Customer Service

Contact Management for SBT Pro Series

Lahey

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1. Overview

- ♦ Introduction
- ♦ Features
- ♦ Understanding Lahey Customer Service

Introduction

Lahey Customer Service is a complete contact management system that can be used for telemarketing, sales tracking, accounts receivable collections, vendor communications and public relations contact tracking. You can use the program to record both incoming and outgoing calls, maintain to-do lists, and print labels. Customer Service prints a wide variety of management reports and can create sales orders and purchase orders when linked with SBT Sales Orders and SBT Purchase Orders.

Featuring completely seamless integration with SBT Pro Series, Customer Service adheres to SBT's programming and interface standards. This guarantees the highest level of productivity by delivering the same intuitive operation no matter which Pro Series module is in use. Users are also able to take advantage of convenient Pro Series features like, File Browsers, Key Changes, and the Business Status Report. All data files are updated in real time, providing up-to-the-minute access to your company's most valuable asset—information.

You begin by creating company and contact records for each person or company you interact with. These records can be created manually or imported from your existing SBT customer file and/or vendor file. Users should log events (calls, faxes, orders, etc.) into a contact's event log to keep an accurate record of company interactions. When events are entered and not checked complete, they will automatically appear on a user's to-do list. You can also create follow-up events for yourself or other users. As long as an event is not complete, it will automatically appear on a user's to-do list.

Features

- *New Feature!* **E-mail Support**: Send e-mail and automatically log each message from within the contact screen.
- *New Feature!* **Rule Table Support**: Each user-defined field can be validated by a rule table.
- *New Feature!* **SIC Codes**: Each company can be assigned an eight-digit Standard Industry Classification code.
- *New Feature!* **Title Codes**: Each contact can be assigned a three-digit code for grouping contact titles.
- **Customizable Screen Labels**: Supports user-defined screen labels for key terminology.
- **Customizable Fields**: Provides five user-defined information fields for each company record and four user-definable information fields for each contact record.
- **Flexible Search Capability**: Allows a user-defined search capability.
- **Company ID Numbers**: Automatically generates company ID numbers in a variety of formats.
- **Contact Names**: Maintains an unlimited number of contact records per company.
- **Contact Record Stores Key Information**: Allows eight phone numbers per contact record and maintains an alternate address, e-mail address, a personal memo field, birthday, anniversary, and spouse’s name for each contact record.
- **Event Tracking**: Supports an unlimited number of user-defined call types with event thread numbers for each contact event.

- **Unlimited Notes and Event Logging**: Provides an unlimited memo field for each contact event and tracks an unlimited number of events per contact record.

- **Event Duration**: Automatically calculates the number of minutes for each event in real time when logging events.

- **Import Capability**: Imports customer, vendor and external records and creates company and contact records.

- **Optimized Data Access**: Supports a separate company table from customers and vendors to avoid degraded performance in other tables.

Understanding Lahey Customer Service

This section explains some of the basic concepts behind the program: the company file, the contact file, the event file, call types, and SIC codes.

Company File

Each company you interact with must have a unique entry in the company file. This includes prospects (companies you have not done business with yet), customers (companies that buy your products and/or services), and vendors (companies that sell you products and/or services).

Contact File

Once a company record is created, you can attach the names of the people you interact with. Each name has a unique record for that company.

> *For more information on using the company and contact files, see "Companies and Contacts" in Chapter 3 of this manual.*

Event File

You can think of the event file as a transaction file for your company's daily interactions with prospects, customers, and vendors. Examples of interactions are phone calls, faxes, letters, and meetings.

> *For more information on event files, see "Logging Events" in Chapter 4 of this manual.*

Call Type Table

The call type table is a central database that contains a list of the valid entries for the type of events your company wants to track.

You need to determine the types of calls and events your company needs to track, such as "Inbound Call" , "Outbound Calls", "Letter Sent", or "FAX Sent". Assign the codes for each call type, up to 8 characters each. For example:

You could define	**CALIN**	for Inbound Call.
	CALOUT	for Outbound Call.
	FAXIN	for Fax Received.
	FAXOUT	for Fax Sent.
	LTRIN	for Letter Received.
	LTROUT	for Letter Sent.

☞ This type of coding scheme is advantageous because when you generate reports, you can specify a portion of the call type ID to be included in the scope of the report. To see a report on all calls received, you would specify **CAL** as the call type—which would include all inbound and outbound calls.

For more information on defining call types, see "Call Types" in Chapter 3 of this manual.

SIC Codes

Many businesses use the government classification scheme known as Standard Industrial Classification or SIC. SIC codes were developed to help the federal government collect and classify data on business activity in the United States. SIC codes are simply numbers. Leading digits in a SIC code identify the type of industry.

Here's a key for the major SIC categories:

Leading Digits	Industry Description
00 through 09	Agriculture
10 through 14	Mining
15 through 17	Construction
20 through 39	Manufacturing
40 through 49	Transportation & Public Utilities
50 through 51	Wholesale Trade
52 through 59	Retail Trade
60 through 67	Finance, Insurance, & Real Estate
70 through 89	Services
99	Unclassified

☞ You can find more information on these SIC codes at **www.census.gov/pub/epcd/cbp/download/industry.ref**

The SIC scheme is hierarchical, and allows related industries to be classified close together. Adding more digits to the SIC code allow one to focus even more specifically to specific industries. For example:

SIC Code	Industry Description
50##	Wholesale Trade – Durable Goods
5045	Wholesale Trade – Durable Goods – Computers, Peripherals, and Software
5045-01	Wholesale Trade – Durable Goods – Computers, Peripherals, and Software – Computer peripheral equipment

☞ You are not required to use SIC codes with Customer Service. It is an optional feature that can be controlled from within the system setup screen in the Customer Service module.

For more information on defining SIC codes, see "SIC Codes" in Chapter 3 of this manual.

2. Installing the Program

- Quick Start
- Running the Setup Program
- Updating Your Installation
- Installing Updates
- Trial Version Limitations
- Manual Installation

Quick Start

This section contains a checklist of the steps necessary to install Lahey applications for SBT Pro Series. Be sure to complete each step in the order specified here. Do not proceed to the next step until you have completed the previous step.

- ☐ Install and link all of your SBT Pro Series modules. See the SBT Installation Guide for instructions.

- ☐ Read the Overview (Chapter 1) for each Lahey application you are installing.

- ☐ Install the Lahey application. See “Running the Setup Program” in this chapter.

- ☐ If you are installing a trial version of a Lahey application, see "Trial Version Limitations" in this chapter.

Once you have done all of these steps, you are ready to handle the tasks that make up the day-to-day routine of working with the program: maintaining key application tables, processing transactions, and printing reports.

Running the Setup Program

Make sure you have done a complete backup of your Pro Series installation before installing a Lahey application. The Lahey installation procedure may install modified versions of SBT program files.

The instructions in this section tell you how to install a Lahey application using Windows NT, Windows 98, or Windows 95.

☞ For linking purposes, be sure that you have already installed and linked all of your SBT applications *before* installing a Lahey application.

Starting SBTINSTW

1. Start Microsoft Windows in the normal mode.

2. From the **Start** menu, select **Run.**

3. In the Open field, type the drive letter and path where SBT Pro Series has been installed followed by SBTINSTW.EXE and click on OK. For example, type:

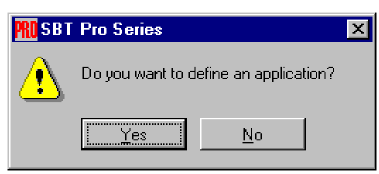
```
S:\PRO\SBTINSTW.EXE
```

☞ If you have any problems starting or running the SBT installation program, please contact your SBT reseller or SBT Technical Support at 415/444-9700. Lahey has not modified these routines.

Once you've started SBTINSTW, you'll see the following screen:

Define the Application

Select **Install | Define Custom Application**. You will see the following prompt:



Select	**Yes**	to add the Lahey application.
	No	to return to the **Install** menu.

Next, specify the floppy disk drive from which you want to copy the application files. Enter the drive letter, then insert the program disk for the application into that drive and select **Ready.**

Once the installation program has updated the Pro Series application database, you will see a prompt that says the application is defined.

Install Applications

Select **Install | Install Applications**. To install an application, highlight it, and press the space bar. "Yes" appears in the Selected column.

☞ For linking purposes, be sure that you have already installed and linked all of your **SBT** applications *before* installing a Lahey application.

Press **<Enter>** or click on **OK** to continue. You will see a screen for entering paths for the data, index, and program files.

The default paths are separate subdirectories under the main system directory you specified upon starting the SBT install program. The default directory for data and index files is named ..*xx*DATA and the default directory for program files is named ..*xx* (where *xx* is the two-digit application ID).

When you enter a directory that does not exist, you will see a message telling you that the directory does not exist and asking you if you want to create one.

Select	**Yes**	to have the install program create the directory you have specified.
	No	to reenter the directory.

After you enter all three paths, you will have these options:

Select	**Yes**	to have the install program create the directory you have specified.
	No	to reenter the directory.

Select	**Install**	to proceed with the installation.
	Edit	to change the application paths before proceeding.

After selecting Install, you will see a prompt that asks about sample data files.

Select	**Install**	to copy the application's sample data and program files.
	Skip	if you want to install the program, but not the sample data files.
	Cancel	to quit without installing the application.

Next, specify the floppy disk drive from which you want to copy the application files. Enter the drive letter, then insert the application disk into that drive.

Select	**Ready**	to copy the application files onto your hard disk.
	Cancel	to quit without copying the application files.

Updating Your Installation

In order to be able to take advantage of a Lahey application from within SBT Pro Series applications, it is sometimes necessary to manually copy customized versions of Pro Series files into your installation and update the data dictionary for linked applications.

Installing Lahey-Enhanced Pro Series Files

The enhanced files are located on your Lahey distribution disk and they must be manually copied into the affected program directory. These Lahey-enhanced files must match the version and build number of your Pro Series application.

☞ The enhanced program files are specific to the current build of your SBT Pro Series installation. Be sure to get updated files from Lahey when installing subsequent builds from SBT. These files are located in the download section of our web site at **http://www.lahey.net**.

The following table outlines which files are modified for each Lahey application:

Lahey Application	Lahey-Enhanced Files
Customer Service	None
Production Entry	SOPOST.PRG, SOSHIP.PRG and SOSHPP.PRG *(These files are only necessary if processing BOM configurator or sales kit transactions.)*
Project Accounting	APPOSD.PRG, APPOSD.SCX, APPOSD.SPR, APPOST.PRG, APPREC.PRG, APRECR.PRG, ARMINV.SCX, ARPOSD.SCX, ARPOST.PRG, ICPOST.PRG, ICTRAN.PRG, ICISSU.SCX, POPOSD.SCX, ICRCPT.SCX, POPOSD.SCX, POPOST.PRG, PORECP.PRG, PRPCHK.PRG, PRPOSP.PRG, PRPOSP.SCX, PRPOST.PRG, SOPOSD.SCX, SOPOST.PRG, SOSHIP.PRG, SOSHPP.PRG
Shop Control	None
Work Orders	None

Changing Data Structures in the SBT Pro Series Data Dictionary

The data dictionary is maintained in SBT System Manager. Select **Maintain | Dictionary | Tables**. Enter the table name in the **Table ID** field, then select **Field**.

☞ The SBT Pro Series Demonstration Version does not allow you to update from the data dictionary.

The following table outlines which tables are modified for each Lahey application:

Lahey Application	Table Name	Necessary Action
Customer Service	None	None
Production Entry	SOTRAN, SOYTRN	Change WONO, C10

Project Accounting	ARDIST, ARTRAN, ARYDST, ARYTRN, ICDIST, ICTRAN, ICYDST, ICYTRN, POTRAN, POYTRN, PRDIST, PRYDST, SOTRAN, SOYTRN	Add JOBCODE, C10
		Add PHASE, C6
		Add SUBCODE, C4
		
		(Add JCCODE, C1 to all xxDIST/xxYDST tables)

	PRDTPT, PREMPT, PRPAYT, PRXPST, PRYDPT	Change PROJECT, C10
Shop Control	None	None
Work Orders	SOTRAN, SOYTRN	Change WONO, C10

Once you have recorded all your changes to the data dictionary, exit to the **System Manager** main menu. From the **Transaction** menu, select **System Recovery**, then **Update from Data Dictionary**.

Select the applications you have updated for the company you are using, press the **<Space>** bar to select the application, then press **<Enter>**. Select **Yes** to the **Rebuild all indexes?** prompt, then select **Update**.

For more information on updating the Data Dictionary, see "Using the System Recovery Utilities, Update from Data Dictionary" in the SBT System Manager manual.

Installing Updates

Updates are disks from Lahey that contain new program files for your version of Pro Series. They are not an *upgrade*, but rather, they are in-line enhancements and refinements to the features of the version you already have.

1. Start the Pro Series Windows setup program, SBTINSTW.EXE. For more information on how to do this, refer to Starting SBTINSTW in the section "Running the Setup Program" of this manual.

2. Select the **Install Updates** option on the **Install** menu.

When you select **Install Updates**, you must first specify which drive to copy the updated file from, then insert the first disk for the update into that drive. The program checks to see if the disk is an update disk or the first of a full set of disks for an application.

☞ Lahey update disks contain the most up-to-date versions of all program, screen, and report files, as well as files that have not changed since the application began shipping.

If you have made modifications to your program, screen, or report form files, you should back up those files before installing any update disk. The update program overwrites all existing files.

Trial Version Limitations

Extreme caution should be taken when installing a trial module in a "live" installation. When you open a trial module, the entire installation is set into a demonstration mode and can destroy live data if file sizes of "live" data are larger than the SBT trial mode allows. To avoid this problem, you must exit Pro Series from the demonstration module before opening a "live" module.

Here are the limitations for Lahey trial modules:

Lahey Application	Table	Number of Records
Customer Service	CCPROS	25 Companies
Production Entry	PEBMHD	5 BOM Headers
Project Accounting	PAMAST	5 Projects
Shop Control	SCMAST	25 Plan Orders
Work Orders	WOMAST	25 Work Orders
	WORTHD	5 Routes

Manual Installation

☞ This is an optional method for installing an application or update. If you have already successfully installed an application or update using SBTINSTW, you do *not* need to follow the instructions in the remainder of this section.

1. Insert the Lahey Customer Service Program Disk into your floppy disk drive.

2. From a DOS prompt, create the Customer Service program and data directories if they do not already exist.

   Change to the drive and directory where SBT Pro Series has been installed. For example, you might type (substitute the correct drive and path for your installation throughout these steps):

   `S:` and press **<Enter>**
   `CD \PRO` and press **<Enter>**

   Once you are in the SBT Pro Series command directory, you can create the Customer Service program and data file directories. For example, type:

   `MD CC` and press **<Enter>**
   `MD CCDATA` and press **<Enter>**

3. Extract all the files from the distribution disk into the program directory. From the SBT Pro Series command directory, type:

```
CD  CC  and press <Enter>
A:ZIPCCC01  CC????.*  and press <Enter>
```

☞ If the extraction process encounters any existing files with the same name, type Y to overwrite the existing file.

4. Copy the extracted files over the existing files. From the Customer Service program directory, type:

```
COPY  *._XP  *.FXP  and press <Enter>
COPY  *._PX  *.SPX  and press <Enter>
COPY  *._R?  *.FR?  and press <Enter>
ERASE  *._??  and press <Enter>
CD  ..  and press <Enter>
```

5. Extract the sample and system data files into the data directory. From the SBT Pro Series command directory, type:

```
CD  CCDATA  and press <Enter>
A:ZIPCCC01  CC????99._??  and press <Enter>
A:ZIPCCC01  SY*._??  and press <Enter>
```

6. Copy the extracted sample and system data files over the existing files. From the Customer Service data directory, type:

```
COPY  *._BF  *.DBF  and press <Enter>
COPY  *._PT  *.FPT  and press <Enter>
ERASE  *._??  and press <Enter>
CD  ..  and press <Enter>
```

7. Start FoxPro and get to a command line. There are many ways to get to a FoxPro command line. You can use the **FoxPro Access** option from the Pro Series **File** menu, run SBTDOTW for Windows, or SBTDOT for DOS.

8. Update the SBT Pro Series installed applications file. There must be one record for each company and application in this database. Be sure to use the correct paths for your installation. From the FoxPro command line, type:

```
USE  sycdata  EXCLUSIVE and press <Enter>
DELETE  ALL  FOR  applid  =  “CC”  and press <Enter>
PACK  and press <Enter>
APPEND  BLANK  and press <Enter>
BROWSE and press <Enter>
99 in the COMPID field press <Enter>
CC in the APPLID field press <Enter>
S:\PRO\CCDATA\ in the ADOSDBF field and press <Enter>
S:\PRO\CCDATA\ in the ADOSNDX field and press <Enter>
S:\PRO\CC\ in the ADOSPRG field and press <Enter> until
   you reach the CHKRULE field
T in the CHKRULE field
F in the CONFRME field
F in the CONFRMS field and press <Enter>
<Esc> to exit the record
USE  sysdata  EXCLUSIVE and press <Enter>
DELETE  ALL  FOR  sysid  =  “CC” and press <Enter>
PACK and press <Enter>
APPEND  FROM  ccdata\sysdata and press <Enter>
```

9. Update the SBT Pro Series data dictionary files. From the FoxPro command line, type:

```
USE sydappl EXCLUSIVE and press <Enter>
DELETE ALL FOR applid = “CC” and press <Enter>
PACK and press <Enter>
APPEND FROM A:\CC.ADD and press <Enter>
USE  sydflds  EXCLUSIVE and press <Enter>
DELETE  ALL  FOR  SUBSTR(tablid,  1,  2)  =  “CC” and
   press <Enter>
PACK and press <Enter>
APPEND  FROM  ccdata\sydflds and press <Enter>
USE  sydindx  EXCLUSIVE and press <Enter>
DELETE  ALL  FOR  SUBSTR(tablid,  1,  2)  =  “CC” and
press <Enter>
PACK and press <Enter>
APPEND  FROM  ccdata\sydindx and press <Enter>
USE  sydproc  EXCLUSIVE and press <Enter>
DELETE  ALL  FOR  applid  =  “CC” and press <Enter>
PACK and press <Enter>
APPEND  FROM  ccdata\sydproc and press <Enter>
USE  sydtabl  EXCLUSIVE and press <Enter>
DELETE  ALL  FOR  SUBSTR(tablid,  1,  2)  =  “CC” and
   press <Enter>
PACK and press <Enter>
```

```
APPEND  FROM  ccdata\sydtabl and press <Enter>
USE  sydtapp  EXCLUSIVE and press <Enter>
DELETE  ALL  FOR  SUBSTR(tablid,  1,  2)  =  “CC” and
   press <Enter>
PACK and press <Enter>
APPEND  FROM  ccdata\sydtapp and press <Enter>
QUIT and press <Enter> to exit
```

10. Update the Customer Service data structures and index files. Start SBT Pro Series and select **System Manager** from the **Programs** menu. Select **System Recovery** from the **Transaction** menu. Select **Update From Data Dictionary** and select all Customer Service companies in the browse window. Be sure to rebuild all index files.

    ☞ The demonstration version of Pro Series does not allow you to update file structures. If you are working with a demonstration version, you need to select **Reindex Application Files** instead of **Update from Data Dictionary**.

3. *Setup and Maintenance*

- Starting Customer Service
- Setting up Customer Service
- Enabling Rule Tables
- Call Types
- Title Codes
- Using the Search Screen
- Adding Companies and Contacts
- Changing Company and Contact Information

Starting Customer Service

☞ Before starting the program, you need to install Lahey Customer Service on your computer or network. For more information about installing the program, see Chapter 2 of this manual.

Double-click on the Pro Series icon.

Concurrent Sessions in Separate Windows

Do not launch multiple instances of Pro Series on the same computer. Although the system may appear to function normally within the two concurrently running windows, memory conflicts prohibit data files from being updated correctly.

Logging In

If your SBT installation requires a login, you will see a box where you enter your user ID and, if necessary, a password.

Select **File | Open | Customer Service**. If you only have one company using Customer Service, that company is loaded automatically, and you will see the Customer Service Main Menu.

If you have more than one company, you will see a list for selecting the company you want to work with. To select the company from the list, use the arrow keys to highlight the company you want to work with and then press **<Enter>**. You can also select a company from the list with your mouse by using your primary mouse button to highlight the company you want to work with and then using your secondary mouse button to select it. After selecting a company, you will see the Customer Service Main Menu.

Selecting a Company

Once you are in Lahey Customer Service, you can select to work with a different company by selecting **File | Company** option.

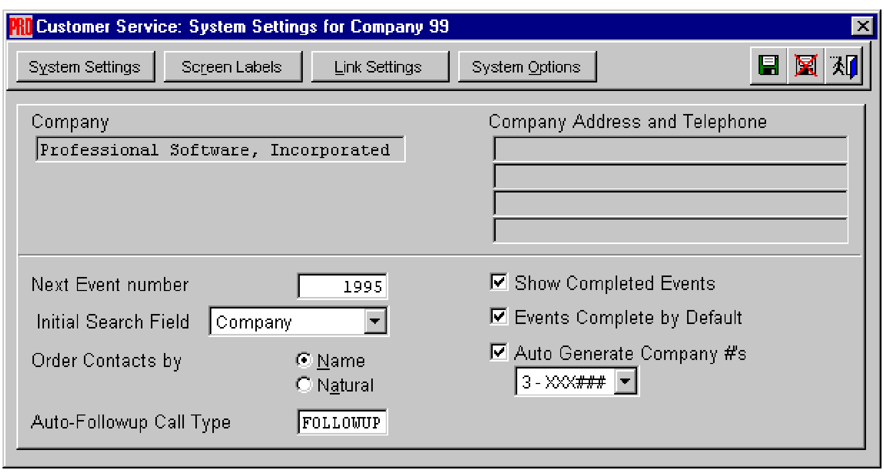
Setting up Customer Service

Before you can enter new company information for Customer Service, you must first add the company and its applications (including Lahey Customer Service) in SBT System Manager. See “Companies, Adding Applications” in the SBT System Manager manual for more information.

Once you have created a company using System Manager and added Customer Service as an application, you can enter specific information for the Customer Service company.

System Settings Screen

You will see the following screen below when you finish entering the Customer Service data and program file paths in SBT System Manager. You can return to this screen later by selecting **File | Change Setup Information** in Customer Service.



Next Event Number: Enter the next event number to use when logging events.

Initial Search Field: Select the field you want to initially search on in the Search screen.

Order Contacts By: Select the order contacts should be listed by in the company screen.

Select	**Name**	to list the contacts in alphabetical order.
	Natural	to list the contacts in the order they were entered.

Auto Follow-up Call Type: Enter the call type the program will use when creating follow-up events.

Show Completed Events: Select to have the Events screen show completed events in the Events screen.

Events Complete by Default: Select this option to mark all events complete upon saving.

Auto Generate Company Numbers: Select this option to enable the program to automatically generate company numbers, or leave blank for manual entry.

Company Number Format: Select the format for the number of characters required for the company number.

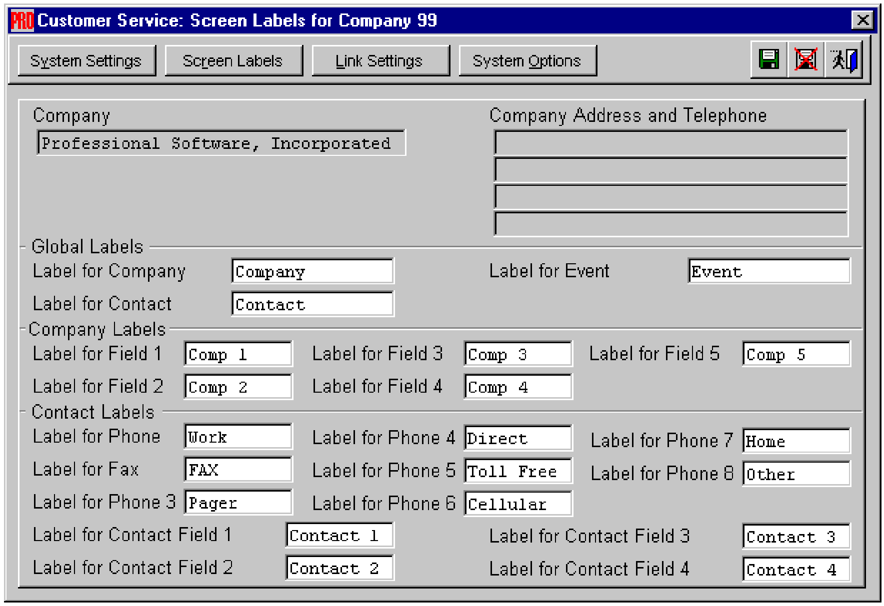
☞ The Base21 format provides well over 85 million unique company numbers and should be used in high-volume environments; however, the company number will not be meaningful to the company name. The other formats automatically calculate a company number based on the company name and provide sequential numbers following the alpha code.

Select	**0-Base21**	to create sequential company numbers with letters and numbers but without vowels from BBBBBB to 999999.
	1-X#####	to create company numbers using the first letter of the company name and a sequential five-digit number from 00000-99999.
	2-XX####	to create company numbers using the first two letters of the company name and a sequential four-digit number from 0000-9999.
	3-XXX###	to create company numbers using the first three letters of the company name and a sequential three-digit number from 000-999.
	4-XXXX##	to create company numbers using the first four letters of the company name and a sequential two-digit number from 00-99.
	5-XXXXX#	to create company numbers using the first five letters of the company name and a sequential single-digit number from 0-9.

☞ If you are not sure which format to use, accept the default format of a three-digit alpha and three-digit sequential number. This format provides up to 999 unique company numbers for the same first three letters of each company name.

Screen Labels Screen

Select this option to change the default screen labels Customer Service uses. You will see the following screen:

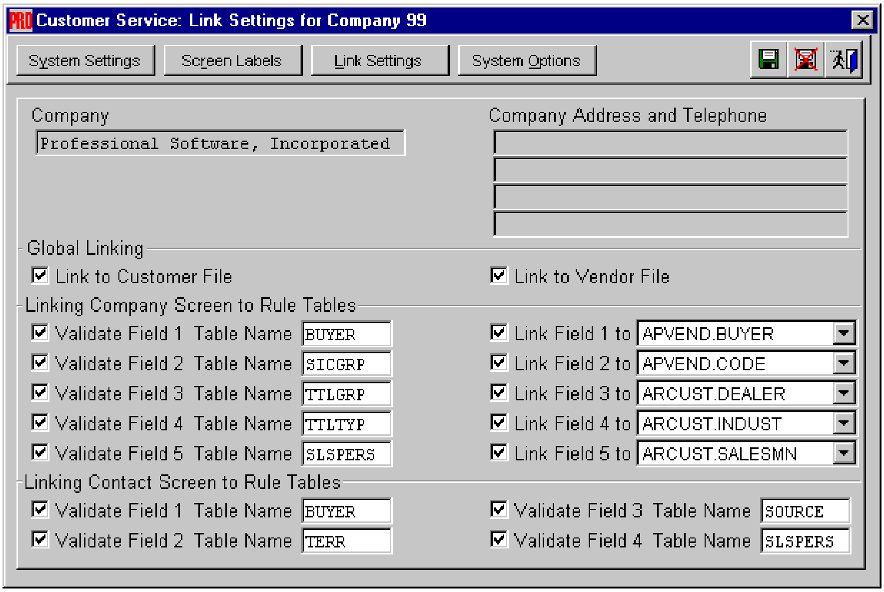


Enter custom screen label titles for the respective data entry fields.

☞ The first phone field is exported as the customer's main phone number and the second phone field is exported as the customer's fax phone number when creating a customer record from Customer Service.

Link Settings Screen

Select this option to change the default link settings Customer Service uses. You will see the following screen:



Link to Customer File: Select this option to enable linking to SBT's Sales Orders module Customer database.

Link to Vendor File: Select this option to enable linking to SBT's Purchase Order module's Vendor database.

For more information about linking applications, see Chapter 6 of this manual.

Validate Field #: Select this option to enable a rule table to validate a user-defined field in the Company or Contact screens.

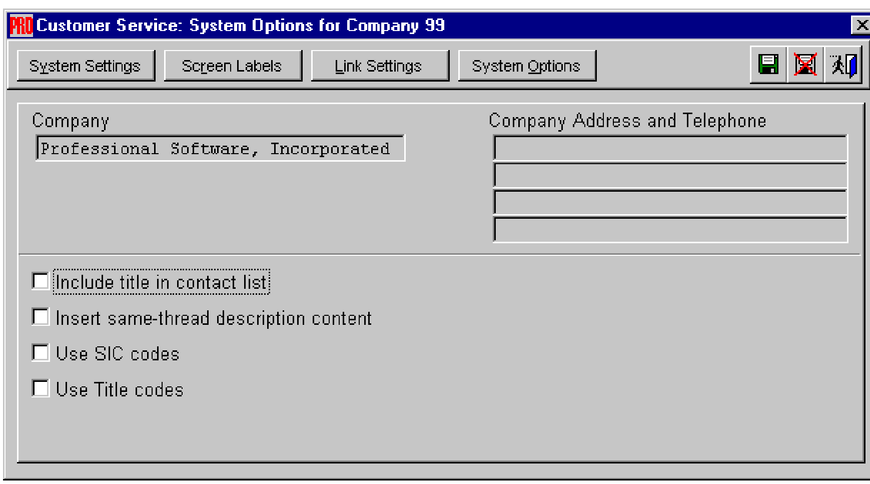
Table Name: This filed will only be visible if the validate field option has been selected. The valid values for Table Name comes from SBT System Manager's rule tables.

For more information about rule tables, see "Rules" in the SBT System Manager manual.

Link Field #: Select this option in order to send the value stored in the Customer Service field to a field in ARCUST or APVEND during the export process of converting a company into a customer or vendor, respectively.

System Options Screen

Select this option to change the default options Customer Service uses. You will see the following screen:



Include title in contact list: Select this option to include the contact's title as well as the contact's name in the company screen.

Insert same-thread description content: Select this option to have the system use the description from a prior event and automatically include it in all events logged for the same event thread.

Use SIC codes: Select this option to enable the use of SIC codes in Customer Service.

Use Title codes: Select this option to enable the use of Title codes in Customer Service.

Completing the Installation

Whatever configuration options you choose, you save your installation preferences by choosing **Save**.

You then see several prompts about adding application notes and copying data from an existing installation. Refer to the installation instructions.

When you finish responding to the final step questions, the program tells you that the installation is complete. You are now ready to switch from SBT System Manager to the new Customer Service installation you have added. Select **File | Open | Customer Service**. If you have more than one company using Customer Service, select the company you want to use.

Changing Setup Information

You can return to the setup screen at any time to change the information by selecting **File | Change Setup Information**.

Deleting a Company

To delete a company from your SBT system, you must first remove any applications installed for that company. See "Companies, Deleting Companies" in the SBT System Manager manual for more information.

Deleting an Application

To remove only Customer Service information for an established company, switch to SBT System Manager and select **Maintain | Companies | Companies**. Enter the company number, and select **Appls** from the top of the screen. Enter **CC** as the application ID. When Customer Service is displayed, choose **Delete** and confirm that you want to delete the Customer Service data.

☞ You must delete the application data from all installed companies before you can remove the application from your SBT Pro Series installation.

Enabling Rule Tables

You can use rule tables to validate certain fields in the Customer Service module. These fields include five user-defined fields on the Company screen and four user-defined fields on the Contact screen.

> *For more information about using rule tables with user-defined fields, see "Setting up Customer Service, Link Settings" in Chapter 3 of this manual.*

Pro Series uses rule tables to give you control over information that users enter in certain fields. This control is based on a predetermined set of valid entries. Rules for all applications are maintained through SBT System Manager.

> *For more information about rule tables, see "Rules" in the SBT System Manager manual.*

From System Manager, **Companies** from the **Companies** submenu on the **Maintain** menu. The **Company File Maintenance** screen will be seen. Next, enter the number of the company you want to update, or press **<F2>**, or click on the **Search** icon to see a list of existing companies from which to select. Once the company record appears, choose **Appls** to switch to the **Installed Applications** screen.

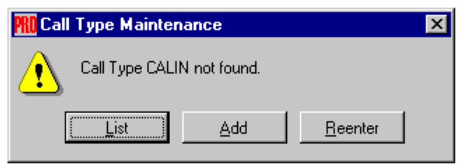
Enter **CC** in the Application ID field to display the Customer Service application record for the company you have selected. In the bottom left corner of the screen, make sure the Use Rule Tables option is checked. If it is not checked, select the **Edit** option and update the record. Select the **Save** icon to save the changes and then the **Exit** icon to return to the **Company File Maintenance** screen. Select the **Exit** icon again to return the System Manager Main Menu.

Call Types

Call types are a definition for what type of events your company tracks. You can define as many call types as you like and you can specify which call type to use when the program requires any event logging information.

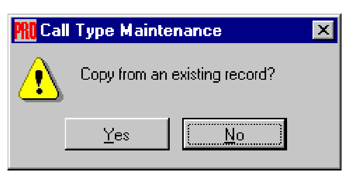
Select **Maintain | Call Types**. Enter the call type ID of the event type you want to create and press **<Enter>.**

When the new call type ID is not found in the call type file, you will see this message:



Select	**List**	to list the current call types.
	Add	to add the call type ID.
	Reenter	to reenter the call type ID.

When you select to add a call type, you will see this prompt if there are other calendars to select from:

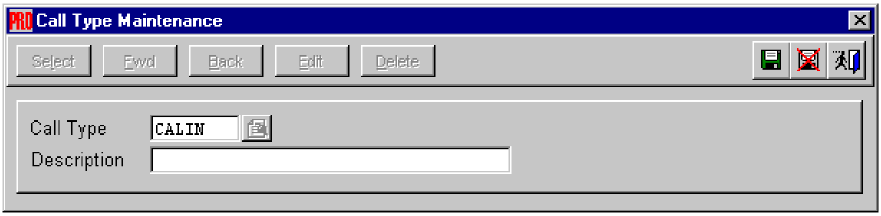


Copying from an Existing Record

To copy the values from an existing call type, select **Yes** at the prompt above. You're asked for the call type ID you want to copy from. When you enter a valid selection, the program will copy the record. After completion of the last field, you will be given the opportunity to edit the record until it is accurate.

Adding a New Call Type

If you are not copying from an existing call type, select **No** at the copy-from prompt to add a new call type. You will see a screen like this:



Description: Enter the name or description of this call type.

After entering information on the call type screen, you will have these options:

Select	**Save**	to save this new call type record.
	Cancel	to cancel with saving the call type information you just entered.
	Exit	to return to the main menu without saving this call type record.

See "Understanding Customer Service" in Chapter 1 of this manual for more information on call types.

Changing a Call Type

To view or change a call type's information, Select **Maintain | Call Types**. Enter or select the call type you want to change.

Press **<F2>** to see a list of all existing call types. You can than choose the one you want by using the mouse or the up and down arrow keys to move through the list, and pressing **<Enter>** when the highlight bar is on the record you want.

Once the call type record is displayed. The following options are available:

Use	**Select**	to find another call type.
	Fwd	to move forward to the next call type in the file.
	Back	to move to the previous call type in the file.
	Edit	to change the currently displayed call type.
	Delete	to delete the current call type.
	Exit	to return to the main menu.

SIC Codes

SIC Code Maintenance is an optional feature of Customer Service. If this menu option is not enabled, see "Setting up Customer Service, System Options" in Chapter 3 of this manual.

☞ You must define a rule table called SICGRP before you can add, change, or delete SIC codes. SIC groups provide a valuable mechanism for further classification of SIC codes for custom reports.

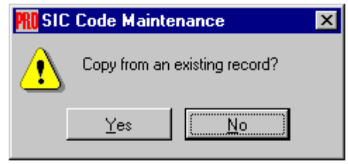
SIC codes provide a way to profile and classify companies that purchase your products or services. You can define as many SIC codes as you like and you can specify which SIC codes to use when you add a new company record.

Select **Maintain | SIC Codes**. Enter the SIC code of the event type you want to create and press **<Enter>.**

When the new SIC code is not found in the SIC code file, you will see this message:

Select	**List**	to list the current SIC codes.
	Add	to add the SIC code.
	Reenter	to reenter the SIC code.

When you select to add a SIC code, you will see this prompt if there are other codes to select from:

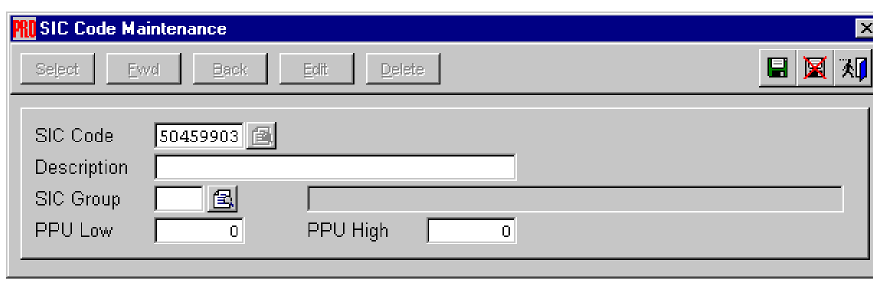


Copying from an Existing Record

To copy the values from an existing SIC code, select **Yes** at the prompt above. You're asked for the SIC code you want to copy from. When you enter a valid selection, the program will copy the record. After completion of the last field, you will be given the opportunity to edit the record until it is accurate.

Adding a New SIC Code

If you are not copying from an existing SIC code, select **No** at the copy-from prompt to add a new SIC code. You will see a screen like this:



Description: Enter the name or description of this SIC code.

SIC Group: Enter the SIC group for this SIC code.

PPU Low/PPU High: These fields are reserved for future use.

After entering information on the SIC code screen, you will have these options:

Select	**Save**	to save this new SIC code record.
	Cancel	to cancel with saving the SIC code information you just entered.
	Exit	to return to the main menu without saving this SIC code record.

> *See "Understanding Customer Service, SIC Codes" in Chapter 1 of this manual for more information on SIC codes.*

Changing a SIC Code

To view or change a SIC code's information, Select **Maintain | SIC Codes**. Enter or select the SIC code you want to change.

Press **<F2>** to see a list of all existing SIC codes. You can than choose the one you want by using the mouse or the up and down arrow keys to move through the list, and pressing **<Enter>** when the highlight bar is on the record you want.

Once the SIC code record is displayed. The following options are available:

Use	**Select**	to find another SIC code.
	Fwd	to move forward to the next SIC code in the file.
	Back	to move to the previous SIC code in the file.
	Edit	to change the currently displayed SIC code.
	Delete	to delete the current SIC code.
	Exit	to return to the main menu.

Title Codes

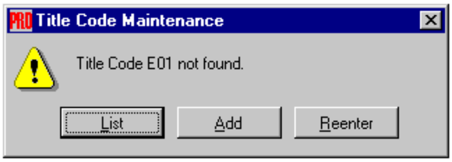
Title Code Maintenance is an optional feature of Customer Service. If this menu option is not enabled, see "Setting up Customer Service, System Options" in Chapter 3 of this manual.

☞ You must define a rule table called TTLGRP and TTLTYP before you can add, change, or delete title codes. These rules provide a valuable mechanism for further classification of title codes for custom reports.

Title codes provide a way to profile and classify contacts that purchase your products or services. You can define as many title codes as you like and you can specify which title code to use when you add a new contact record.

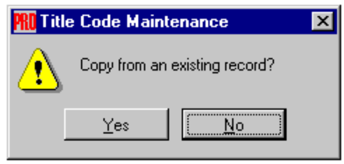
Select **Maintain | Title Codes**. Enter the title code of the title type you want to create and press **<Enter>.**

When the new title code is not found in the title code file, you will see this message:



Select	**List**	to list the current title codes.
	Add	to add the title code.
	Reenter	to reenter the title code.

When you select to add a title code, you will see this prompt if there are other codes to select from:

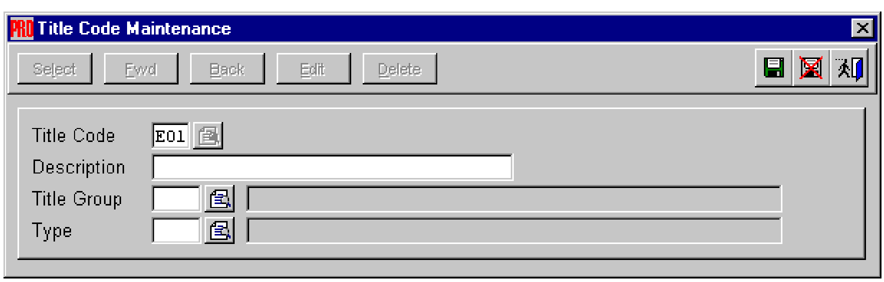


Copying from an Existing Record

To copy the values from an existing title code, select **Yes** at the prompt above. You're asked for the title code you want to copy from. When you enter a valid selection, the program will copy the record. After completion of the last field, you will be given the opportunity to edit the record until it is accurate.

Adding a New Title Code

If you are not copying from an existing title code, select **No** at the copy-from prompt to add a new title code. You will see a screen like this:



Description: Enter the name or description of this title code.

Title Group: Enter the title group for this title code.

Title Type: Enter the title type for this title code.

After entering information on the title code screen, you will have these options:

Select	**Save**	to save this new title code record.
	Cancel	to cancel with saving the title code information you just entered.
	Exit	to return to the main menu without saving this title code record.

Changing a Title Code

To view or change a title code's information, Select **Maintain | Title Codes**. Enter or select the title code you want to change.

Press **<F2>** to see a list of all existing title codes. You can than choose the one you want by using the mouse or the up and down arrow keys to move through the list, and pressing **<Enter>** when the highlight bar is on the record you want.

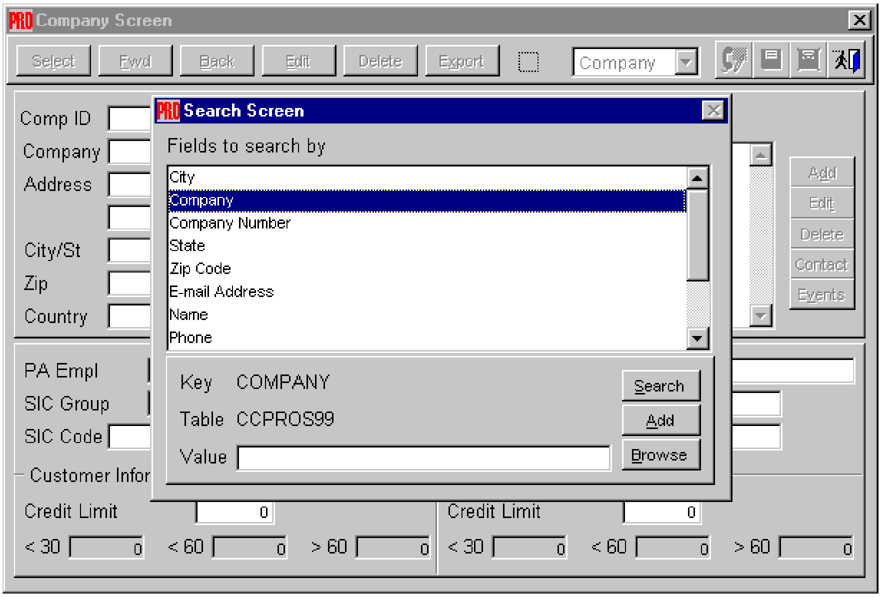
Once the title code record is displayed. The following options are available:

Use	**Select**	to find another title code.
	Fwd	to move forward to the next title code in the file.
	Back	to move to the previous title code in the file.
	Edit	to change the currently displayed title code.
	Delete	to delete the current title code.
	Exit	to return to the main menu.

Using the Search Screen

One of Customer Service's most important features is its ability to find information without having to remember a customer number or a person's last name. This section contains tips on how to find information in Customer Service's databases.

The **Search** screen is the first screen that you see when you select **Company** from the **Maintain** menu.



The **Search** screen is divided into three areas:

- Fields to Search By
- Search Value
- Action

Fields to Search By

This area of the **Search** screen lets Customer Service know where you plan to search. The program uses this information to select the proper database and sort order. Customer Service can search on two databases: a company file (CCPROS) and name file (CCNAME). The following table outlines the default fields available to search by:

Field Name	CCPROS	CCNAME
Company ID	✓	
Company Name	✓	
City	✓	
State	✓	
Zip	✓	
Name		
E-mail		
Phone		
User 1		
User 2		
User 3		
User 4		

☞ The field that is highlighted by default is selected in the **System Settings** screen in the **Customer Service Setup** screen.

Search Value

This area of the **Search** screen tells Customer Service who or what to look for.

Action

This area of the **Search** screen tells Customer Service how to do the search.

Click	**Search**	Customer Service will search for an EXACT match to the value in the search value field.
	Add	Customer Service will create a new record in the company file and will enter the information in the search value field.
	Browse	Customer Service will show a list of previous entries that matches or closely matches the information in the search value field.

☞ You can only add a new record, when you enter a value in one of the company fields of the search screen.

Leaving the Search Screen

Press **<Esc>** to exit and return to the Customer Service Main Menu.

Adding Fields to Search By

You can add additional fields to the search screen without changing the program's source code by marking a company or contact table's index as user-searchable.

For more information about user-searchable indexes, see "Viewing and Adding Indexes" in the "Tables" section of the SBT System Manager manual.

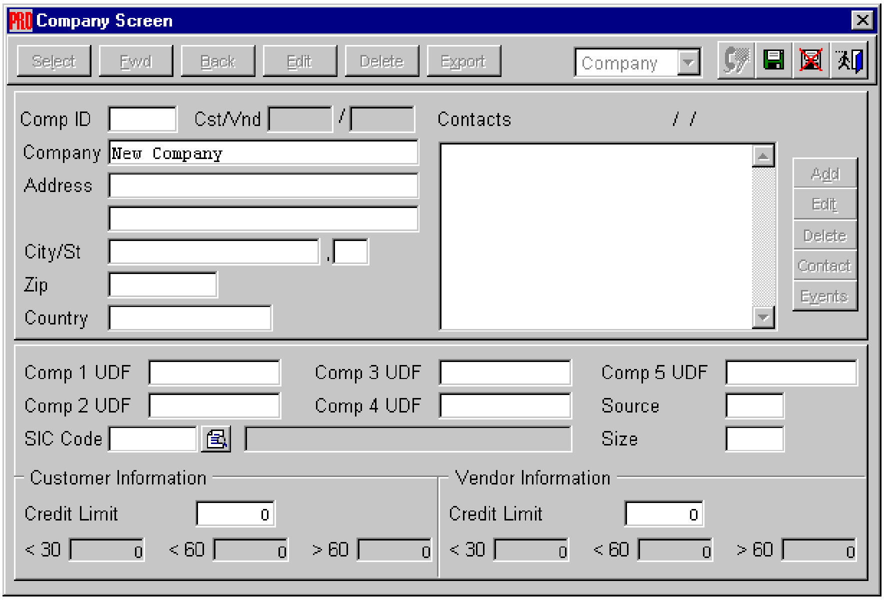
Adding Companies and Contacts

There are two ways to build your company and name databases. You can enter the information manually or you can import the information from the Customer file and/or the Vendor file (see "Import Options" in Chapter 4 of this manual).

Select **Maintain | Company**. Customer Service will display the Search Screen. From within the Fields to Search by area, select **Company** by using your mouse or by using your up and down arrow keys. Press **<Tab>** or use your mouse to return to the Value area. Enter the company name you want to add, and then select the **Add** button.

Company Screen

When you select the Add button, you will see the following screen:



Company: Verify the company's name you entered.

Address, City, State, Zip, Country: Enter the information for the company.

User-Defined Fields 1-5: Enter or select the values for these fields that are appropriate for the company record that is being added.

Source: Enter or select the code that describes how this company found out about your company.

☞ If you choose to use rule tables, you can define a rule called SOURCE that will validate any entries entered into this field.

For more information about rule tables, see "Rules" in the SBT System Manager manual.

SIC Code: Enter or select the values for these fields that are appropriate for the company record that is being added.

☞ SIC Codes are an optional feature of Customer Service. If this field is not enabled, see "Setting up Customer Service, System Options" in Chapter 3 of this manual.

For more information about SIC codes, see "Understanding Customer Service, SIC Codes" in Chapter 1 of this manual.

Size: enter either the number of employees or a revenue estimate for the company record that is being added.

Select the **Save** icon to save the company information. The option buttons along the top of the screen that become available are:

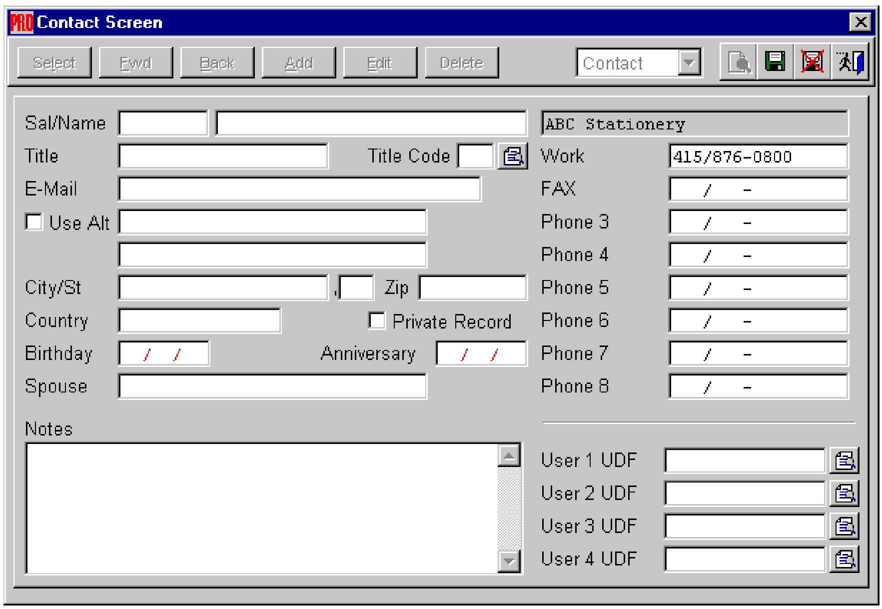
Select	**Select**	to search for or a new company.
	Fwd	to move to the next record.
	Back	to move to the previous record.
	Edit	to edit the selected company information.
	Delete	to delete the selected company and all of the contacts and event records associated with the selected company.
	Export	to export the selected company to the customer and/or vendor file.
	Add	to add a new contact record.

If there is at least one contact record, the side option buttons now available for the contact record are:

Select	**Add**	to add a new contact record.
	Edit	to edit the selected contact information.
	Delete	to delete the selected contact and all of event records associated with the selected contact.
	Copy	to add a new contact record based on the selected contact record.
	Events	to switch to the Events Screen for the selected contact.

Contact Screen

When you click on the **Add** button or select **Contacts** from the list box on the Company Screen, you will see the following screen:



Salutation: Enter Mr., Ms., Miss, Dr., Rev., or you can leave this field blank.

Name: Enter contact's name for this company record.

Title: Enter contact's job title.

Title Code: Enter contact's title code.

☞ Title Codes are an optional feature of Customer Service. If this field is not enabled, see "Setting up Customer Service, System Options" in Chapter 3 of this manual.

E-Mail: Enter the contact's e-mail address.

> *The e-mail button will be enabled on the Contact Screen when a contact record has an e-mail address. Click on this button to send an e-mail message to a MAPI-compliant e-mail program.*

Use Alternate: Select this option to enter a secondary address for this contact. The main company address is shown by default unless this option is selected.

Address, City, State, Zip Code, Country: Enter the alternate address information for the contact.

Birthday: Enter the contact's birthday.

Anniversary: Enter the contact's anniversary.

Spouse: Enter the name of the contact's spouse.

Phone: Enter the contact's phone number.

Fax: Enter the contact's fax number.

Phone 3-8: Enter any user-defined contact phone information.

User-Defined Fields 1-4: Enter or select the values for these fields that are appropriate for the contact record that is being added.

Notes: Enter any important personal information about the contact.

Select **Save** icon to save the contact information. The top option buttons now available for the company record are:

Select	**Select**	to search for or select a new company.
	Fwd	to move to the next contact record.
	Back	to move to the previous contact record.
	Add	to add a new contact record.
	Edit	to edit the selected contact information.
	Delete	to delete the selected contact and all of event records associated with that contact.

Changing Company and Contact Information

There may come a time where it is necessary to change the company or contact information in your database. To do so, select **Company** from the **Maintain** menu, then search for the company or contact that you need to change in the **Search** screen.

Once the company or contact information is displayed, you will have the following choices:

Select	**Select**	to select another company or contact.
	Fwd	to move forward to the next company record.
	Back	to move to the previous company record.
	Edit	to change the currently selected record.
	Delete	to delete the currently displayed record.

When you have completed changing the information, you will have the following options:

Select	**Save**	to save your changes.
	Cancel	to discard any changes.
	Exit	to exit the screen.

Deleting a Contact or Company

Select **Delete** from the options at the top of the company or contact screen. You must confirm that you want to delete it.

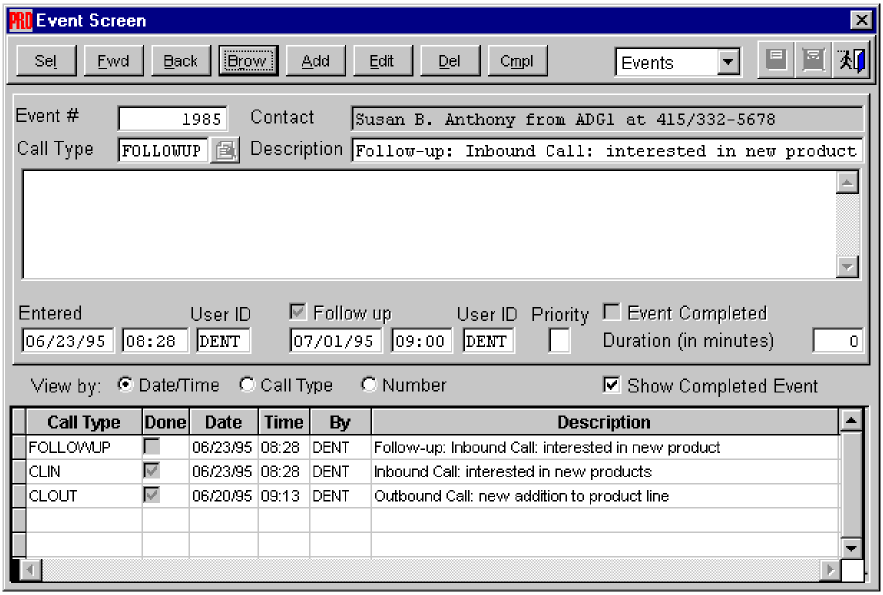
You cannot recall a deleted contact or company. If you delete a contact in error, you will loose all of the event records associated with that contact. If you delete a company in error, you will loose all of the contact and event records associated with that company.

4. *Working with the Program*

- Logging Events
- Exporting Company and Contact Information
- Entering Sales Orders and Purchase Orders
- Import Options

Logging Events

From the Company Screen, select **Events**. The **Events** screen for the selected contact will be seen.



Adding Events

Click the **Add** button, enter the user-defined call type in the **Call Type** field, and press **<Enter>**. The call type description will automatically be entered in the **Description** field.

Detailed information regarding the call or event can be entered starting after the call type description. The event description can be of unlimited character length and is limited only by the amount of hard disk space.

Entered: Enter date, time, and user ID of person entering event or call. The fields will automatically be filled with current date, time, and user ID, but the date and time fields can be changed if necessary. Please note time is in 24-hour format.

Follow-up event?: Select this option to create a follow-up event, and then enter date, time, and user ID of person responsible for following up on the event or call.

Priority: Enter the order of priority for the event. This field accepts a user-defined one character code (1-9, A-Z).

Event Completed: Select this option to indicate completion of the selected call or event.

Duration: The system clock will automatically calculate the amount of time this event required. The clock starts from the moment you click on the **Add** button and stops when you click on the **Save** button. You can override this automatic calculation by entering your own value in this field.

Select the **Save** icon to save the event information and to add it to the review the events area below. The top option buttons now available are:

Select	**Select**	to select another company record.
	Fwd	to move forward one contact record in the current company, or move to the next record if there are no more contacts for that company record.
	Back	to move back one contact record in the current company, or move to the previous record if there are no more contacts for that company record.
	Browse	to browse previously entered events for the current contact.
	Add	to add new events or calls for the selected contact.
	Edit	to edit selected event or call information.
	Delete	to delete selected event or call.
	Complete	to toggle the completion status of the current record.

Browsing Events

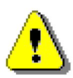
Click the **Browse** button on the Events Screen. Using the up and down arrow keys, or mouse, select the event or call to be reviewed. Events included in the event grid are determined by the selection in the **Show Completed Events** option.

Editing an Event

Click the **Edit** button on the Events Screen. Using the up and down arrow keys, or mouse, select the event or call to be edited. Press **<Enter>** to edit the selected record. Click on the **Save** to save the changes.

Deleting an Event

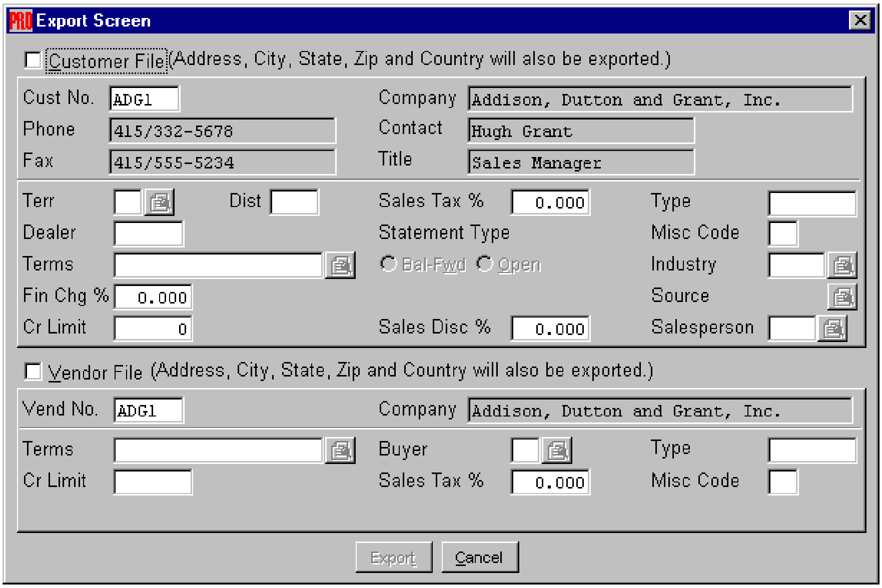
Click the **Delete** button on the Events Screen. Using the up and down arrow keys, or mouse, select the event or call to be deleted. Press **<Enter>** to delete the selected record.



You cannot recall a deleted event. If you delete an event in error, you must recreate the information.

Exporting Company and Contact Information

After a contact becomes an active customer or vendor, you will want to transfer their business information to either the **Customer** or **Vendor** databases. To do this without having to re-enter the company information, use the **Export** feature. You will see the following screen:



The company's information can be exported to both the customer and vendor files if the company serves as both.

Entering Information to be Exported

Select which database file you wish to export the company record into, and select the box. This screen prompts you for the additional information required by the customer or vendor screen used by other Pro Series modules.

Entering Sales Orders and Purchase Orders

One of the features of Customer Service is the ability to enter Sales Orders and Purchase Orders from the **Company** screen. This feature imports all necessary information, such as company name and address, into the Sales Orders or Purchase Order screen for you.

The order button will be enabled on the Company Screen when a customer and/or vendor code has been associated to a company record in Customer Service.

☞ You can also enter Sales Orders or Purchase Orders from the Customer Service **Transaction** menu.

For more information on entering sales orders, see "Entering Sales Orders" in the SBT Sales Orders manual.

For more information on entering purchase orders, see "Entering Purchase Orders" in the SBT Purchase Orders manual.

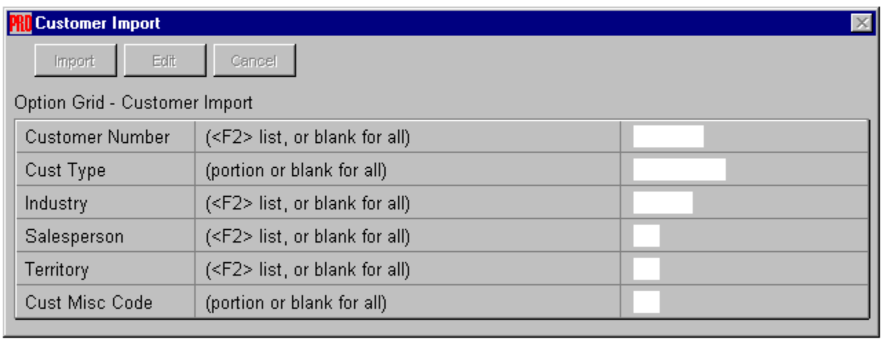
After completing and saving a sales order or purchase order, you will be returned to the Company Screen.

Import Options

Customer Service also allows you to import pre-existing customers and vendors from SBT's Customer and Vendor files.

Importing the Customer File

To import your Customer file into Customer Service, select **Transaction | Import | Customer File**. You will see the following screen:



Customer Number: Enter the customer number you wish to import, or leave blank to import all customer records.

Customer Type: Enter the customer type you wish to import, or leave blank to import all customer types.

Industry: Enter the customer industry type you wish to import, or leave blank to import all industry types.

Salesperson: Enter the salesperson whose customers you wish to import, or leave blank to import customers for all salespeople.

Territory: Enter the territory you wish to import customers from, or leave blank to import customers from all territories.

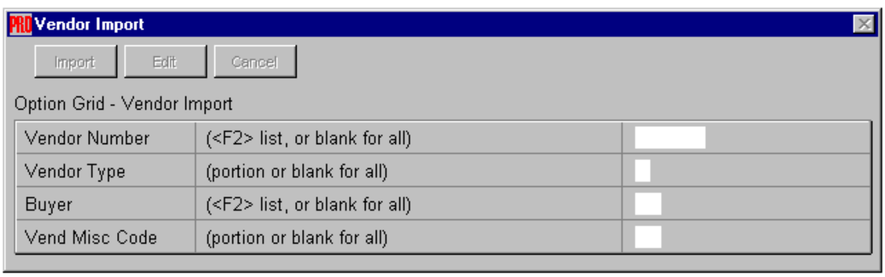
Customer Miscellaneous Code: Enter the customer miscellaneous code you wish to import, or leave blank to import all code types.

After you have completed the option grid, you will have these choices:

Select	**Import**	to import the selected records.
	Edit	to edit your selections in the option grid.
	Cancel	to cancel the customer file import.

Importing the Vendor File

To import your Vendor file into Customer Service, select **Transaction | Import | Vendor File**. You will see the following screen:



Vendor Number: Enter the vendor number you wish to import, or leave blank to import all vendors.

Vendor Type: Enter the vendor type you wish to import, or leave blank to import all vendor types.

Buyer: Enter the buyer whose vendors you wish to import, or leave blank to import vendors for all buyers.

Vendor Miscellaneous Code: Enter the vendor miscellaneous code you wish to import, or leave blank to import all code types.

When you have completed the option grid, the following options will be available to you:

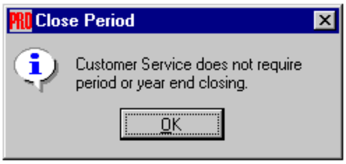
Select	**Import**	to import the selected records.
	Edit	to edit your selections in the option grid.
	Cancel	to cancel the vendor file import.

Closing the Period or Year

Unlike most Pro Series modules, Customer Service does not require a period or year-end closing. Since Customer Service stores all of its transaction data in a single file, there is no need for the program to move the current period's closed transactions into a history file.

You close the period or year for all Pro Series applications using the options on the **Period Close** submenu in System Manager. Refer to your SBT System Manager manual for information on using the period close options.

If you try to close the period or year for Customer Service, you will see the following message:



Logging In and Logging Out

Logging In

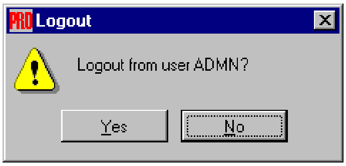
With this option, you can log in under a different user ID without having to exit the program. For example, this allows a supervisor with a higher level access privilege to perform a restricted task to help a clerk.

Select **File | Log In**. A dialog box appears for you to enter the new user ID and its password. If you enter blanks, you return to the program without any change taking place.

Logging Out

This option allows you to log out of the system without quitting entirely. This can be useful if you want to disable the system while leaving your desk for a time. The program will not be operable until someone enters a valid user ID and password.

Select **File | Log Out**.



Select	**Yes**	to log out.
	No	to cancel and return to the program.

When you answer yes, the program clears out the current user and displays a dialog box to accept a new login ID. If you enter blanks for the new user, you are asked if you want to exit the program.

Changing the System Date

This option lets you temporarily change the date the program thinks of as “today.” For example, you might want to do this if:

- You want a different default date for entering transactions or producing reports.
- Your computer’s clock isn’t working.

To change the date, select **File | Change System Date**, menu and enter the new system date.

Using a Previous Date

If you enter a date that is older than your computer clock date, the new system date only affects the company, application, and workstation for which you set the date. The historical date remains in effect until you do one of the following:

- Transfer to another company.
- Transfer to another application.
- Exit the system.

Using a Future Date

If you enter an SBT system date that is greater than your computer clock date, the new date applies to all applications in the company for which you set the date. That date will remain in effect until you set the date back again, or until the computer clock is greater than the system date. In addition, every time you start or transfer to an application, you see a warning message that the system date is greater than your computer clock date.

Exiting Pro Series

You can leave any Pro Series application and go to another Pro Series application, or return to Windows. You can also “shell out” of Customer Service and temporarily access Visual FoxPro.

Transferring to Other Pro Series Applications

You can easily leave Customer Service and work with another installed Pro Series application. When an application is defined in System Manager, it appears as a menu choice on the **Open** submenu.

Select **File | Open**, then select the application you want to use. If you transfer to an application that is installed for the same company, you go directly to that application; otherwise, you will see a list of available companies from which you can select the one you want to work with.

Transferring to Another Application

When you define your installation in System Manager, you can add custom menu options, which enable you to access other programs on your system. Custom menu options can also be assigned on a user-by-user basis. See “Changing Custom Menu Options, Users”, in the SBT System Manager manual for more information about adding custom menu options.

External program calls appear on the **Custom** menu. Until you define custom menu options, the menu remains dimmed.

Accessing Visual FoxPro

☞ This option is only available for administrator-level users.

Use the **File | Open | FoxPro Access** option to temporarily leave the Pro Series application you are running and go to the Visual FoxPro command window. If you are using the runtime version of Visual FoxPro, you see a single command line, rather than the command window. You can then perform tasks such as viewing database files directly or customizing report forms.

> *Do not use this feature to enter or edit records directly. If you do, you will bypass the normal error-checking routines that are built into the programs. This could result in loss of data and system file integrity.*

To return to the original application, type **RESUME** in the command window, or press **<Enter>** on the command line.

Exiting to Windows

To end you working session of Pro Series, select **File | Exit**. You are automatically logged out and returned to Windows desktop.

> *Exiting by turning off your computer or by pressing **<Ctrl>+<Alt>+<Del>** may damage your files.*

5. Reports and Inquiries

- Selecting the Output Destination
- Activity Reports
- Contact Reports
- File Listings
- User Reports

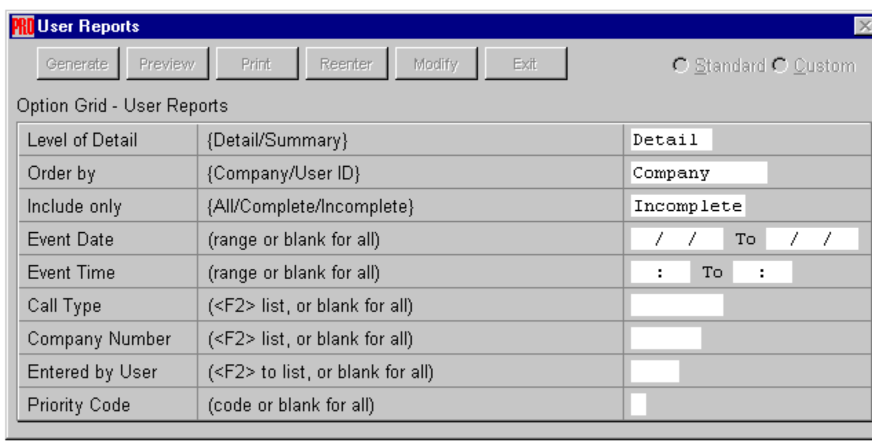
Selecting the Output Destination

The option to print or display is available for all reports in Work Orders. You might indicate your choice by selecting a command button, selecting an option button, or clicking an icon, but at least one choice is always available.

☞ You can exit most printing routines by pressing **<Esc>**. If you choose this option, the program will close all data files to protect them from damage before returning you to the previous screen.

When you select a report from one of the options on the **Print** menu, you will see an option grid to define the scope of the report. Detailed explanations of each report's options are found later in the chapter.

This is an example of a report option grid:



Producing a report is a three-step process.

1. Complete the option grid to select the data you want.

2. After completing the option grid, click **Generate** to compile the information for the report according to the option grid criteria.

3. After the program has assembled the data for the report, choose the report output destination.

Click	**Preview**	to display the report on your screen.
	Print	to send the report to a printer or save it to a disk file.

After the program prints or displays the report, you automatically return to the option grid. You can print and display the report as many times as you like before exiting.

To make changes to the report:

Click	**Reenter**	to change your option grid responses.
	Modify	to create a customized report for this company.

Any time you change your responses on an option grid, you must select **Generate** again to update the version of the report that is stored for viewing.

Displaying Reports

Use the **Preview** button to display a report before you print. You can look at entire pages to check the layout or zoom in on a particular portion to check details.

The window displays a mock-up of your report. A special toolbar offers quick access to a number of special commands.

You can also use the scroll bars to move forward and backward through the report, or scroll right and left to see its entire width.

Clicking anywhere on the document window changes the magnification. From the full-page view, the first click zooms you in on the portion of the page you clicked on. The second click returns you to the full-page view.

Printing or Exporting Reports

After generating a report, select **Print** to choose an output destination (i.e., print or export data to a disk file).

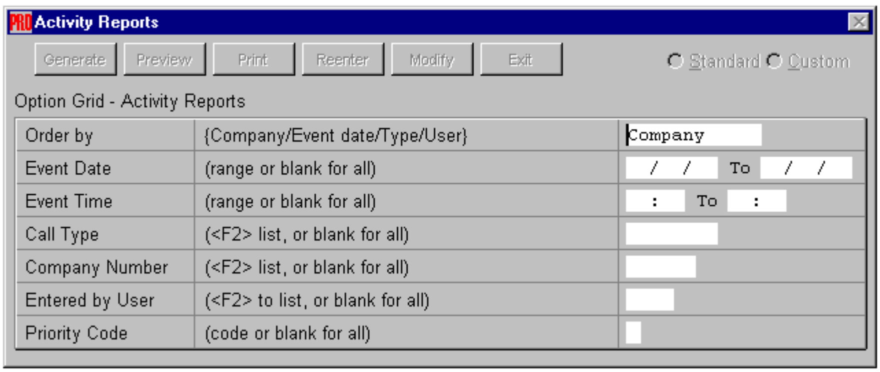
Click	**Print**	to send output to the default printer.
	Setup	to go to the Windows Print Setup dialog box. You can use it to set print job properties or select another printer.
	Export	to save the data as a spreadsheet or text.
	Cancel	to return to the option grid.

If you choose to print a report, Pro Series sends the output to the default printer whose ID is displayed in the dialog box.

If you choose to export a report, you see a dialog box that enables you to specify the name and format of the file to which you are exporting.

Activity Reports

This report details the general activity that occurred within Customer Service. Select **Print | Activity Reports**. You will see the following option grid:



Order by:

Select	**Company**	to order the report by company.
	Event Date	to order the report by event date.
	Type	to order the report by call type.
	User	to order the report by user.

Event Date: Enter dates in either or both of these fields to see only events whose transaction date falls within that range.

Event Time: Enter times in either or both of these fields to see only events whose transaction time falls within that range.

Call Type: Enter the call types to see the report for events with a particular call type, or leave blank to see events with all call types.

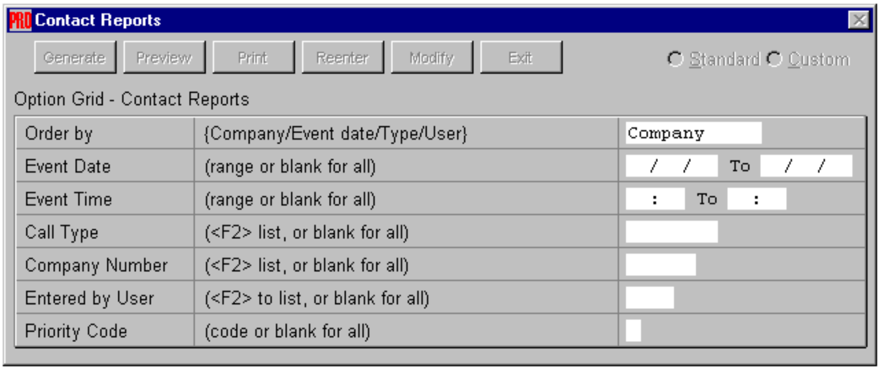
Company Number: Enter the company number to see the report for events in a particular company, or leave blank to see events in all companies.

Entered by User: Enter the user ID to see the report for events entered by that user, or leave blank to see events entered by all users.

Priority Code: Enter the priority code to see the report for events with a particular priority, or leave blank to see events with all priorities.

Contact Reports

This report details the contact activity that occurred within Customer Service. It is the same as the Activity Report, but breaks down the information by contacts within a company. Select **Print | Contact Reports**. You will see the following option grid:



Order by:

Select	**Company**	to order the report by company.
	Event Date	to order the report by event date.
	Type	to order the report by call type.
	User	to order the report by user.

Event Date: Enter dates in either or both of these fields to see only events whose transaction date falls within that range.

Event Time: Enter times in either or both of these fields to see only events whose transaction time falls within that range.

Call Type: Enter the call types to see the report for events with a particular call type, or leave blank to see events with all call types.

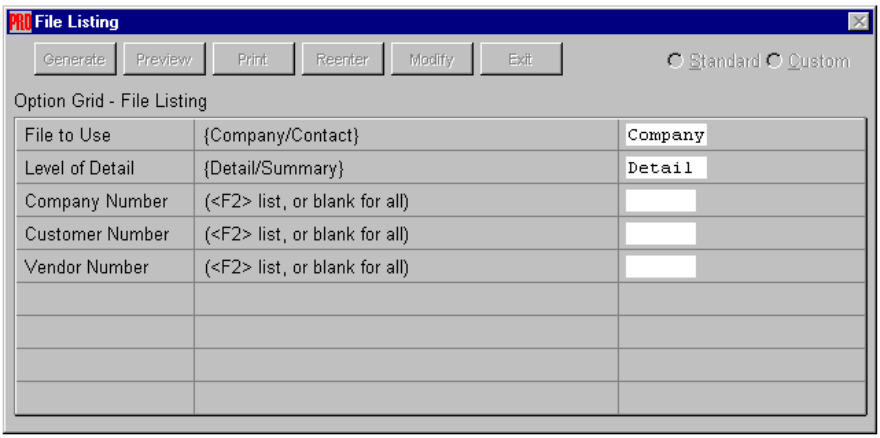
Company Number: Enter the company number to see the report for events in a particular company, or leave blank to see events in all companies.

Entered by User: Enter the user ID to see the report for events entered by that user, or leave blank to see events entered by all users.

Priority Code: Enter the priority code to see the report for events with a particular priority, or leave blank to see events with all priorities.

File Listings

This report contains information on the companies or contacts you specify. Select **Print | File Listings**. You will see the following option grid:



File to Use:

Select	**Company**	to use company information.
	Contact	to use contact information.

Level of Detail:

Select	**Detail**	to show detailed information.
	Summary	to show summary information.

Company Number: Enter the company number you wish to generate the report for, or leave blank to see information for all companies.

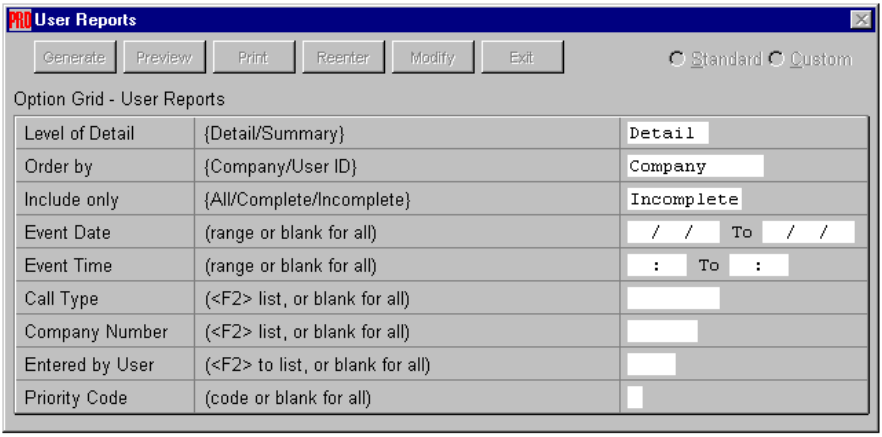
Customer Number: Enter the customer number you wish to generate the report for, or leave blank to see information for all customers.

Vendor Number: Enter the vendor number you wish to generate the report for, or leave blank to see information for all vendors.

User-Defined Fields (when File to Use = Contact): Enter the values in each field you wish to generate the report for, or leave blank to see information for user-defined fields.

User Reports

This report contains information entered in Customer Service by specific users. Select **User Reports** from the **Print** menu. You will see the following option grid:



Level of Detail:

Select	**Detail**	to show detailed information.
	Summary	to show summary information.

Order by:

Select	**Company**	to order the report by company.
	User ID	to order the report by user ID.

Include only:

Select	**All**	to list all events.
	Complete	to list only completed events.
	Incomplete	to list only incomplete events.

Event Date: Enter dates in either or both of these fields to see only events whose transaction date falls within that range.

Event Time: Enter times in either or both of these fields to see only events whose transaction time falls within that range.

Call Type: Enter the call types to see the report for events with a particular call type, or leave blank to see events with all call types.

Company Number: Enter the company number to see the report for events in a particular company, or leave blank to see events in all companies.

Entered by User: Enter the user ID to see the report for events entered by that user, or leave blank to see events entered by all users.

Priority Code: Enter the priority code to see the report for events with a particular priority, or leave blank to see events with all priorities.

6. *Linking with Other Applications*

- Linking Overview
- Linking with SBT Accounts Payable
- Linking with SBT Accounts Receivable
- Linking with SBT Purchase Orders
- Linking with SBT Sales Orders

Linking Overview

Lahey Customer Service links with other SBT applications to create a complete Enterprise Resource Planning system. It enables you to generate transactions in one application, which in turn updates related information in another application's data files.

There are actually two types of linking. One method works by creating postings that do not immediately affect another application's data, but are held until you decide to release them to the linked application. This is how SBT Inventory Control links to SBT General Ledger.

The other linking method integrates the Lahey Customer Service data with SBT Sales Orders, Purchase Orders, Accounts Receivable, and Accounts Payable. Transactions in these applications directly affect the customer and vendor files, such as when you create a sales order or receive a purchase order.

The following sections describe how Lahey Customer Service works with other SBT applications.

Linking with SBT Accounts Payable

Lahey Customer Service and SBT Accounts Payable share the same vendor file. This means that you only have to enter vendor information in one place for both programs to be able to use the information available.

Setting up the Link

To create the link with SBT Accounts Payable, follow these steps:

1. Install SBT Accounts Payable and Lahey Customer Service, if you haven't already done so, and create the data files for both applications. The data files must use the same company number.

2. Start Customer Service. Select **File | Change Setup Information | Link Settings**.

3. Select the "Link to Vendor File" option and click on the **Save** button.

Linking with SBT Accounts Receivable

Lahey Customer Service and SBT Accounts Receivable share the same customer file. This means that you only have to enter customer information in one place for both programs to be able to use the information available.

Setting up the Link

To create the link with SBT Accounts Receivable, follow these steps:

1. Install SBT Accounts Receivable and Lahey Customer Service, if you haven't already done so, and create the data files for both applications. The data files must use the same company number.

2. Start Customer Service. Select **File | Change Setup Information | Link Settings**.

3. Select the "Link to Customer File" option and click on the **Save** button.

Linking with SBT Purchase Orders

SBT Purchase Orders uses and updates the same vendor file as Lahey Customer Service, and allows you to enter Purchase Orders from the **Company** screen and **Transaction** menu.

Setting up the Link

Linking with SBT Purchase Orders is a very simple process -- all you need to do is install both programs and assign the same company number to each application.

Linking to SBT Sales Orders

SBT Sales Orders uses and updates the same customer file as Lahey Customer Service, and allows you to enter Sales Orders from the **Company** screen and **Transaction** menu.

Setting up the Link

Linking with SBT Sales Orders is a very simple process -- all you need to do is install both programs and assign the same company number to each application.

7. *Sample Reports*

- Activity Reports
- Contact Reports
- File Listings
- User Reports

Activity Report by Company

```
Page: 1                                                 Date: 06/23/95 at 5:12 PM
                      Professional Software, Incorporated
                                Activity Reports
                    From 01/01/01 at 00:00 to 12/31/99 at 23:59
                               Ordered by Company


CallType Description                            Complete  Incomplete       Total
======== =================================== =========== =========== ===========

Company: ABC Stationery
CLIN     Inbound call                                  1           0           1
EMOUT    Outbound e-mail                               1           0           1
                                             ----------- ----------- -----------
                              Company Total:           2           0           2

Company: Ashland Copy Center
FAXOUT   FAX sent                                      2           0           2
MTG9503  Meeting offsite: NMW95- Automation            1           0           1
                                             ----------- ----------- -----------
                              Company Total:           3           0           3

Company: American Chemical Products
FAXOUT   FAX sent                                      1           0           1
                                             ----------- ----------- -----------
                              Company Total:           1           0           1

Company: Addison, Dutton and Grant, Inc.
FAXOUT   FAX sent                                      1           0           1
                                             ----------- ----------- -----------
                              Company Total:           1           0           1

Company: Atlantic Edison
EMIN     Inbound e-mail                                5           0           5
EMOUT    Outbound e-mail                               3           0           3
                                             ----------- ----------- -----------
                              Company Total:           8           0           8

Company: Animal Health Care
FAXOUT   FAX sent                                      1           0           1
                                             ----------- ----------- -----------
                              Company Total:           1           0           1
```

Activity Report by Event Date

```
Page: 1                                              Date: 06/23/95 at 5:12 PM
                      Professional Software, Incorporated
                                Activity Reports
                  From 01/01/01 at 00:00 to 12/31/99 at 23:59
                             Ordered by Event Date


CallType Description                            Complete  Incomplete       Total
======== =================================== =========== =========== ===========

Event Date  05/26/95
CLIN     Inbound call                                 12           0          12
CLOUT    Outbound call                                 4           0           4
EMIN     Inbound e-mail                                1           0           1
FAXOUT   FAX sent                                      2           0           2
FOLLOWUP                                               1           0           1
MTGIN    Meeting onsite                                1           0           1
                                             ----------- ----------- -----------
                           Event Date Total:          21           0          21

Event Date  05/27/95
CLIN     Inbound call                                 12           0          12
EMIN     Inbound e-mail                                1           0           1
FAXIN    FAX received                                  2           0           2
FAXOUT   FAX sent                                      2           0           2
FOLLOWUP                                               3           0           3
                                             ----------- ----------- -----------
                           Event Date Total:          20           0          20

Event Date  05/28/95
CLIN     Inbound call                                  5           0           5
CLOUT    Outbound call                                 4           0           4
                                             ----------- ----------- -----------
                           Event Date Total:           9           0           9

Event Date  05/29/95
CLIN     Inbound call                                  7           0           7
EMIN     Inbound e-mail                                1           0           1
EMOUT    Outbound e-mail                               1           0           1
FAXOUT   FAX sent                                      1           0           1
                                             ----------- ----------- -----------
                           Event Date Total:          10           0          10

Event Date  05/30/95
EMOUT    Outbound e-mail                               1           0           1
                                             ----------- ----------- -----------
                           Event Date Total:           1           0           1
```

Activity Report by Type of Call

```
Page: 1                                            Date: 06/23/95 at 5:12 PM
                      Professional Software, Incorporated
                                Activity Reports
                  From 01/01/01 at 00:00 to 12/31/99 at 23:59
                             Ordered by Type of call


         Company                              Complete  Incomplete       Total
         =================================== =========== =========== ===========

Call Type: CLIN
         ABC Stationery                                1           0           1
         Albany Hospital Place                         3           0           3
         Alan McPhearson                               1           0           1
         Atlas Systems, Inc.                           1           0           1
         Hughes Finance Company                       14           2          16
         Micro Computer Publishing Co.                 1           0           1
                                             ----------- ----------- -----------
                            Call Type Total:          21           2          23

Call Type: CLOUT
         Albany Hospital Place                         1           0           1
         Hughes Finance Company                        1           0           1
         Micro Computer Publishing Co.                 5           0           5
                                             ----------- ----------- -----------
                            Call Type Total:           7           0           7

Call Type: EMIN
         Atlantic Edison                               5           0           5
         Bay Business Enterprises                      2           0           2
         Bellavista Creative Arts                      3           0           3
         Hughes Finance Company                        1           0           1
         Interstate Air Conditioning                   9           0           9
         Micro Computer Publishing Co.                 4           0           4
         Smith, Taylor and Hawkins                     1           0           1
                                             ----------- ----------- -----------
                            Call Type Total:          25           0          25

Call Type: EMOUT
         ABC Stationery                                1           0           1
         Atlantic Edison                               3           0           3
         Hughes Finance Company                        1           0           1
                                             ----------- ----------- -----------
                            Call Type Total:           5           0           5
```

Activity Report by User ID

Page: 1 Date: 06/23/95 at 5:12 PM

Professional Software, Incorporated
Activity Reports
From 01/01/01 at 00:00 to 12/31/99 at 23:59
Ordered by User ID

CallType	Description	Complete	Incomplete	Total
Entered by: ADMN				
CLIN	Inbound call	1	0	1
CLOUT	Outbound call	1	0	1
FAXOUT	FAX sent	1	0	1
LTROUT	Letter sent	1	0	1
VMIN	Inbound voice mail message	1	0	1
	Entered by Total:	5	0	5
Entered by: DENT				
CLIN	Inbound call	516	24	540
CLOUT	Outbound call	297	10	307
EMIN	Inbound e-mail	10	4	14
EMOUT	Outbound e-mail	5	0	5
FAXIN	FAX received	13	0	13
FAXOUT	FAX sent	1117	2	1119
FOLLOWUP		37	8	45
LTROUT	Letter sent	4	0	4
MTGOUT	Meeting offsite	14	0	14
PAGIN	Page received	3	0	3
PAGOUT	Page sent	27	0	27
VMIN	Inbound voice mail message	368	0	368
VMOUT	Outbound voice mail message	234	2	236
	Entered by Total:	2645	50	2695
Entered by: SUPE				
CLIN	Inbound call	102	0	102
CLOUT	Outbound call	20	0	20
EMIN	Inbound e-mail	1	0	1
EMOUT	Outbound e-mail	2	0	2
FAXIN	FAX received	14	0	14
FAXOUT	FAX sent	36	1	37
FOLLOWUP		22	10	32
LTRIN	Letter received	1	0	1
MTGIN	Meeting onsite	0	1	1
VMIN	Inbound voice mail message	16	0	16

Contact Report by Company

```
Page: 1                                                Date: 06/23/95 at 5:12 PM
                      Professional Software, Incorporated
                                Contact Reports
                    From 01/01/01 at 00:00 to 12/31/99 at 23:59
                               Ordered by Company


CallType Description                          Complete  Incomplete       Total
======== =================================== =========== =========== ===========

Company/Contact: ABC Stationery/George Welbourne
CLIN     Inbound call                                1           0           1
EMOUT    Outbound e-mail                             1           0           1
                                             ----------- ----------- -----------
                              Company Total:          2           0           2

Company/Contact: Ashland Copy Center/Fred Jacobs
MTG9603  Meeting offsite: NMW95- Automation          1           0           1
FAXOUT   FAX sent                                    2           0           2
                                             ----------- ----------- -----------
                              Company Total:          3           0           3

Company/Contact: American Chemical Products/Renee Lachine
FAXOUT   FAX sent                                    1           0           1
                                             ----------- ----------- -----------
                              Company Total:          1           0           1

Company/Contact: Addison, Dutton and Grant, Inc./Hugh Grant
FAXOUT   FAX sent                                    1           0           1
                                             ----------- ----------- -----------
                              Company Total:          1           0           1

Company/Contact: Atlantic Edison/Jerry Penalta
EMIN     Inbound e-mail                              5           0           5
EMOUT    Outbound e-mail                             3           0           3
                                             ----------- ----------- -----------
                              Company Total:          8           0           8

Company/Contact: Albany Hospital Place/Henry Grover
CLIN     Inbound call                                4           0           4
VMIN     Inbound voice mail message                  1           0           1
VMOUT    Outbound voice mail message                 1           0           1
                                             ----------- ----------- -----------
                              Company Total:          6           0           6
```

Contact Report by Event Date

```
Page: 1                                            Date: 06/23/95 at 5:12 PM
                      Professional Software, Incorporated
                                Contact Reports
                  From 01/01/01 at 00:00 to 12/31/99 at 23:59
                             Ordered by Event Date


CallType Description                           Complete  Incomplete       Total
======== =================================== =========== =========== ===========

Event Date  05/26/95
CLIN     Inbound call                                12           0          12
CLOUT    Outbound call                                4           0           4
EMIN     Inbound e-mail                               1           0           1
FAXOUT   FAX sent                                     2           0           2
FOLLOWUP                                              1           0           1
MTGIN    Meeting onsite                               1           0           1
                                             ----------- ----------- -----------
                           Event Date Total:         21           0          21

Event Date  05/27/95
CLIN     Inbound call                                12           0          12
EMIN     Inbound e-mail                               1           0           1
FAXIN    FAX received                                 2           0           2
FAXOUT   FAX sent                                     2           0           2
FOLLOWUP                                              3           0           3
                                             ----------- ----------- -----------
                           Event Date Total:         20           0          20

Event Date  05/28/95
CLIN     Inbound call                                 5           0           5
CLOUT    Outbound call                                4           0           4
                                             ----------- ----------- -----------
                           Event Date Total:          9           0           9

Event Date  05/29/95
CLIN     Inbound call                                 7           0           7
EMIN     Inbound e-mail                               1           0           1
EMOUT    Outbound e-mail                              1           0           1
FAXOUT   FAX sent                                     1           0           1
                                             ----------- ----------- -----------
                           Event Date Total:         10           0          10

Event Date  05/30/95
EMOUT    Outbound e-mail                              1           0           1
                                             ----------- ----------- -----------
                           Event Date Total:          1           0           1
```

Contact Report by Type of Call

```
Page: 1                                              Date: 06/23/95 at 5:12 PM
                      Professional Software, Incorporated
                                Contact Reports
                    From 01/01/01 at 00:00 to 12/31/99 at 23:59
                             Ordered by Type of call


Company/Contact                                     Complete  Incomplete       Total
============================================ =========== =========== ===========

Call Type: CLIN
ABC Stationery/George Welbourne                            1           0           1
Albany Hospital Place/Henry Grover                         3           0           3
Alan McPhearson/                                           1           0           1
Atlas Systems, Inc./Peter Folette                          1           0           1
Hughes Finance Company/Jeff Smith                         14           2          16
Micro Computer Publishing Co./Shirley Sutton               1           0           1
                                             ----------- ----------- -----------
                            Call Type Total:              21           2          23

Call Type: CLOUT
Albany Hospital Place/Henry Grover                         1           0           1
Hughes Finance Company/Jeff Smith                          1           0           1
Micro Computer Publishing Co./Shirley Sutton               5           0           5
                                             ----------- ----------- -----------
                            Call Type Total:               7           0           7

Call Type: EMIN
Atlantic Edison/Jerry Penalta                              5           0           5
Bay Business Enterprises/Mary Lou Anderson                 2           0           2
Bellavista Creative Arts/Jim Whitesell                     3           0           3
Hughes Finance Company/Jeff Smith                          1           0           1
Interstate Air Conditioning/Joe Morrows                    9           0           9
Micro Computer Publishing Co./Shirley Sutton               4           0           4
Smith, Taylor and Hawkins/                                 1           0           1
                                             ----------- ----------- -----------
                            Call Type Total:              25           0          25

Call Type: EMOUT
ABC Stationery/George Welbourne                            1           0           1
Atlantic Edison/Jerry Penalta                              3           0           3
Hughes Finance Company/Jeff Smith                          1           0           1
                                             ----------- ----------- -----------
                            Call Type Total:               5           0           5
```

Contact Report by User ID

```
Page: 1                                                Date: 06/23/95 at 5:12 PM
                      Professional Software, Incorporated
                                Contact Reports
                  From 01/01/01 at 00:00 to 12/31/99 at 23:59
                               Ordered by User ID


CallType Description                                  Complete  Incomplete       Total
======== =================================== =========== =========== ===========

Entered by: ADMN
CLIN     Inbound call                                        1           0           1
CLOUT    Outbound call                                       1           0           1
FAXOUT   FAX sent                                            1           0           1
LTROUT   Letter sent                                         1           0           1
VMIN     Inbound voice mail message                          1           0           1
                                              ----------- ----------- -----------
                           Entered by Total:                 5           0           5

Entered by: DENT
CLIN     Inbound call                                      516          24         540
CLOUT    Outbound call                                     297          10         307
EMIN     Inbound e-mail                                     10           4          14
EMOUT    Outbound e-mail                                     5           0           5
FAXIN    FAX received                                       13           0          13
FAXOUT   FAX sent                                         1117           2        1119
FOLLOWUP                                                    37           8          45
LTROUT   Letter sent                                         4           0           4
MTGOUT   Meeting offsite                                    14           0          14
PAGIN    Page received                                       3           0           3
PAGOUT   Page sent                                          27           0          27
VMIN     Inbound voice mail message                        368           0         368
VMOUT    Outbound voice mail message                       234           2         236
                                              ----------- ----------- -----------
                           Entered by Total:              2645          50        2695

Entered by: SUPE
CLIN     Inbound call                                      102           0         102
CLOUT    Outbound call                                      20           0          20
EMIN     Inbound e-mail                                      1           0           1
EMOUT    Outbound e-mail                                     2           0           2
FAXIN    FAX received                                       14           0          14
FAXOUT   FAX sent                                           36           1          37
FOLLOWUP                                                    22          10          32
LTRIN    Letter received                                     1           0           1
MTGIN    Meeting onsite                                      0           1           1
VMIN     Inbound voice mail message                         16           0          16
```

Company File List (Detail)

```
Page: 1                                              Date: 06/23/95 at 5:12 PM
                      Professional Software, Incorporated
                                  File Listing
                              Company File Detail


Comp ID Company                            Cust ID Vend ID Add User Add Date
======= ================================== ======= ======= ======== ========
ABC1    ABC Stationery                             ABC1    ADMN     01/02/95
        123 Broadway St.

        San Francisco, CA
        94110      U.S.A.

ACC1    Ashland Copy Center                        ACC1    ADMN     01/02/95
        1234 Ygnacio Valley Road

        Concord, CA
        93876      U.S.A.

ACP1    American Chemical Products                 ACP1    ADMN     01/02/95
        443 Brannan St.

        San Francisco, CA
        94110      U.S.A.

ADG1    Addison, Dutton and Grant, Inc.    ADG1            ADMN     02/18/96
        Main Offices
        1334 New Park Mall
        Palo Alto, CA
        94306      U.S.A.

AED1    Atlantic Edison                    AED1            SUPE     03/28/95
        Main Offices
        440 Electric Avenue
        Claremont, NH
        14086      U.S.A.

AHC1    Animal Health Care                 AHC1            DENT     08/28/95
        Suite 2000
        Four Civic Center
        San Francisco, CA
        94111      U.S.A.
```

Company File List (Summary)

```
Page: 1                                                    Date: 06/23/95 at 5:12 PM
                      Professional Software, Incorporated
                                  File Listing
                              Company File Summary



Comp ID Company                            Cust ID Vend ID Add User Add Date
======= ================================== ======= ======= ======== ========
ABC1    ABC Stationery                             ABC1    ADMN     01/02/95
ACC1    Ashland Copy Center                        ACC1    ADMN     01/02/95
ACP1    American Chemical Products                 ACP1    ADMN     01/02/95
ADG1    Addison, Dutton and Grant, Inc.    ADG1            ADMN     02/18/96
AED1    Atlantic Edison                    AED1            SUPE     03/28/95
AHC1    Animal Health Care                 AHC1            DENT     08/28/95
AHP1    Albany Hospital Place              AHP1            ADMN     01/02/95
AMC1    Alan McPhearson                            AMC1    ADMN     01/02/95
ASY1    Atlas Systems, Inc.                        ASY1    ADMN     02/16/96
ATS1    Atlanta Trust and Savings          ATS1            ADMN     02/16/96
BBE1    Bay Business Enterprises           BBE1            ADMN     02/16/96
BCA1    Bellavista Creative Arts           BCA1            ADMN     02/16/96
BEC1    Birmingham Ecumenical Council      BEC1            ADMN     02/16/96
BGR1    Beato Grinding and Refinishing     BGR1            ADMN     02/16/96
BIG1    Barrow's Insurance Group                   BIG1    ADMN     02/16/96
BRA1    Businesswear Retail Association    BRA1            ADMN     02/16/96
BST1    Blowtorch, Steamshovel, and Trowel BST1            ADMN     02/16/96
CASH    Cash Sale                          CASH            ADMN     02/16/96
CCC1    Consumer Credit Card                       CCC1    ADMN     02/16/96
HFC1    Hughes Finance Company             HFC1            ADMN     02/16/96
IAC1    Interstate Air Conditioning        IAC1            ADMN     02/16/96
IBI1    International Business Industries  IBI1            ADMN     02/16/96
IDS1    International Data Systems                 IDS1    ADMN     02/16/96
MCL1    McClure & Company                          MCL1    ADMN     02/16/96
MCP1    Micro Consumer Products                    MCP1    ADMN     02/16/96
MCPC    Micro Computer Publishing Co.      MCPC            ADMN     02/16/96
MIS1    Miscellaneous Vendor                       MIS1    ADMN     02/16/96
SCR1    Scranton Associates                        SCR1    ADMN     02/16/96
STH1    Smith, Taylor and Hawkins          STH1            ADMN     02/16/96
```

Contact File List (Detail)

```
Page: 1                                                               Date: 06/23/95 at 5:12 PM
                              Professional Software, Incorporated
                                          File Listing
                                      Contact File Detail


Comp ID                                                 Title                 Mobile          User1
Cust ID Contact                                         Work                  Pager           User2
Vend ID Company                                         FAX                   Home            User3
======= ======================================== =============== =============== ==========
ABC1     George Welbourne                        President                        P
        ABC Stationery                           415/876-0800
ABC1    123 Broadway St.

        San Francisco, CA
        94110      U.S.A.

ACC1     Fred Jacobs                             Manager
        Ashland Copy Center                      408/734-9790
ACC1    1234 Ygnacio Valley Road

        Concord, CA
        93876      U.S.A.

ACP1     Renee Lachine                           CEO
        American Chemical Products               714/441-1200
ACP1    443 Brannan St.

        San Francisco, CA
        94110      U.S.A.

ADG1    Ms. Susan B. Anthony                     Vice President
ADG1    Addison, Dutton and Grant, Inc.          415/332-5678
        Main Offices                             415/555-5234     415/999-9999
        1334 New Park Mall
        Palo Alto, CA                            Email: santhony@adg.com
        94306      U.S.A.
                                                 Notes: Susan has held almost every position at
                                                        ADG and has worked her way to the top.
                                                        She has been with the company since 1984
                                                        and is responsible for more product
                                                        sales than anyone else.

                                                        Loves to sail.  Husband's name is Bruce.
ADG1    Mr. Hugh Grant                           Vice President
ADG1    Addison, Dutton and Grant, Inc.          415/332-5678
        Main Offices                             415/555-5234
        1334 New Park Mall
        Palo Alto, CA                            Email: santhony@sbtcorp.com
        94306      U.S.A.
```

Contact File List (Summary)

```
Page: 1                                                                     Date: 06/23/95 at 5:12 PM
                                      Professional Software, Incorporated
                                                  File Listing
                                              Contact File Summary



Comp ID Company                   Contact                                   Work
======= ========================= ======================================== ====================
ABC1    ABC Stationery             George Welbourne                         415/876-0800
ACC1    Ashland Copy Center        Fred Jacobs                              408/734-9790
ACP1    American Chemical          Renee Lachine                            714/441-1200
ADG1    Addison, Dutton and       Ms. Susan B. Anthony                      415/332-5678
ADG1    Addison, Dutton and       Mr. Hugh Grant                            415/332-5678
AED1    Atlantic Edison            Jerry Penalta                            508/734-1111
AHP1    Albany Hospital Place      Henry Grover                             408/345-7723
ASY1    Atlas Systems, Inc.        Peter Folette                            212/249-5875
ATS1    Atlanta Trust and Savings  Hank Ehrenberg                           408/941-2222
BBE1    Bay Business Enterprises   Mary Lou Anderson                        408/923-4587
BCA1    Bellavista Creative Arts   Jim Whitesell                            111/777-3333
BEC1    Birmingham Ecumenical      Robert Mervin                            111/783-1234
BGR1    Beato Grinding and         James Fiasco                             415/320-1111
BIG1    Barrow's Insurance Group   James Wong                               415/776-7700
BRA1    Businesswear Retail        Tony Sandhill                            415/888-1111
BST1    Blowtorch, Steamshovel,    Greg Harry                               415/989-8733
CASH    Cash Sale                                                              /   -
CCC1    Consumer Credit Card       Susan Tillman                            800/123-1122
HFC1    Hughes Finance Company     Jeff Smith                               408/823-3878 501
IAC1    Interstate Air             Joe Morrows                              415/347-3248
IBI1    International Business     Rob Goodman                              241/934-3894
MCL1    McClure & Company          Mike McClure                             415/333-2200
MCP1    Micro Consumer Products    Dimitri Vassily                          206/980-1200
MCPC    Micro Computer Publishing  Shirley Sutton                           408/774-3555
MIS1    Miscellaneous Vendor
SCR1    Scranton Associates       Mr. Curtis Scranton                       415/775-3321
```

User Report by Company

```
Page: 1                                                                  Date: 06/23/95 at 5:12 PM
                              Professional Software, Incorporated
                                          User Reports
                          From 01/01/01 at 00:00 to 12/31/99 at 23:59
                             Incomplete Events, Ordered by Company

Ev Date                                                                              ---- Follow Up ----
Ev Time  CallType P Description/Notes                             S Enter By User   Date   Time
======== ======== = ============================================= = ======== ==== ======== =====

Company: Hughes Finance Company/Jeff Smith   310/555-3878 501

05/26/96 CLIN       Inbound call:  Voice Mail System for Merlin   I   SUPE   SUPE
@ 13:50             1.) Discussed info on the voice mail system for the new
                    Merlin phone system we bought.

06/16/96 CLIN       Inbound call:  Wants to order demo            I   DENT   DENT
@ 12:44             UPS Blue, COD.
                    Jeffrey D Smith
                    4436 0000 0000 9999  x03/97

                    Wants to get product ASAP.  Says that if the product is not going to ship
                    before the end of the week, can we at least send the manual.  OK.  Will
                    call back with credit card billing address.


Company: International Business Industries/Rob Goodman   241/934-3894 4403

11/29/95 VMIN       Inbound voice mail message                    I   ADMN   ADMN
@ 11:48


Company: International Business Industries/Brad Pitt   241/934-3894 4412

11/21/95 CLIN       Inbound call from Brad: company buyout        I   ADMN   ADMN
@ 08:49             Looking for info we spoke about at Comdex.  I told him that we are
                    swamped with business since the show.  Will be in Dallas until Monday,
                    11/27:

                    1255 Molewood Lane
                    Dallas, TX  75248
                    (V) 214-555-0355
                    (F) 214-555-9135

11/28/95 VMIN       Inbound voice mail message: buyout            I   ADMN   ADMN
@ 10:31


Company: International Business Industries/John Candy   241/934-3894 4412

11/29/95 VMIN       Inbound voice mail message: large sale        I   ADMN   ADMN
@ 13:27
```

User Report by User ID

```
Page: 1                                                               Date: 06/23/95 at 5:12 PM
                                    Lahey Financial Systems
                                          User Reports
                          From 01/01/01 at 00:00 to 12/31/99 at 23:59
                             Incomplete Events, Ordered by User ID

Ev Date                                                                        - Follow Up -
Ev Time  CallType P Description/Notes                                   S Enter By   Date   Time
======== ======== = ================================================== = ======== ======== =====

User ID: ADMN

11/21/95 International Business Industries/Brad Pitt                         241/934-3894 4412
@ 08:49  CLIN       Inbound call from Brad: company buyout             I   ADMN
                    Looking for info we spoke about at Comdex.  I told him that we are
                    swamped with business since the show.  Will be in Dallas until Monday,
                    11/27:

                    1255 Molewood Lane
                    Dallas, TX  75248
                    (V) 214-555-0355
                    (F) 214-555-9135


11/28/95 International Business Industries/Brad Pitt                         241/934-3894 4412
@ 10:31  VMIN       Inbound voice mail message: buyout                 I   ADMN


11/29/95 International Business Industries/Rob Goodman                       241/934-3894 4403
@ 11:48  VMIN       Inbound voice mail message                         I   ADMN


11/29/95 Micro Computer Publishing/Shirley Sutton                            408/774-3355
@ 11:48  VMIN       Inbound voice mail message: problem account        I   ADMN


11/29/95 International Business Industries/John Candy                        241/934-3894 4412
@ 13:27  VMIN       Inbound voice mail message: large sale             I   ADMN


11/30/95 Scranton Associates/Curtis Scranton                                 408/774-3355
@ 17:48  CLIN       Inbound call: product evaluation                   I   DENT   05/30/96 09:30
                    Really impressed with the quality and integration of our products.  Wants
                    demo versions of all products.  Works with large, big-name accounts. Sees
                    big savings by working with our products instead of developing his own in-
                    house solutions.  Request reseller kit by FAX.

                    1.  Verified that complete source code was available for all products.

                    2.  Reviewed dealer pricing.

                    3.  Reviewed dealer requirements.  Stressed importance of attending dealer
                        training.
```

♦ *Notes*