

FLEXX[®]
Contact Manager
Reference Manual
Version 7.0L0

Databyte



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1.0 Introduction

1.1 *About Contact Manager*

Description

Contact Manager (CM) is used to enter and maintain information about individuals and organizations which are of importance to your organization. (Established groupings are: customers and prospective customers). It also provides comprehensive tracking on sales related activities necessary to ensure a systematic follow up and management of the sales cycle. Using Contact Manager, you can;

- Δ Set up and maintain an unlimited number of contacts.
- Δ Transfer a prospect to a customer with no additional input.
- Δ Establish an unlimited list of contacts.
- Δ Track the contact's areas of interest.
- Δ Set up one follow up action per contact and be reminded to do them.
- Δ Allow system wide sharing of contacts and actions.

Contact Manager and FLEXX

The Contact Manager module is fully integrated with these FLEXX modules:

- Δ Accounts Receivable (AR). The Customer Master table is shared equally by both CM and AR. When a prospect becomes a customer, the Contact type is changed from P - Prospect to C - Customer.

Contact Manager can be accessed from other FLEXX modules as follows:

* Order Processing - **Notes** button on Order Detail Entry/Maintenance form (*see Order Processing Manual, Order Detail description*).

* Accounts Receivable - **Notes** button on the Invoice Aging Inquiry function (*see Accounts Receivable Manual, Invoice Aging Inquiry description*).

1.2 *About this Manual*

Content

This manual describes the screens and functions within Contact Manager. It contains the following sections.

- Δ Starting Contact Manager; describes how to get into the Contact Manager module.
- Δ Working with Contact Manager; describes the Contact Manager screens you use to find, add and update a contact, define contact information and set up Follow Up Notes.
- Δ Extracting Contact Information; describes how to print reports and how to monitor follow - up actions.

Assumptions

Please become familiar with the standard features of the FLEXX system, including how to select menu options, move around the screen, use Zoom and wild cards and how to find, add, update and delete records.

Table Setup

The Contact Manager requires the following tables listed below. These will be set up by your System Administrator at time of FLEXX implementation. For more information on the required and optional tables, see the FLEXX Getting Started Manual.

Setup System Tables:

- Δ Company Table
- Δ Division Table
- Δ Company/Division Table
- Δ GL Account Table
- Δ GL Period Table

Setup Master Tables:

- Δ User Master
- Δ Customer Master
- Δ Employee Table

Manual Conventions

- △ We use an asterisk (*) to indicate wild cards. However, different database systems use different symbols for wild cards. See the table below. Ask your System Administrator which symbol to use.

Database	To Match All	To Match One
MS SQL Server	%	_(underscore)
Oracle	%	_(underscore)
Sybase	%	_(underscore)

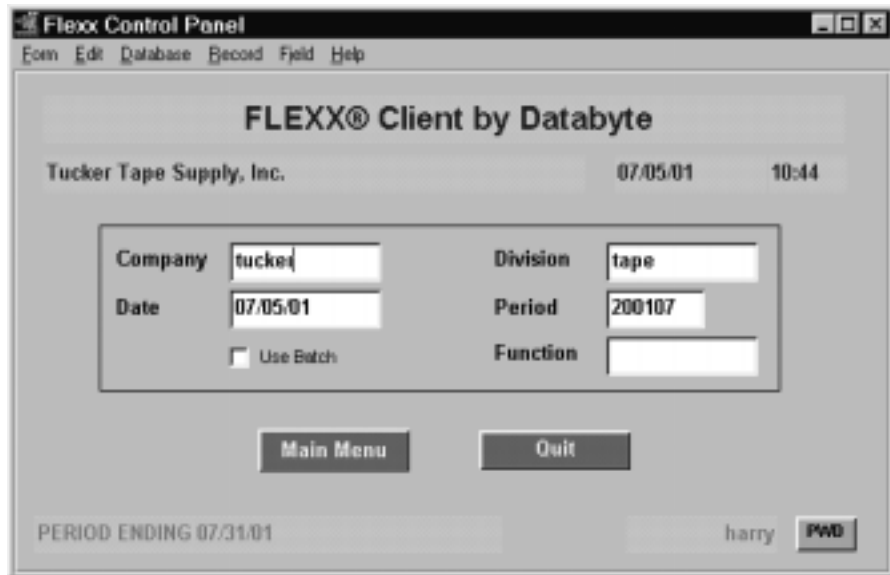
- △ Information that you enter and information that appears on the screen appears in bold type. Example: Enter Y in the **Begin Process?** field.

References to other sections are italicized. Example: *See 2.0 Starting CM.*

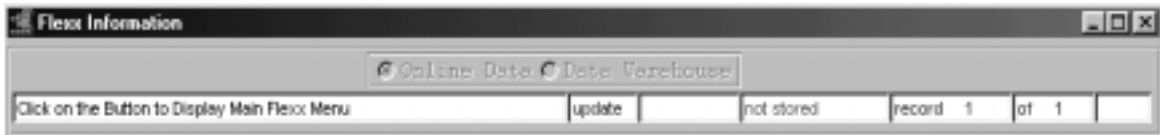
2.0 Starting Contact Manager

To start Contact Manager

Log on to FLEXX. The Session defaults screen appears.



The screenshot shows the 'Flex Control Panel' window. The title bar reads 'Flex Control Panel' and the menu bar includes 'Form Edit Database Record Field Help'. The main content area displays 'FLEXX® Client by Databyte' and 'Tucker Tape Supply, Inc.' with the date '07/05/01' and time '10:44'. Below this is a form with the following fields: 'Company' (tucker), 'Division' (tape), 'Date' (07/05/01), 'Period' (200107), and 'Function' (blank). There is a 'Use Batch' checkbox which is unchecked. At the bottom of the form are 'Main Menu' and 'Quit' buttons. At the very bottom of the window, it says 'PERIOD ENDING 07/31/01' and 'harry PWD'.



The screenshot shows the 'Flex Information' window. The title bar reads 'Flex Information'. Below the title bar are two radio buttons: 'Online Data' (selected) and 'Data Warehouse'. Below this is a table with the following data:

Click on the Button to Display Main Flex Menu	update	not stored	record 1	of 1
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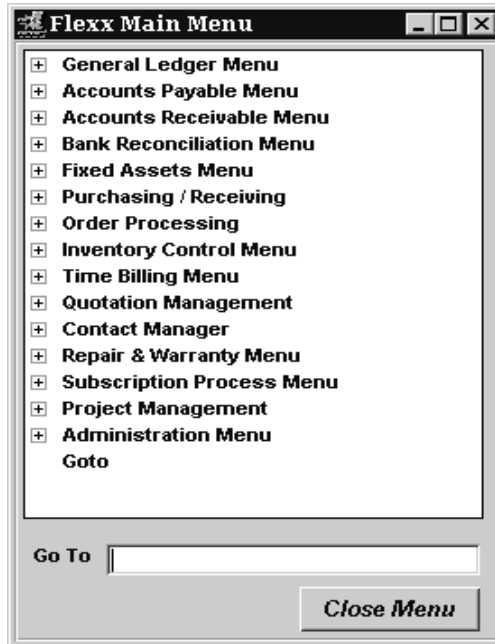
This screen lets you set up the defaults for the session. For example, if you plan to work with accounts in one company/division during a session, enter the company and division codes here. During the session, these codes appear automatically in the **Company** and **Division** fields whenever you have a blank screen or new record. You can overwrite the session defaults any time they appear on a screen.

Fields

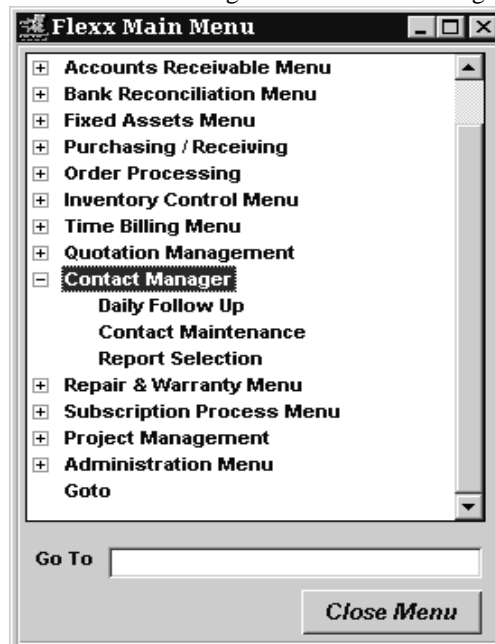
Enter the following information.

Field	Entry	Default	Reqd
Company	The default company code. Use Zoom to select from a list of companies.	Set by System Administrator	Y
Division	The default division code. Use Zoom to select from a list of divisions.	Set by System Administrator	Y
Date	The default date.	System Date	Y
Period	The default period number.	GL Period Table	Y
Use Batch	Select this option by clicking the box. Batch control lets you group similar Contact Manager transactions together and enter, edit and post them as a whole using a unique batch number. Each Contact Manager transaction in the batch still has a transaction number. If you selected B/C, the Batch Control screen appears when you first go to add a transaction.		Y
Function	To quickly access a specific FLEXX module, enter the code for the module, then <<press Main Menu>>. Example: To go straight to Contact Manager and bypass the Main Menu, type mainpros in this field and <<press Enter>> Twice. The Contact Manager menu appears. See the Session Defaults section of your <i>Getting Started</i> manual for more information.		N
Buttons			
Main Menu	Access the FLEXX main menu		
Quit	Terminate the FLEXX session.		
PWD	Press this button to change both the user's Logon password and the FLEXX Authorization password (See <i>Administration Manual, User Master description</i>).		

Press **Main Menu**. The FLEXX Main Menu appears.



Select **Contact Manager**. The Contact Manager Main Menu appears.

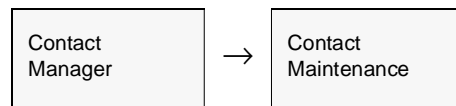


3.0 Contact Maintenance

Description

The Contact Maintenance form allows you to set up an unlimited number of companies, attach unlimited contacts, define the contact profile and set/maintain key areas of interest.

Select



The Contact Maintenance form appears in Find Mode.

<<Find>> the desired customer/prospect. To add new customers and contacts press the “Add” button on the corresponding section. The Customer Master form will be displayed in update mode. Enter the new information (See *FLEXX Getting Started Manual, Customer Master description*) save it and <<Previous Form>> back to Contact Maintenance.

Fields

The following fields appear on the screen.

Field	Entry	Default	Reqd
Company	The code for the company the contact/customer is doing business with.	Session Default	Y
Customer	The customer code, which is initially set up on the Customer Master Table	Customer Master	Y
Type	Used to classify contacts as either: <ul style="list-style-type: none"> • C - Client • P - Prospect 	Customer Master	Y
Rating	Each customer is ranked according to their activity level. The rating defaults are 0 to 4, but any other single alphanumeric character can be used. These values are for user reference and reporting only. <ul style="list-style-type: none"> • 0 - Dead Lead/Inactive • 1 - 10% Prospect • 2 - 25% Prospect • 3 - 50% Prospect • 4 - 90% Prospect. 	Customer Master	Y
Customer Name, Address	The formal customer name, address and phone numbers as defined on the Customer Master.	Customer Master	N
Web	The customer's website address.		N
Comments	User defined comments.		N
Customer Time	This field is used to keep track of what time period the customer uses. For example, if the customer is 5 hours ahead, enter 05:00 here and select the Ahead button. FLEXX will automatically calculate the customer's current time.	Customer Master	N
Salesperson	The salesperson assigned to the customer as defined on the Customer Master.	Customer Master	N
Profile	User defined (i.e. industry type).		N
Active User	The FLEXX user code of the person currently accessing the form.		Y
Add button	Press the "Add" button to enter a new customer/prospect. The Customer Master form will be presented in Update mode (See <i>FLEXX Getting Started Manual</i> for further information on entering customer data).		
Contacts Tab			
Contacts	These fields display the list of customer contacts showing name, phone number, title and e-mail address. Only existing customer contacts with a status of "a" - active or "p" - primary will be displayed. To add further contacts press the "Add" button and the Customer Contact Entry form will appear in Update mode.	Customer Master Contact Entry	
Add button	Press the Add New button to enter a new customer contact. The Customer Master Contacts form will be presented in Update mode (See <i>FLEXX Getting Started Manual</i> for further information).		
Interests button	Press the Interests button to enter or display the Contact's Interests table (See Sec. 3.4).		
Create Word Doc. button	Press this button to create a new MS Word document. It will have the contact name and address automatically entered at the top of the form.		
Send E-Mail button	Press this button to open an MS Outlook Mail session, using the e-mail address defined for this contact.		

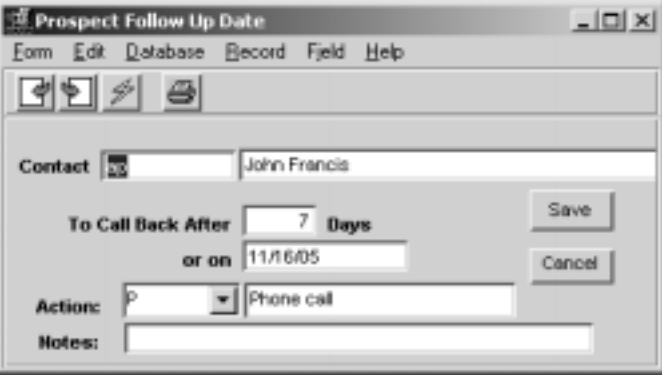
Field	Entry	Default	Reqd
Buttons			
Show History	Press this button to display the Conversation Context Detail form (See Sec. 3.1).		
Customer Interests	Press this button to display the Customer Interests form (See Sec. 3.3).		
Search	Press this button to present the Search menu (See Sec. 4.2).		
Quote	Press this button to display the Quote Overview table. This table lists all quotes recorded in FLEXX for this customer.		
Equipment	Press this button to display all Repair & Warranty equipment registered in FLEXX to this customer.		

Action Items Tab

The screenshot shows the 'Contact Maintenance' window for 'Remco Supply Inc.'. The interface includes a menu bar (Form, Edit, Database, Record, Field, Help), a toolbar with navigation icons, and a main form area. The form contains fields for Customer Name, Type, Rating, Address, Phone, Fax, Sales Person, Profile, and Active User. There are also sections for 'Customer Time' and 'Current Time'. At the bottom, there are buttons for 'Show History', 'Customer Interests', 'Search', 'Quote', and 'Equipment'. The 'Action Items' tab is active, displaying a table with columns for Employee, Date, Action, and Contact. The table contains three entries: one for 'eric' on '03/07/01' with action 'p' and contact 'John Francis'; another for 'eric' on '12/14/01' with action 'P' and contact 'Mr Burrows'; and a third for 'lexh' on '07/05/01' with action 'p' and contact 'John Francis'. There is also a note 'test for eric .. harry' and '1234 - this is AP line 1'.

These fields are only used to display the Follow Up action items that are to be performed, showing the customer contact to be contacted, when and what action. To enter further actions, press the "Add" button (described below).

Add button	Press the Add button to enter new follow up action items. This will call up the Prospect Follow Up Date form (describe below).
-------------------	--

Field	Entry	Default	Reqd
The Prospect Follow Up Date form appears in Update mode			
			
<p>To enter new follow up actions, enter the contact code of the person to be contacted, the number of days forward from today that the action is to be carried out and then enter the action code to be performed. If there are any additional notes, enter those and then press the Save button.</p> <p>If the action item just entered is not to be saved (i.e. wrong contact, not required, etc.), press the Cancel button to prevent saving the entry and <<Previous Form>> to return to the Contact Maintenance form.</p> <p>If there is no existing follow up action for this contact and none is to be added, press <<Previous Form>> or press Cancel to return to the Contact Maintenance form.</p> <p><i>See Sec. 3.2 for more details on this form.</i></p>			

Old (expired) follow up items can be deleted as desired, but **ONLY** by the user that entered them. Multiple action items can also be entered for the same contact. Press the Save button to save the entry, or Cancel or <<Previous Form>> to cancel.

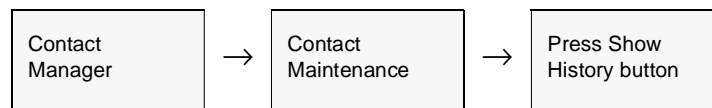
See Sec. 3.2 for more details on this form.

3.1 Show History

Description

By pressing the Show History button, the Conversation Context Detail form will be presented. This screen is a display only form and allows you to view existing conversation history or add new conversation notes.

Select



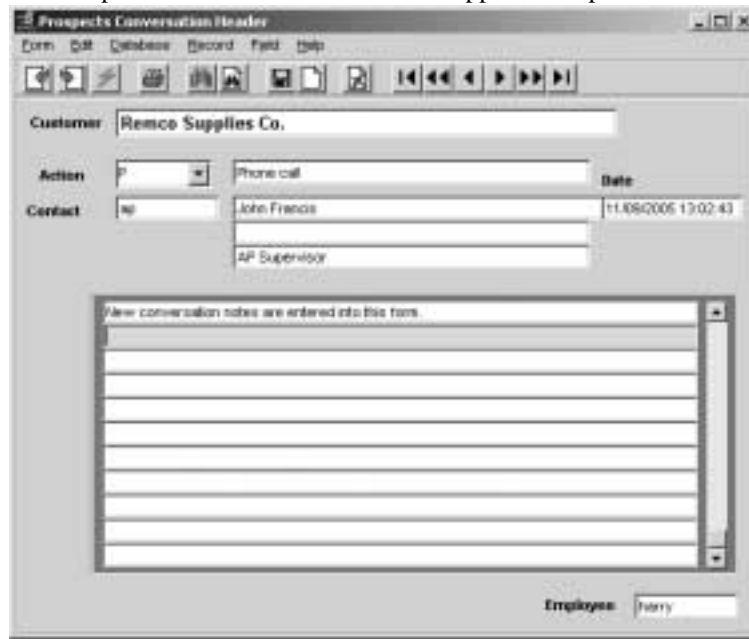
The Show History form appears in Find Mode, and is a view only screen.



The form will by default display only the notes entered by the session user. To see all the notes previously entered by all users, press the “**Show all notes**” button. These will be displayed in chronological order, latest to earliest. Press the “**Reverse Order**” button to reverse the order. Each note will be identified as to the user that entered it, the date and time, as well as the Customer and Contact the note was for.

To add new notes press the “**Add Notes**” button. This will call up the Prospects Conversation Header form (see below).

The Prospects Conversation Header form appears in Update mode



Fields

The following fields appear on the screen.

Field	Entry	Default	Reqd
Customer	The customer code of the contact.		
Action	The code and description of the action to be performed (i.e. phone call, fax, message).		Y
Contact	The person to be contacted.	Contact Manager	Y
Date & Time	The date and time the action was recorded into FLEXX.	Session Default	Y
<p>Once the action and contact information have been entered, the text of any conversation that took place can be recorded. FLEXX will auto save the line of text when it reaches the end of the line and perform a Clear to Add on the next line. The enter key can also be used to save lines that don't use the auto save feature. Once the conversation has been entered and saved, <<Previous Form>> back to the Conversation Context Detail form. To have the text appear on this history screen, press the "Show all notes" button.</p>			

Once you have completed viewing/adding conversation history, press <<Previous Form>> to return to the Conversation Context form. <<Previous Form>> from that and the Follow Up form will be presented to enter any additional follow-up actions that may be needed. Either enter a new followup or Cancel it to return to the main form.

This form can also be used to delete conversation notes, as follows.

Delete Conversation Notes

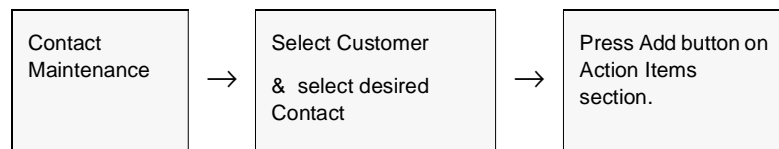
To delete previously entered notes, access the Prospects Conversation Header form, and do a Find on the note data, using any of the entry fields (e.g. Employee code). This will result in all notes that fit the search criteria to be found. Display the note to be deleted and press the X-Delete icon, and that complete note will be deleted. Any user is able to delete conversation notes.

3.2 Contact Follow Up

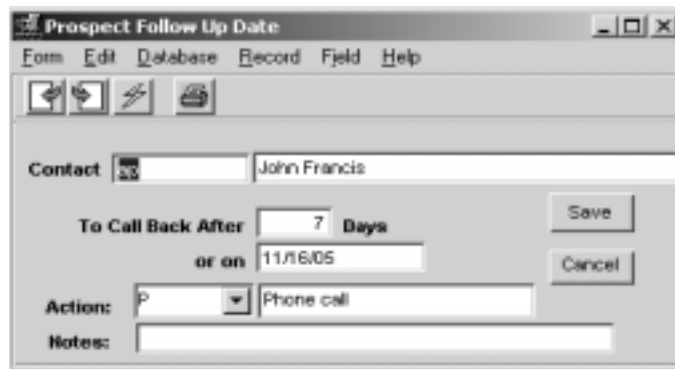
Description

Contact followups are entered into the Prospect Follow Up Date form. This allows you to enter information to remind you to take future action (i.e. phone call). Follow Up is tracked by day (not by time) and can also be viewed by accessing the Daily Follow Up option (See Sec. 4.4) from the Main Contact Manager menu.

Select



The Prospect Follow Up Date form appears in Update mode.



Fields

The following fields appear on the screen.

Field	Entry	Default	Reqd
Contact	The code and name of the individual to which the action code is associated as defined on the Customer Master Contacts form.		Y
To Call Back After	The number of days from today that the follow up action is required.	7 Days	Y
Action	The action code and description representing the follow up action to be performed. Predefined codes are: <ul style="list-style-type: none"> • P - Phone call • Q - Left a quote • O - Order placed • MMSG - Left message However, additional codes can be defined and used as desired.	P	Y
Notes	Any user defined notes.		N
Save button	Press the Save button to save (Add/Update) the entry. Just pressing <<Previous Form>> will not save the entry.		
Cancel button	Press Cancel to cancel the entry. <<Previous Form>> to exit the form.		

Old (expired) follow up items can be deleted as desired, but ONLY by the user that entered them. Multiple action items can also be entered for the same contact. Press the Save button to save the entry, or Cancel or <<Previous Form>> to cancel.

Once this information has been entered and saved, press <<Previous Form>> to return to the Contact Maintenance form.

3.3 Customer Interests

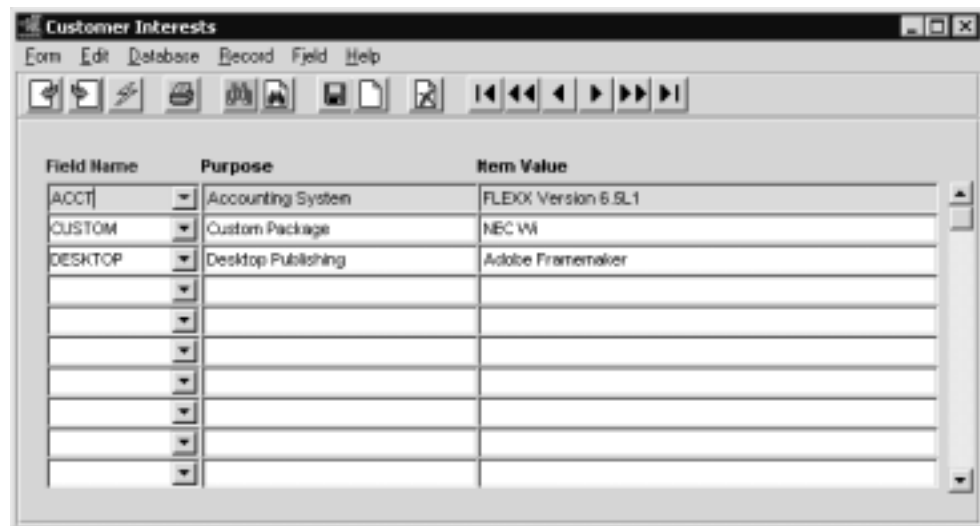
Description

This form allows you to set up a user defined list of interests associated with the selected customer (or prospective customer). This can be used for sorting and reporting purposes.

Select



The Customer Interests Table appears in Update mode.



Fields

The following fields appear on the screen.

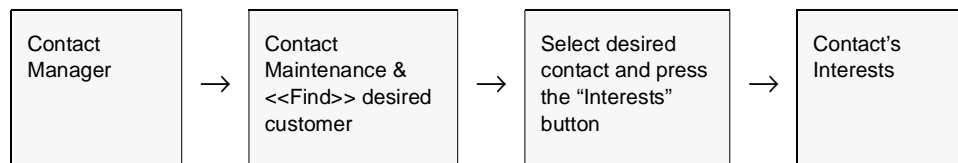
Field	Entry	Default	Reqd
Field Name	Any user defined code for the type of interest. Need to be predefined on the Prospect Interests Master Type Table (table # 1500)		Y
Purpose	The description of the Field Name code from the Master Table.	Contact Interest Table	
Item Value	Any user-defined description.		

3.4 Contact's Interests

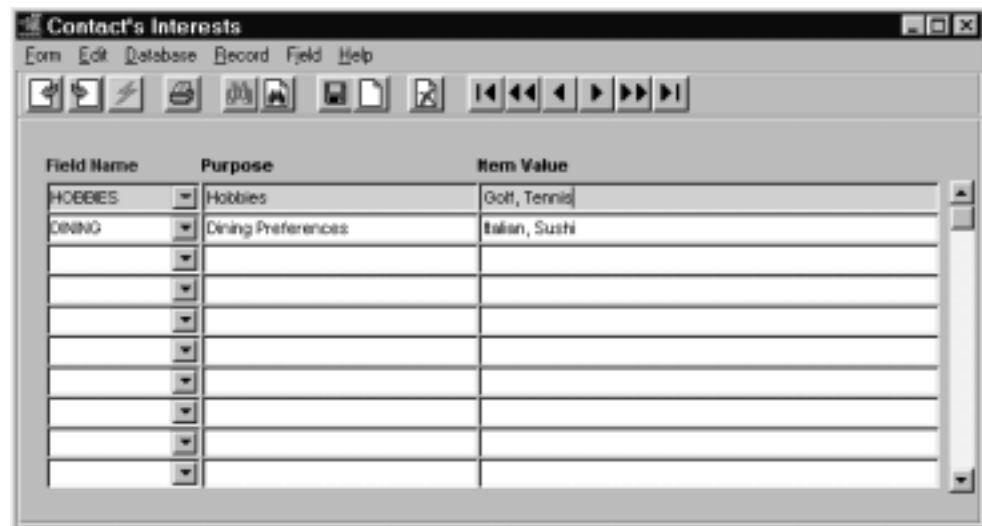
Description

This form allows you to set up a user defined list of interests associated with the specific customer contact. This can be used for sorting and reporting purposes.

Select



The Contact's Interest Table appears in Update mode.



Fields

The following fields appear on the screen.

Field	Entry	Default	Reqd
Field Name	Any user defined code for the type of interest. Need to be predefined on the Prospect Interests Master Type Table (table # 1500)		Y
Purpose	The description of the Field Name code from the Master Table.	Contact Interest Table	
Item Value	Any user-defined description.		

4.0 Extracting Contact Manager Information

Description

This section describes:

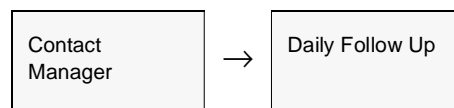
- Δ How to perform on-screen inquiries with regards to follow up actions.
- Δ Perform multiple searches
- Δ Printing standard reports

4.1 *Daily Follow Up*

Description

The Daily Follow Up form is a view only screen which lists all follow up activity. It will default to the activity for the session default user, but can be displayed for any other user or all users by performing a FIND with that user's id entered into the Employee field. Activity can also be displayed by date by modifying the follow up date. New Follow up activities are entered as described in Sec. 3.2.

Select



FLEXX® - Contact Manager 4.0 Extracting Contact Manager Informa-

The Daily Follow Up form appears in Update mode.

Fields

The following fields appear on the screen.

Field	Entry	Default	Reqd
Company	The Company Code.	Session Default	Y
Employee	The employee who is to perform the follow up action. This is a searchable field. Accept the default to view only your actions or leave blank to view follow up activities of all employees.	Session Default	N
Customer	The customer for which the follow up action is to be performed or leave blank to see follow up activities for all customers.		N
Follow Up	The date the follow up activity is to be performed on. Accept the default or leave blank to view all follow up activities regardless of date.	Session Default	N
Contact	The contact code for the person to be followed up with.	Prospect Follow Up	N
Action	The code for the action to be performed.	Prospect Follow Up	N
Notes	The notes entered on the Prospect Follow Up form.	Prospect Follow Up	N

FLEXX® - Contact Manager 4.0 Extracting Contact Manager Informa-

Field	Entry	Default	Reqd
Status	The follow up status; can be <ul style="list-style-type: none"> • p - pending • c - complete 		
Customer Name	Formal Customer Name.	Customer Master	N
Buttons			
Complete Follow-up	Press this button to mark the selected follow-up item complete. All completed action items will no longer be displayed on this form, but will still show on the Contact maintenance "Action Items" screen where they can be deleted if desired.		
Display Customer	Press this button to display the Contact Maintenance screen showing the specific customer this item was entered for.		

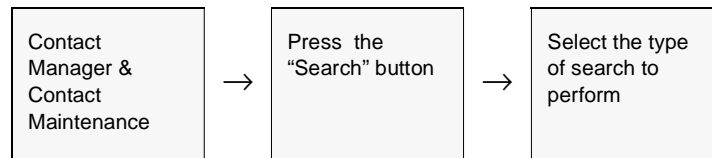
4.2 Search Engines

Description

Contact Manager comes with the capability to do searches based on the following:

- Δ Conversation Text
- Δ Customer Name and Address
- Δ Client Interest Profile
- Δ Contact Name

Select



Prospect Conversation Search

If you search using this method, the Prospect Conversation Search form appears in Find mode. To start a search enter the text, (including wild cards) you are looking for and press <<Find>>. Once the text has been found you can obtain further information by pressing either of the “Show Context” or “Select Customer” buttons.

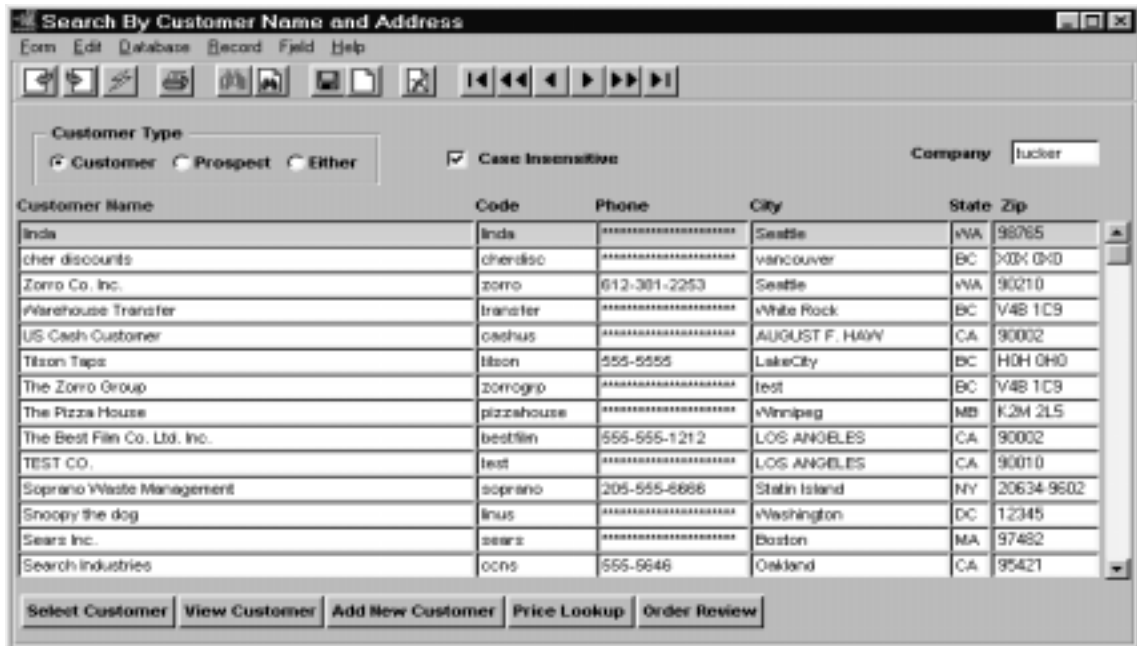
Be aware that the data is case sensitive meaning any search keywords entered need to be in the same case (upper/lower/mixed) as the conversation data.



Customer Name and Address Search

This search will present the Search by Customer Name and Address form which allows you to search for a customer based on the full company name of the customer, address and/or their customer code.

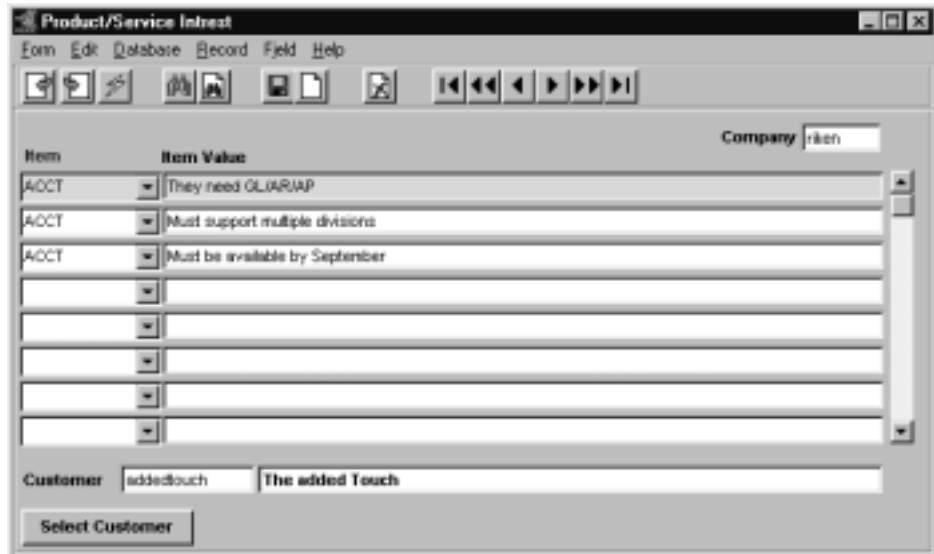
Note that with the “Case Insensitive” box marked, any search keyword can be entered in any case and FLEXX will search that value regardless of its case (upper/lower/mixed).



FLEXX® - Contact Manager 4.0 Extracting Contact Manager Informa-

Client Interest Profile Search

This search allows you to find customers based on their interests. These are the interests defined on the Customer's/Prospect's Interests form (Sec. 3.3), not the Contact's interests.



Contact Name Search

This search is used to find a particular contact and the customer he is defined to. It can be performed using the contact demographics as selection criteria.



4.3 Printing Standard Contact Manager Reports

Description

Reporting within Contact Manager is the same as in all FLEXX modules. The type of reports you are able to generate depends on which ones your company has set up in the system.

The following table lists the standard Contact Manager reports.

Report Code	Report Title	Description
convprt	Conversations Report	This report contains data pertaining to "entered" conversation with contacts that are recorded; based upon a user defined range.
fouplprt	Follow Up List	Used to print a daily call back sheet. Report provides a list of contacts that need to be called back.
salesprt	Salesperson's Report	Report generates either a detailed or summarized report of a salesperson's activity within a defined period of time.

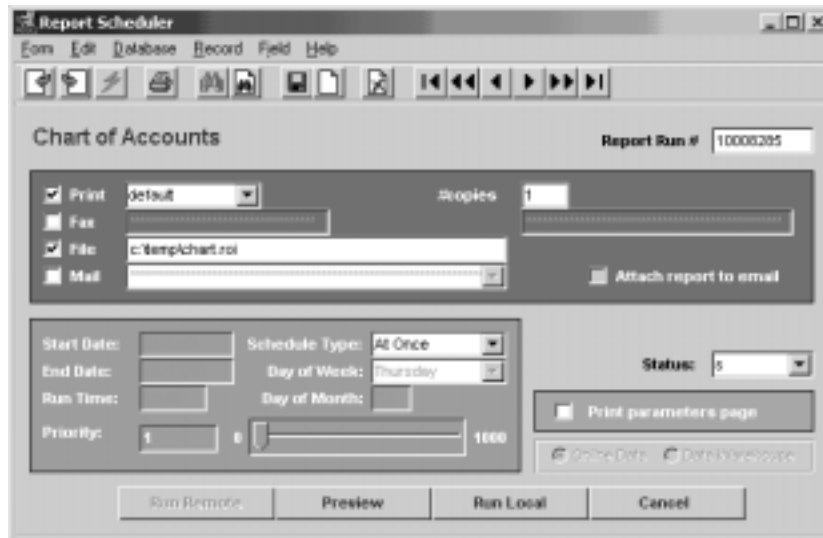
Procedure

To print a Contact Manager report:

- Δ Select **Report Selection** from the Contact Manager Menu.
- Δ Position your cursor on the report you want to print.
- Δ <<Press Select Report>>. The report selection criteria appears along with the report title and control number.
- Δ Enter the selection criteria.

FLEXX® - Contact Manager 4.0 Extracting Contact Manager Informa-

Δ <<Press Run Report>> to display the following printing options.



Fields

Enter the following information to print the report.

Field	Entry	Default	Reqd
Print	Select the print box to send the report output to a printer.		Y
Print Device	The printer name. This will be the printer specified as the Default on the User Master for this user.	default	Y
# Copies	Enter the number of copies of the report desired.	1	Y
Fax	Select the fax box to fax the report. This functionality only works if fax software has been installed and configured to FLEXX specifications.		Y
Fax Number	Enter the fax telephone number.		Y
File	Select the file box to send the report output to a file, otherwise leave blank. This file can be used to reprint the report at any time.		Y
File Name	The user-defined name of the file to send the output to. Your System Administrator sets up this field.	System Generated	
Mail	Select the Mail box to have the report server send you an e-mail on print completion. This functionality only works when reports are being "scheduled".	User Master	N
Mail Address	The e-mail address to be used.	User Master	
Attach report to email	Select this box to have the report "rox" file sent to the designated e-mail address as an attachment. If Actuate is loaded the report can then be viewed or printed.		
The following fields are only active (lit) if the FLEXX Report Server is installed and active.			

FLEXX® - Contact Manager 4.0 Extracting Contact Manager Informa-

Field	Entry	Default	Reqd
Start Date	The date to start the printing schedule for this report.	Session Default	Y
End Date	The date when the print schedule is to end.	Session Default	Y
Run Time	The time of day when the print schedule is to be started.	Internal Time Clock	Y
Priority	The scheduling priority. Once the report scheduler has determined which reports are eligible to be run for the specified date or time, they are then prioritized with 1000 being the highest and 0 the lowest priority.	1	
Schedule Type	The type of schedule to use; can be: <ul style="list-style-type: none"> • At Once – to be run immediately. This is the only option for Preview or Run Local. • Run Once – run only once (no repeats). • Daily – run schedule each day for the period entered. • Weekly – run the schedule once a week. • Monthly – run the schedule once a month 	At Once	
Day of Week	The day of the week the report is to be scheduled.	Session Default	
Day of Month	The month date the report is to be scheduled. Note that when defining the Day of Week or Day of Month settings, only one or the other can be set. FLEXX will enter the other corresponding value to match.	Session Default	
Status		s	
Print Parameters Page	Select this box to have a cover sheet printed with the report, displaying the selection criteria used to produce the report. This can be controlled with the Application Control variable <i>parampage</i> setting.	marked	
Buttons			
Run Remote	Press this button to send the report to the Report Scheduler to be printed.		
Preview	Press this button to preview the report only. It can be printed from the preview screen.		
Run Local	Press this button to print the report on the local printer (i.e. not schedule the printing)		
Cancel	Press Cancel to cancel the operation. This is the same as pressing <<Previous Form>>. It will not cancel printing if the report has already been sent to the printer or scheduler.		