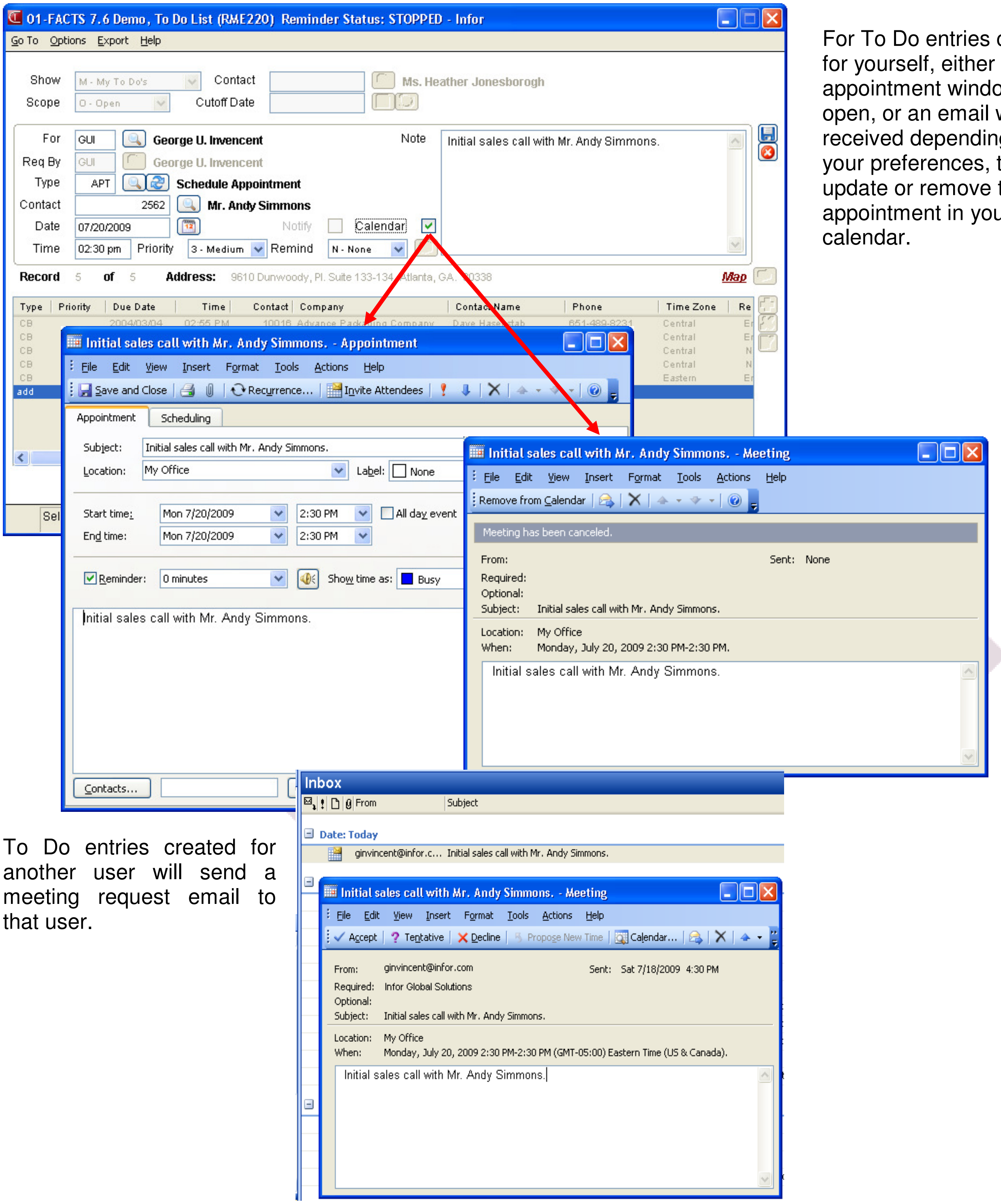
Mark a To Do Completed

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.

Create / Maintain Appointments in your Windows®[ii]-based Calendar Application

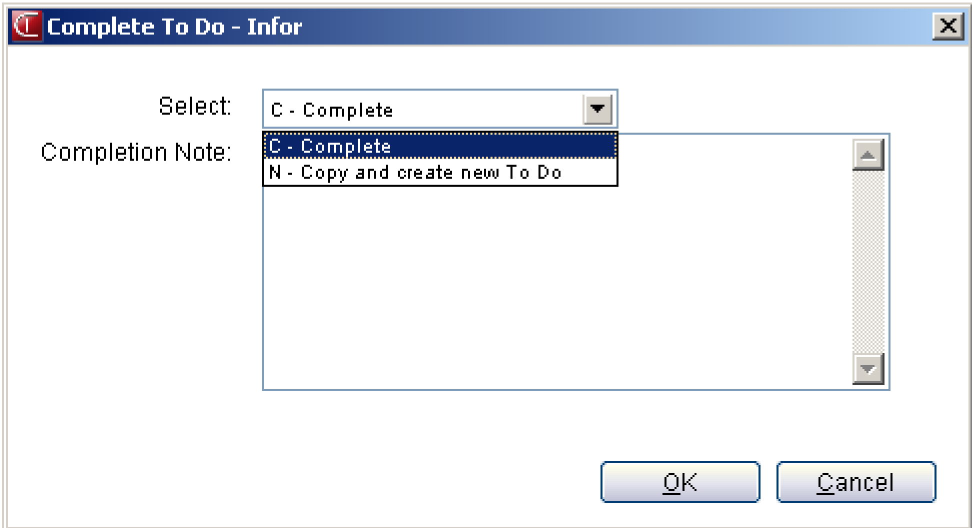
A new checkbox has been added in To Do entry that will create, maintain, or remove appointments in any Windows-based calendar application that is compatible with the iCalendar specification and is mapped to the .vcs file extension. The examples shown below are from Microsoft® Outlook®.

For To Do entries created for yourself, either an appointment window will open, or an email will be received depending on your preferences, to add, update or remove the appointment in your calendar.



For To Do entries created for yourself, either an appointment window will open, or an email will be received depending on your preferences, to add, update or remove the appointment in your calendar.

To Do entries created for another user will send a meeting request email to that user.



Start/Stop Reminders

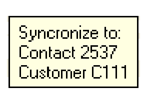
Each To Do item has a scheduled date and time the system can use to remind you of deadlines. You can start or stop the reminder program manually by selecting the Start/Stop Reminder option on the Options pull down menu. You can also stop the reminder program by clicking the Stop Reminder (All) button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

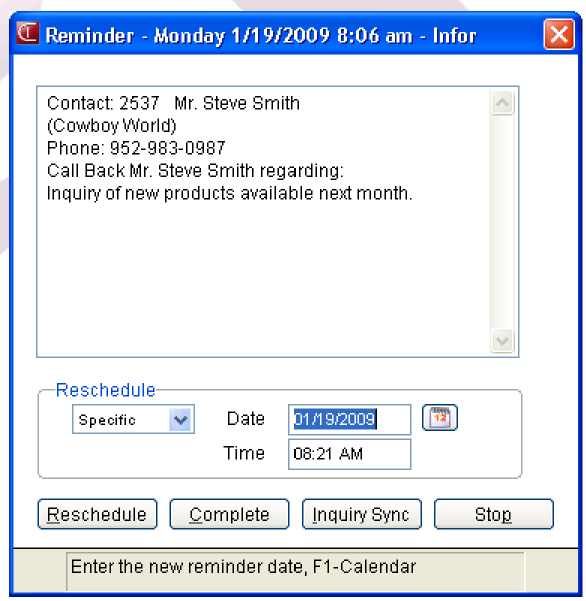
Reminders

The pop-up reminder window has been redesigned using the Answer Driver.

Rescheduling the reminder is easier since the date and time fields are included.

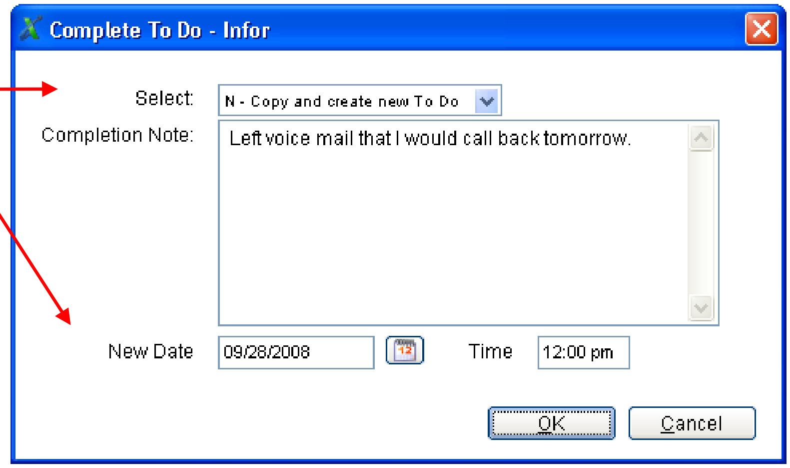
A new button, Inquiry Sync, will synchronize inquiries to the contact and customer or vendor associated with the To Do. Customer and vendor associations are available for To Dos created from within the standard work centers. The button is disabled when none of the associations are available. The tool tip for the button shows the synchronization that will occur.



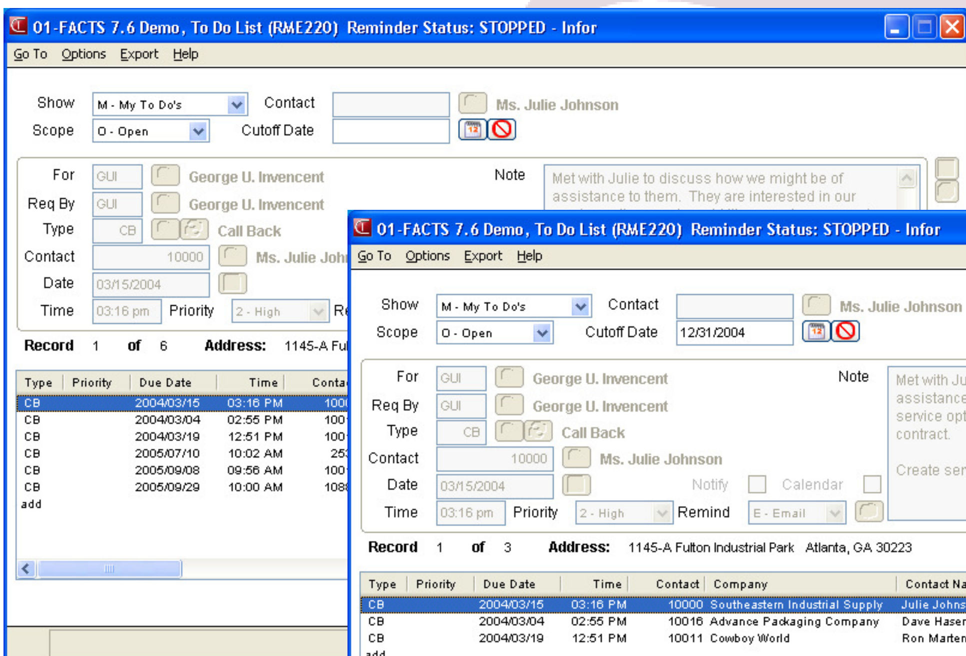


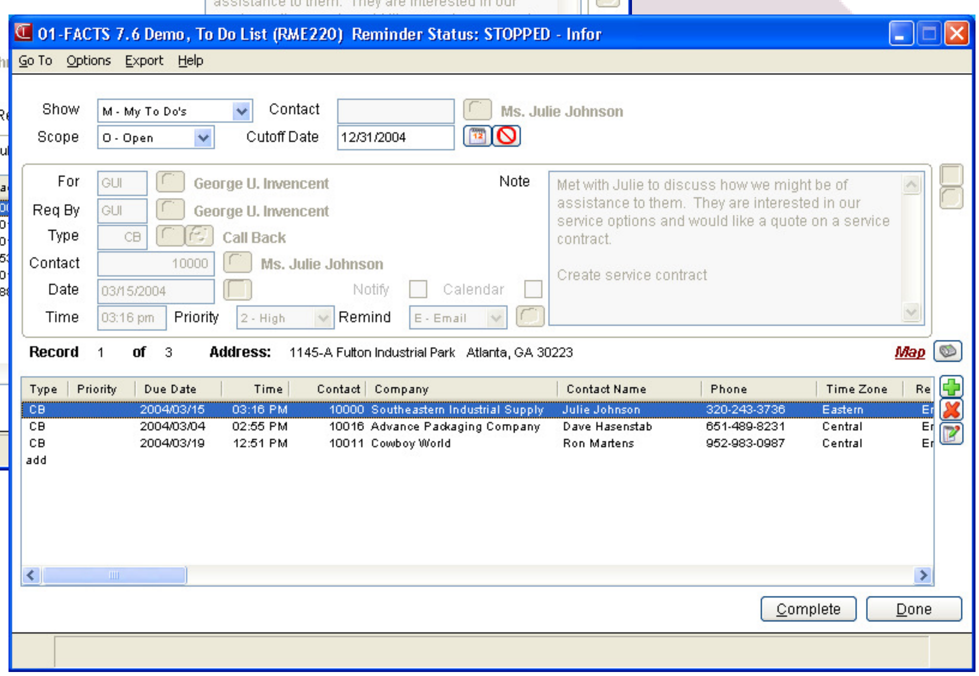
The “Complete To Do” window has been enhanced to include the Select, New Date, and Time fields to support the new “Copy and create new To Do” feature of To Do Entry.

The “Select” field defaults to “Complete” and is a “back-into” field. The “New Date” and “Time” fields are only enabled when the copy and create option is selected. A future date and/or time is required.



The filter area has been rearranged to include a new Cutoff Date when the Open Scope is chosen. All open To Dos due on or before the cutoff date will be listed. The ability to scroll through the Note field without having to edit the line item has also been added. To Dos also synchronize with the notes viewer.

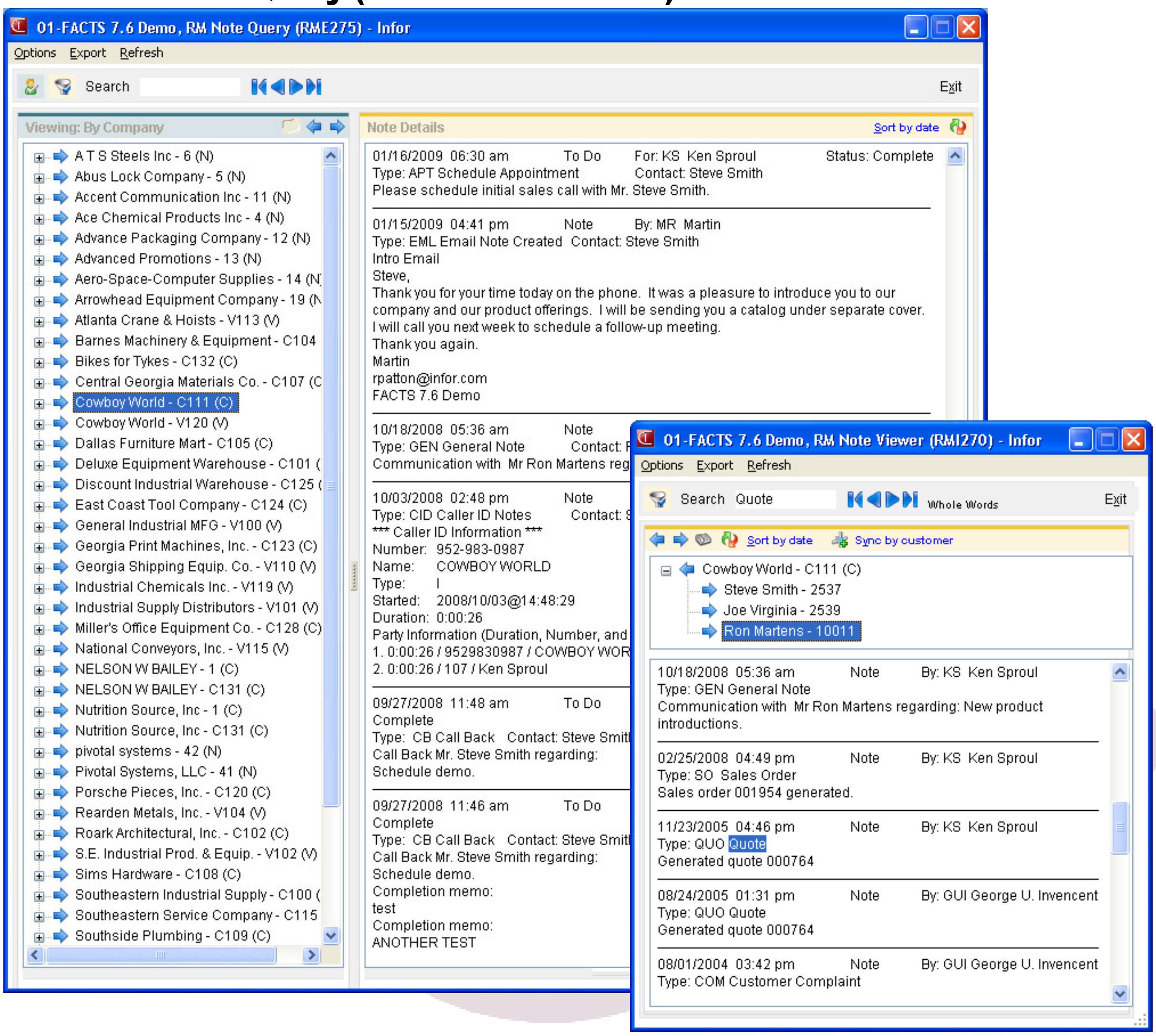




*.Note: **If you set up a To Do with an email only reminder, the only way to reschedule or complete the To Do is through the To Do Entry program.***


Filtered Notes Query

Note Viewer & Query (RMI270 & RME275)

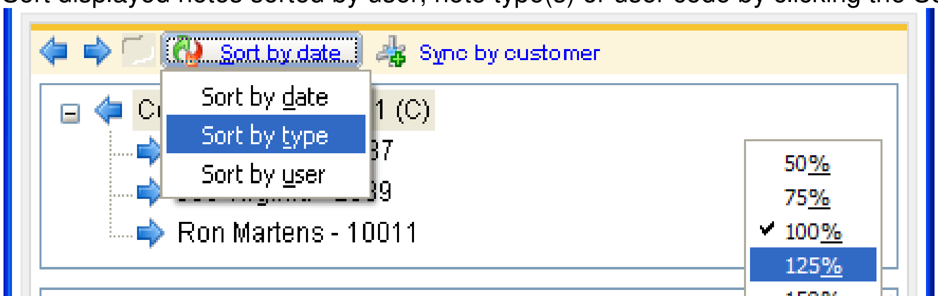


Common Features:

- Resizable window
- Remembers screen position, size & preferences on next launch
- Notes text search with:
  - VCR buttons
    - Alt-F – First occurrence
    - Alt-L – Last occurrence
    - Alt-N – Next occurrence
    - Alt-P – Previous occurrence
  - Match Case option
  - Whole Word option
- Notes Filter (see screen below)

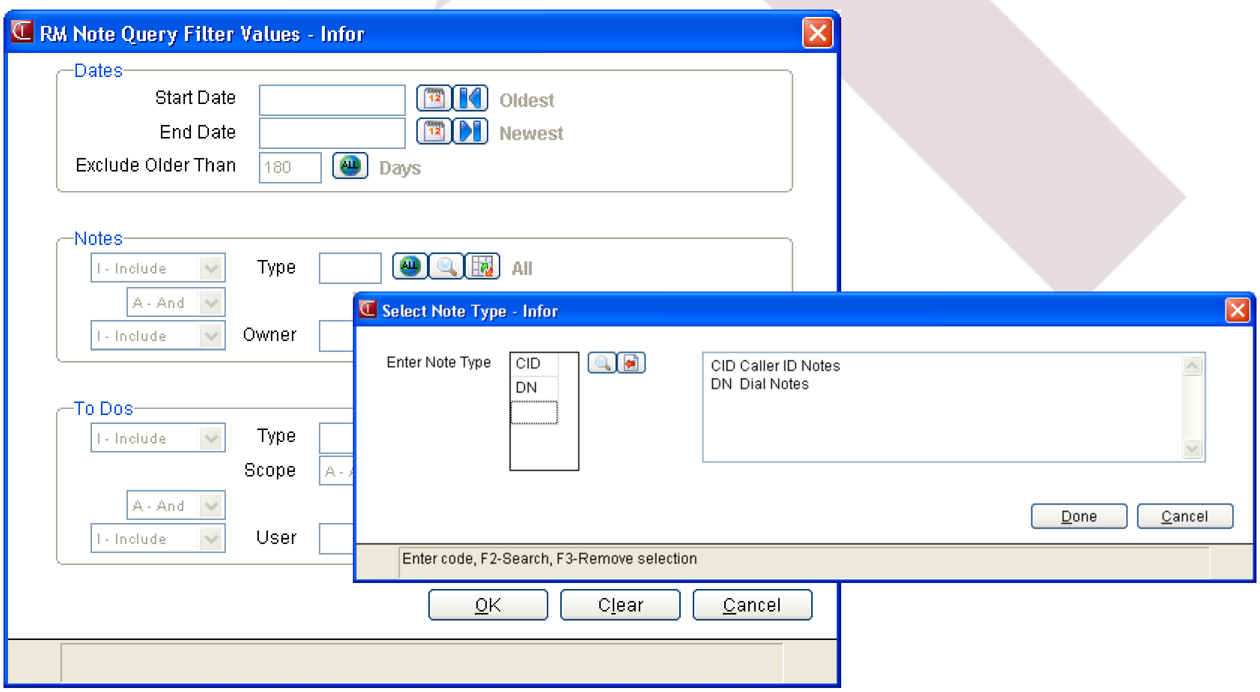
- Click button , Alt-B or select from preferences menu
- Button changes to when a filter is in use. When you hover over the button, the tool tip will display the filter criteria

- Preferences for viewing and loading notes (see screen below)
- View individual contact notes or all notes by customer/vendor. Clicking on the vendor/customer will display all notes, clicking on a contact will display notes for just that contact
- Sort displayed notes sorted by user, note type(s) or user code by clicking the Sort by button



- Right click the note text to select a font size for the text
- Export selected notes to Excel
- The standard RM Go To menu is available when you right click on a contact in the tree view
- Expand or collapse tree view

Filters

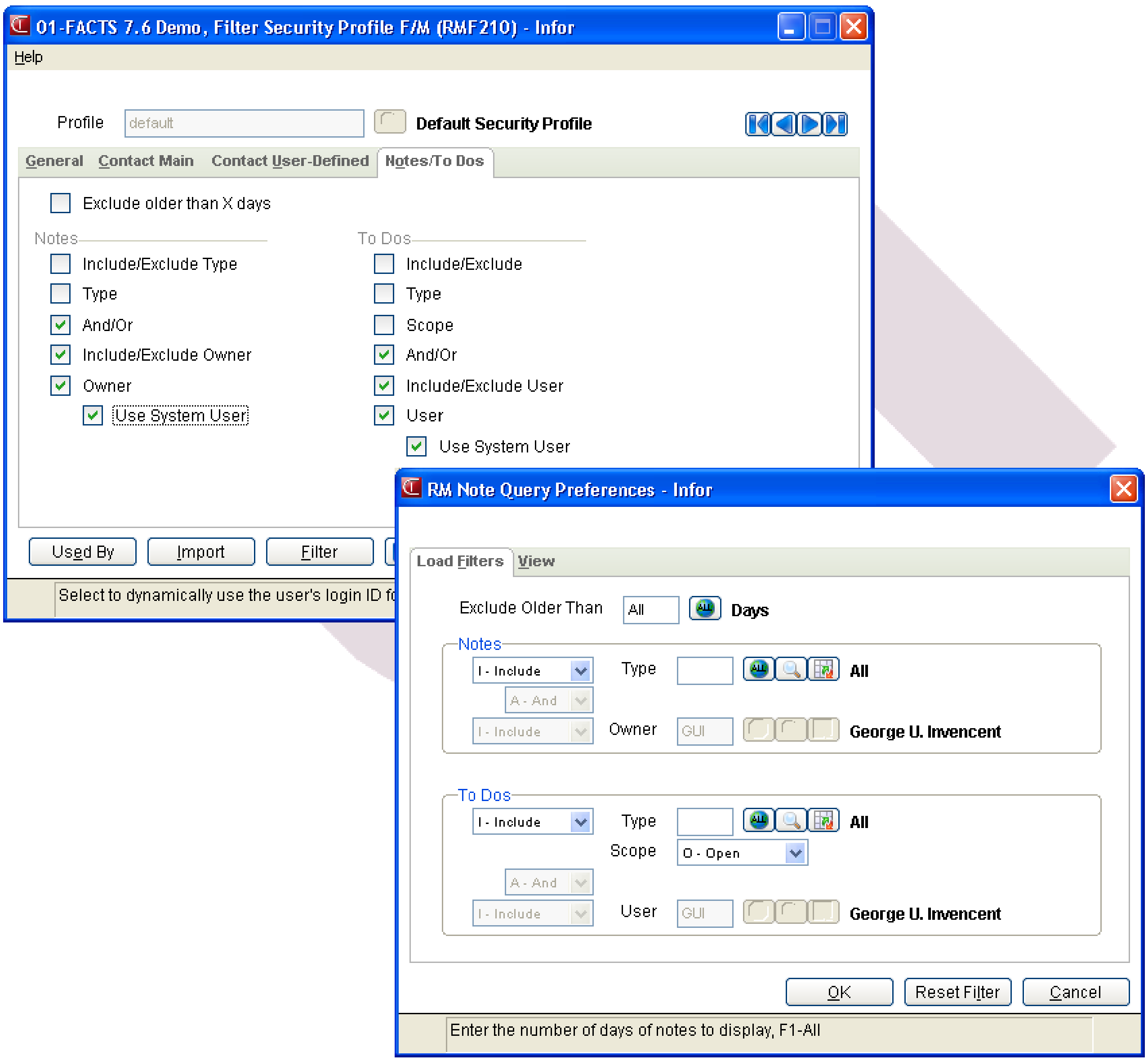


- Dates
  - Start & end date range
  - The 'exclude older than' field allows you to see notes for a fixed number of days back relative to today
- Notes
  - Include / Exclude single or multiple note types
  - And/Or option

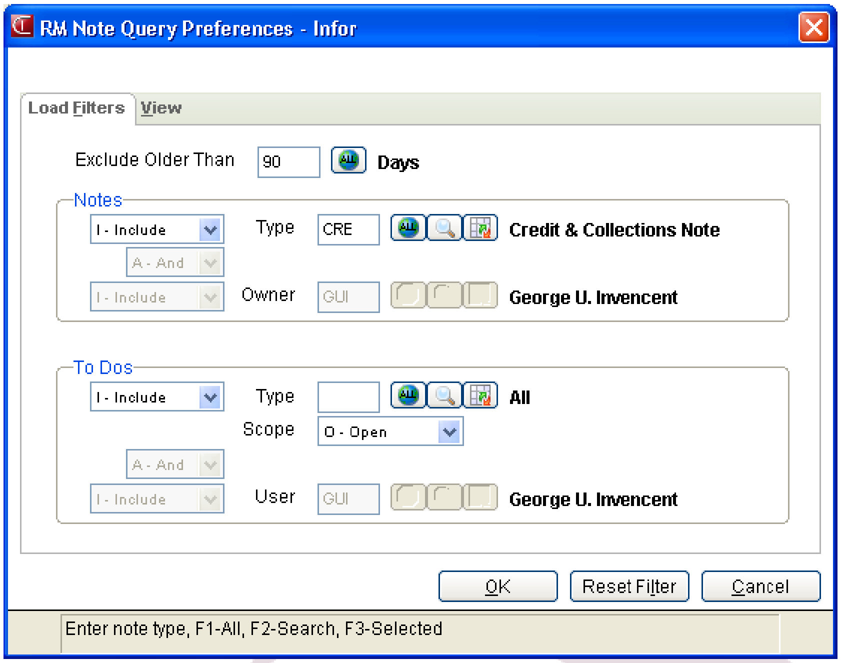
- Include / Exclude single or multiple note owners

- To Dos
  - Include / Exclude single or multiple to do types
    - Scope selection for To Do:
      - All
      - Completed
      - Open
  - And/Or option
  - Include / Exclude single or multiple to do users

Load Filter Security
The load filters have been incorporated into our standard filter security program.

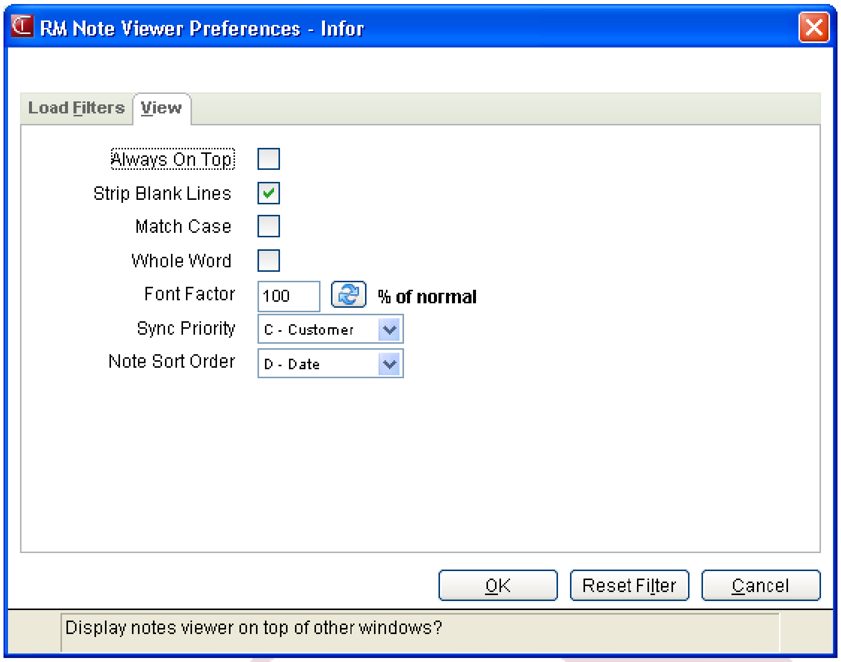


Preferences



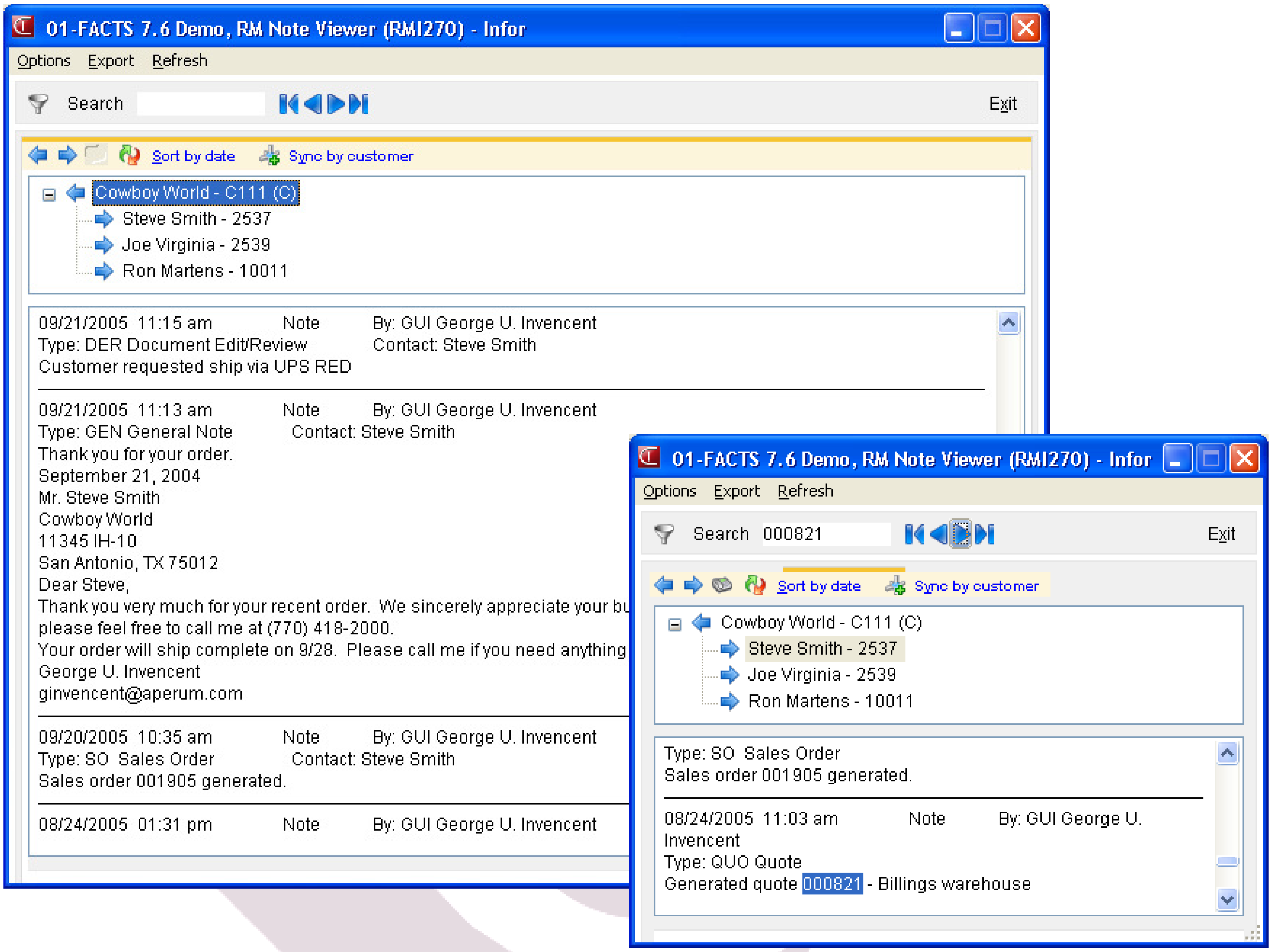
The Load Filters tab allows you to control the volume and type of notes to load. When the Note Viewer or Query is started or synchronized, the filter values are used to limit the scope of the notes to load.

- The 'exclude older than' field allows you to see notes for a fixed number of days back relative to today
- Notes
  - Include / Exclude single or multiple note types
  - And/Or option
  - Include / Exclude option for selected note owners
- To Do
  - Include / Exclude single or multiple to to types
  - Scope:
    - All
    - Open
    - Completed
  - And/Or option
  - Include / Exclude single or multiple to do users



- The Always On Top option will keep the note viewer on top of other windows
- The Strip Blank Lines options will remove blank lines from all notes as they are displayed to allow more notes and less scrolling
- Match Case on text search will highlight only text that matches by case
- Whole Word on text search will only highlight complete words
- Font Factor is used to display notes in a font that is a percentage of the standard FACTS font size
- Sync Priority allows the user to select which value to look at to cause the viewer to redisplay data. There are situations where synchronization values are available for customers, vendors and RM contacts. (Note Viewer Only)
- The Note Sort Order selects the default note display order by descending note date, note type or user code

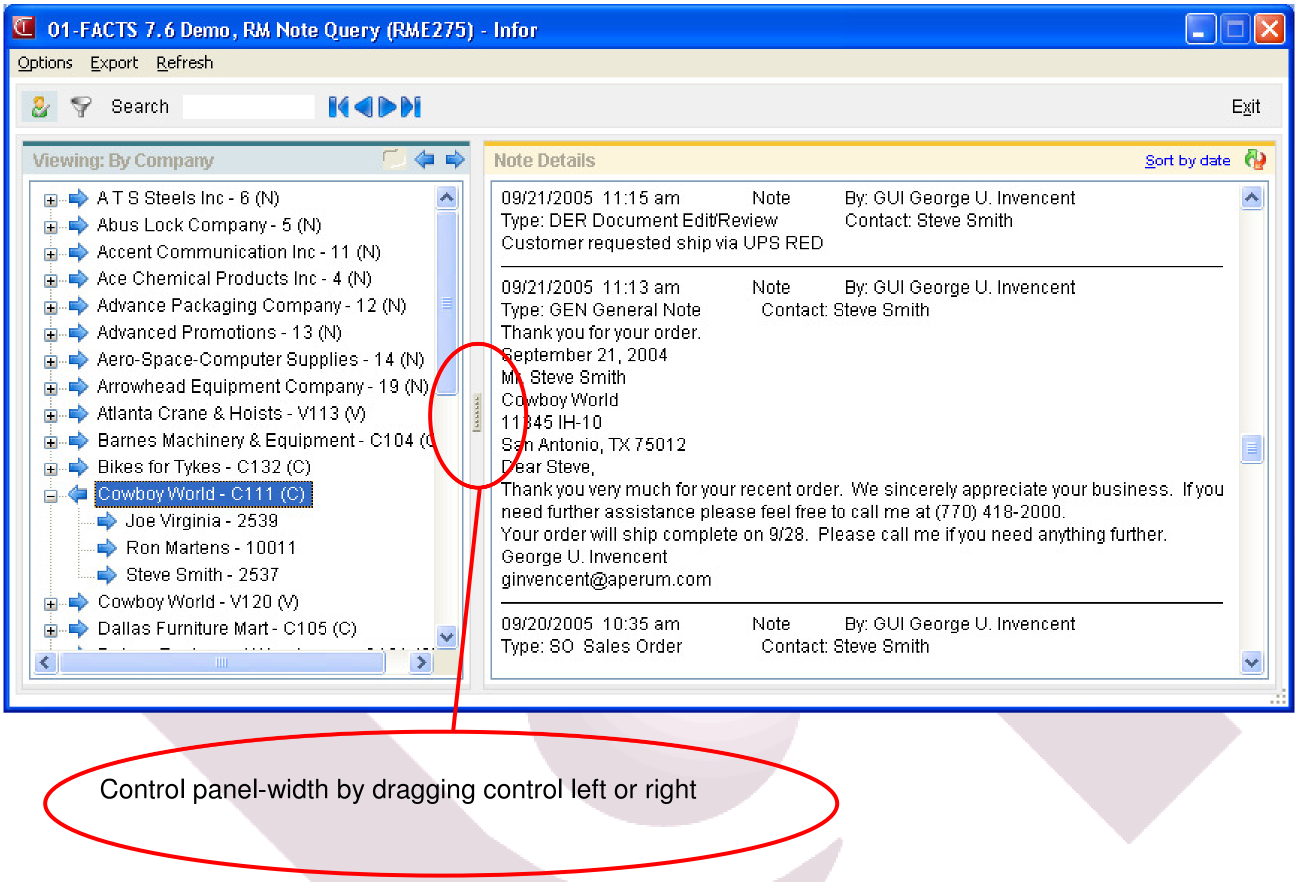
Note Viewer Specific Features

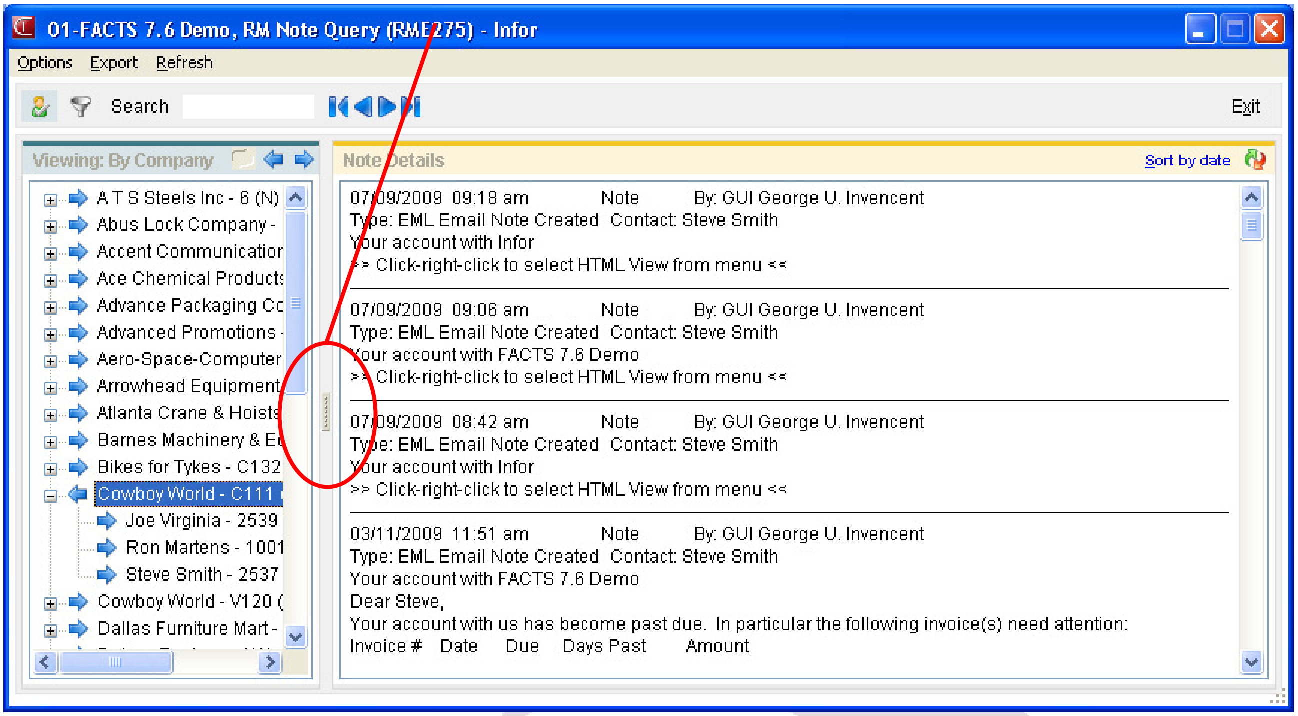


- Launch with hotkey defined in User Preferences any time from any FACTS screen
- Synchronize to RM Contact, Customer or Vendor
  - When synchronizing to contacts, the associated Customer/Vendor and related contacts are displayed
  - Change the sync priority for the session with the “Sync by” button
- Synchronize from anywhere in FACTS where customers, vendors or contacts are used

Note Query Specific Features

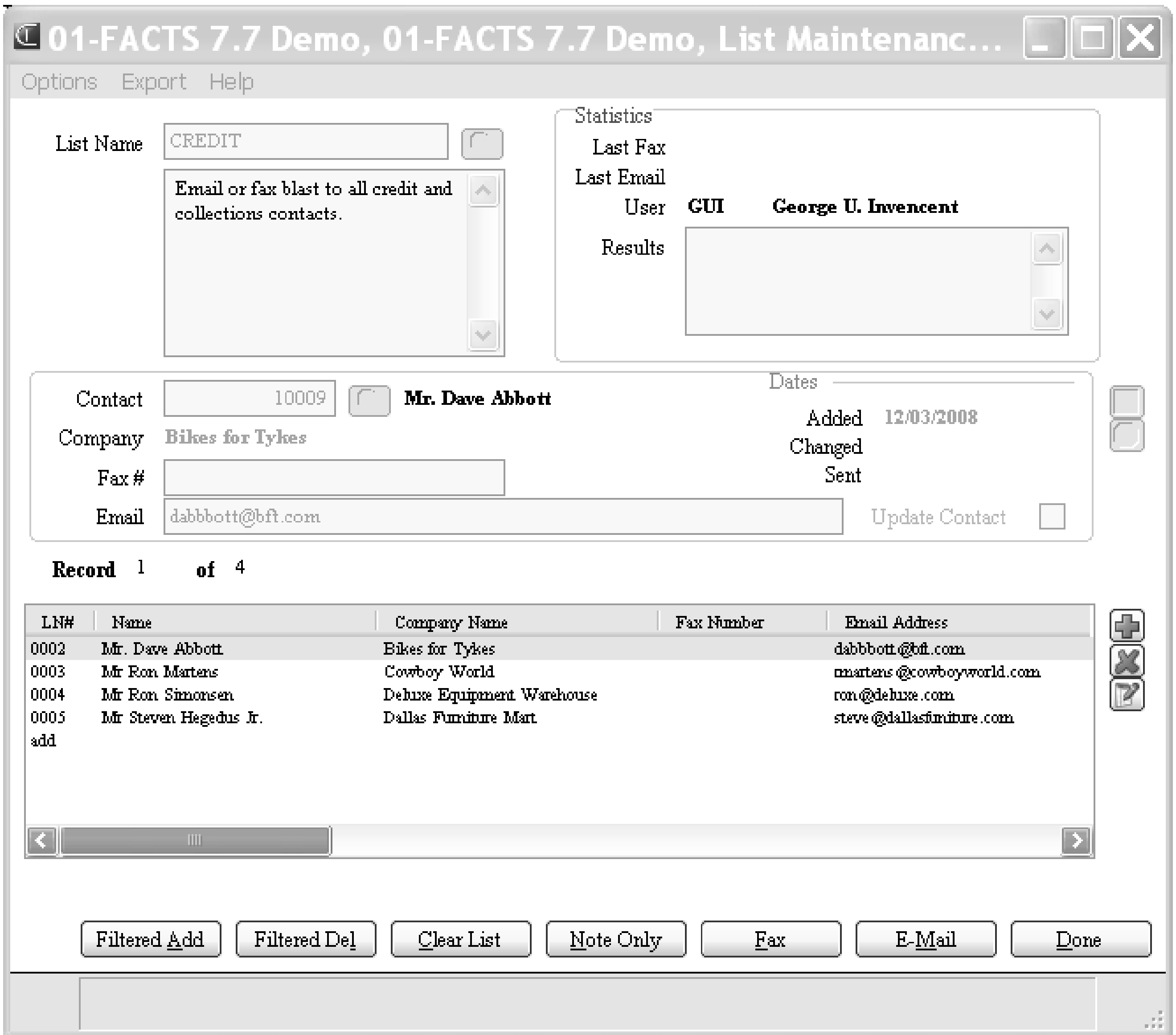
If the Note Removal security in the RM Static Control F/M is not locked and the user has security, the filtered notes visible may be removed via Note Removal in the Options menu. The user must confirm that they want to remove the notes.




01-FACTS 7.6 Demo, RM Note Query (RME275) - Infor
Options
Export
Refresh
Search
Exit
Viewing: By Company
A T S Steels Inc - 6 (N)
Abus Lock Company -
Accent Communicatior
Ace Chemical Products
Advance Packaging Co
Advanced Promotions
Aero-Space-Computer
Arrowhead Equipment
Atlanta Crane & Hoists
Barnes Machinery & E
Bikes for Tykes - C132
Cowboy World - C111
Joe Virginia - 2539
Ron Martens - 1001
Steve Smith - 2537
Cowboy World - V120 (
Dallas Furniture Mart -
Note Details
Sort by date
07/09/2009 09:18 am Note By: GUI George U. Invencent
Type: EML Email Note Created Contact: Steve Smith
Your account with Infor
>> Click-right-click to select HTML View from menu <<
07/09/2009 09:06 am Note By: GUI George U. Invencent
Type: EML Email Note Created Contact: Steve Smith
Your account with FACTS 7.6 Demo
>> Click-right-click to select HTML View from menu <<
07/09/2009 08:42 am Note By: GUI George U. Invencent
Type: EML Email Note Created Contact: Steve Smith
Your account with Infor
>> Click-right-click to select HTML View from menu <<
03/11/2009 11:51 am Note By: GUI George U. Invencent
Type: EML Email Note Created Contact: Steve Smith
Your account with FACTS 7.6 Demo
Dear Steve,
Your account with us has become past due. In particular the following invoice(s) need attention:
Invoice # Date Due Days Past Amount

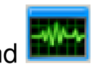
Broadcast List Maintenance

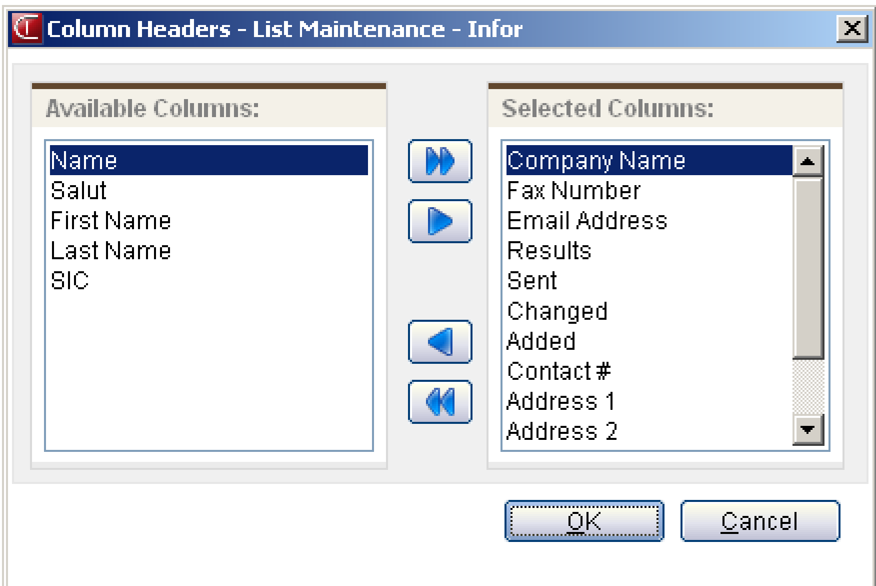
This program is used to associate contacts with specific Broadcast Lists. The header identifies the List Name as defined in the List Name F/M which will be covered later in this document. Statistics for the last broadcast are also displayed in the header.



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

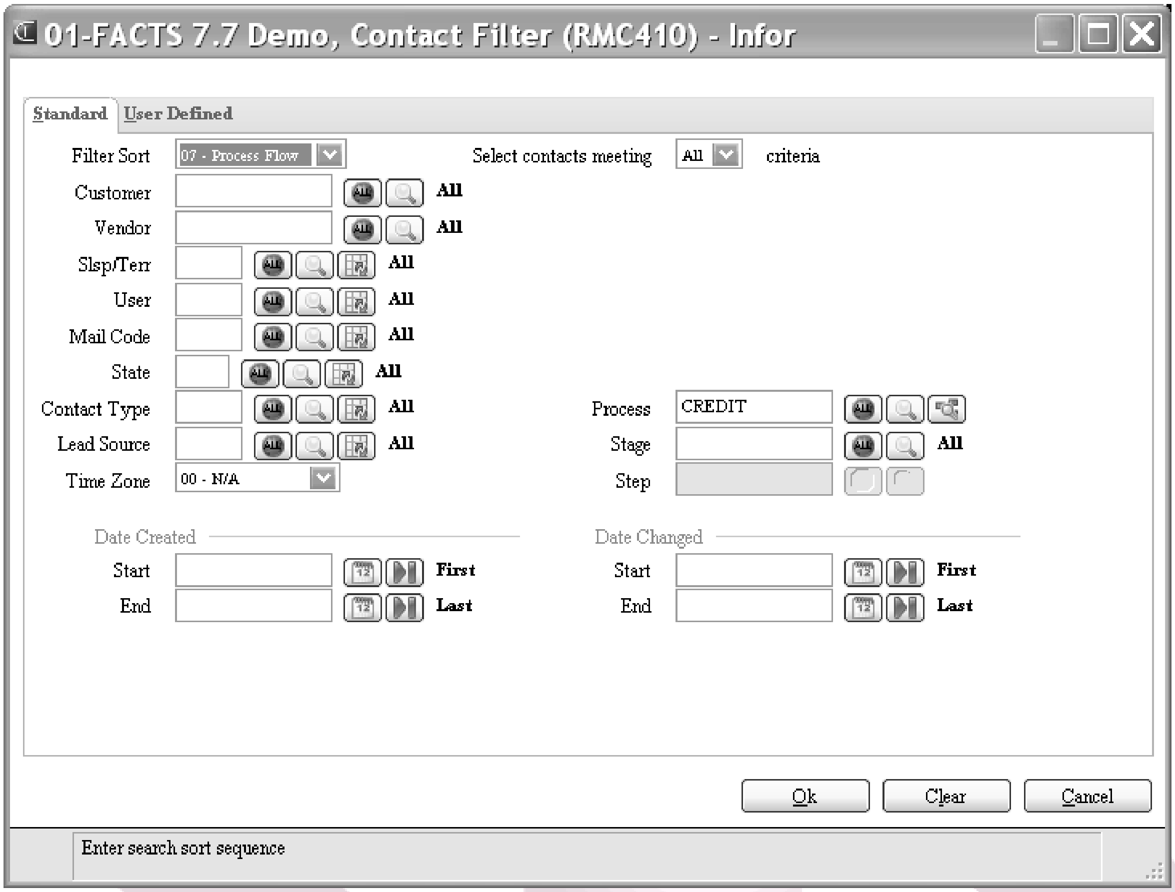
Contacts may be added to or deleted from the Broadcast List by using the ‘Filtered Add’ or ‘Filtered Del’ buttons. Using the Contact Filter, you can perform multiple combinations of additions or deletions to fine tune your list.

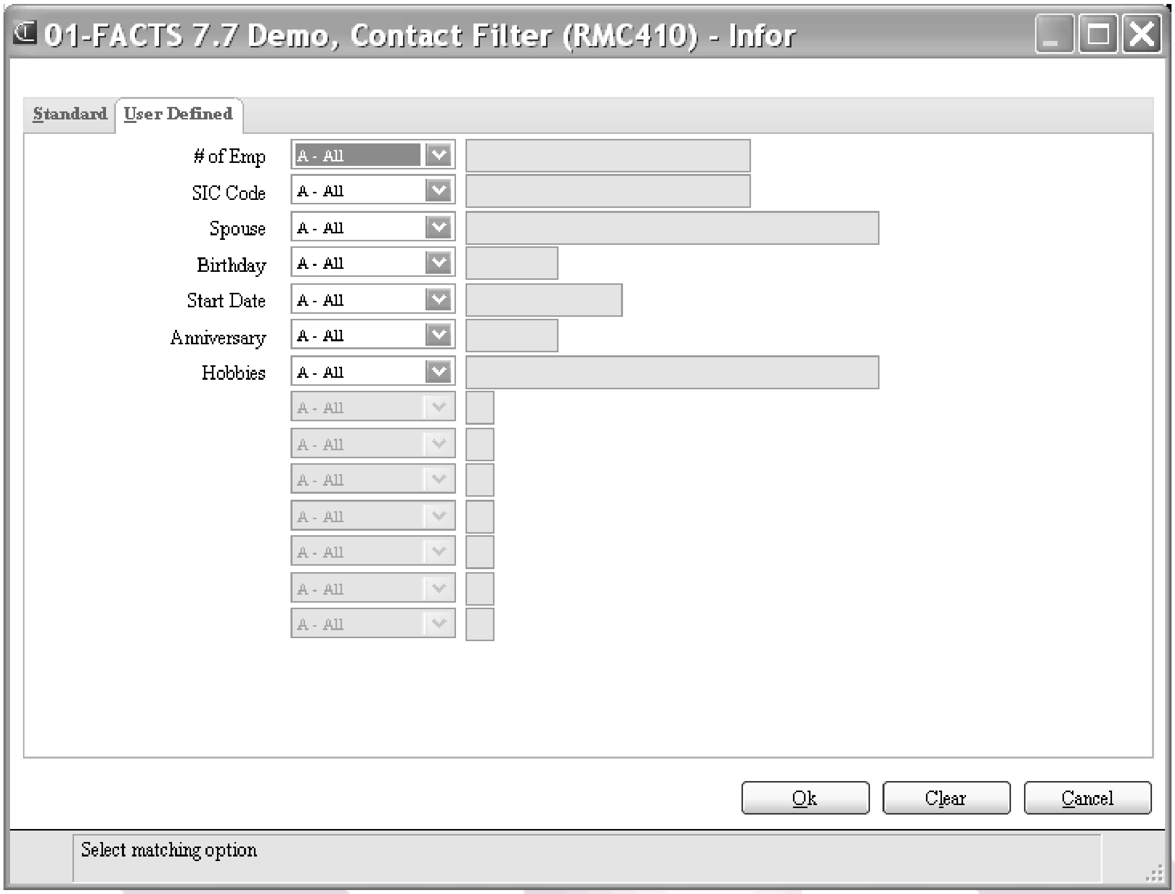
Filtered Add
Use the filter to select the criteria for contacts you want to add to the list. Duplicates will not be added.

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.

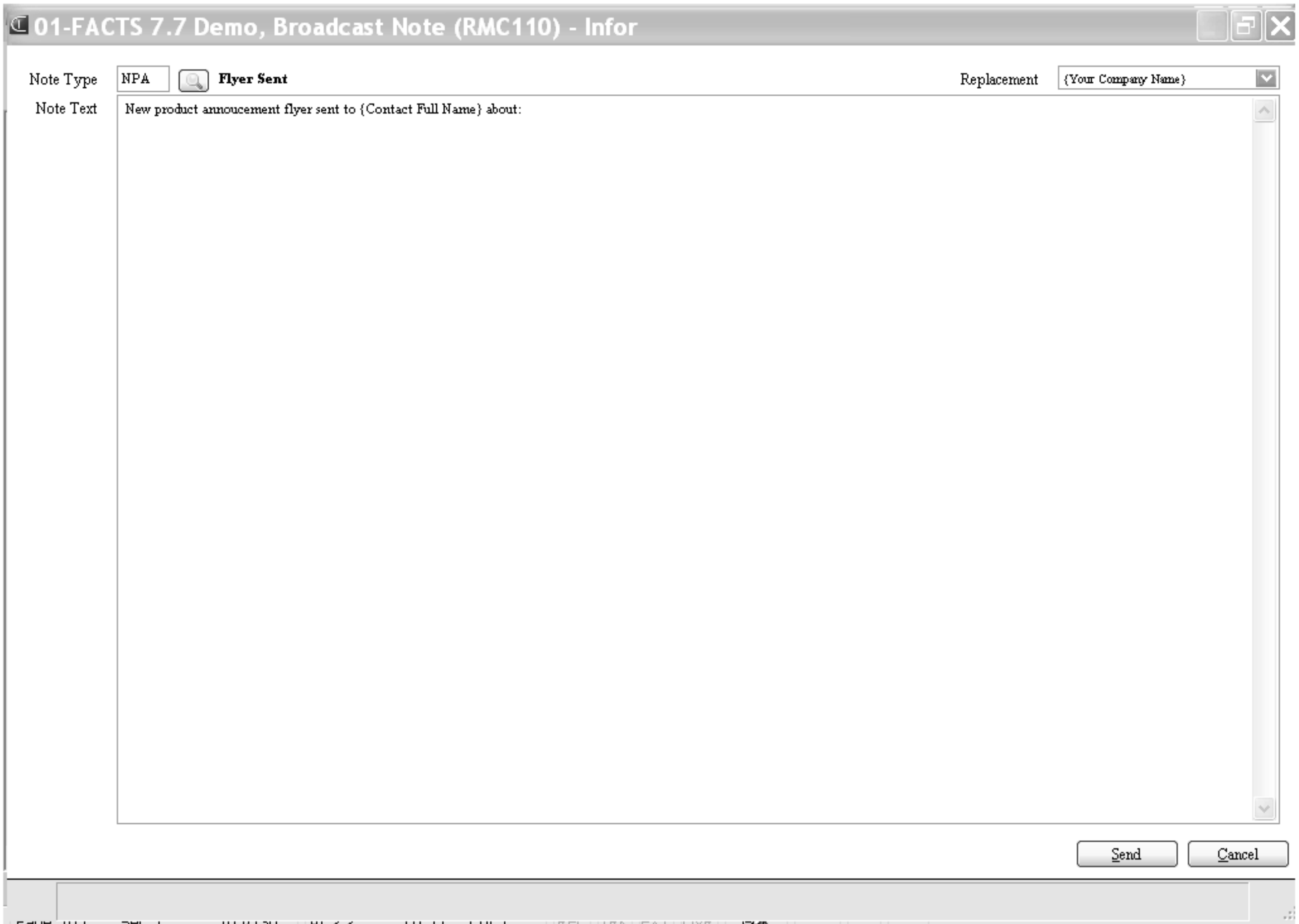

01-FACTS 7.7 Demo, Contact Filter (RMC410) - Infor
Standard
User Defined
Filter Sort
07 - Process Flow
Select contacts meeting
All
criteria
Customer
All
Vendor
All
Slsp/Terr
All
User
All
Mail Code
All
State
All
Contact Type
All
Process
CREDIT
Lead Source
All
Stage
All
Time Zone
00 - N/A
Step
Date Created
Start
First
End
Last
Date Changed
Start
First
End
Last
Ok
Clear
Cancel
Enter search sort sequence



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

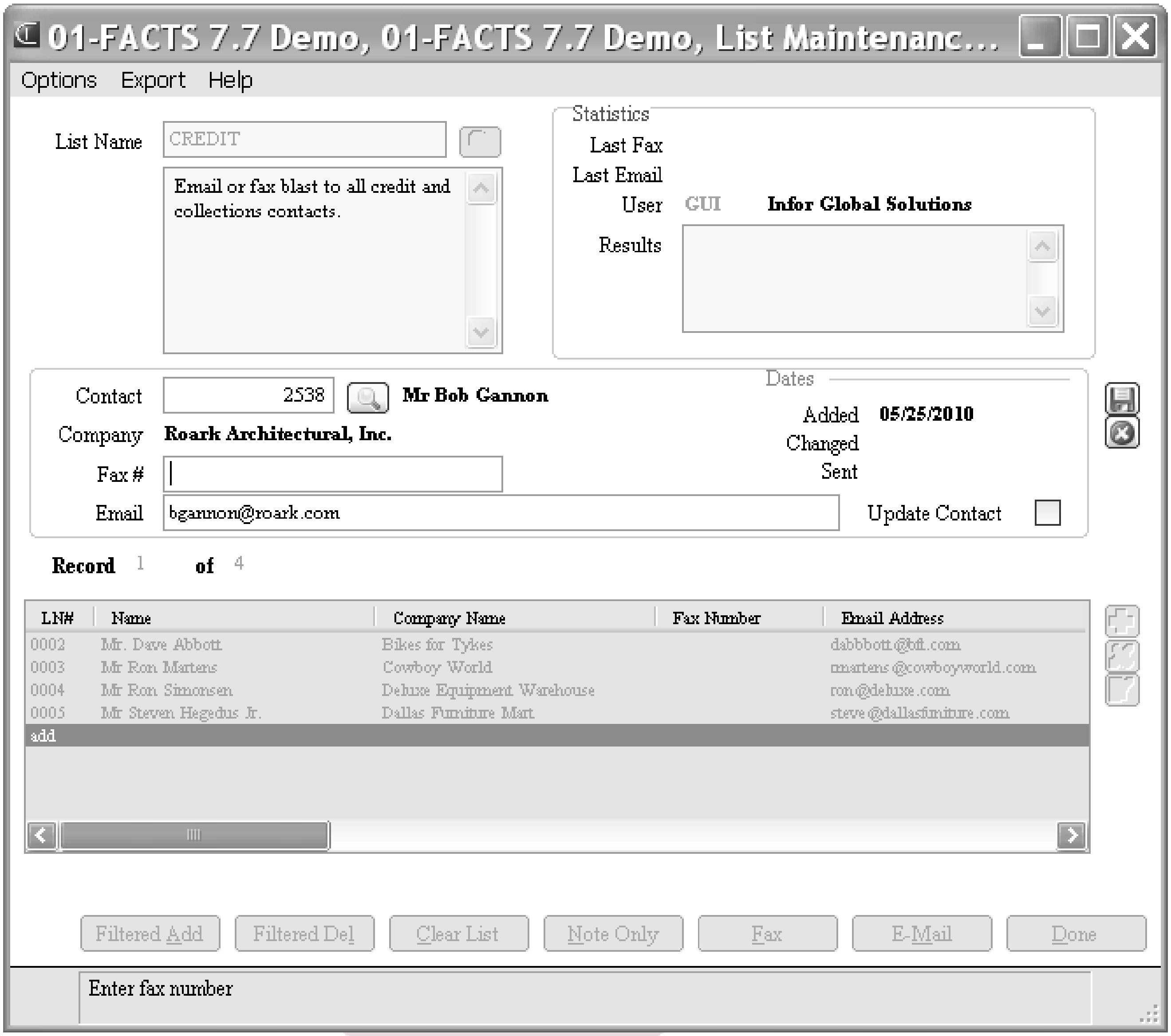
The export function will export the list of contacts in the browser window directly to Excel using fields in the browser column titles. This option is only available if the user has security to export as defined in the RM Static Control.

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.

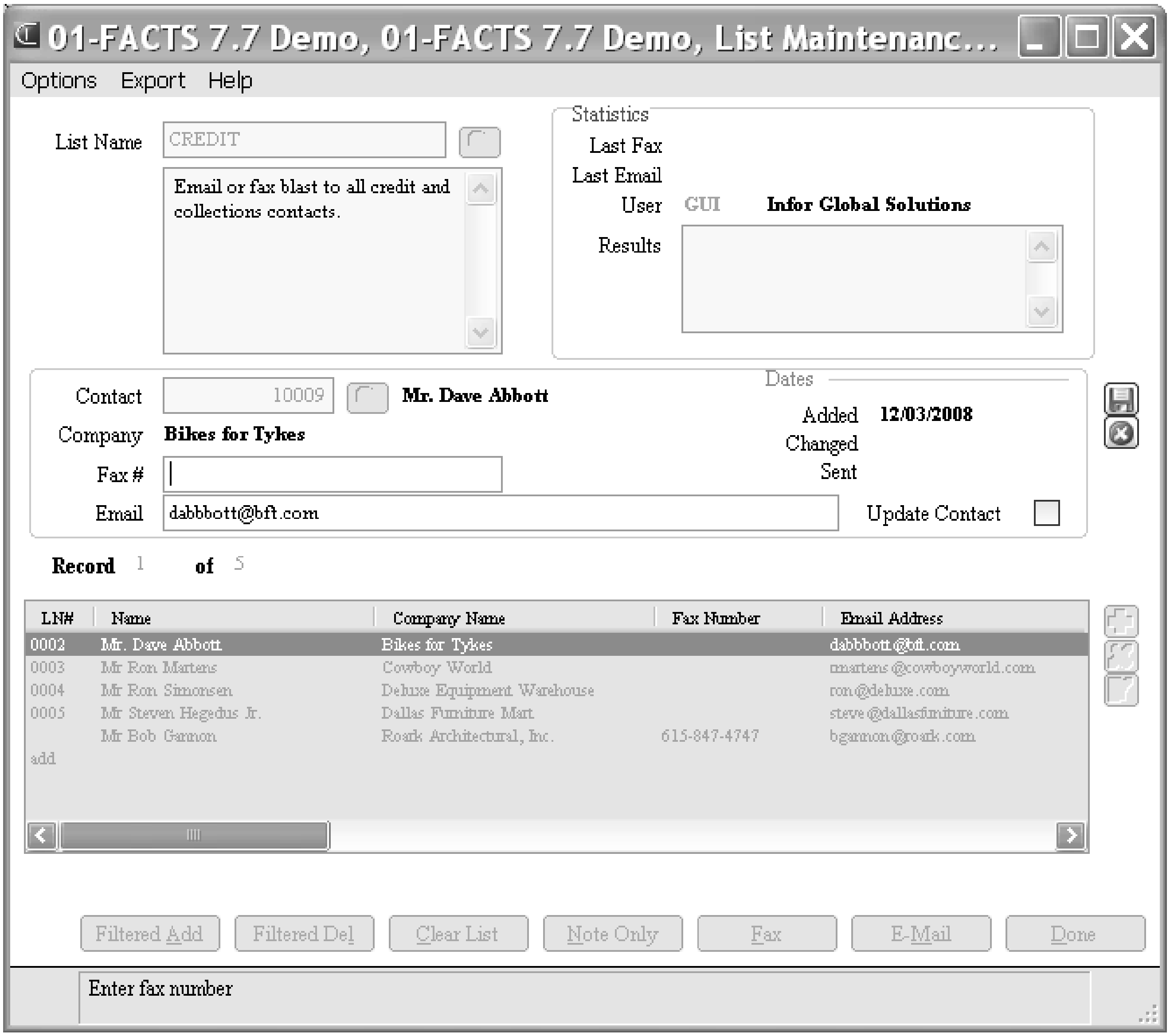


To find a contact, click the  icon for the standard contact search. The fax number and email address are pre-filled from the contact file.

Update Contact - Selecting the Update Contact check-box in line item entry has always updated the Email address and/or the Fax number in the Contact file when the line item is saved. Changing the Email address and Fax number fields in Contact F/M will now update the Broadcast List as well.

Editing a Contact

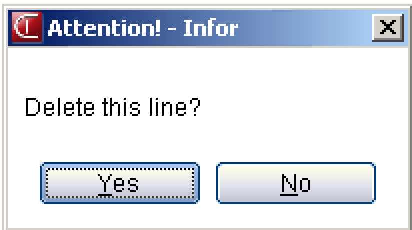
Double click a contact in the Broadcast List or click highlight the contact and click the  icon. You will be presented with the Edit screen as shown below allowing the fax and email address to be changed. If the update contact button is checked, the contact record will be changed.



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

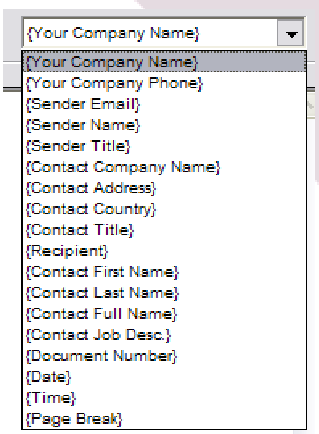
If checked, the system will create a note with the type of 'BFX' or 'EML' and the text of the subject line (email) or a message indicating what was sent.

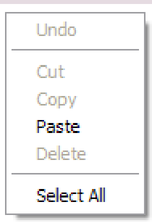
Include Text

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.



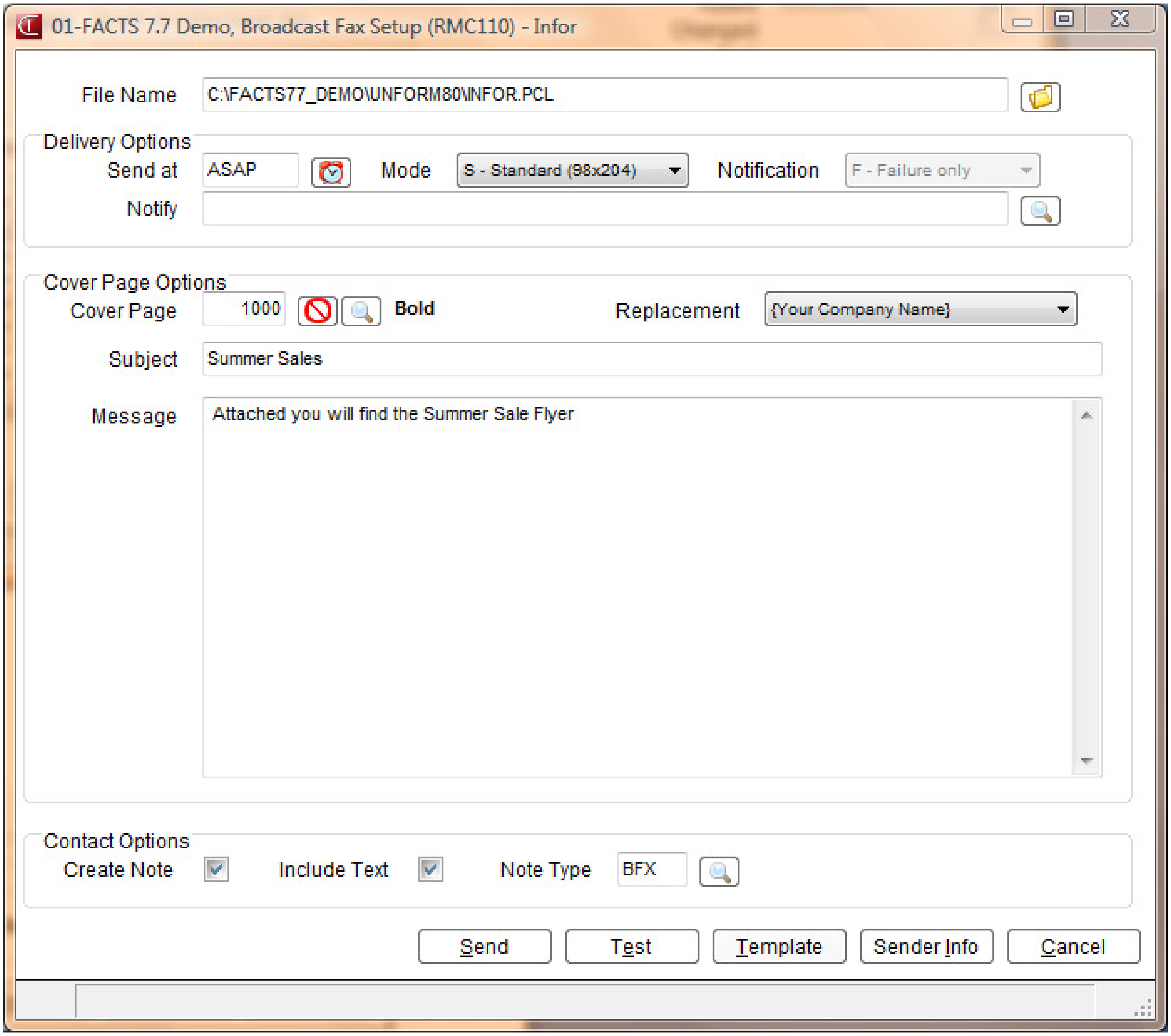


Templates

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

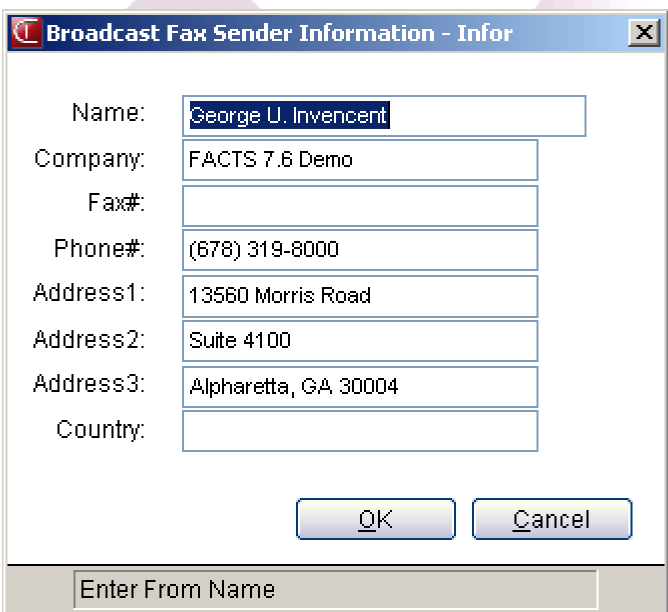
Send at - The user can give a send time for FACTS to start sending the fax or click the  icon and FACTS will send this fax out ASAP.
Mode – Select how to send the fax, in standard mode of fine mode. Most graphical files should be sent in fine mode.
Notify – Enter in an email address to activate the notification 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

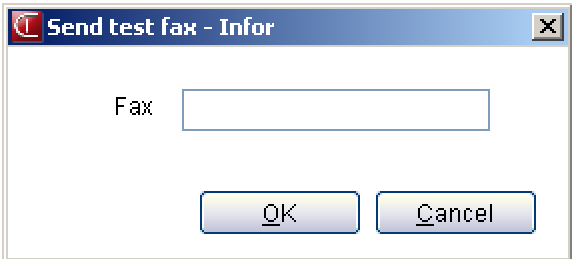
Select a cover page format to use to send the fax. If the user selects a cover page the replacement, subject, and message fields will become active. This will allow the user to customize the cover page of the fax by selecting a template to send with the fax, or creating their own cover page. Click on 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 from 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.



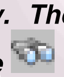
Test button. Opens a window for the user to enter a fax number for the test fax or an email address for a test email. Pressing the test button will send a single copy of the broadcast fax/email for review prior to the entire list being sent.

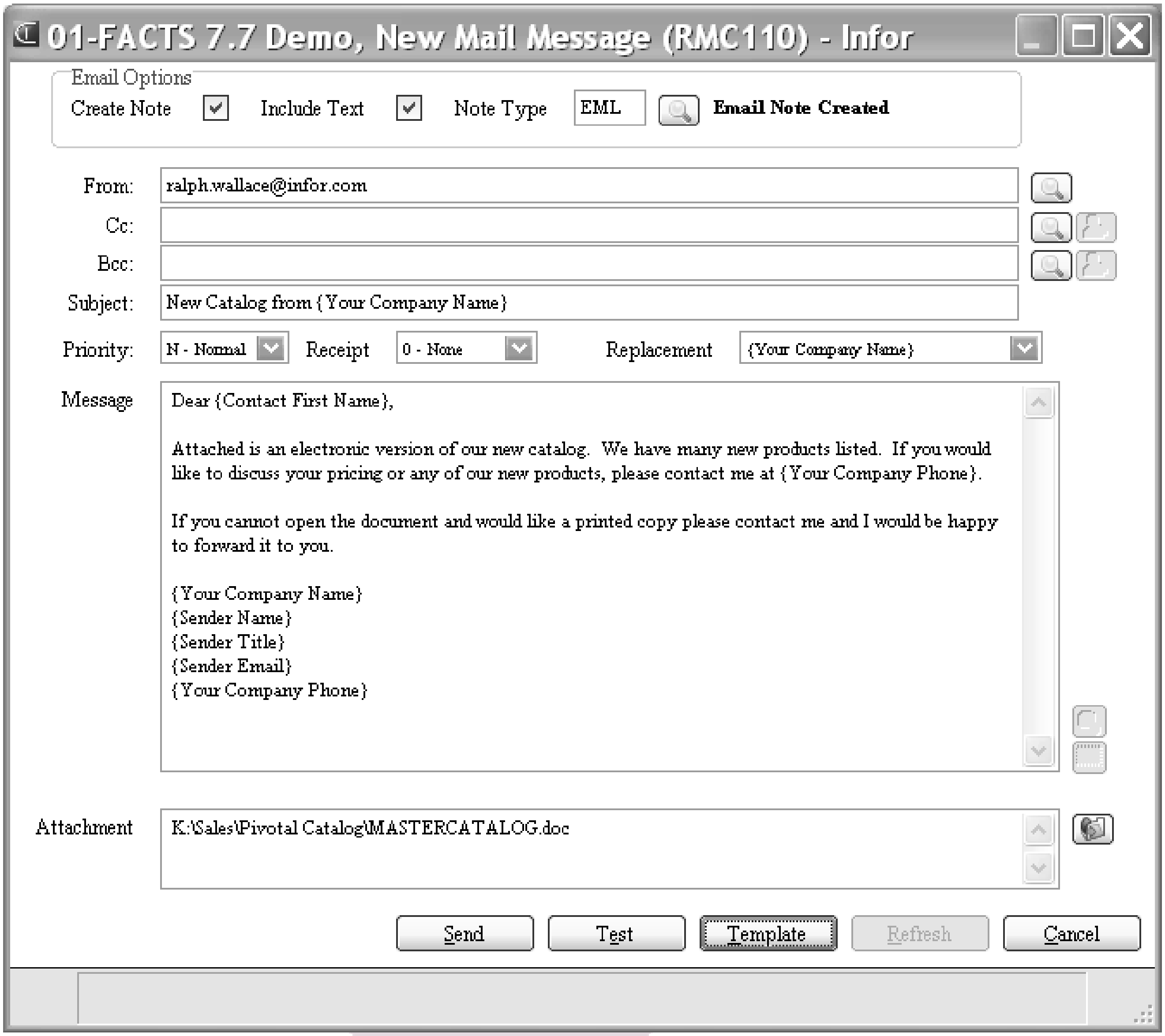
In addition, the broadcast history contact will be automatically included in all broadcasts and a note with full text will be written.



Email

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

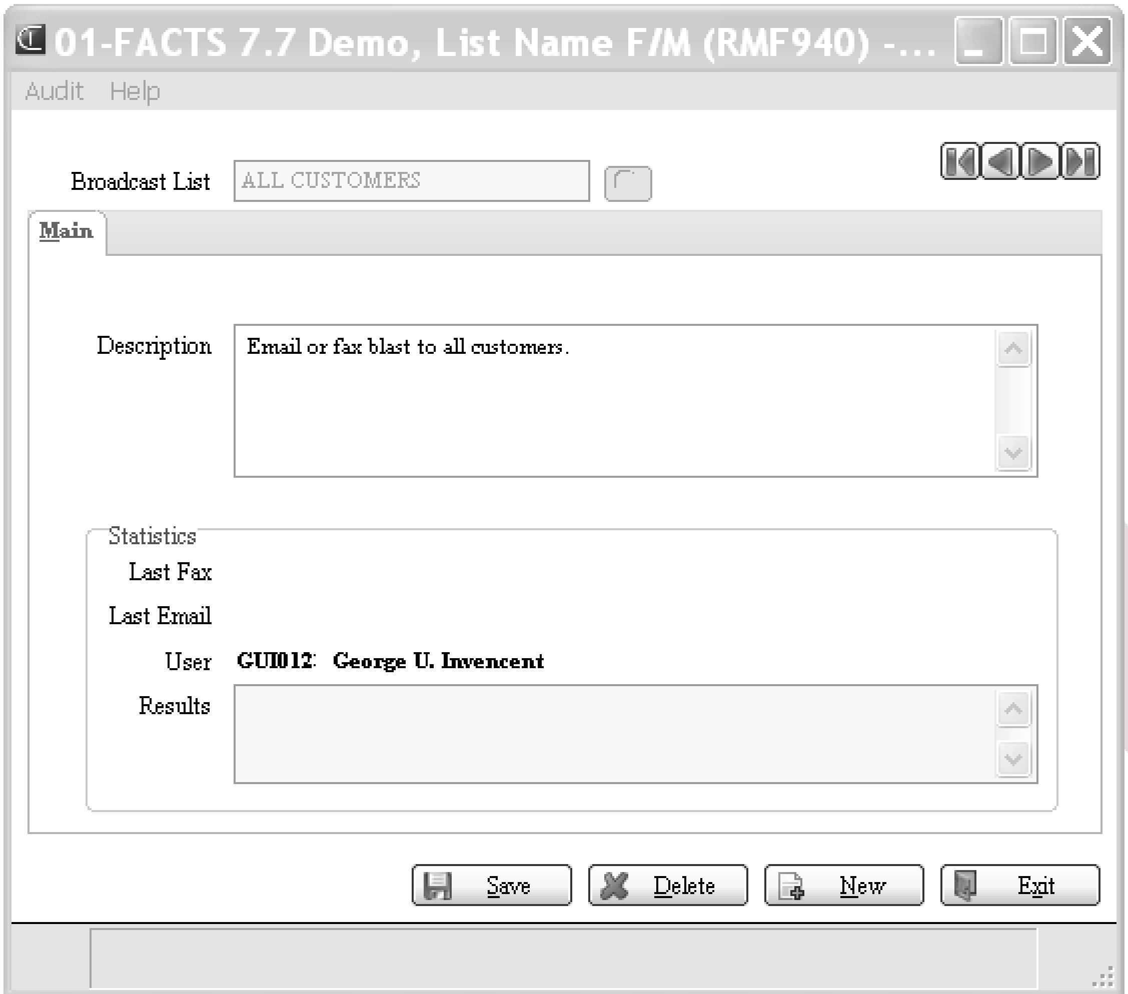
The To and CC addresses are omitted from the screen. The To address will be supplied by the Broadcast List and the CC is unnecessary. The From address defaults to the email address set up in the User Code Additional Info F/M. The  ***icon will display a from address search allowing the selection of either 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.

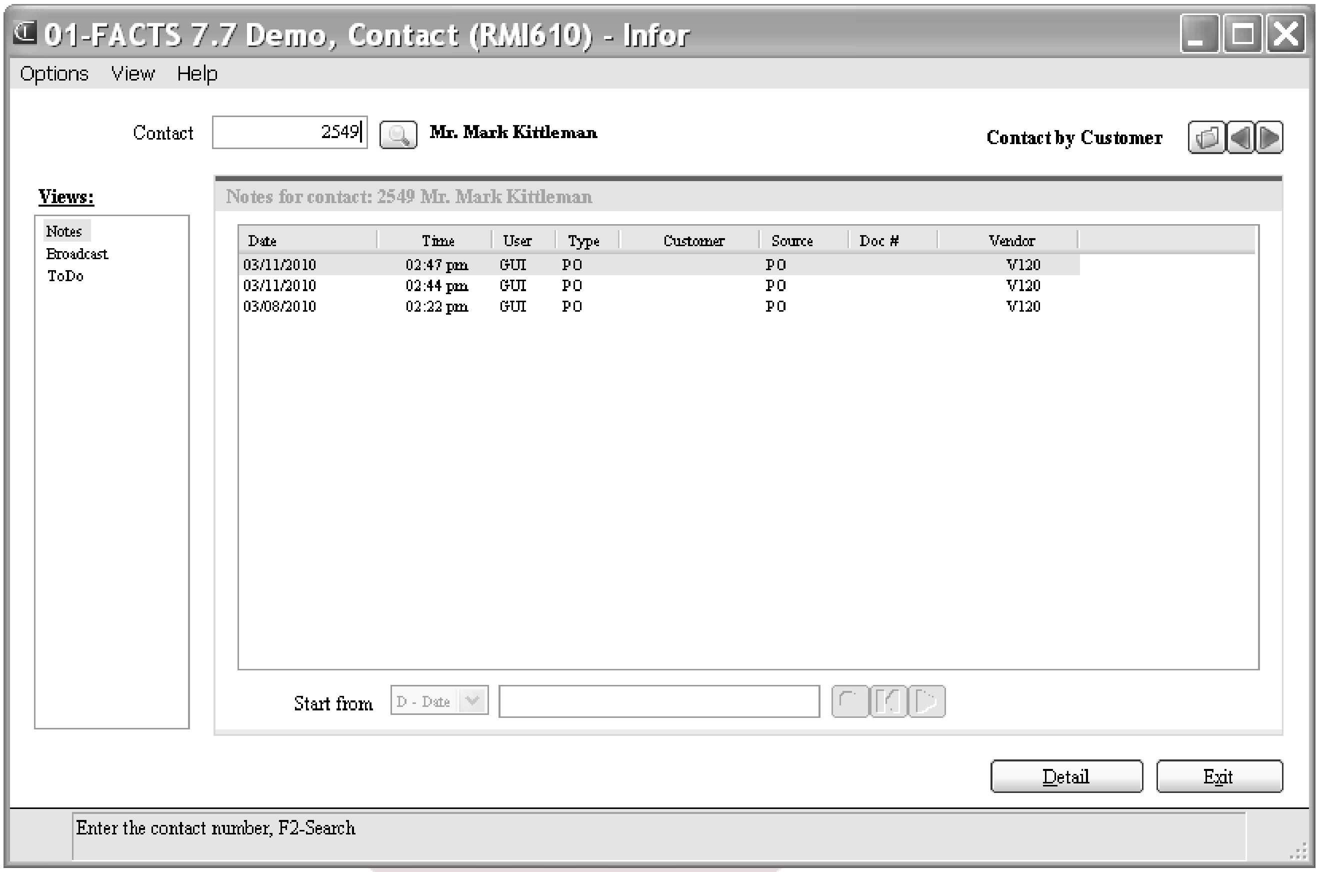
List Name File Maintenance

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.



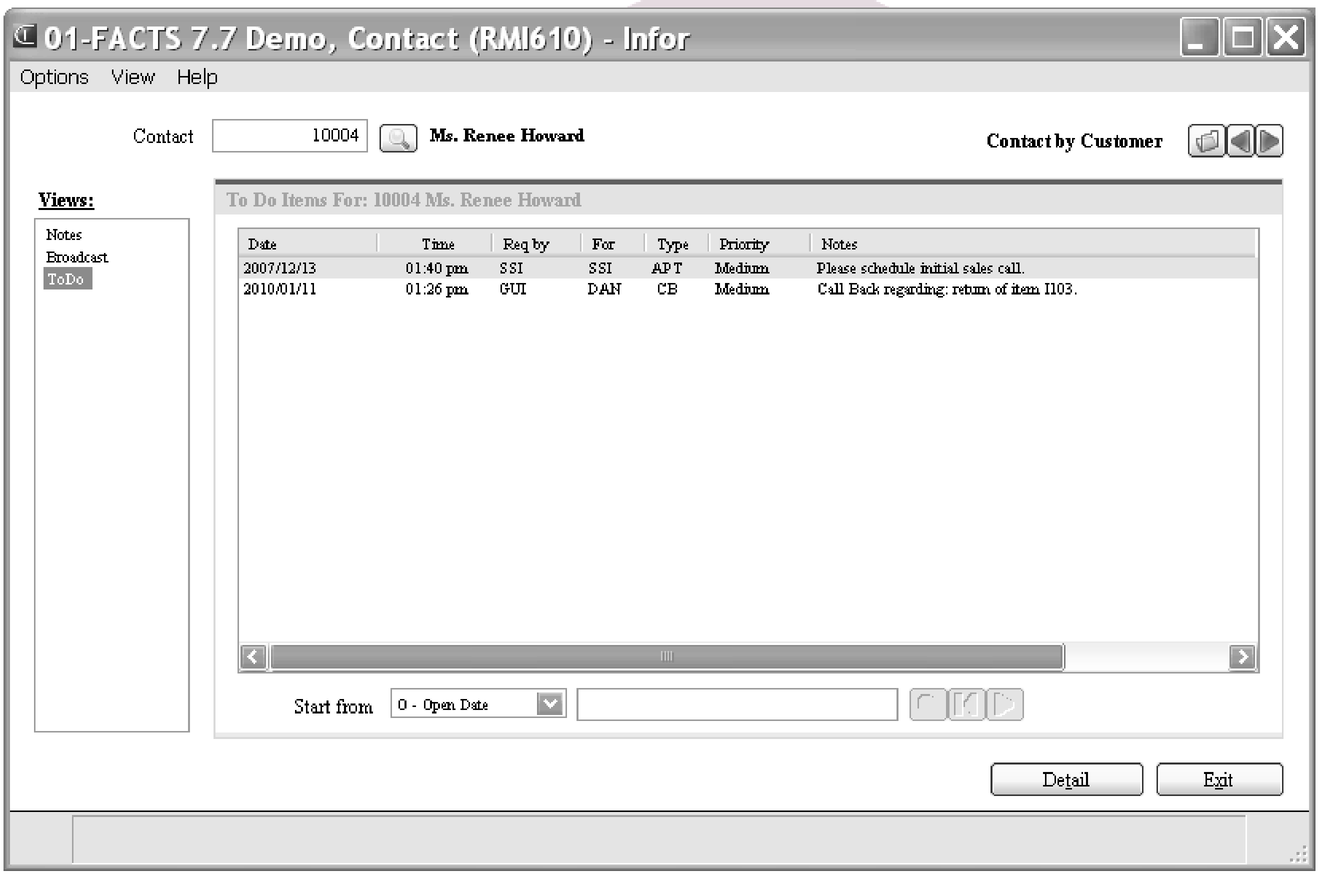
Contact Inquiry

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.

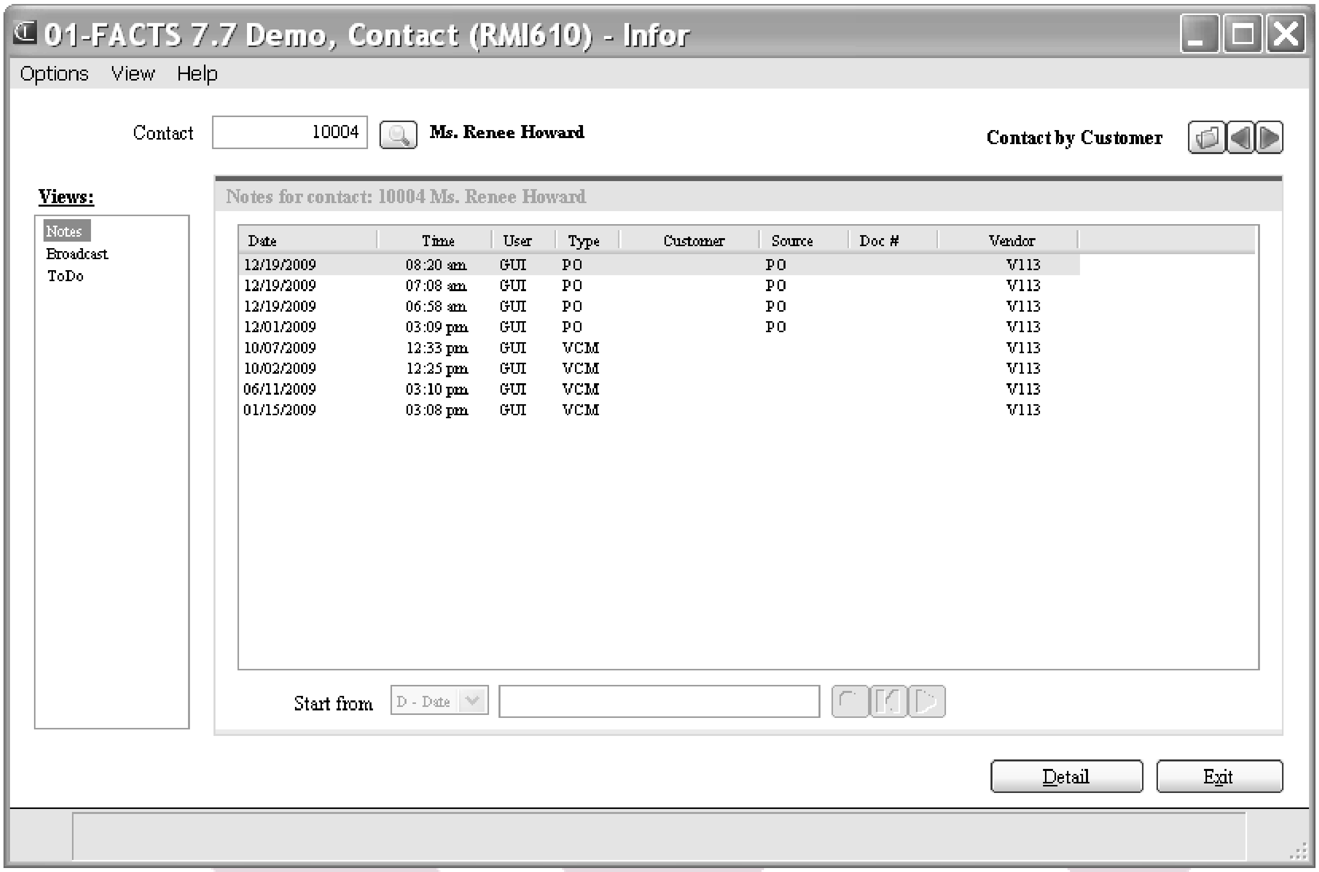


To Do View

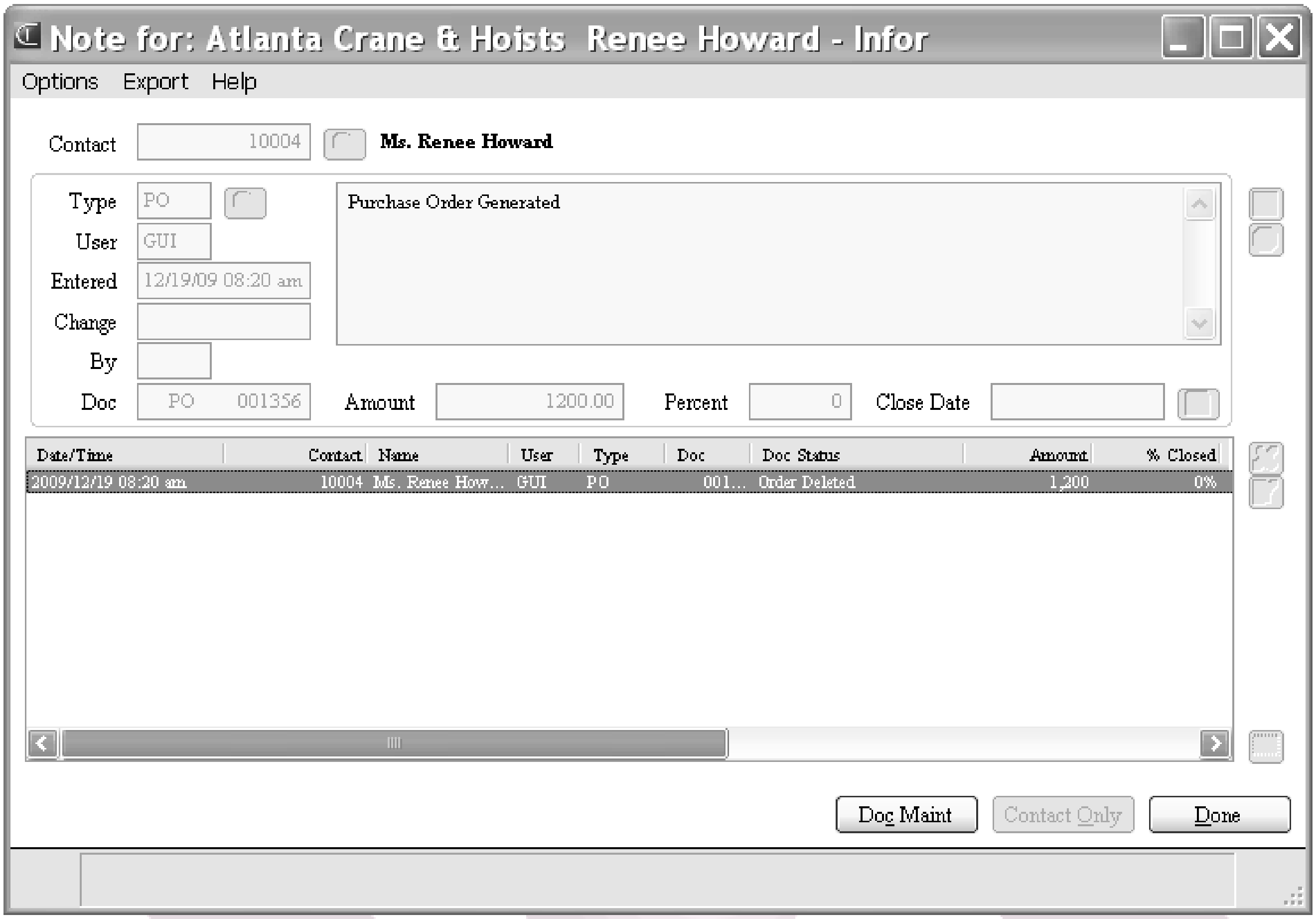
As shown in the screen below, you can start from either open or completed To Dos. The detail button will display a read only version of the To Do entry program. Once in the To Do entry program, all of the functionality of the pull down menus is available. While you can't make changes to the note, the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



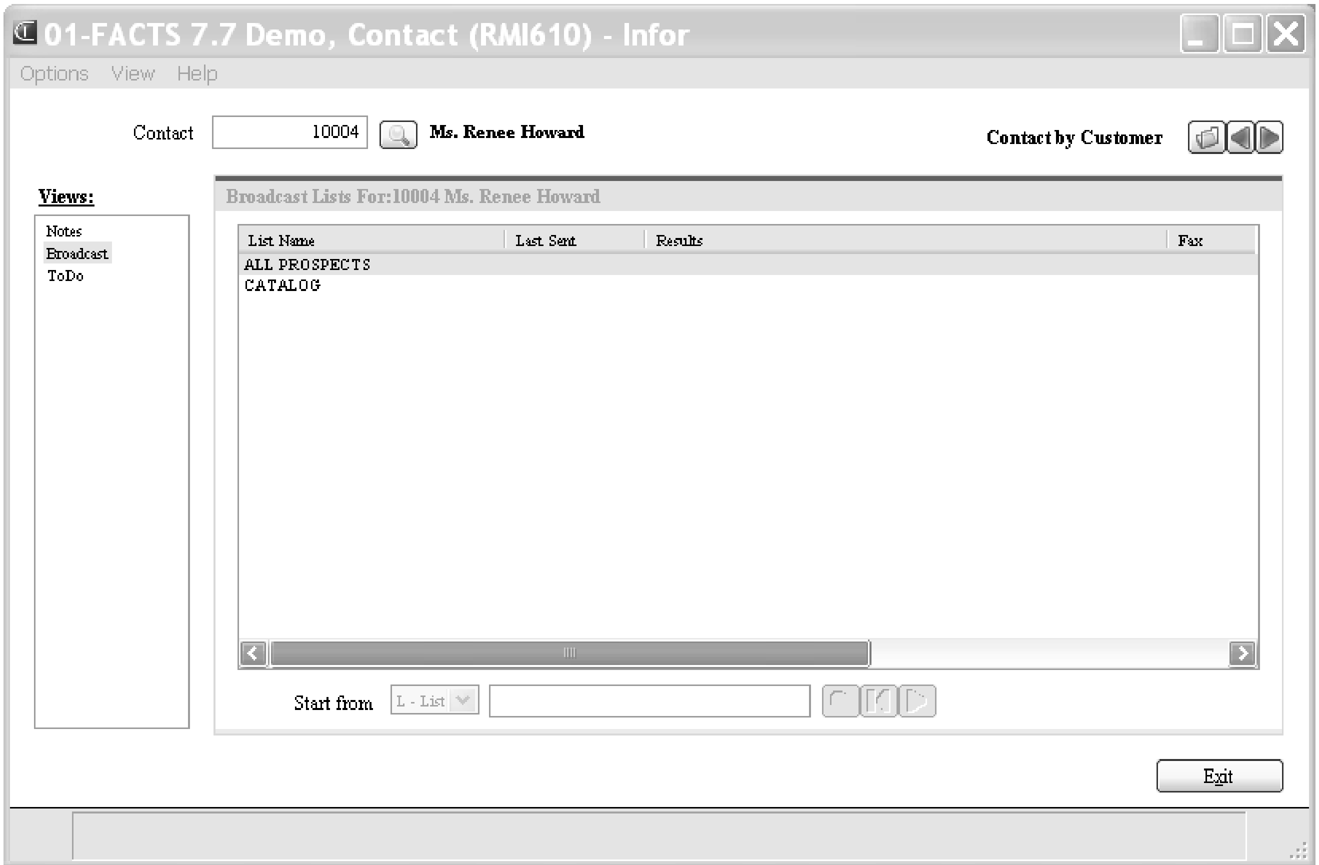
Notes View



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.


Note for: Atlanta Crane & Hoists Renee Howard - Infor
Options
Export
Help
Contact
10004
Ms. Renee Howard
Type
PO
User
GUI
Entered
12/19/09 08:20 am
Change
By
Doc
PO 001356
Purchase Order Generated
Amount
1200.00
Percent
0
Close Date
Date/Time
Contact
Name
User
Type
Doc
Doc Status
Amount
% Closed
2009/12/19 08:20 am
10004
Ms. Renee How...
GUI
PO
001...
Order Deleted
1,200
0%
Doc Maint
Contact Only
Done

Broadcast List View



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

User Code Inquiry

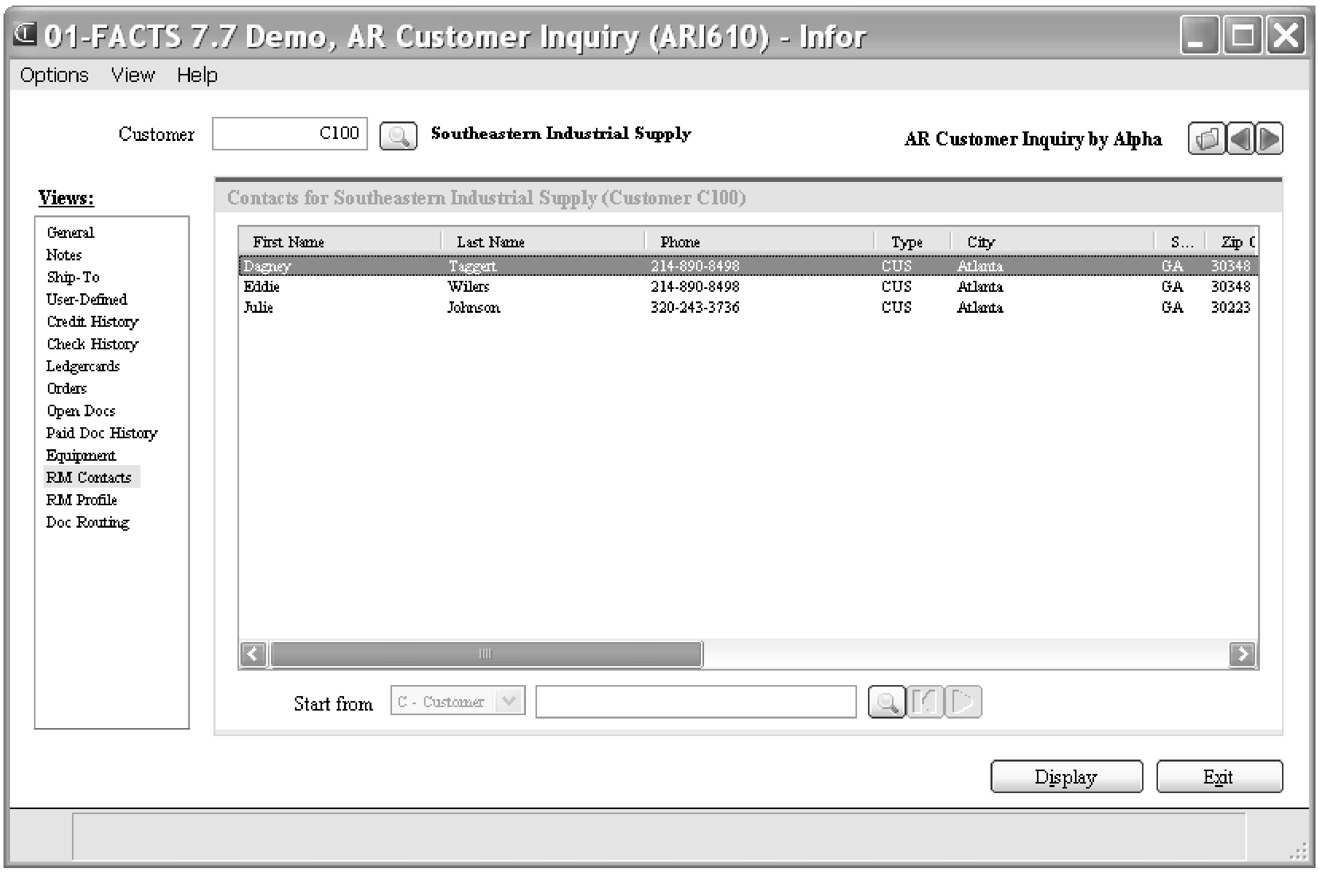
The user code inquiry shows To Dos by user with a detail button, which runs the To Do entry program.

Customer & Vendor Inquiry Views for RM Contacts

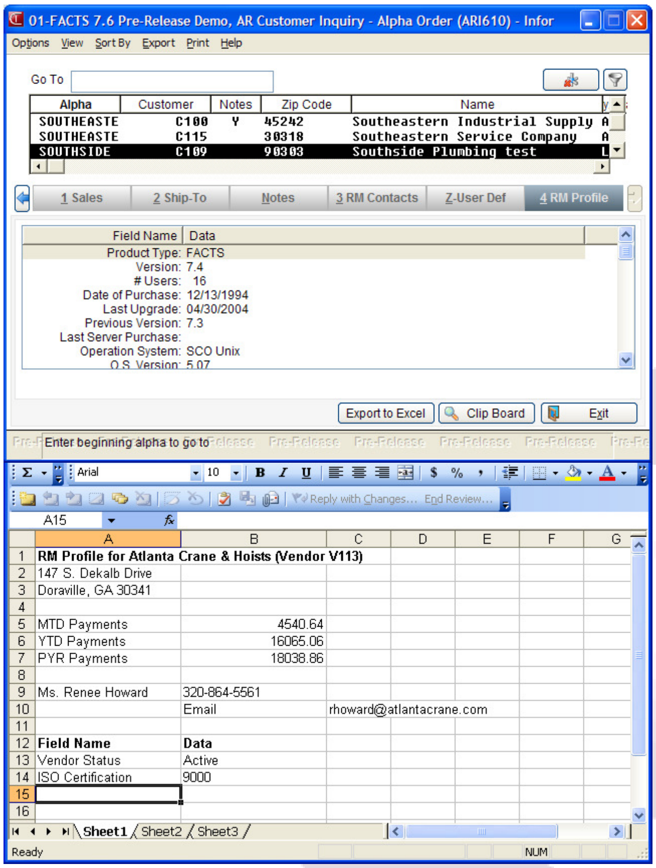
RM Contact views are available from both the AR customer and the AP vendor inquiry programs. Both of these views call the Contact Display program with the list of contacts displayed in the view window. Once in the Contact Display, all of the functionality of the pull down menus is available. The 'Filter'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

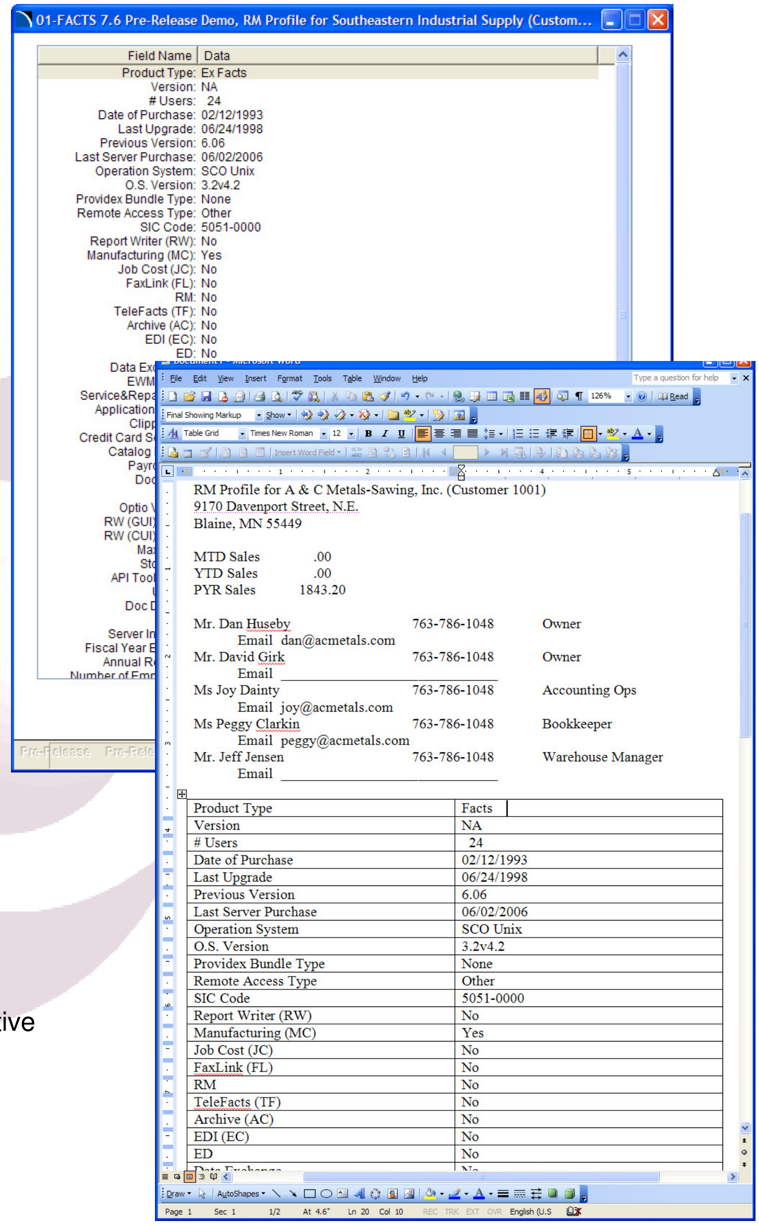
These views provide convenient access to RM for those users who are focused on customers and vendors rather than on contacts.

Customer Inquiry



RM Profile (shown below), is lists the fields defined in the RM Customer/Vendor Profile work centers. Buttons to export the view to Excel or the clip board are available. The open view as window has been enhanced to show more data. A sample export and clipboard pasted into Word is also shown below.

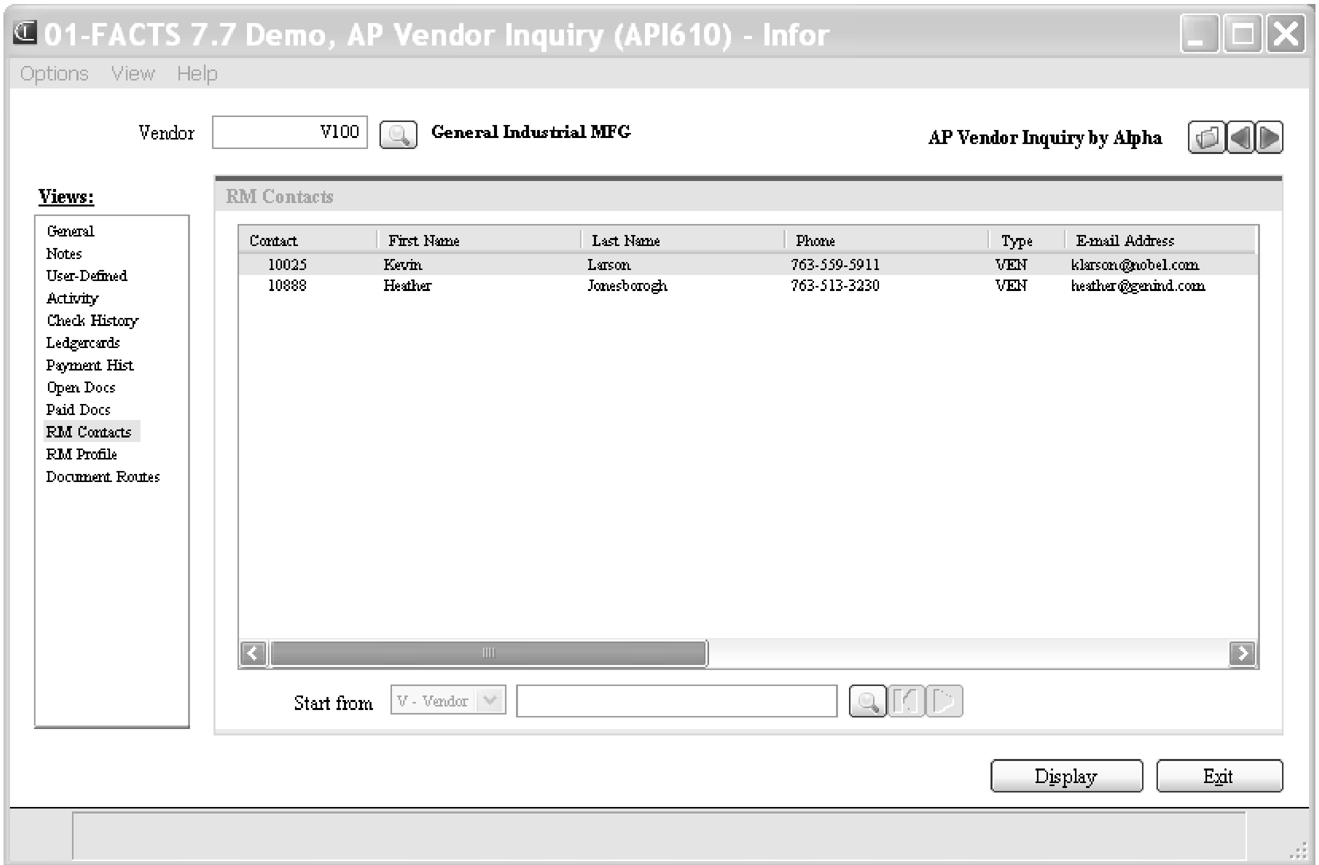




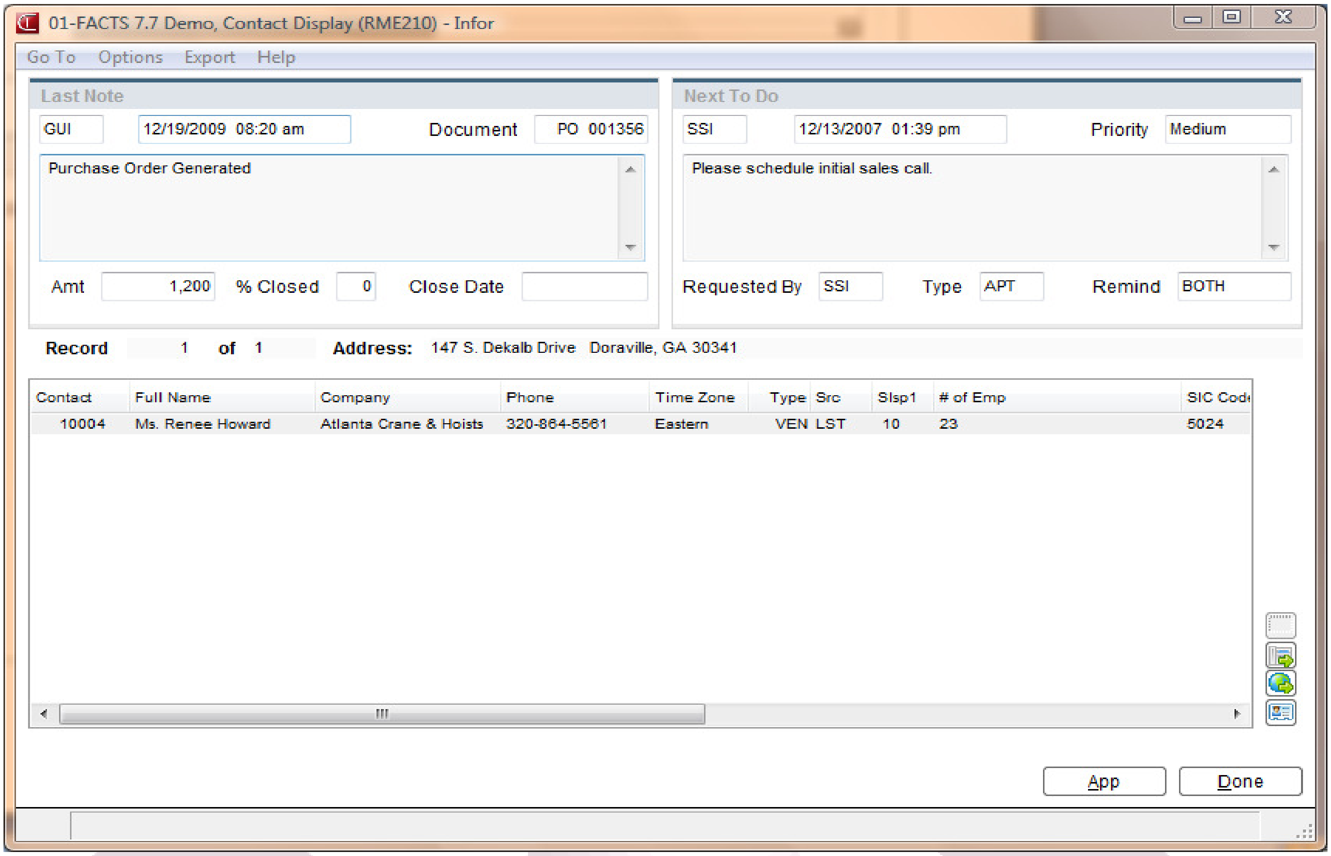
- Company address
- Name, phone, title and email for all contacts
- MTD, YTD, PYR sales

This tool, when taken into the field, is an easy and effective method of updating customer & vendor information.

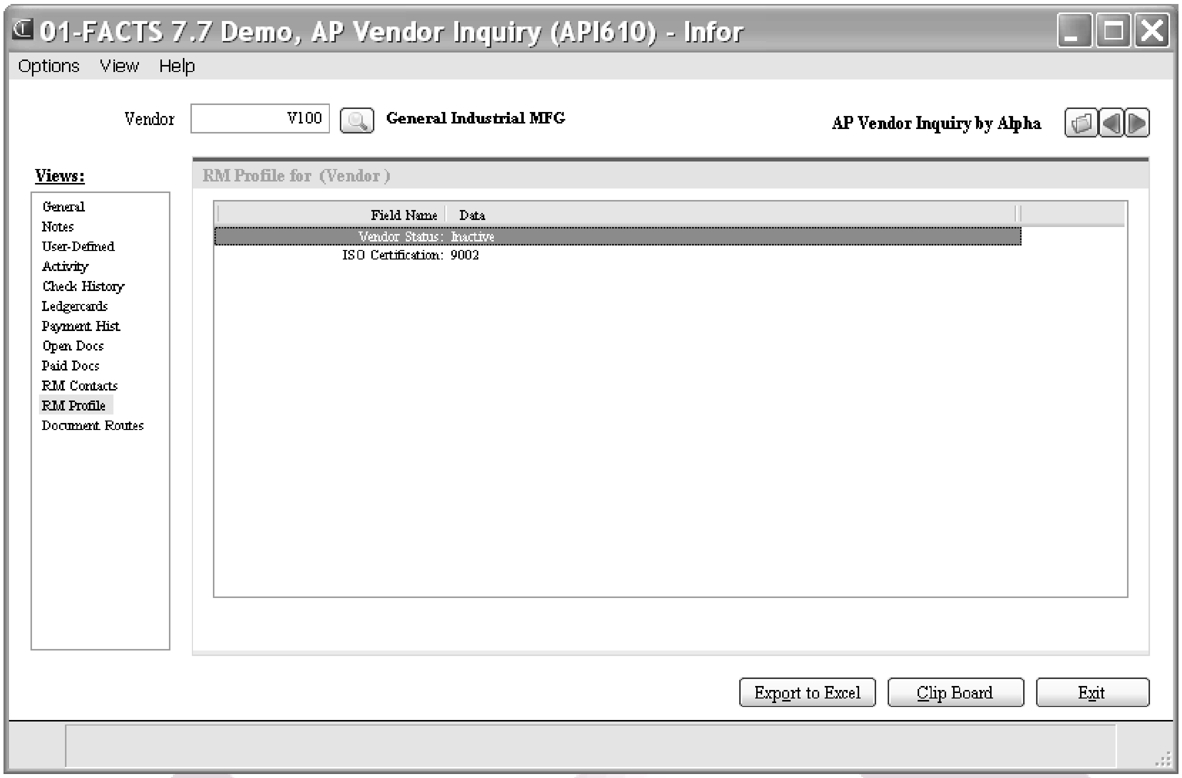
Vendor Inquiry



By clicking the display button in the lower right hand corner of the screen a Contact Display screen is made available.



Once that screen is displayed you have the ability to do everything that is made available had you started off in Contact Display under Relationship Management.

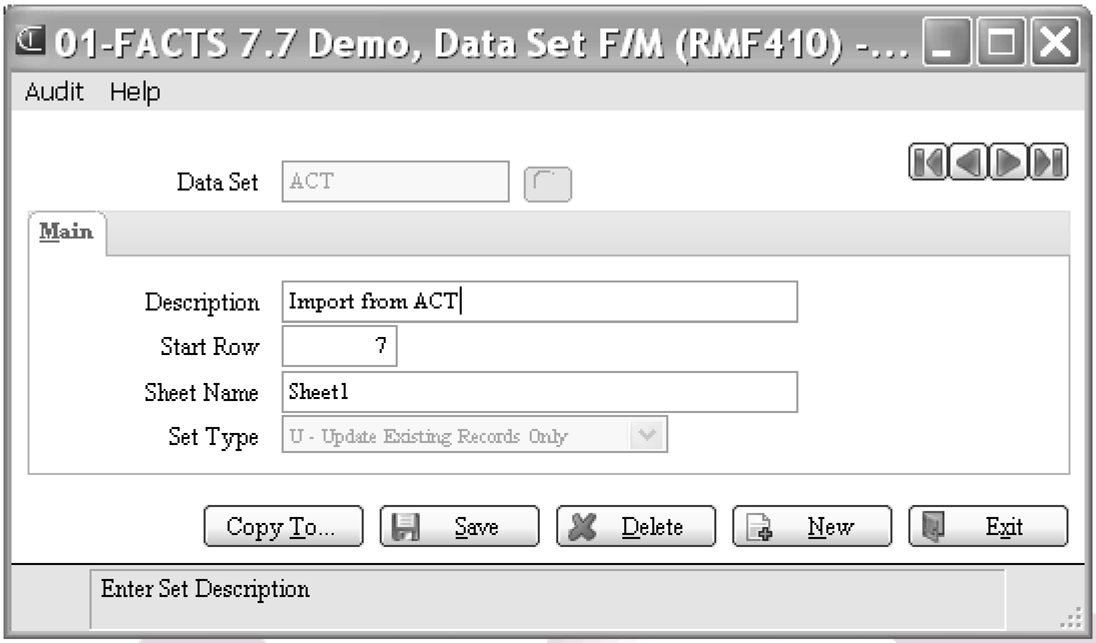


By clicking on the Export to Excel the end user gets an abbreviated version of useful information.

RM Profile for Atlanta Crane & Hoists (Vendor V113)		
147 S. Dekalb Drive		
Doraville, GA 30341		
MTD Payments	4540.64	
YTD Payments	16065.06	
PYR Payments	18038.86	
Ms. Renee Howard	320-864-5561	
	Email	rhoward@atlantacrane.com
Field Name	**Data**	
Vendor Status	Active	
ISO Certification	9000	

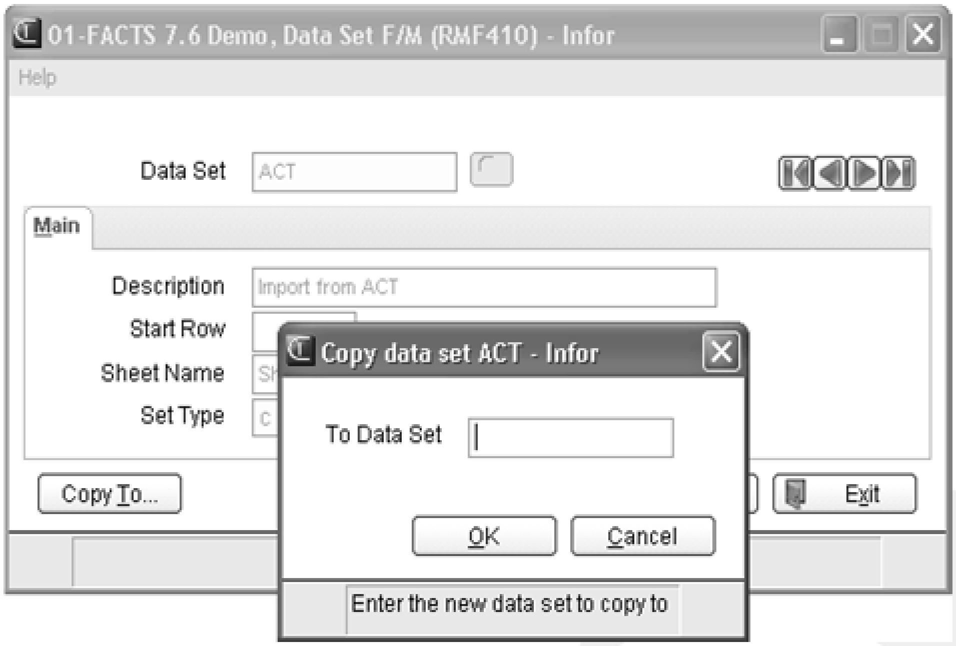
Data Set File Maintenance

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

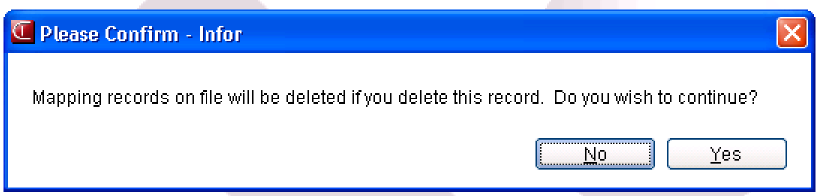


You can create a name by entering a Data Set name not already on file and adding the following fields:
Description – Enter a meaningful description for this definition.
Start Row – Indicates the starting column number of data to be imported. This is typically the first row after column headers.
Sheet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

The Copy To button was added to copy an existing data set to a new data set.



Deleting a data set with mapping records on file will now present the following message and will delete the mapping records if the user chooses to continue and proceeds to delete the record.

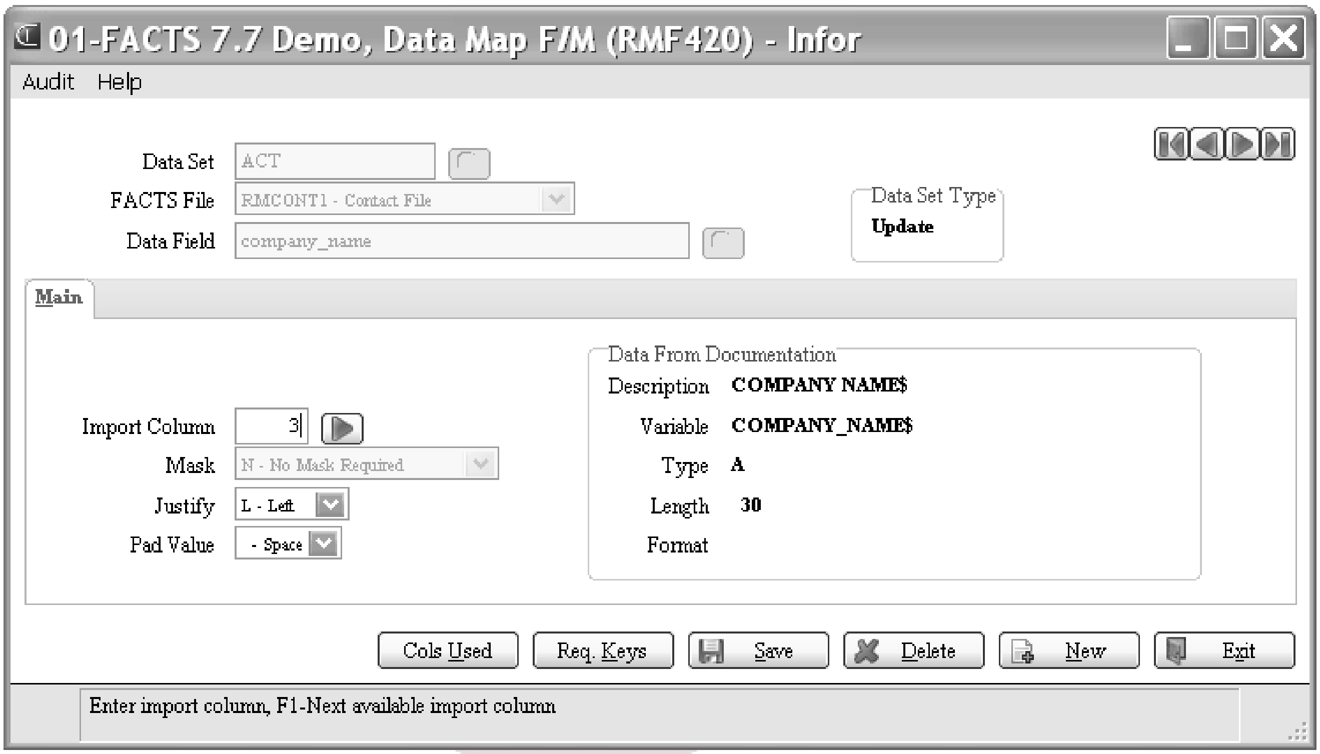


Data Map File Maintenance

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

Header Information

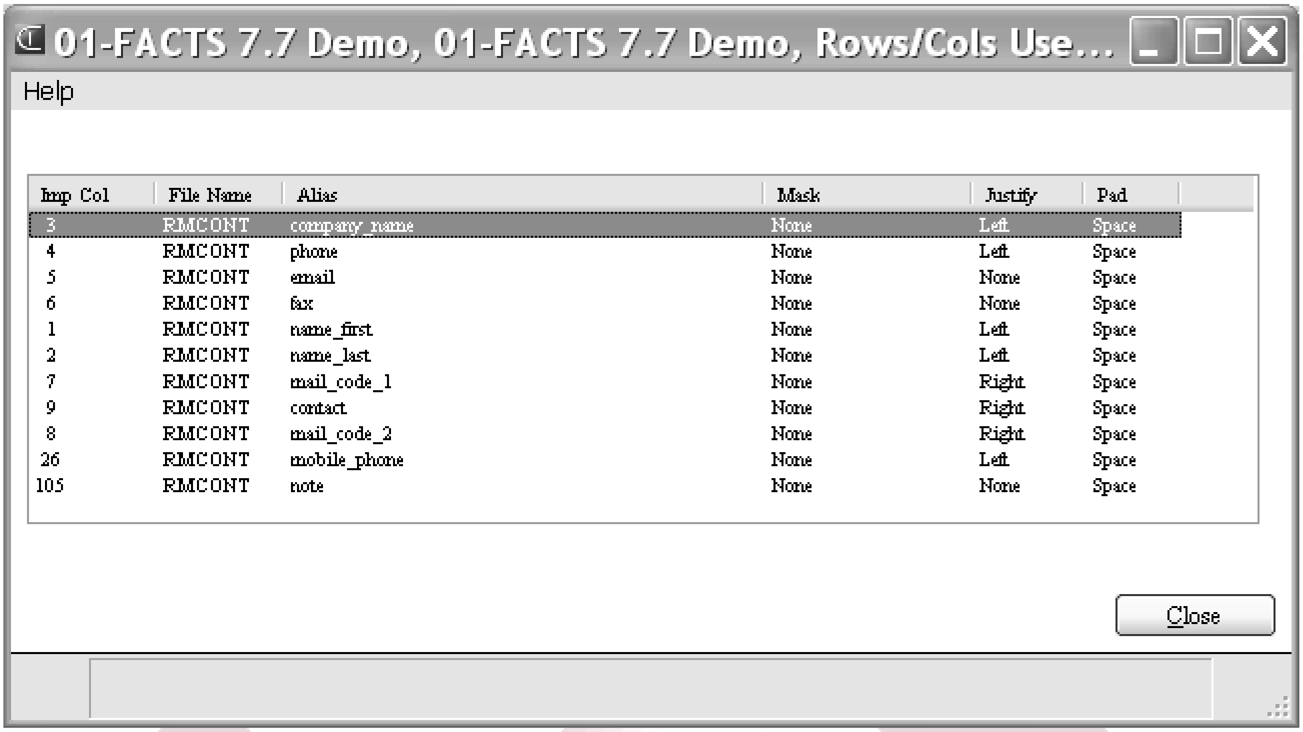
In the Header you identify:
Data Set – As defined in the Data Set F/M
FACTS File – The FACTS file to receive the data from the import (Contacts, Notes or To Do)
Data Field - The destination field in the FACTS file where the data will be placed.



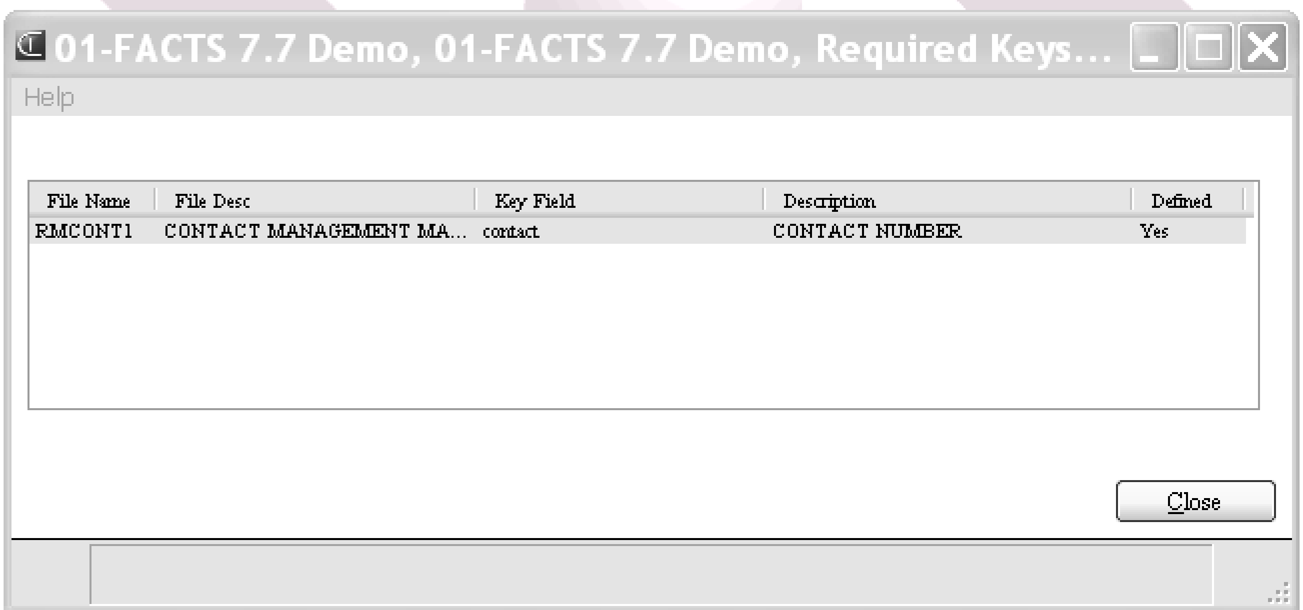
Detail Information

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.



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



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'.

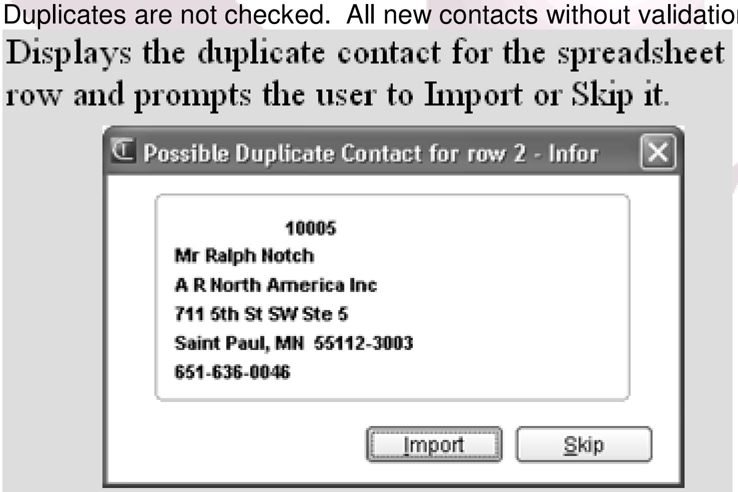
The spreadsheet to be imported should be opened and the selected sheet should be highlighted before starting the program.

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.
Check Duplicates – N – Don't check duplicates, Ask to skip ossible duplicate contact, Skip duplicate contacts without asking

Duplicates are not checked. All new contacts without validation errors will be imported.



Contacts with a possible duplicate will not be imported.

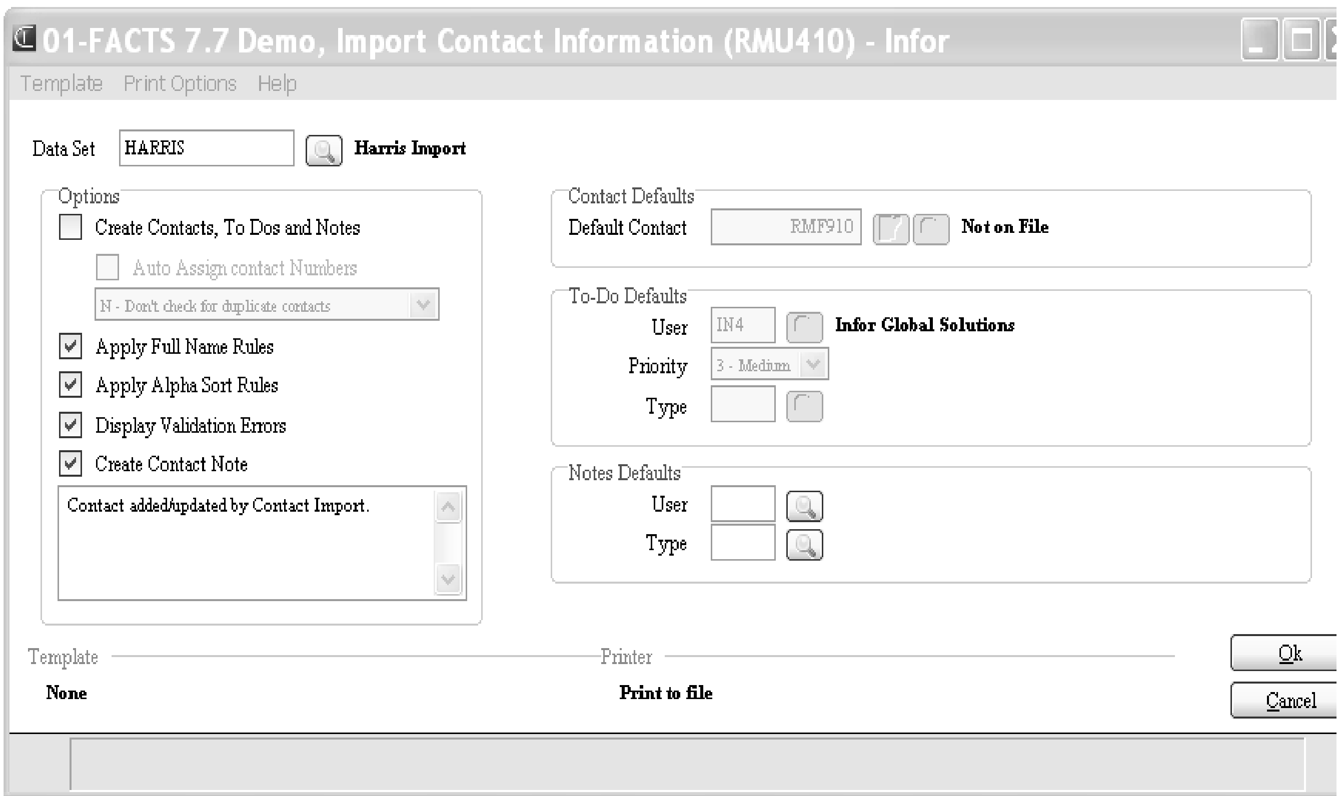
Display Validation Rules – Displays validation errors during the import so that you know which contact might have to be adjusted manually
Create Contact Note – If checked, a note will created in the notes file using the text from the text box and the user code and type from the Notes Defaults

***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*

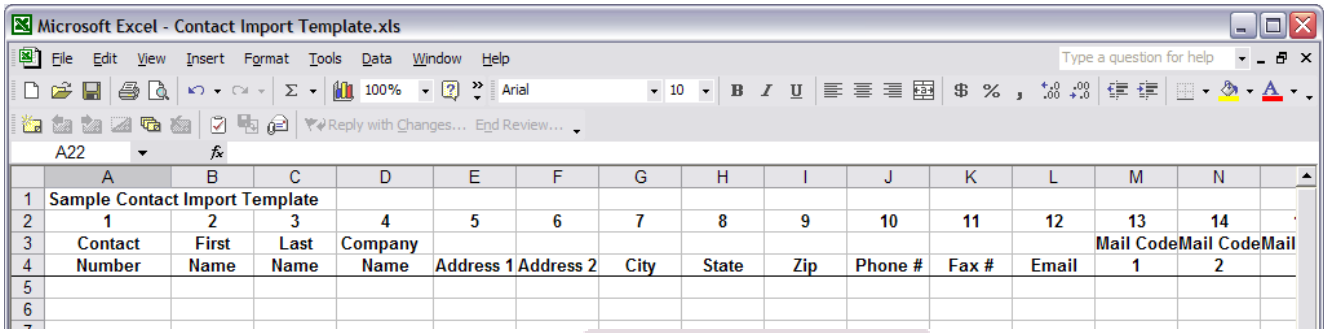
***Notes Defaults** – These are the default values to be used when creating Notes. If no note fields are mapped or the Create Contact Note box is un-checked, this section does not need to be populated*

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



Contact Import

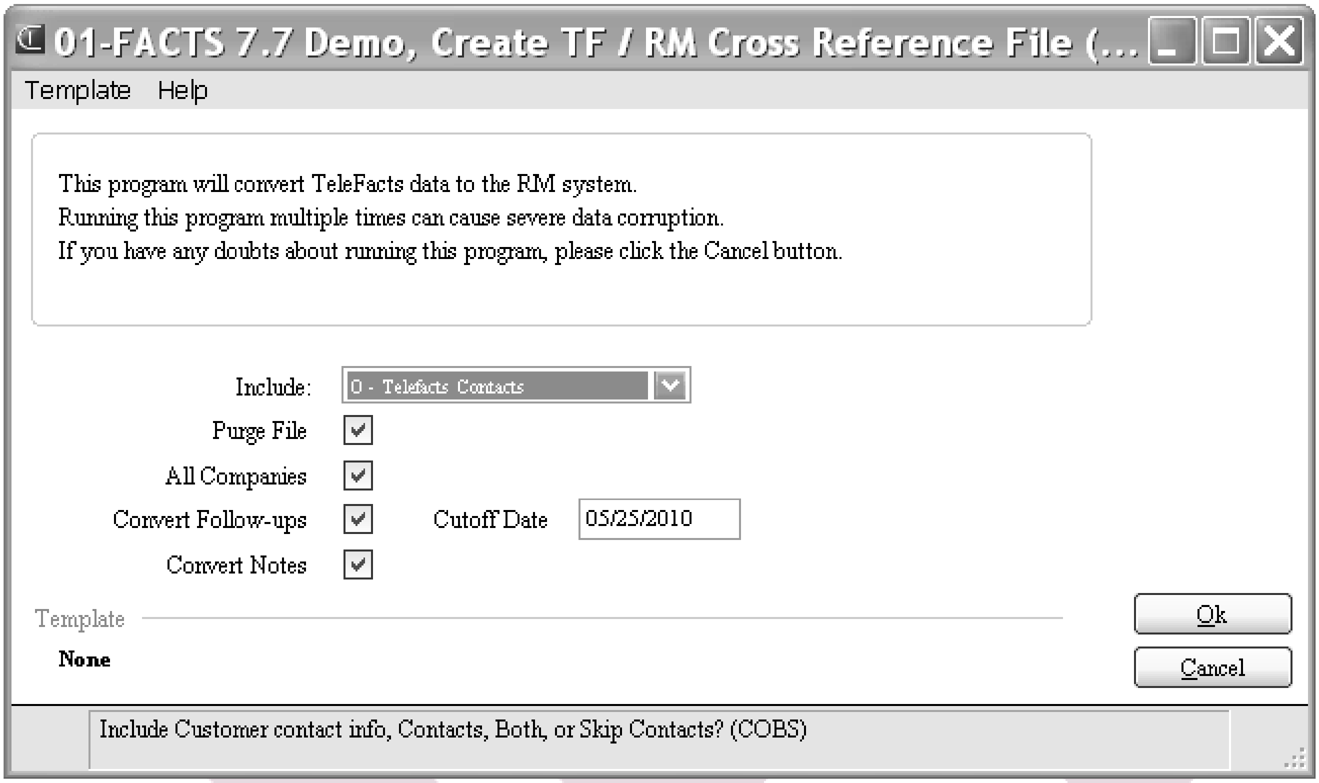
The Contact Import feature makes it easy to import Contacts, Notes or To Dos directly from an Excel spreadsheet. You can also import contacts from other contact management packages such as ACT or GoldMine, purchased lists or TeleFacts. We recommend that you format your spreadsheets, as shown below, with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



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Sample Contact Import Template													
2	1	2	3	4	5	6	7	8	9	10	11	12	13	14
3	Contact	First	Last	Company									Mail Code	Mail Code
4	Number	Name	Name	Name	Address 1	Address 2	City	State	Zip	Phone #	Fax #	Email	1	2
5														
6														

Convert TeleFacts to RM

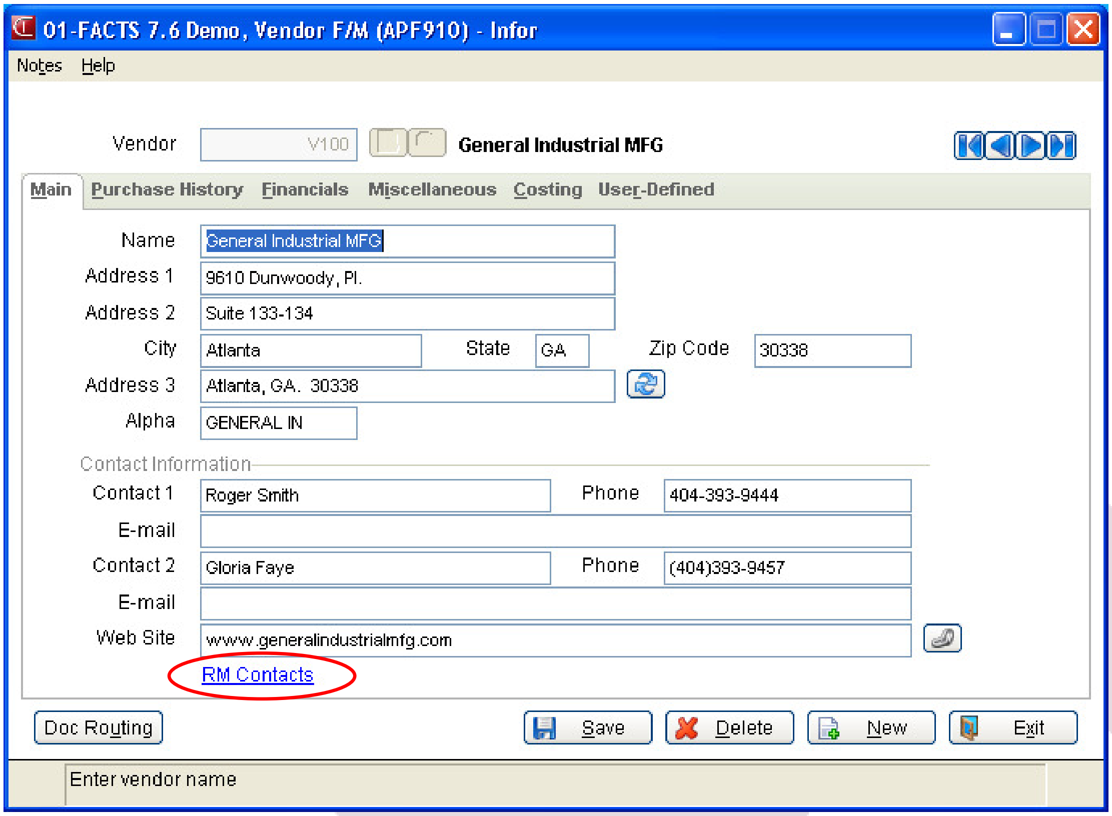
This Program will convert your existing data that you have stored in TeleFacts into the RM module. This area will require some technical assistance from your Facts Solution Provider.



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

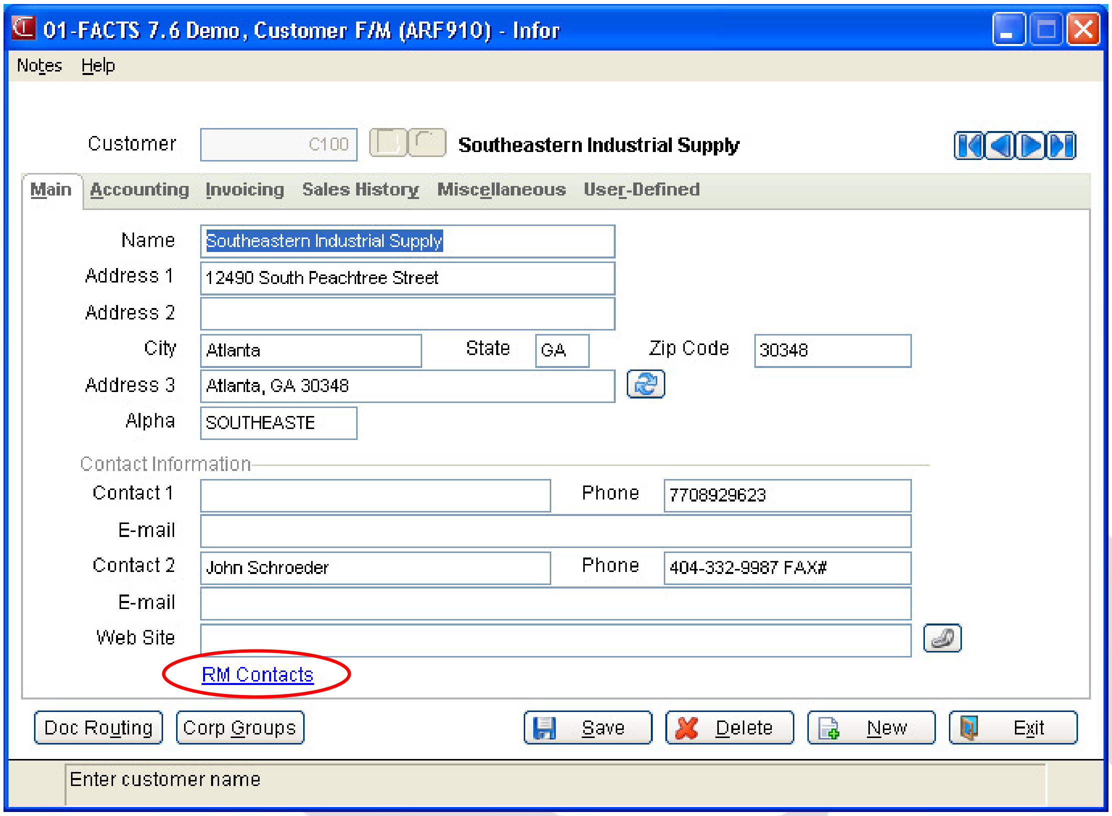
Vendor F/M (APF910)

A hyperlink to RM Contacts has been added to the Main tab in the Contact Information frame. It will produce the Contact Display showing only contacts associated with the vendor being maintained. New contacts will automatically be associated with the vendor by default. However, the association may be overridden.



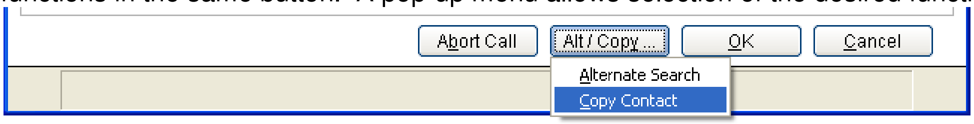
Customer F/M (ARF910)

A hyperlink to RM Contacts has been added to the Main tab in the Contact Information frame. It will produce the Contact Display showing only contacts associated with the customer being maintained. New contacts will automatically be associated with the customer by default. However, the association may be overridden.



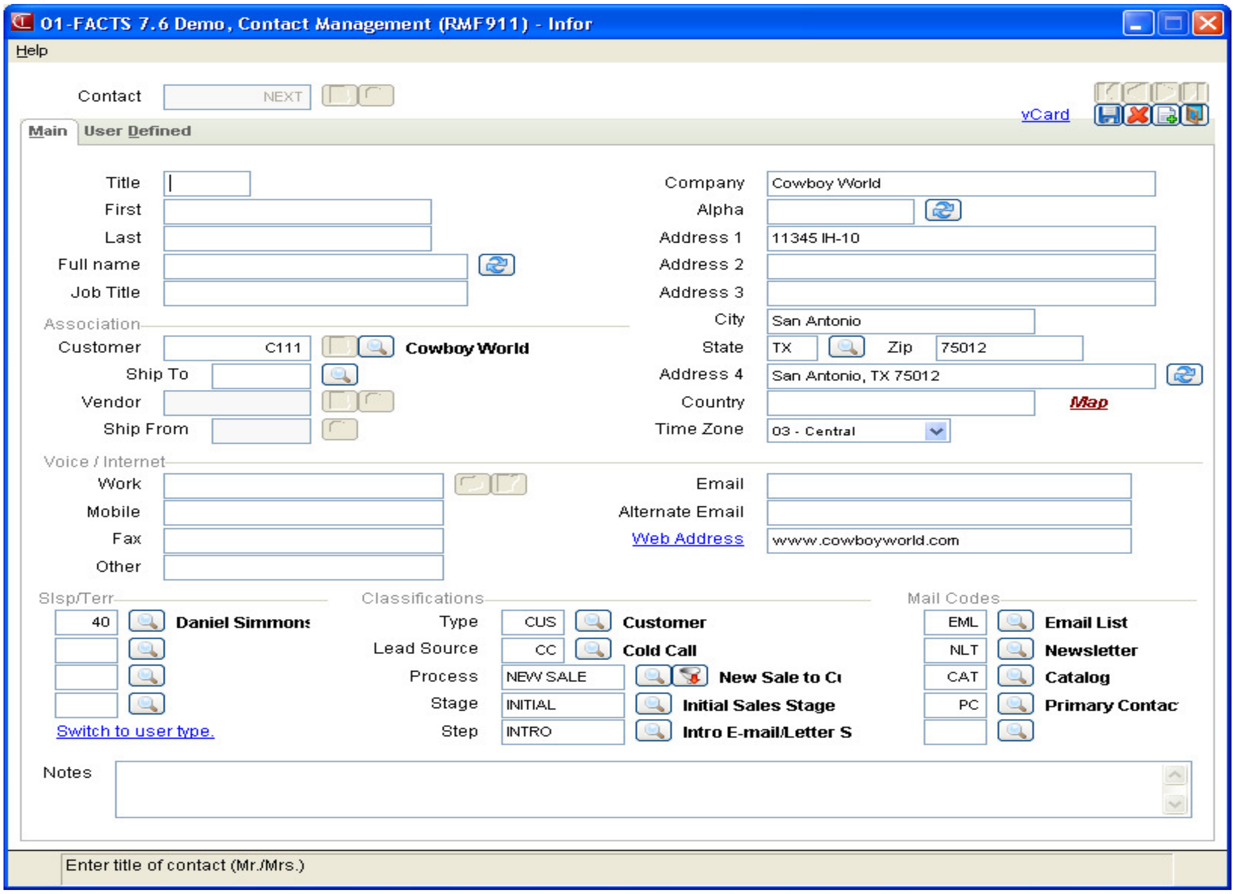
FacetPhone Caller-ID Contact Searches

All of the contact searches for incoming calls have been changed to include a “Copy Contact” button when the user has security for Contact F/M. The Full Contact Search combines the Alternate search and Copy Contact functions in the same button. A pop-up menu allows selection of the desired function.



The Copy Contact function will present a “Quick Contact Add” maintenance using the information from the highlighted contact except for the following fields:

- Title
- First Name
- Last Name
- Full Name
- Job Title
- Work Phone
- Mobile Phone
- Fax Phone
- Other Phone
- Email Address
- Alternate Email Address
- Notes



Either a new Contact number must be entered or the F1-Next function must be selected. If the maintenance is ended without creating a contact, it will return to the search. After saving the new contact, it will be used in the Caller-ID window.